

APPENDICES

LIST OF APPENDICES

REFERENCE DOCUMENTS

APPENDIX 1: ORGANISATIONS CONSULTED

APPENDIX 2: SUMMARY OF ECONOMIC POLICY AIMS

APPENDIX 3: ECONOMIC STATISTICS

APPENDIX 4: SURVEY OF LOCAL FIRMS

APPENDIX 5: EMPLOYMENT GROWTH ASSUMPTIONS

APPENDIX 6: SITE ASSESSMENT CRITERIA

APPENDIX 7: SITE ASSESSMENT SHEETS

REFERENCE DOCUMENTS

1. Employment Land Reviews: Guidance Note, ODPM, 2004.
2. Ashford Borough Local Plan 2011, Adopted 2000.
3. Kent & Medway Structure Plan 2016, Adopted July 2006
4. Kent Prospects 2007-12: 'An economic development and regeneration framework for Kent', The Kent Partnership, June 2007.
5. Regional Economic Strategy for the South East, SEEDA, 2006.
6. Draft South East Plan, DCLG, July 2008
7. Ashford LDF Core Strategy, Adopted July 2008
8. Ashford LDF Core Strategy Employment Background Document, undated.
9. Ashford Town Centre Area Action Plan, Preferred Options Report, 2006
10. Ashford Council Notes 3 and 4 responding to the Core Strategy EiP Inspector, 2007
11. Global Index of Regional Knowledge Economies: Benchmarking South East England. Final Report prepared for The South East England Development Agency (SEEDA), Robert Huggins Associates, November 2001.
12. Use of Business Space and Changing Working Practices in the South East, DTZ Pidea Consulting, May 2004.
13. The Impact of Offshoring on the South East Economy, Report for South East England Regional Assembly & the South East England Development Agency, Experian, November 2004
14. Employment Land & Development Monitor, Kent County Council, various years.
15. Spatial Requirements of Key Sectors in the South East, Atkins for SEERA, 2004
16. Ashford Sector Targeting, OCO for Ashford Borough Council, April 2008
17. Ashford Office Market Report, Knight Frank for Ashford Borough Council, April 2008
18. Business Perception Survey, Priority Research for Swale Borough Council, 2005
19. Ashford Borough Business Profile, Step Ahead Research for Locate in Kent & Ashford Borough Council, January 2007
20. Greater Ashford Development Framework, Urban Initiatives for EP & Ashford Borough Council, 2005.
21. Ashford's Future: The Overarching Report, Ashford Borough Council and Partners, Halcrow, October 2002.

APPENDIX 1

ORGANISATIONS CONSULTED

ORGANISATIONS CONSULTED

Property Market

David Swindale, Colyer Commercial

Jeremy Wilton, Cluttons

Richard Stafford, Taylor Riley

Emma Goodford, Knight Frank

Economic/Business Organisations

Phillip Last, Locate in Kent

Andrew Osborne, Ashford Economic Development Manager

Martin Barrow, SEEDA

Jo James, Kent Invicta Chamber of Commerce

Developers/Landowners

Hugh Chesterton, Quadrant Estates

Nick Dowling, GSE Group

Businesses

Hitachi Rail Maintenance

Givaudan

Q Creative

Senate Solutions

Additus

GSE Group

Geerings

Adastra Software

Evolution Technology Ltd

Commidea

Headley Brothers/Invicta Press

Maruwa

Stewart Filtration Ltd

Orbital Net

Brakes

Kos Media

Destra Engineering Ltd

Planit International Ltd

APPENDIX 2

SUMMARY OF ECONOMIC POLICY AIMS

SUMMARY OF ECONOMIC POLICY AIMS

- 1 This Appendix summarises key planning and economic policy aims relevant to the future economic strategy and employment land needs of Ashford.

Regional Planning Guidance for the South East (RPG9): Ashford Growth Area (2004)

2. Alterations to RPG9 were published in 2004 concerning the Ashford Growth Area. This stated that 13,100 houses and 10,300 jobs should be provided over the period 2001-2016, based on the Sustainable Communities Plan. New development should be delivered through urban intensification and the development of new sustainable urban extensions integrated with new public transport provision and other infrastructure improvements.
3. It noted there was sufficient planned employment land supply to meet forecast demand to 2016, but that this should be kept under review through the LDF process in order to encourage job growth in tandem with new housing development.

Draft South East Plan: Regional Spatial Strategy for the South East / Panel Report

4. The emerging Regional Spatial Strategy was first published in December 2004, and in due course will replace RPG9. The Plan has undergone an Examination-in-Public (EiP) and a Draft Plan published for consultation in July 2008. These documents therefore provide the latest strategic policy position for development within the region.
5. The Plan focuses on increasing prosperity and growth in the region, and helping to regenerate disadvantaged areas. Specific policies of relevance include:
 - Policy RE1 encourages local authorities to promote nationally and regionally significant sectors and clusters, taking into account national economic interests and the recommendations of SEEDA and local economic partnerships. Specifically, Local Development Documents should include policies that:
 - ensure land and premises are available to meet the specific requirements of regionally important sectors and clusters;
 - enhance, develop and promote local assets that can facilitate the development of sectors and clusters.
 - Policy RE2 requires local authorities to assess the employment needs of the local economy and workforce, providing a range of sites and premises based on the following criteria:
 - Locations that are accessible to the existing and proposed labour supply;
 - Efficient use of existing and underused sites and premises;
 - Locations which intensify the use of existing sites;
 - Focus on urban areas;
 - Promotion of mixed-use development where appropriate and subject to replacement of land and premises lost to non-employment uses;
 - Locations that promote the use of public transport.
6. Ashford lies within the 'East Kent and Ashford' sub-region, where specific policies include:

- Policy EKA1 (Core Economic Strategy) The sub-region should exploit the potential for housing and business at locations served by the CTRL domestic services, especially at Ashford. It also requires that the sub-region should build on the distinct economic roles of each area – Ashford with high-speed rail links to London and Europe, should develop as an office, research and business node, providing market growth for the sub-region as a whole, and opportunity for large investments that need an expanding workforce;
 - Policy EKA6: Employment Locations gives priority to completion of major employment sites at locations including Ashford and new employment locations will be provided if required to keep employment and housing growth in balance in Ashford.
 - Supporting text notes that high quality proposals for intensifying or expanding the technology, knowledge and scientific sectors will be supported at established and suitable locations subject to environmental considerations including the Ashford urban area. The amount of employment land provided in East Kent should be generous where growth is concentrated and where the local economy is most urgently in need of regeneration. The existing Strategic sites for new business uses provide a major opportunity for inward investment to the Ashford Growth Area and the coastal regeneration areas.
 - There is also a need to attract and retain higher 'added value' professional, technical and service jobs, and, in accordance with Policy EKA6, high quality proposals for intensifying or expanding the technology and knowledge sectors should be supported at established and suitable new locations if required.
7. The EIP Panel Report in relation to Ashford's future growth generally supported this approach with no significant changes recommended.

Regional Economic Strategy for the South East Region, 2006-16

8. The vision of this Strategy is for the South East to be a world class region achieving sustainable prosperity by 2016. It adopts three main objectives:
- i. Global Competitiveness – investing in success through assisting more businesses to operate internationally and maximising the South East's share of foreign direct investment; increasing business expenditure on research and development, and encouraging greater collaboration with the region's knowledge base; increasing the percentage of total South East business turnover attributable to new and improved products and services; and securing the infrastructure needed to secure continued prosperity.
 - ii. Smart Growth – lifting underperformance through increasing the region's stock of businesses; maximising the number of people ready for employment at all skill levels, and ensuring they are equipped to progress in the labour market; reducing road congestion and pollution levels by improving travel choice, promoting public transport, managing demand and facilitating modal shifts; ensuring sufficient and affordable housing and employment space of the right type and size to meet the needs of the region and create the climate for long-term investment through efficient use of land resources, including mixed-use developments; and improving the productivity of the workforce and increasing economic activity.
 - iii. Sustainable Prosperity – supporting quality of life through reducing CO₂ emissions and increasing the contribution of renewable energy to overall energy supply in the region; reducing per capita water consumption and increasing the Gross Value Added per tonne of materials entering the waste stream; achieving measurable improvements in the quality, biodiversity and accessibility of green space, open space and green infrastructure; and enabling more people to benefit from sustainable prosperity across the region and reducing polarisation between communities.
9. Ashford lies within the Coastal South East area defined by the RES. The strategy expects that through a co-ordinated partnership approach there will be a focus on developing the town centre's commercial 'offer', linked to a number of new mixed-use district centres and village communities, which will see Ashford grow as a place to live and do business. It notes the objective of the Ashford's

Future partnership is strengthen Ashford's economic vitality, providing a sustainable community with jobs as well as houses. This will be achieved through establishing an attractive and unique inward investment offer, as well as supporting enterprise and innovation in existing local companies to provide a balanced sustainable economy for the future. Ashford is also identified as a potential location for a new multi-university campus in line with its future needs and growth.

Kent and Medway Structure Plan, 2006

10. The Kent and Medway Structure Plan remains in force until such time as the South East Plan is adopted. In economic terms, the key issues identified are to improve the County's economic performance relative to the rest of the South East, encouraging higher quality, better paid jobs, reducing current out-commuting levels, and fostering encouraging knowledge-based sectors. Major economic development will be concentrated in six strategic locations, including Ashford.
11. In terms of employment land, policies of specific relevance include:
 - Policy EP2 (*Employment Land Provision*) gives priority to developing sites with planning consent or identified in Local Plans for employment uses as at 2001; in Ashford commitments totalled 592,000 m² with further employment land to be provided where required to support to its role as a regional growth point based on balanced employment and housing growth;
 - Policy EP3 (*Location of New or Replacement Employment Land*) states that proposals for employment and business development other than those already identified should be located in, or adjacent to, major or principal urban areas and be easily accessible by a choice of transport. Such proposals should be attractive to the market place.
 - Policy EP4 (*Locations of Strategic Importance for Business, Industrial or Distribution Uses*) identifies Eureka Science Park and the South East Sector (including or replacing land at Orbital Park, Waterbrook and Cheeseman's Green) as strategic employment locations.
12. More specifically, Policy AS1 (*Ashford*) includes the following requirements:
 - the location and phasing of development will be comprehensively planned, focusing on high quality and sustainable developments in and around central Ashford, and where further greenfield development is required, with a broad area of search to the south of the town between the M20 and A38;
 - early measures to improve the quality of life in Ashford should include major investment in educational, cultural, retail, leisure and community facilities;
 - provision will be made for additional land for business development to meet requirements beyond 2011 for balanced employment and housing growth;
 - major investment in physical infrastructure, social and community facilities and public transport will be required to support growth, including improvements to M20 Junction 10, a new Junction 10a and improvements to Junction 9 in the longer term;
 - in the rest of Ashford Borough, the principal planning policy will be to protect and enhance the character of the countryside and rural settlements.

Kent Prospects 2007-2012, Kent Partnership

13. Based on the 'Vision for Kent' Community Strategy, this non-statutory document provides a framework for guiding and co-ordinating economic development and regeneration activities across Kent. This is based on four key objectives:
 - Strengthening Kent's accessibility and connections through investment in infrastructure;

- Growth and regeneration to enable development of sustainable communities in urban and rural areas, encouraging communities to address opportunities and combat deprivation;
 - The development of enterprise and competitiveness across Kent, to promote established strengths, market opportunities, key sector and cluster opportunities; and
 - Promote sustainable prosperity through smart development and addressing environmental and climate change issues.
14. More specifically in respect of *economic growth and regeneration*, Ashford is included within the 'Thames Gateway and Ashford Growth Area', where the strategy highlights that job targets need to be supported by investment in strategic employment locations and business premises, skills development programmes, investment in infrastructure to support key locations, attraction of new businesses and jobs, and promotion of innovation, enterprise, key sector and cluster opportunities. Other specific priorities include:
- Priority 5: Secure resources and investment in key infrastructure and economic development projects, to enable the development of business and job opportunities in the growth areas;
 - Priority 8: Encourage enterprise, innovation, skills development and high income job opportunities within rural businesses and communities with particular emphasis on the development of the rural knowledge economy;
 - Priority 12: Develop Kent's local, national and global tourism, visitor and investment profiles.
15. In terms of *enterprise and competitiveness*, priority is afforded to attracting investment in locations, clusters and sectors with growth potential. High value engineering / manufacturing, higher education, financial and business services and ICT are identified as key sectors where such opportunities exist. The strategy notes the need to market Kent as a high quality business location, to attract new investment and jobs which contribute to the development of market and sector opportunities, and to developing Kent's knowledge economy.
16. A further priority is identified as protecting and improving the *supply of business sites and premises* across the County, facilitating investment in a range of business sites, premises and mixed-use developments, focussing on sustainable strategic employment sites, growth and regeneration areas. Major development proposals will need to address environmental and transport issues, provide sustainable infrastructure, and where appropriate provide mixed-use opportunities.

Ashford Core Strategy, Adopted July 2008

17. The Adopted Core Strategy sets out in broad terms the likely future direction of development within Ashford Borough between 2006-2021.
18. Policy CS1 (Guiding Principles) sets out key planning objectives, which include:
- a general balance between a growing population and the creation of jobs locally and, on large sites, a mix of residential, employment, community and other local services that together help create a well served community, capable of providing locally for many of its needs; and
 - provision of a commercial environment that is conducive to encouraging new and existing businesses.
19. Policy CS2 (The Borough-wide Strategy) sets out that land for 16,770 new dwellings and related uses, and 16,700 additional jobs will be developed within the Ashford Growth Area between 2006-21. In the rest of the Borough, land for 1,180 new dwellings will be developed by 2021, alongside appropriately scaled employment opportunities where justified. Within this context, more specifically:
- Policy CS3 (Ashford Town Centre) requires that sites will be identified for an additional 8,000 jobs and 2,500 new dwellings by 2021;
 - Policy CS4 (Ashford Urban Area) states that land will be identified for 3,500 additional dwellings and 6,625 new jobs for the period up to 2021 in or adjoining the Ashford urban area;

- Policy CS5 (Ashford Urban Extensions) proposes with immediate effect major new development areas at Chilmington Green / Discovery Park (3,350 homes and 600 jobs by 2021) and Cheeseman's Green / Waterbrook (4,300 dwellings and 1,475 jobs by 2021) during the LDF period.
20. Outside of the Ashford Growth Area, Policy CS6 (The Rural Settlement Hierarchy) states that employment land will be allocated within the Tenterden and Rural Sites DPD based on the rural settlement hierarchy, on a scale capable of avoiding any worsening of the jobs to homes ratio in the rural area as a whole and the larger settlements in it.
21. Policy CS7 (The Economy and Economic Development) sets out the Council's commitment to enabling a range of employment opportunities to be provided that will be sufficient to generate an additional 16,700 jobs by 2021, thus ensuring that employment remains in balance with housing development. This will include:
- Monitoring the creation of jobs in the town centre and taking early action to remedy any emerging shortfall; this may include identifying additional employment land in other locations;
 - Complementing the strategy for the town centre by ensuring that there is an ample supply of land readily available for employment development in attractive locations elsewhere. This should be distributed spatially and sufficient to provide a degree of choice and competition;
 - Protecting existing employment sites / allocations that it is not proposed to 'carry forward' but which have not been specifically identified in the Core Strategy for other uses at least until a comprehensive review of employment land has been carried out.
 - Developing a strategy, to be set out in a subsequent DPD or SPD, to facilitate the relocation of existing firms in areas identified as having potential for redevelopment for more intensive uses to minimize the risk of existing businesses and jobs being lost to the town. If practicable this will include the identification of area suitable and available for firms to move to.

Inspector's Report on Examination of Ashford Core Strategy, June 2008

22. The Inspector's conclusions on employment land issues contained in the draft Core Strategy were as follows:
- the aspirations for growth in the town centre are challenging but not unrealistic provided the Council commit themselves to positive action to promote development. This should be set out further in the Town Centre AAP;
 - careful monitoring of job growth in the town centre will be required so that any shortfall is quickly identified enabling corrective action to be taken. This may include identifying more employment land elsewhere;
 - the Core Strategy needs to complement job growth in the town centre by a generous supply of traditional style employment land. This should be provided in a variety of attractive locations that are, as far as possible, free from constraints and offer choice to developers / occupiers, as well as a degree of competition between landowners;
 - at least until a comprehensive employment land review has been carried out there should be no reduction in the amount of employment land compared to the 2006 base level and the main existing areas of employment land should not be released for other uses (this excludes the Powergen site);
 - on the present evidence a modest increase in the amount of employment land may be desirable. Moreover, it would be helpful if any such provision was made in a way that increased the choice of sites. The feasibility of achieving this should be considered in the Urban Sites and Infrastructure DPD;

- a high priority should be given to using the strategic tariff, and other available funding, to remove infrastructure constraints that are an obstacle to employment development;
- a strategy needs to be developed to facilitate the relocation of existing businesses within redevelopment areas;
- the Eureka area should be retained primarily for employment use and action taken to stimulate development there;
- clarification of the intentions for Waterbrook should be a high priority to establish whether potential exists for early development that, amongst other things, would help with the relocation of existing businesses from redevelopment areas.

23. The Inspector also concluded that the Core Strategy should provide a separate chapter and policy on the economy and employment land provision.

Ashford Town Centre Area Action Plan, Preferred Options, 2006

24. The Area Action Plan indicates the following amounts of floorspace sought in key town centre development sites by 2021:

- The Town Centre Core - 500 residential units, 25,000 m² of net new office space, 43,000 m² of retail/leisure uses, 5,000 m² of education/cultural/community uses and up to 8,500 m² of additional office space;
- The Commercial Quarter – 40,000 m² of office space and up to 180 residential units
- The International Station Quarter - 9,700 m² of offices and 8,000 m² of new retail floorspace;
- The Southern Expansion Quarter – 1,200 residential units, 25,000 m² of net new office space and 12,000 m² of retail/leisure uses;
- Memorial Square Quarter – 6,000 m² of net new office space and supplementary retail/cultural uses;
- Residential Transition Zone – 400 residential units and 2,500 m² new retail floorspace.

APPENDIX 3

ECONOMIC STATISTICS

ECONOMIC STATISTICS

Table 1: Firms by Employment Size, 2007 (% of Total Firms)

District	Employment size band								
	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
Ashford	3,295 69.8%	690 14.6%	375 7.9%	240 5.1%	75 1.6%	30 0.6%	15 0.3%	0 0%	0 0%
Kent	32,990 67.7%	7,430 15.3%	4,230 8.7%	2,565 5.3%	870 1.8%	445 0.9%	135 0.3%	35 0.07%	10 0.02%
GB	66.9%	14.9%	8.8%	5.7%	2.0%	1.1%	0.3%	0.1%	0.04%

Source: UK Business Activity, 2007, ONS

Table 2: Change in Employment in Kent Districts 1998–2006

District	1998	2006	% Change
Ashford	38,780	47,045	21.3
Maidstone	65,510	71,800	9.6
Swale	38,750	42,650	10.1
Canterbury	53,680	58,310	8.6
Shepway	32,780	33,170	1.2
Tunbridge Wells	48,780	45,940	-5.8
Kent			
South East	3,425,140	3,668,710	7.1
GB	24,355,030	26,320,630	8.1

Source: Annual Business Inquiry

Table 3: Employment by Industrial Sector (%)

Sector	Ashford (%)		South East (%)	Great Britain (%)	
	1998	2006	2006	1998	2006
Agriculture	3.7	2.5	1.1	1.7	0.9
Energy & Water	0.4	0.1	0.5	0.9	0.6
Manufacturing	16.5	11.6	8.8	17.8	10.9
Construction	4.3	5.6	4.5	4.3	4.8
Distribution, Hotels & Catering	26.1	26.7	24.6	22.5	23.5
Transport & Communications	5.8	9.0	6.0	5.8	5.9
Banking, finance & insurance	20.2	17.2	24.1	18.3	21.2
Public Administration, education, health	20.3	23.5	25.4	24.1	26.9
Other Services	2.7	3.9	5.2	4.7	5.3
All Sectors	100	100	100	100	100

Source: Annual Business Inquiry

LON2006/R11509-005-appendices)

Table 4: Change in Employment Structure in Ashford

Sector	Ashford			Great Britain
	1998 ('000s)	2006 ('000s)	% change	1998 – 2006 (% change)
Agriculture	1.4	1.1	- 21.4	- 18.4
Energy & Water	0.2	0.07	- 65.0	- 23.4
Manufacturing	6.4	5.5	- 14.0	- 29.1
Construction	1.7	2.6	+ 53.9	+ 13.5
Distribution, Hotels & Catering	10.1	12.5	+ 23.8	+ 4.8
Transport and Communications	2.2	4.2	+ 90.9	+ 9.7
Business, finance and insurance	7.8	8.1	+ 3.8	+ 23.7
Public Administration, education, health	7.8	11.0	+ 41.0	+ 23.4
Other Services	1.0	1.8	+ 80.0	+ 22.2
Total	38.7	47.0	+ 21.3	+ 8.1

Source: Annual Business Inquiry

Table 5: Change in Number of VAT Registered Firms

Area	1994	2006	1994-2006 (%)
Ashford	3,440	4,285	24.6
Kent	37,475	43,460	16.0
South East	243,280	291,755	19.9
United Kingdom	1,621,720	1,853,215	14.3

Source: DTI / Small Business Service: Business Start-ups and Closures: VAT registrations and de-registrations, 1994 / 2006

Table 6: VAT Registrations per 10,000 Population (16+), 2005

	VAT Registrations per 10,000 population
Ashford	50
Kent	38
South East	42
United Kingdom	37

Source: DTI / Small Business Service: Business Start-ups and Closures: VAT registrations and de-registrations, 2006

Table 7: Survival Rate of VAT Registered Businesses 2001-2003

	1 Year	2 Years	3 Years
Kent	92.7	82.7	69.1
South East	93.3	83.2	71.1
United Kingdom	92.0	81.1	68.9

Source: DTI / Small Business Service, 2003 % of firms still trading that registered in 2001

Table 8: Unemployment Rates

Area	No. Unemployed	Unemployment Rate (%)	Long Term Unemployment Rate (%) **
Ashford	839	1.3	8.4
Kent	13,563	1.6	
South East	69,827	1.4	11.1
Great Britain	824,298	2.3	13.1

Source: NOMIS, ONS Feb 2008 **over 12 months as % of claimant unemployed.

Table 9: Job Vacancies and Unemployment Indicators

Area	Live Unfilled Vacancies	No. of Claimant Unemployed	Unemployed/Vacancy Ratio
Ashford	554	839	1.5
Kent	7,083	13,563	1.6
South East	44,049	69,827	2.1
Great Britain	387,359	824,298	1.9

Source: NOMIS, Feb 2008

Table 10: Economic Activity & Income Support

Area	Economic Activity rate (%)	Benefit claimants * (%)
Ashford	82.3	10.7
South East	82.0	9.7
Great Britain	78.5	14.2

Source: Annual Population Survey 2007; DWP Benefit Claimants * Note: includes job seekers, incapacity and other benefits

Table 11: Occupational Breakdown of Labour Force

Occupational Group	Ashford (%) *	South East (%)	GB (%)
Managers/senior officials	9,200 (18.1)	17.6	15.2
Professional occupations	6,800 (13.3)	14.0	13.0
Associate professional & technical	7,000 (13.7)	15.2	14.3
Administrative & secretarial	5,700 (11.2)	12.5	12.0
Skilled trades	7,300 (14.3)	10.1	10.9
Personal service occupations	3,500 (6.8)	7.8	8.1
Sales & customer service occupations	3,700 (7.3)	7.2	7.7
Process plant & machine operatives	3,700 (7.1)	5.2	7.2
Elementary occupations	4,200 (8.3)	10.2	11.4

Source: Annual Population Survey NOMIS 2007 * Note: totals rounded

Table 12: Qualifications of Working Age Residents

District	% of Residents with no Qualifications *	% of Residents with Degree or Higher Qualification *
Ashford	12.1	22.2
South East	9.6	30.5
GB	13.8	27.4

Source: Annual Population Survey, 2006 * Persons aged 17 – 64

Table 13: Sought Occupation of Claimant Unemployed Workers

Sought Occupation	Ashford	South East	GB (%)
Managers / Senior Officials	60 (7.3%)	4,395 (6.3%)	3.6
Professional Occupations	20 (2.4%)	2,195 (3.2%)	2.6
Associate Prof./ Technical	35 (4.2%)	4,245 (6.1%)	5.7
Administrative / Secretarial	80 (9.7%)	7,855 (11.3%)	10.1
Skilled Trades Occupations	105 (12.7%)	7,880 (11.3%)	11.1
Personal Service Occupations	40 (4.8%)	3,395 (4.9%)	5.1
Sales and Customer Service Occupations	140 (17.0%)	11,155 (16.0%)	16.8
Process Plant/Machine Operatives	95 (11.5%)	6,295 (9.0%)	10.8
Elementary Occupations	250 (30.3%)	22,120 (31.8%)	34.0
Occupation Unknown	0 (0.0%)	95 (0.1%)	0.2
Total	825 (100.0%)	69,625 (100.0%)	100.0

Source: ONS, NOMIS, Feb 2008

Table 14: Average Gross Weekly Earnings of Full Time Employees

Area	Workplace Based		Residence Based	
	Average Weekly Earnings	As a % of GB Average	Average Weekly Earnings	As a % of GB Average
Great Britain	553.0	100	552.1	100
South East	617.1	112	583.2	105
Kent	602.5	109	535.9	97
Ashford	541.7	98	490.2	89

Source: Annual Survey of Hours and Earnings, 2007

Table 15: Deprivation Indices for Kent Districts

District	Rank of average score
Ashford	227
Canterbury	198
Maidstone	248
Shepway	123
Swale	116
Tunbridge Wells	273

Source: The English Indices of Deprivation, 2007

Table 16: Commuting Patterns in Ashford, 2001

2001	Live in Ashford:		
			%
	Total	48,706	100
Work in:	Ashford	33,753	69.3
	Maidstone	2,780	5.7
	Shepway	1,935	4.0
	Canterbury	1,226	2.5
	Tunbridge Wells	1,194	2.5
2001	Work in Ashford:		
			%
	Total	46,109	100
Live in:	Ashford	33,753	73.2
	Shepway	4,212	9.1
	Canterbury	1,478	3.2
	Maidstone	1,195	2.6
	Dover	1,036	2.2

Source: 2001 Census

Table 17: Self-containment Rates for Kent Boroughs

District	% of Residents Working in own Borough
<i>Ashford</i>	69%
Canterbury	73%
Maidstone	61%
Shepway	70%
Swale	65%
Tunbridge Wells	61%

Source: Census 2001 Workplace Data

APPENDIX 4

SURVEY OF LOCAL FIRMS

SUMMARY OF KEY POINTS ARISING FROM SURVEY OF FIRMS

This appendix summarises key points arising from the telephone survey of firms conducted as part of this study (listed in Appendix 1). This included some recent incomers to Ashford and a range of firms by size, sector and location.

- Many firms had been attracted to Ashford primarily by available good quality premises to buy at reasonable cost, and to some extent by good road/rail links to London and the rest of Kent and the south coast. Only a few firms had located here due to accessibility to European markets.
- Most firms had relocated from other parts of Kent and some from higher cost business parks;
- The more established firms had grown up in Ashford over many years and were relatively tied to it by staff retention factors and high costs of relocation. Relatively few needed to be located in Ashford for operational / business reasons but smaller firms in rural areas were quite tied by locally based clients.
- The majority of firms considered their sites/premises adequate for their current needs, with some having spare capacity. Relatively few indicated a requirement for more space over the next 5 years or so although some of these would require significant amounts of expansion space;
- Those firms planning to expand indicated they could expand in situ or already had permission for further premises;
- Most firms did not expect to benefit directly from Ashford's planned major growth as they mainly serve wider UK or European markets, but a number suggested that there may be some indirect increases in local business opportunities in line with growth in population and new firms moving into the area, while recruiting staff may become easier; and
- A number of firms located within the Ashford Urban Area indicated problems of local traffic congestion, particularly on the town centre ring road and also at motorway junctions at peak times. There were some concerns the new Junction 10a would not relieve this. Lack of public transport is a constraint for some firms on Eureka Park.
- Few firms reported any labour supply problems.

APPENDIX 5

EMPLOYMENT GROWTH ASSUMPTIONS

Table 4.1: Experian Annual Growth Forecasts by Sector, 2006-21 (% p.a)

	Ashford Baseline	South East	UK
Agriculture, Forestry & Fishing	-4.9	-2.7	-2.0
Oil & Gas Extraction	0.0	0.0	-2.8
Other Mining	-1.2	-0.3	-1.6
Food, Drink & Tobacco	-6.9	-1.9	-1.6
Textiles & Clothing	-8.0	-2.1	-4.0
Wood & Wood Products	-0.9	-0.7	-3.3
Paper, Printing & Publishing	-0.8	-0.4	-1.3
Fuel Refining	0.0	0.0	-0.8
Chemicals	-0.8	-1.0	-2.0
Rubber & Plastics	-12.2	-1.8	-1.9
Minerals	-1.4	-2.5	-1.9
Metals	0.6	0.3	0.1
Machinery & Equipment	-3.8	-1.7	-1.0
Electrical & Optical Equipment	-0.4	0.1	-0.3
Transport Equipment	-2.1	-3.5	-0.8
Other 'Other' Manufacturing	0.3	0.2	-1.0
Gas, Electricity & Water	-4.3	-1.8	-3.5
Construction	0.6	0.1	0.4
Wholesaling	0.4	-0.3	-0.4
Retailing	0.8	0.8	0.3
Hotels & Catering	1.9	1.8	0.9
Transport	1.0	0.6	0.0
Communications	0.3	0.9	0.2
Banking & Insurance	-0.7	0.6	1.6
Business Services	0.8	1.4	1.5
Other F&Bs	1.4	1.3	0.2
Public Admin. & Defence	-0.5	-0.5	-0.5
Education	1.4	0.3	-0.5
Health	1.9	0.8	1.3
Other 'Other' Services	2.0	1.1	1.0
Total	0.7	0.6	0.4

Source: Experian Business Strategies, May 2008

Table 4.2: Breakdown of Employment By Sector in Other Growth Towns & Towns Of Comparable Scale

Sector	Milton Keynes (% of jobs)	Swindon (% of jobs)	Oxford (% of jobs)	Peterborough (% of jobs)	Norwich (% of jobs)	Growth Town Average (% of jobs)	SE Average (% of jobs)
Population (2006)	224,800	186,600	149,100	163,300	129,500		
Agriculture	0.2	0.1	0.1	0.7	0.0	1.0	1.1
Energy/water/utilities	0.1	2.3	0.3	0.5	0.1	0.3	0.4
Construction	2.3	3.0	1.9	3.0	3.5	3.3	4.5
Manufacturing	9.4	14.7	8.5	11.1	8.2	11.0	8.8
Distribution	10.4	5.0	2.5	8.1	4.6	9.5	7.6
Business Services	23.5	18.6	19.6	19.6	19.9	21.0	20.5
Financial Services	5.1	7.0	6.7	7.0	13.4	5.0	3.5
Transport/storage	6.5	6.2	3.5	6.5	4.6	6.8	3.9
Communications	2.9	2.2	1.3	2.0	0.2	0.3	2.0
Retail	12.3	12.3	7.9	11.5	11.3	12.0	10.7
Hotels/Catering	5.0	5.4	5.7	4.6	5.5	5.0	6.6
Health	6.9	8.2	15.0	9.8	6.9	8.5	11.5
Education	7.8	5.8	22.0	7.8	10.8	8.0	9.5
Public Admin/services	3.5	4.9	3.5	4.9	6.7	4.8	4.8
Leisure/cultural	3.3	2.9	1.8	3.5	3.1	3.0	3.2
Other Services	1.1	1.2	0.8	0.6	0.7	0.8	1.5

Source: ABI, 2006

Note: columns may not total 100% due to rounding

APPENDIX 6
SITE ASSESSMENT CRITERIA

ASHFORD EMPLOYMENT LAND STUDY - SITE ASSESSMENT CRITERIA

The proposed criteria for assessing the quality/condition of protected and other existing sites, reflecting the particular circumstances of Ashford are set out below. These criteria mainly relate to the inherent value of a site rather than current conditions on it, although such characteristics would also be noted. Additional criteria would apply to undeveloped allocated/development sites although ownership and availability information may not be possible to obtain in many cases and a judgement may need to be made on these.

Each site would be given a score of between 1 and 5 against each criterion (1 = poor, 5 = very good). No individual weightings would be attached to different criteria.

EXISTING DEVELOPED EMPLOYMENT AREAS

1. Access to strategic road network:

5 = **very good**: within 2 Km of strategic road junction/ via good unconstrained roads

1 = **poor**: over 5 Km from junction/access, and/or through constrained/local roads, and/or through town centre or residential areas etc

2. Local road access including congestion and quality of roads;

5= **very good local access**: via free moving good roads avoiding residential areas/difficult junctions;

1 = **poor**: difficult/narrow road access, via residential roads, difficult junction, congested roads;

3. Public transport access;

5 = **very good**: near centre of urban area, close to range of frequent public transport linking residential areas and services, including park & ride routes

1 = **poor**: remote site, poor infrequent public transport access;

4. General location in terms of proximity to urban centres, and ease of access to labour and services;

5 = **very good**: near town, district centre, good access to residential areas and services

1 = **poor**: remote site, no services or residential areas nearby;

5. Proximity to incompatible uses:

5 = within larger employment area/ no incompatible surrounding land use

2-4 = B1 use adjoining residential/other sensitive uses;

1 = B2/B8 adjoining residential/other sensitive uses;

6. Site characteristics including topography, size, profile, development constraints etc:

5= **very good**: generally level site, regular shape, over 3 ha in size; no significant other constraints on development,

1 = **poor**: sloping/uneven site; under 0.5 ha, irregular/narrow shape, other severe constraints;

7. Vacancy levels

5 = under 10% vacant,

1 = over 25% vacant space/buildings

8. General attractiveness of the location:

5= **very good:** high profile/high quality appearance, environment and quality of occupiers

1 = **poor:** low profile; poor/run-down unattractive appearance/location; attracts lower end users;

9. Market Perceptions

5= viewed as attractive by agents/occupiers; recent activity, strong demand, units rarely available

1 = low demand, difficult to attract occupiers/needs heavy marketing

OTHER FACTORS TO BE NOTED

Age/ of Premises

- Pre-1970
- 1970-90
- 1990 -2000
- Post 2000

Condition of Premises

- Poor
- Average
- Good

Amount of land still available

- Under 10% of site undeveloped
- Over 50% of site undeveloped

Potential for alternative employment use

- good for bad neighbour or niche uses
- potential to sub-divide for starter units
- scope to upgrade for employment use
- remove undesirable use

ADDITIONAL CRITERIA FOR ALLOCATED/DEVELOPMENT SITES

10. Sustainability

5= brownfield/provides regeneration benefits

1= greenfield/no regeneration/social benefits

11. Planning constraints

5= allocated employment site, within urban area, planning permission, no restrictive designations

1= greenfield site, outside urban area, no allocation or planning permission, restrictive landscape, policy or environmental designations

12. Ownership Factors: [Where available]

5 = all in single ownership/management

1 = many small separate ownerships/no management

13. Availability [Where available]

5 = land available immediately for development or occupation

1= constraints on development, unlikely to be available within 5 years or more

APPENDIX 7
SITE ASSESSMENT SHEETS