

Southend-on-Sea Borough Council Employment Land Review Final Report May 2010



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1. Introduction

- 1.1 Baker Associates has been commissioned to undertake an Employment Land Review (ELR) in parallel with a Strategic Housing Land Availability Assessment (SHLAA) for use by Southend-on-Sea Borough Council.
- 1.2 This is the Final Report from the project. The site survey work was undertaken between September 2008 and April 2009. The ELR has involved dialogue with the planning authority and specific contributions have been sought from representatives of the Southend business community.

Objectives

- 1.3 The purpose of the project as described in the brief has been a review of employment land. The **principal output** required was to provide an assessment of the total quantity of new employment land and floorspace needed in Southend over the Local Development Framework (LDF) period of 2001 to 2021. The study required the demand for employment land and floorspace to be identified at different locations in the Borough and within the central area as a whole.
- 1.4 Planning Policy Statement 4: Planning for Sustainable Economic Growth states “*Local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation*”.
- 1.5 PPS4 also states that “Local planning authorities should ensure that their development plan sets out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth identifying priority areas with high levels of deprivation that should be prioritised for regeneration investment, having regard to the character of the area and the need for a high quality environment.”
- 1.6 National planning guidance on employment land reviews published in December 2004 states that “*employment land reviews are an integral part of the preparation of Local Plans*”.
- 1.7 An integral part of the principal output of the study has been to establish the location of new employment provision and its distribution across Southend and to manage the existing stock to reflect structural changes occurring in the economy.
- 1.8 This has been influenced by the overall housing distribution, past trends, employment enquiries, consultation and analysis of sustainable levels of future employment growth distribution. Information on the level and distribution of employment land to come forward, in specified locations, was needed to enable:
 - The needs of existing business and industry to be provided for within the Borough
 - Potential employment growth sectors to be promoted and stimulated by the provision of an adequate quantity of employment land in a range of suitable locations

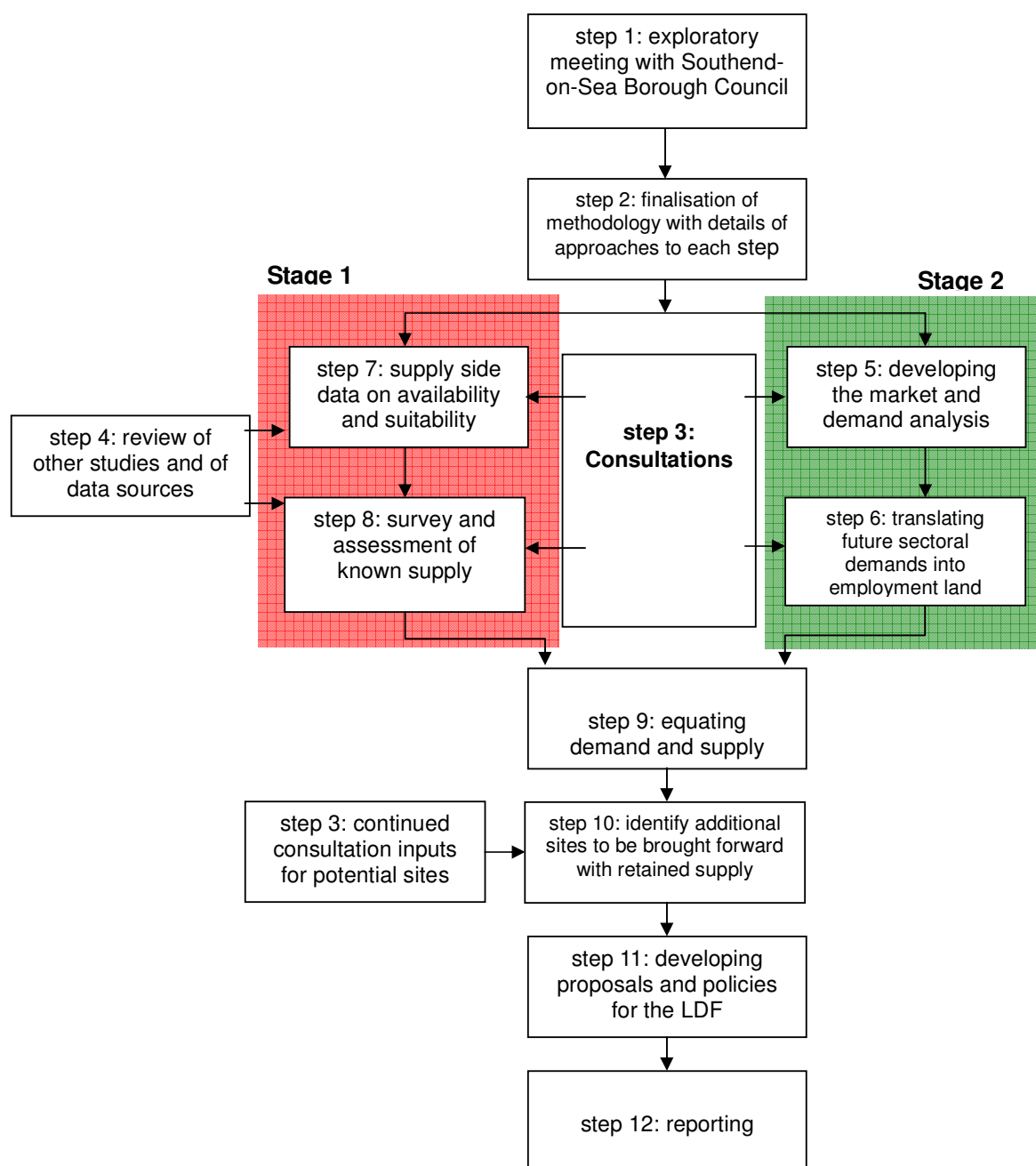
- 1.9 A **second output** has been an assessment of the existing employment areas. The analysis has provided a review of currently identified employment land and premises, and makes recommendations to retain or dispose of vacant land for employment purposes.
- 1.10 A **third output** has been a survey of potential employment locations. The search has identified locations for possible new employment provision in the locations determined by the principal and secondary outputs. This search has focused on the main employment areas of the town centre, the A127 and the airport area.

Report Content

- 1.11 Matters dealt with in the report include:
- The methodology that has been followed – section 2
 - Analysis of the existing employment situation, including analysis of supply side information, previous studies, past take up rates, business enquiries, locational analysis by sector and consultation. Site surveys of existing employment sites - section 3
 - Analysis of past economic trends, including economic trends for Southend and Rochford. Assessing future demand, establishing the level of likely job growth for individual sectors with a particular focus on the sectors identified by the Economic Development and - section 4
 - Translating future employment growth into locational floorspace and land requirements by sector - section 5
 - Assessing supply against demand. Analysis on the quality of existing provision, recommendations for the future of sites and identifying where future requirements for particular sectors will not be met, based on consultation and existing spatial distributions - section 6
 - Policy development and analysis of future provision and identifying locations, land and floorspace to meet future employment needs to 2021 - section 7

2. Methodology

- 2.1 This section sets out in detail the methodology we have followed to deliver the outputs sought from the ELR.
- 2.2 The process is best explained as a series of stages based on ODPM guidance “Employment Land Reviews: Guidance Note” (2004), and is introduced and summarised in the diagram overleaf. The work has sought to demonstrate the relationship between the parallel investigations of supply and demand at the core of the approach, the way that the work has been informed by consultations with key stakeholders, and the relationship with the LDF. The reason for conducting the stages in parallel is to enable the examination of existing provision and future land requirements in the context of what is required through economic projections, i.e. there is a benefit of assessing existing provision based on future requirement to truly understand if it continues to be fit for purpose.
- 2.3 Steps 1 and 2 involved an inception meeting and confirmation of the methodology followed. Steps 3 to 8 involved the necessary steps to address Stage 1: Taking stock of the existing situation and Stage 2: Assessing the likely demand and available supply, as defined in the national guidance. This involved an assessment of existing employment areas, the investigation of economic growth, its translation into employment land demand and consultation to inform qualitative views on supply and demand.
- 2.4 Following this work, Stage 3 was conducted. Steps 9 to 11 of the study were about bringing these together to develop possible ways forward and the implications for the economy of different attitudes and approaches to the provision made for employment. The process culminated in the development and reporting of recommendations on existing and new employment land allocations and on the policy mechanisms to deliver and maintain economic development.



Step 1: Exploratory meeting

- 2.5 The project commenced with an inception meeting. This established project management arrangements, the objectives of the study and the type and use of outputs required. The methodology was finalised, including consultation, working arrangements and the study programme.
- 2.6 The Council's work on its LDF was part of the discussion, as well as the relationship with the RSS work. The meeting was an open discussion of the Council's experiences and views about the future potential and management of economic activity, and the relationship between this and the other matters to be tackled through the spatial plan and related delivery mechanisms.
- 2.7 At the inception meeting specific information requirements were set out, including:
- contact details for Council officers and representatives of other agencies
 - details of other relevant completed and current studies, with copies where possible if not otherwise available on the web
 - information in the form of business directories on the known supply of employment sites in the City, with information that is available on the occupiers by name, activity and size (with contacts where possible)
 - any other relevant information on the take up of land and on business inquiries.

Step 2: Refinement of the methodology

- 2.8 The methodology was refined following discussion with the Council. This included detail on:
- the form of economic analysis and scenario building,
 - site assessment undertaken
 - scope and detail of the consultation
 - the relationship with the evidence base being developed for other matters that will have a formative role in creating the proposed Area Action Plans (AAP) and Development Plan Documents (DPD)
- 2.9 This detail was part of the briefing of members of the team for quality control and project management purposes.

Step 3: Consultation

- 2.10 A key part of the study was to draw on different views and on market knowledge through discussions with the representatives of the involved and interested bodies at local and regional levels, within both the private and public sectors. This was to ensure that a qualitative element was an integral part of the process and supplemented the quantitative analysis, but was done primarily to draw on different perspectives when making judgements based on data analysis, or about possible policy approaches, and when developing permutations for employment land portfolios following site assessments and the matching of future supply with demand.

2.11 Consultation focused on a range of economic topics such as:

- the current general level of economic activity with the authority
- the influence of major industry and employers
- sub-regional economic issues
- emerging economic trends within the region and authority
- impact of inward investment
- labour supply

Step 4: Review of other studies and data sources

2.12 Feeding into the early part of the process was a review of other economic and employment studies. The categories of relevant material variously included:

- work undertaken by the Council on the potential growth and on how this was to be achieved, such as Economic Growth Aspirations for Southend (2006), Economic Development Strategy (2007) and Industrial Estates Study (2005), together with any other updating, monitoring and review work;
- other work on the economy of the Borough and wider sub region which had informed the development of the South Essex Economic Development Strategy and work on individual sectors, for example, the Regional Airports Masterplan for London Southend Airport.

2.13 We examined this material in part to learn about the economic character and potential of the Borough and in part to more precisely define what had been carried out to date and what remained to be assessed in this study.

Step 5: Developing the market and demand analysis

2.14 The aim of the work on the demand side was to determine with some confidence how the economy is likely to perform in the future, in order to inform the assessment of future requirements for employment land, whilst recognising that to some degree demand will be affected by what is on offer. It is essential to acknowledge the different market sectors within the employment market. When seeking to assess authority needs and requirements, the specific needs of each sector have a different impact on the quantity and type of employment land and premises required to maintain and stimulate economic growth.

2.15 The labour demand technique involved the analysis of recent employment growth trends and structural changes in employment (growing and declining sectors) to identify key drivers for change in the local economy. Using ONS employment data and information on regional and national trends, employment growth by industrial sector and sub area was identified.

2.16 The study incorporated economic strategies, local business surveys on expansion needs, identified supply constraints and consultations with local economic development bodies, property companies, estate agents and employers in order to enable changes in industrial sectors, locational and premise requirements of existing and future businesses to be

understood and considered.

2.17 Using existing employment site information, business land and premises enquiries and monitoring of market and specific sub area take up of employment property, a revealed demand for particular employment sectors in particular locations was established. The review involved analysis of:

- monitoring of planning permissions and take up rates
- rates of development for other uses on employment land
- recent surveys of business need including employment sites and premises register and reports from local economic forums
- business inquiries data such as Annual Business Inquiry (and its predecessors), new business registrations for VAT purposes, and other sources of information on past economic activity
- past sectoral and locational employment trends
- desk based analysis of site plans and aerial photos
- other existing documentary evidence or data held by the Council.

Step 6: Translating forecast sectoral demands into employment land requirements

2.18 This step involved the translation of employment forecasts for the whole authority. The ODPM Employment Land Reviews: Guidance Note provides a series of assumptions to assist in this translation. These include:

- Employment Sector (SIC code) to Use Class
- Employment to Floorspace (Jobs per sq m)
- Building Height and Plot Ratio
- Existing Employment Space Capacity.

2.19 Baker Associates' experience has led us to develop a more sophisticated approach to employment forecast translation. This has been beneficial for Southend-on Sea Borough Council in terms of identifying the demands of specific employment sectors with regards to location and premises type before applying standard translation assumptions.

2.20 Through previous ELR work Baker Associates has identified that the locational and premises preferences of each employment sector ultimately determine the assumptions used in the translation model of floorspace per worker, plot ratio/building height and spaceless economic growth. A good example of this is business services and other office based employers. Job growth in this sector could be accommodated in both business parks and central office locations; however, these locations would have very different plot ratios, building heights and even different employment densities. It is considered important to recognise such variations in the study and to set out assumptions on the level of growth that is both desirable and achievable in terms of location and premise type. The assumptions used to identify a picture of future requirements included analysis of:

- Location preferences of individual employment sectors
- Premises preferences of individual employment sectors
- Desirability and achievability of sector preferences.

- 2.21 Analysis was informed by the existing distribution of each employment sector and key location and premises characteristics e.g. Distribution prefers good road access. Consultation with agents and developers also fed into this analysis to provide qualitative evidence on the market preferences for particular type of employment development. Following this exercise, standard assumptions were applied to create a clear picture of future requirements based on market demand and to remove artificial constraints generated through rigid application of basic translation models.
- 2.22 Not all future employment growth will come from allocated employment sites, with a considerable proportion of jobs being associated with community facilities, such as retailing, health and education that do not require additional accommodation and particularly new sites. There is a distinction to be carefully understood in the investigation between increased economic activity that requires additional jobs and that which occurs without increased employment, arising from increased productivity.
- 2.23 The contribution of 'spaceless growth' was considered as part of the study. Economic growth is also achieved through the reconfiguration and more efficient use of existing space, including increased employment density resulting from changing practice in some service industries and the need to drive down overheads, together with competing demands for space from different employment sectors and from other uses. Homeworking is also a factor. Using urban space well and supporting more sustainable growth patterns are aims for the spatial planning process which also affect the way that the economy grows spatially.
- 2.24 The results of this task were detailed floorspace and land requirements for future potential economic growth to enable the fitness for purpose of the existing employment site portfolio to be assessed in step 9 and recommendations made on the release or retention of sites and the identification of potential gaps in provision.
- 2.25 The outputs from these 'demand' investigations in steps 5 and 6 were fed into the integration steps, described below following the explanation of the 'supply side' work in the study process

Step 7: Supply side data on availability and suitability

- 2.26 This step was the first part of the parallel activity on the supply side of the economy. Using existing Council monitoring information and Census travel to work data a picture was established on the quantity and location of existing employment areas and subsequent travel to work patterns. In addition business and premises registers provided further information on vacancy levels and the suitability of existing provision.

Step 8: Review of existing provision

- 2.27 A survey was undertaken of the provision that exists in the form of employment sites. This was informed by the employment land availability material that already existed. A set of characteristics were examined and recorded in the assessment, having regard to the ODPM guidance (see Appendix 2). On all of the matters assessed, guidelines were provided to the surveyors in order to provide for consistent 'scoring' alongside descriptive

material.

- 2.28 The way that the assessment and recording of site information was undertaken was designed to feed directly into the establishment of a monitoring system.

Step 9: Equating demand and supply

- 2.29 The study sought to get to a situation where we had:

- an appreciation of the quantity and types of land and accommodation in different parts of the authority likely to be most supportive of the achievement of the potential that is predicted to arise in different economic sectors provided certain actions are taken
- a good understanding of the fit between the quantity, type and location of the land and accommodation available for employment and what appears likely to be wanted.

- 2.30 This step involved setting out in as much detail as possible the equation between these two, effectively presenting the brief for the identification of further land in step 10.

Step 10: Identify additional sites to be brought forward with retained supply

- 2.31 This step followed simply from the last. Knowing what land is wanted of what type and where, it was a matter of seeking the means of making up the difference. This involved:

- reviewing what has been found from the surveys where land that has potential but is not currently used for employment has been noted
- reviewing sites that the Council believes could be suitable for employment use
- comparing what land could be available in the right parts of the authority with the identified requirement to identify the most suitable sites to recommend.

Step 11: Developing policies and proposals for the LDF

- 2.32 The purpose of the study was to help in the preparation of an LDF, that will play its part in the economic, social and environmental development of Southend-on-Sea Borough and specifically to be effective in providing for the full economic potential of the authority to be met. The output from the study includes material which will help to inform the proposed AAPs and DPD including both proposals for land allocations and development management policies, together with the justification for this material on the basis of evidence gathered.

- 2.33 Because of the importance of the issue and the potential value of the work, and with the benefit of our familiarity with these issues we have been able to reflect on the integration of the contribution of economic development with other aspects that the AAPs and DPD will have to deal with. This happened in a number of ways throughout the study, including considering the implications of competing demands on land on the market feasibility of bringing sites forward. Analysis that informed the recommendations included:

- the form of allocations to be used, linked to policies to achieve particular performance from different types of development

- dealing with the maintenance of the desired employment sites and resisting their loss to other uses
- phasing mechanisms if these were appropriate in any areas, with links between rate of economic change and housing provision
- what might be sought from developer contributions
- whether there were any justification for limiting the use of certain types of employment sites, using variations on the Use Classes Order for instance
- whether there was potential for existing employment sites which perform poorly in terms of future requirements to be considered for alternative uses, such as housing.

Step 12: Reporting

2.34 The report was presented in draft form and finalised after the receipt of comments from the Council. Its content includes:

- a description of the aims of the work and the way that it has been undertaken
- detailed economic and employment analysis leading to possible economic development levels
- an assessment of the employment land and accommodation currently available or allocated in the authority
- an informed deliberation on the prospects likely to be available in the authority for spaceless economic and employment growth as part of the future development with the consequences for what land is required
- proposals for the quantity, type and locational criteria of sites that could be needed, and proposals for land to be considered
- the types of policies required to achieve what is wanted from employment land in the authority in the future.
- the form of monitoring required for the employment sites to enable ongoing evaluation and scenario testing
- recommendations
- appendices of detailed information and sources.

3. Analysis of the existing employment stock and site surveys

- 3.1 The first stage of the study was to establish the existing employment situation. This involved reviewing previous studies, analysis of past employment take up, surveying existing employment areas and premises and consultation with representatives on the main positive and negative factors about locating in Southend.
- 3.2 The main objective of steps 7 and 8 of the methodology was to take stock of the existing employment situation, as defined as stage 1 in the “Employment Land Reviews: Guidance Note” (ODPM, 2004). This included a review of supply side data and an assessment of known supply to provide recommendations on whether sites should be retained or released.
- 3.3 Planning Policy Statement 4 (PPS4) provides the current and national guidance about planning for the economy. It states that *“The Government’s overarching objective is sustainable economic growth. To help achieve sustainable economic growth, the Government’s objectives for planning are to”*:
- *“build prosperous communities by improving the economic performance of cities, towns, regions, sub-regions and local areas, both urban and rural”*
 - *“reduce the gap in economic growth rates between regions, promoting • regeneration and tackling deprivation “*
 - *“deliver more sustainable patterns of development, reduce the need to travel, • especially by car and respond to climate change”*
 - *“promote the vitality and viability of town and other centres as important places • for communities. To do this, the Government wants”:*
 - a. *“new economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities”*
 - b. *“competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres, which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups)”*
 - c. *“the historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and a focus for the community and for civic activity”*
 - *raise the quality of life and the environment in rural areas by promoting thriving, inclusive and locally distinctive rural communities whilst continuing to protect the open countryside for the benefit of all”*
- 3.4 Planning Policy Statement 1 (PPS1) Delivering Sustainable Development states that *“the government is committed to promoting a strong, stable and productive economy which aims to bring jobs and prosperity for all. It considers that planning authorities should”*:
- *“recognise that environmental and social benefits can be delivered”*
 - *“ensure that suitable locations are available for industrial, commercial, retail,*

- “public sector (e.g. health and education), tourism and leisure developments, so that the economy can prosper;”
- “actively promote and facilitate good quality development, which is sustainable and consistent with plans”;
- “ensure that infrastructure and services are provided to support new and existing economic development and housing”;
- “identify opportunities for future investment to deliver economic objectives”.

Past take up rate trends

- 3.5 An indication of future employment requirements can be gained from the analysis of past take up rates. Take up rates for completed developments can show the level of market activity in the Borough. The following table shows past employment land take up for Southend between 2003-2008.

Table 3.1: Past employment land and floorspace completions

Year	Net Completions (Ha)	Net Completions (Sq m)
2003/2004	+4.73 ha	+30,005 sq m
2004/2005	-1.19 ha	-2,344 sq m
2005/2006	-0.26 ha	-1,374 sq m
2006/2007	+2.13 ha	+17,271 sq m
2007/2008	-0.14 ha	+766 sq m
Totals	+5.27 ha	+ 44,324 sq m

Source: Southend-on-Sea Borough Council

- 3.6 Table 3.1 shows that overall there has been a net gain in floorspace and employment land within Southend within the last 5 years. For illustrative purposes if demand for employment land followed a similar trend until 2021, there would be a requirement for 13.7 ha and 115,242 sq m of employment provision.
- 3.7 Table 3.2 below illustrates the use class breakdown for 2007/2008 by sub area.

Table 3.2: Past employment floorspace completions (sq.m) by B Class 2007/2008

Use Class	Priority Urban Area: Districts	Priority Urban Area: Industrial	Shoeburyness	Seafront	Town Centre / Central Area	Southend Total
B1 a	-169	30	0	0	-150	-725
B1 (b)	0	0	0	0	0	0
B1 (c)	0	0	0	0	0	0
B1*	0	0	0	0	0	0
B2	0	60	0	0	0	170
B8	86	-216	1555	0	0	1425
B1-B8*	0	0	0	0	0	-104
Total	-83	-126	1555	0	-150	766

* Unknown breakdown

Source: Southend-on-Sea Borough Council

- 3.8 Table 3.2 shows that only Shoeburyness has seen a gain in employment floorspace. All other areas have seen a slight reduction of floorspace. The main activity in Southend was in the B1a and B8 classes.

Outstanding commitments

- 3.9 An important consideration for this study is the location of the committed supply. The Core Strategy sets out the spatial strategy for the Borough and identifies those employment areas that will be protected and regenerated to meet job targets and employment needs. The Core Strategy policies seek to protect and enhance the towns existing key employment areas such as industrial estates, district centres and the town centre.
- 3.10 Within these areas however, outstanding employment permissions will create a loss of - 2.38 hectares in employment land. This is primarily due to a single permission which would lead to a loss of 1.05 Ha within the town centre. Table 3.3 sets out all outstanding permission by area and use class.

Table 3.3 Employment land supply (ha.) by type (outstanding permissions)

Use Class	Priority Urban Area: Districts	Priority Urban Area: Industrial	Shoeburyness	Seafront	Town Centre and Central Area	Non Specified Areas (Intensification)	Southend Total
B1 a	-0.02	0.00	0.00	-0.04	-1.04	0.06	-1.05
B1 (b)	0.00	0.00	0.00	-0.02	0.00	0.00	-0.02
B1 (c)	0.00	0.00	0.00	0.00	0.00	-0.93	-0.93
B1*	0.01	0.40	0.00	0.00	0.00	-0.03	0.39
B2	-0.03	-0.07	0.00	-0.06	0.00	-0.16	-0.32
B8	-0.08	0.00	0.03	0.00	-0.02	-0.06	-0.13
B1-B8*	0.00	0.17	0.41	0.00	-0.11	-0.78	-0.32
Total	-0.12	0.50	0.44	-0.12	-1.17	-1.90	-2.38

* Unknown breakdown

Source: Southend-on-Sea Borough Council

- 3.11 This information will be used in section 6 when we assess supply and demand to identify gaps in future provision.

Analysis of existing employment locations

- 3.12 Information from the annual business inquiry (ABI) for Southend has been used to broadly identify the existing location of particular employment sectors in the Borough. Data from 2008 was examined on a ward basis. Figures have been rounded to the nearest hundred to ensure confidentiality of businesses in line with national statistics guidelines. The analysis below and maps in appendix 1 provide a broad spatial distribution for existing employment provision and the specific distribution of the following employment sectors:

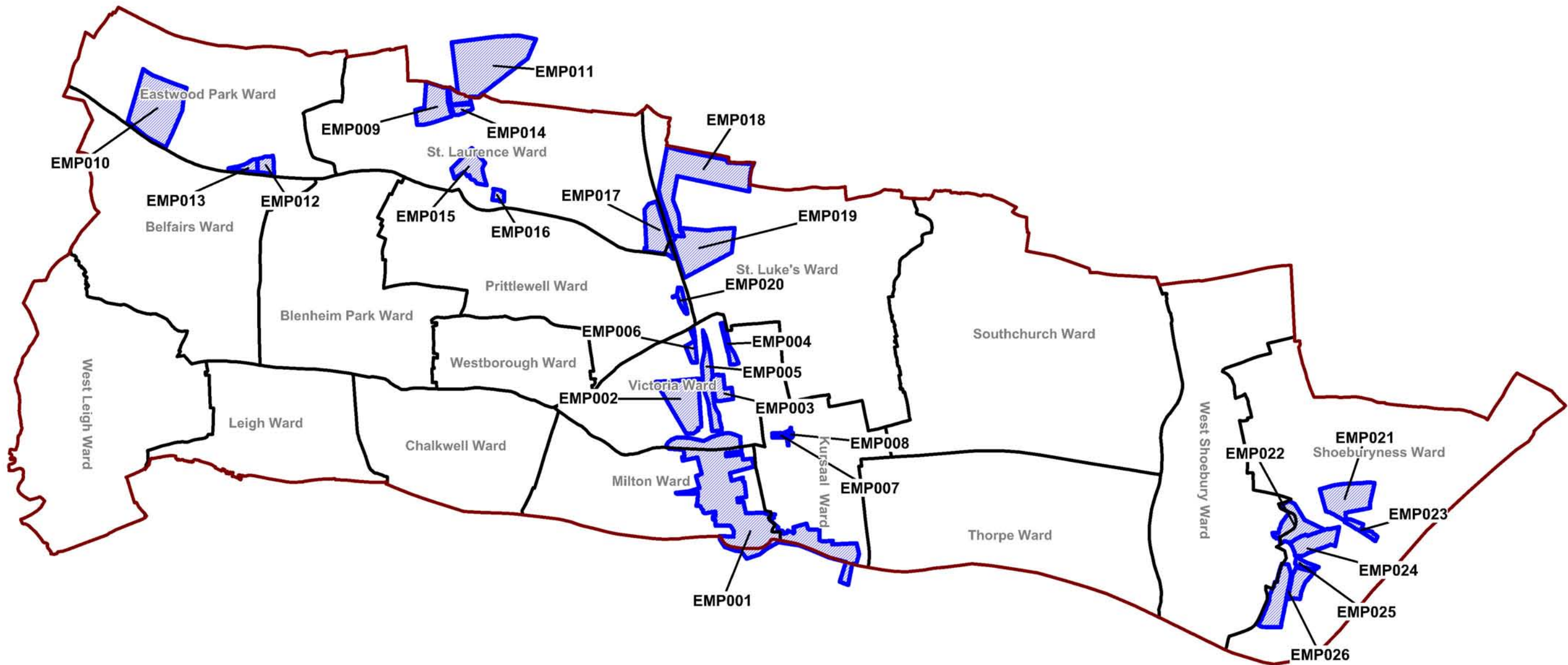
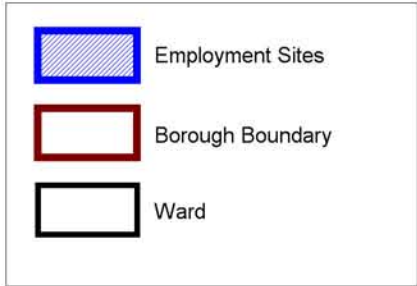
- Manufacturing
- Wholesale and retail trade; repair of motor vehicles,

- Hotels and restaurants
- Transport, storage and communication
- Financial intermediation
- Real estate, renting and business activities
- Public administration and defence; compulsory social security
- Education
- Health and social work
- Other community, social and personal service activities

3.13 The analysis shows the distribution of growth sector employment across the Borough. The largest concentrations of this employment are found in Milton, Victoria, St Lukes, Prittlewell and St Laurence. Analysis of ten employment sectors showed the town centre as a significant location for employment, the exceptions were health and social care and manufacturing, which identified Prittlebrook and St Lukes as the primary location for existing business. The analysis also showed that other wards located adjacent to the city centre e.g. Southchurch and Kursaal contained reasonable levels of employment activity. Beyond those areas the A127/airport corridor is a significant existing destination. Leigh and Shoeburyness appear to provide valuable levels of employment but at a reduced level. The following bullet points highlight the key findings:

- Manufacturing is generally located in St Lukes in the north of the Borough and in Eastwood Park off the A127. Other clusters are located in Shoebury, St Laurence and Victoria;
- Wholesale and retail trade and repair of motor vehicles are primarily located in the town centre and the north fringe, A127/airport corridor. Other locations include Shoeburyness and Eastwood Park;
- Hotel and restaurants are generally located in the town centre, with a smaller element in Leigh Thorpe and Victoria;
- Transport, storage and communication are located in Victoria and fringe with a smaller element in Shoeburyness;
- Financial services are generally located in the town centre;
- Real estate, renting and business activities are located in the town centre and north fringe, but with a larger quantity dispersed across other locations in the city and smaller centres such as West Leigh and Shoeburyness;
- Public administration and defence and compulsory social security are generally located in Victoria and Milton. Other locations include Leigh and Shoeburyness;
- Education is dispersed across the Borough, with higher concentrations in Milton, Prittlewell, Blenheim and Southchurch;
- Health and social care are concentrated in Prittlewell ward, but with a surprising level of activity in other parts of the city, such as Milton, Chalkwell and Victoria;
- Other community, social and personal service activities are located in the town centre and town centre fringe wards such as Southchurch.

3.14 The map overleaf shows the main employment locations in the Borough.



- 3.15 Table 3.4 below shows the broad location of existing employment sectors. Primary locations contain the largest quantity of employees within each sector.

Table 3.4: Location of existing employment by sector

Sector	Primary Location	Secondary Locations	Other
Overall	Milton Victoria	Prittlewell St Laurence St Lukes	Shoeburyness Leigh
Manufacturing	St Lukes	Shoeburyness Eastwood Park	St Laurence Victoria
Wholesale and retail trade; repair of motor vehicles,	Milton	St Laurence St Lukes Victoria	Shoeburyness Eastwood Park
Hotels and restaurants	Milton	Leigh	Victoria Thorpe
Transport, storage and communication	Victoria	Shoeburyness	Milton Southchurch St Laurence
Financial intermediation	Victoria	Milton Kursaal	
Real estate, renting and business activities	Milton St Laurence	Victoria Chalkwell	Shoeburyness West Leigh
Public administration	Victoria	Milton	Leigh Shoeburyness
Education	Milton	Prittlewell Blenheim Southchurch	St Lukes West Shoebury Victoria
Health and social work	Prittlewell	Milton Chalkwell Victoria	St Lukes Westborough
Other community, social and personal service activities	Milton	St Lukes Kursaal	Southchurch Victoria

- 3.16 The analysis of existing employment location relates to the distribution of future employment growth because it indicates the underlying locational preferences of each employment sector. Appendix 1 contains maps illustrating the distribution for each growth sector.

Existing employees and travel to work patterns

- 3.17 One of the main objectives of the Southend-on-Sea Core Strategy is to address the high level of out-commuting to destinations outside of the Borough. As part of the review of the existing situation it is important to understand the existing employment distribution across the town and existing travel to work patterns. Table 3.4 overleaf shows the employment

density for each ward within the Borough. The ratio is the number of economically active people in relation the number of jobs.

Table 3.5: Employment density ratio

Ward	Economically Active 16-74 2001	No of Jobs 2007	Employment Density Ratio
Belfairs	6,198	1,087	0.18
Blenheim Park	6,852	1,474	0.22
Chalkwell	6,308	2,681	0.43
Eastwood Park	6,779	2,371	0.35
Kursaal	6,155	2,434	0.40
Leigh	6,471	3,138	0.48
Milton	6,553	12,189	1.86
Prittlewell	6,569	6,027	0.92
Shoeburyness	7,093	3,245	0.46
Southchurch	6,331	1,663	0.26
St Laurence	6,743	5,188	0.77
St. Luke's	7,145	4,681	0.66
Thorpe	6,104	1,513	0.25
Victoria	6,511	11,058	1.70
West Leigh	5,943	1,807	0.30
West Shoebury	6,848	1,399	0.20
Westborough	7,186	1,180	0.16
Southend	117,789	63,137	0.56

Source: ONS Census 2001, Nomis 2007

- 3.18 Table 3.5 shows that the level of economically active people across the Borough is relatively consistent. The wards range from 5,943 to 7,186 economically active people. However when compared to Nomis ABI 2007 data the employment density ratio clearly shows that overall Southend has insufficient employment opportunities to support the overall number of economically active population living in the Borough.
- 3.19 The data shows that across the Borough there is an imbalance of people to jobs. Whilst most wards show relatively low levels of employment, several wards do have higher levels of employment opportunity, specifically Milton, Victoria and Prittlewell. Employment density ratios for particular areas provide an indication of the self containment and likely travel patterns in the area.
- 3.20 Analysis of existing travel to work patterns can confirm employment density trends and potentially form the basis of analysis into the impact of increasing employment or population in certain locations. Table 3.6 below shows the existing travel to work patterns by broad locations.

Table 3.6: Travel to work patterns (origin-destination)

	Town Centre	Airport/A127	North Fringe	Shoeburyness	District Centres	Other Wards
Town Centre	66%	14.4%	7.9%	3.9%	5.2%	2.6%
Airport/A127	30.3%	51.7%	6.2%	2.8%	6.8%	2.1%
North Fringe	38.3%	12.7%	36.3%	5.8%	3.6%	3.3%
Shoeburyness	30.8%	11.3%	8.7%	42.4%	3.4%	3.4%
District centres	29.3%	15.6%	4.6%	2.8%	44.4%	3.4%
Other Wards	30.8%	13.6%	7.1%	4.5%	8.2%	35.8%

Source: 2001 Census Origin-Destination Table 206

- 3.21 The level of travel within the areas appears to correlate with the employment density in that the higher the ratio of jobs to people the higher the level of self containment. Figures emboldened show the self containment of each area. The table shows that the town centre area is the focus for employment within the Borough with approximately 30% of all leaving their area to work within the town centre.

Site surveys

- 3.22 A comprehensive site survey was conducted to establish the current status of existing employment sites and employment land. The survey site list consisted of all current allocations and sites assessed as part of the Industrial Estates Study conducted by GVA Grimley and other industrial sites identified by Baker Associates in conjunction with the Council.

Site survey criteria

- 3.23 The criteria used followed guidelines set out in ODPM guidance Planning Employment Land Reviews. The criteria used included:
- Site ref
 - Address
 - Site area
 - Current site status and location
 - Description of site and suitable uses
 - Adjacent uses and conflicts
 - Ownership and vacancy
 - Strategic and site access
 - Car parking and public transport provision
 - Known development constraints
 - Market appraisal and suitable types of development

- 3.24 Full site criteria are attached in appendix 2 and site proformas are attached in appendix 3.

Spatial planning for employment

- 3.25 To assist in the spatial planning of Southend and help inform the production of Area Action plans and Core Strategy Implementation the ELR has categorised employment areas

spatially in line with the Core Strategy spatial distribution. Box 3.1 below provides extracts from the Southend-on-Sea Core Strategy Policy KP1 and includes details of employment areas considered as priority areas.

Box 1: Core strategy spatial policy

Policy KP1: Spatial Strategy

“The primary focus of regeneration and growth within Southend will be in”:

- Southend Town Centre and Central Area – to regenerate the existing town centre, as a fully competitive regional centre, led by the development of the University Campus, and securing a full range of quality sub-regional services to provide for 6,500 new jobs and providing for at least 2,000 additional homes in conjunction with the upgrading of strategic and local passenger transport accessibility, including development of Southend Central and Southend Victoria Stations as strategic transport interchanges and related travel centres.

In addition, appropriate regeneration and growth will be focused in the following locations:

- Seafront – to enhance the Seafront’s role as a successful leisure and tourist attraction and place to live, and make the best use of the River Thames, subject to the safeguarding of the biodiversity importance of the foreshore.
- Shoeburyness – to promote the role of Shoeburyness as a place to live and work, led by the successful redevelopment at Shoebury Garrison, regeneration of local shopping centres and existing industrial estates to secure an additional 1,500 jobs, and providing for 1,400 additional dwellings, linked to improved access, and subject where relevant to the safeguarding of the biodiversity importance of the foreshore*.

Priority Urban Areas – these comprise:

- The District Centres of Westcliff (Hamlet Court Road) and Leigh (Leigh Broadway, Elm Road and Rectory Grove), the Southchurch Road shopping area, and the West Road/Ness Road shopping area of Shoebury; The main industrial/employment areas as identified on the Key Diagram, including: Progress Road, Airbourne, Comet Way/Laurence/Aviation Way, Thanet Grange, London Southend Airport, Prittle Brook Estate/Temple Farm/Stock Road, Fossetts Farm, Sutton Road, Towerfield (including Campfield Road)/Vanguard Way, Shoeburyness and the Old Ranges, Shoeburyness
- The Cluny Square Renewal Area.

3.26 Based on the identification of the spatial distribution of development the following spatial areas have been identified:

Town Centre/Seafront and Central Fringe (Southend Central AAP)

- Southend Town Centre/Seafront
 - a. London Road
 - b. Elmer Square
 - c. St John Quarter
 - d. Warrior Square
 - e. Southchurch Road
 - f. Victoria Avenue Office Quarter
- Sutton Road
- Grainger Road Industrial Estate

- Short Street
- Tickfield Avenue
- Southchurch Road Business Park
- Boscombe Mews

A127/Airport

- Comet Way
- Progress Road
- Aviation Way
- Airborne Industrial estate
- Airborne Close
- Laurence Industrial estate
- Thanet Grange (RBS Credit Services)
- Prince Close
- Prittle Brook Industrial Estate
- Priory Works

North Fringe:

- Temple Farm
- Stock Road, including Key Med

Shoeburyness:

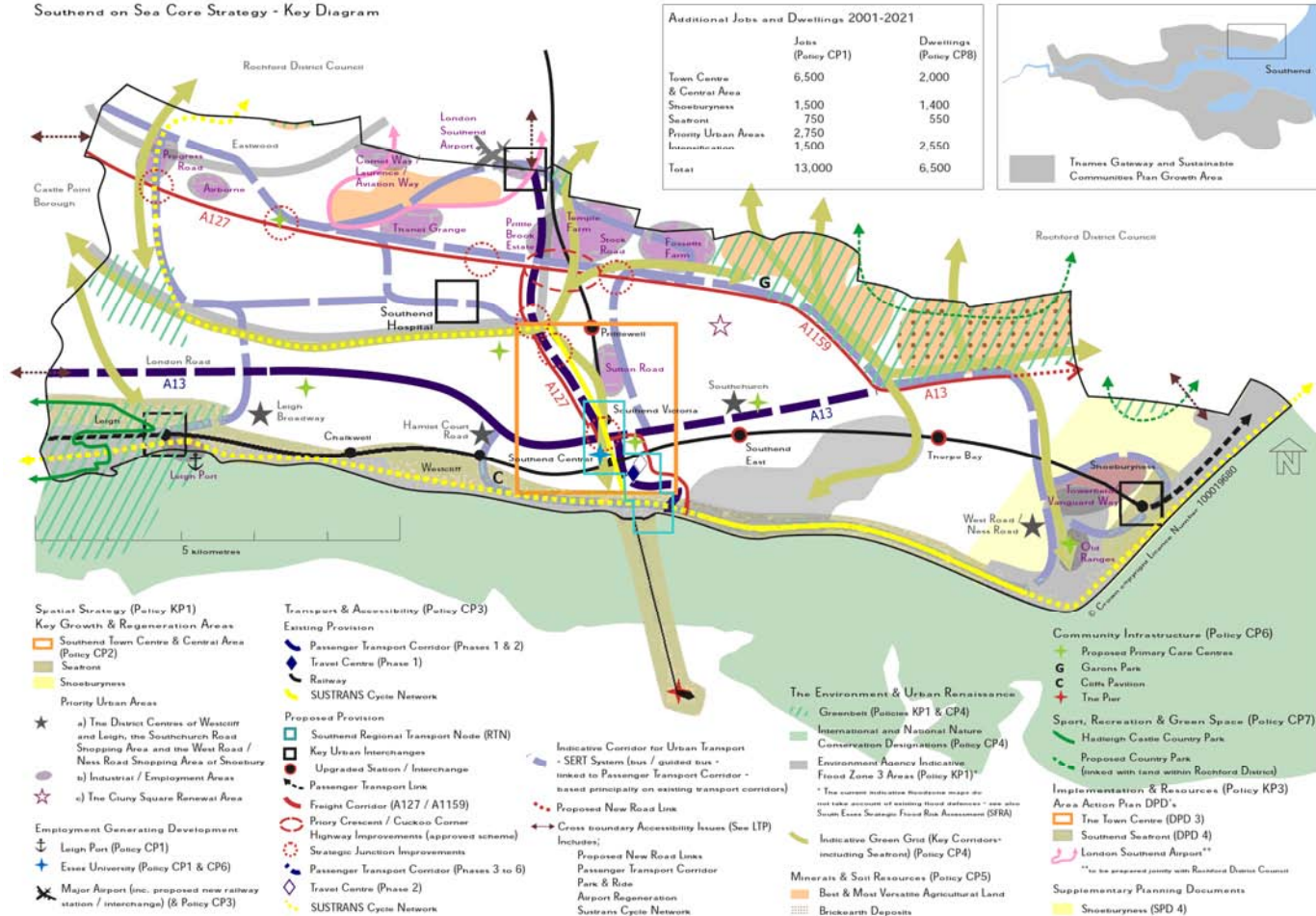
- Vanguard Way
- Towerfield Road
- Terminal Close
- Campfield Road
- The Garrison

District and Local Centres:

- Leigh Broadway (District Centre)
- Hamlet Court Road (District Centre)
- Southchurch Road (Local Centre)
- West Road/Ness Road (Local Centre)

3.27 The spatial categorisations have been identified in line with the Core Strategy Key Diagram, See overleaf:

Southend on Sea Core Strategy - Key Diagram



Criteria for the retention or release of employment land

- 3.28 The following criteria, as defined in “Employment Land Reviews: Guidance Note” have been used to consider the suitability of continued use of sites for employment purposes. It is considered that poor stock quality and high vacancy rates are primary indicators for the release or redevelopment of existing employment location. The criteria are set out below and included within the site survey proforma in Appendix 3:

1: Market Attractiveness Factors

- Has the site been formally identified for employment for at least 10 years?
- Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.
- Is the site being actively marketed as an employment site?
- Has there been any recent market activity? [This could include enquiries, sales or lettings]
- Is the site owned by a developer or another agency known to undertake employment development?
- Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?
- Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?
- Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?
- Is the site immediately available?

2: Sustainable Development Factors

- Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/greenfield considerations)?
- Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
- Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?

3: Strategic Planning Factors

- Is the site within an area identified as of strategic importance to the delivery of the RSS/RES?
- Is the site identified or likely to be required for a specific user or specialist use?
- Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?
- Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?
- Are there any other policy considerations, such as emerging strategic objectives or

- spatial vision, which should override any decision to release the site?
 - Is the site important in delivering other economic development objectives or the spatial strategy?
- 3.29 It is considered that the normal operation of the market leads to a level of vacant premises and floorspace. Employment monitoring represents a snap shot in time and the vacant premises identified at this time might well become occupied very quickly. As part of the site survey, sites with vacant premises have been assessed. Those which are clearly unsuitable for continued employment use have been identified. In general this has been where concentrations of poor quality vacant floorspace have been discovered.
- 3.30 The following paragraphs summarise the existing main employment areas by spatial area, discussing location, overall quality, available land and premises and their position within a spatial employment hierarchy.

Town Centre/Seafront and Central Fringe

- 3.31 The primary location for existing employment, the town centre contains 40% of all employment within the Southend-on-Sea Borough. The town centre/seafront area has not been assessed on a site by site basis but in a holistic way. The area is and will continue to be a significant location for future employment provision. Whilst some office buildings within the centre are of poor quality there is evidence of refurbishment, e.g. Chichester House. It is considered that recommendations on specific buildings within the area should be undertaken through the AAP for the town centre and seafront. Whilst reviewing individual building suitability could be undertaken, the piecemeal consideration of premises will not facilitate a comprehensive plan for the town centre. It may be the case that reasonable office buildings will need to be redeveloped as part of wider proposals for the regeneration of the town and these detailed considerations are beyond the limitations of the ELR. The ELR has however conducted surveys of other clearly more defined employment locations within the central fringe.
- 3.32 The Victoria Avenue office quarter has been a key location for employment in Southend-on-Sea. However, in recent years it appears that the number of vacant units has increased due to the general poor quality of provision. Office stock is generally dated and considered unsuitable for modern purposes. Several of the buildings are still occupied by tenants, including the HM Revenue and Customs and Occupational Health Services, and other units have been fully or partially refurbished internally to a better standard. It is recommended that the area is protected for employment purposes but with the recognition that a comprehensive regeneration strategy involving a greater mix of uses will need to be considered.
- 3.33 There is already an indicative masterplan for the area and design work as part of the SHLAA has illustrated an alternative mixed use proposal. The Council is currently in the process of developing a development brief for the area. Subject to future demand the area still provides a valuable level of employment and should be protected. The area does however have several large surface car parks, primarily off Baxter Way, which could facilitate redevelopment.

- 3.34 It must be noted that the area is likely to take several decades to redevelop as recently refurbished premises continue to attract new tenants and poorer quality stock becomes available when leases expire. To illustrate, whilst many premises are vacant, others such as Alexander House are currently let to HM Revenue and Customs whose next lease option is 2021. Also others such as The Pinnacle have recently been refurbished. Following this investment the owners are unlikely to redevelop the site unless it is for a significantly higher land value use, e.g. residential. The complex nature of Victoria Avenue office quarter will require a long term vision to guide redevelopment; this could be implemented by the market in a piecemeal way or by the private sector or public body through comprehensive site assembly.
- 3.35 Sutton Road and Grainger Road Industrial Estate have been considered as part of the design study work of the SHLAA. Grainger Road is an old industrial estate, within a terraced housing area. The units are in relatively poor condition and there are high vacancy rates. Part of the site has been promoted by the land owner for alternative uses. It is recommended that the site is protected for employment purposes but identified for redevelopment to provide modern units. Sutton Road is located north of the town centre, several units are vacant and the premises are of mixed condition. Part of the area already has permission for residential use and one further site has been promoted for residential for the SHLAA. It is recommended that the site is considered for redevelopment and regeneration with residential led schemes with supporting commercial uses consolidated on the ground floor to serve the community.
- 3.36 Short Street contains the Postal Depot, Victoria Business Park and Bus Depot. The site is generally in use, albeit at a very low density in parts. Victoria Business Park contains good quality units and is well occupied. Current redevelopment proposals for the former B&Q site and Postal Depot could reduce the level of employment provision in this location. It is recommended that the site is protected for employment uses and potentially intensified over time.
- 3.37 Southchurch Road Business Park and Boscombe Mews are both recommended for release and redevelopment for alternative uses, unless required to meet future employment demand. Whilst occupied, it is considered that over time they will become increasingly vacant and the opportunity to redevelop them for more complementary uses, better integrated with there residential and mixed use surrounded should be seized. Overall they provide older employment units of a low quality. Southchurch Business Park has been promoted to the SHLAA and contains several vacant units. It could be combined with the former Maybrook centre site for redevelopment. Boscombe Mews is in general use but given the poorer quality of the site, when it becomes vacant it is likely it will be difficult to let and could potentially be lost from employment use.
- 3.38 Tickfield Avenue is currently in use and whilst not particularly good quality, it has recently been improved by the Council. The site is not available for redevelopment due to its continued valuable use for Council employment purposes. It is recommended that the site is protected for future employment use.

A127/Airport Corridor

- 3.39 Comet Way, Laurence Industrial Estate, Airborne Close, Aviation Way, Thanet Grange (RBS Credit Services) and Airborne Industrial Estate are all recommended for retention for continued employment use. All sites provide reasonable to good quality premises within this key employment corridor. Aviation Way has scope for potential redevelopment thorough the reuse of existing sites to improve the employment density. Thanet Grange could offer future potential as part of the wider Joint Area Action Plan for the Airport. Both sites should be considered further in section 6.
- 3.40 Prittle Brook Industrial Estate and Progress Road are significant employment sites within Southend. Both sites are in reasonable employment use and offer opportunities for redevelopment to support future employment growth. Prittle Brook Industrial Estate has already been partially cleared and it is recommended that it is retained for continued employment purposes, given the restricted nature of employment land supply within the Borough. It is considered that a flexible approach will be needed to enable redevelopment of the site. Baker Associates recommends that a development brief is produced to ensure that employment use is safeguarded as the major land use, to improve site access and to integrate better employment uses with surrounding residential and open space uses.
- 3.41 Progress Road Industrial Estate has direct access from the A127 at the gateway to Southend-on-Sea. The site is in reasonable use, but this is being undermined by increased vacancy rates in poor quality stock and the increased presence of retail trade businesses. The site represents a valuable employment location that is in reasonable use and the Council has a Design Brief to guide the regeneration and redevelopment of the estate. It is recommended that the site should be protected for employment uses. Parts of the site are already being promoted by the Council in partnership with Renaissance Southend Ltd and the East of England Development Agency which will lead to the incremental redevelopment of the site to provide better quality provision. The site is considered further in section 6.
- 3.42 Prince Close is a small employment site located off the A127 near Thanet Grange. It is of low quality with a problematic access and poor relationship with surrounding residential uses. Whilst still occupied the site is no longer considered suitable for future employment uses. Once vacant, the site is likely to be difficult to let and will therefore be targeted for alternative uses. It is recommended that the Council should continue to monitor the site and consider it for release unless market demand requires its retention for manufacturing purposes.
- 3.43 The Priory Works site is located within a residential area. Whilst far from an ideal location, the site appeared in good use at the time of survey and whilst of a lower quality, it is recommended for retention for employment purposes. The site represents an opportunity, if combined with Network Rail land to the west, to be developed at a high density given its close proximity to the station and the improved access that could be provided through wider development. It is recommended that the site is retained for employment uses and future monitoring will be required.

North Fringe

- 3.44 Located west of the main railway, the north fringe sites of Stock Road and Temple Farm have been considered separately to other A127/airport corridor sites. Strategic access to this area and new development areas at Fossett's is reasonable but of a more local scale than sites with good access to the A127. The two employment sites comprise a large comprehensive employment area surrounding a cemetery on Sutton Road. Stock Road is generally in poor to reasonable condition, local access is good and the estate is in reasonable use. Currently there are a large number of vacant units available for let within the Robert Leonard Industrial estate part of Stock Road. Higher than average vacancy rates reflect the secondary nature of this location and the relatively poor building stock. The main exception in Stock Road is KeyMed, which occupies some good quality premises. Temple Farm to the North of Stock Road is a more modern employment estate, local access is good and the quality of premises is good, which is reflected in the limited vacancies.
- 3.45 It is recommended that Stock Road and Temple Farm are retained for future employment purposes. Whilst parts of Stock Road are of poorer quality the site meets a clear need in Southend. Given the recent growth in health and medical companies in the close proximity to KeyMed, Temple Farm is well placed to attract these uses with the potential to create a health cluster. Stock Road could also potentially support this sector through redevelopment in the future for modern employment units. It is recommended that monitoring is undertaken to identify if premises become unfit and therefore suitable for redevelopment for better quality employment provision within Stock Road.

Shoeburyness

- 3.46 The general findings on supply include recommendations for the retention of existing employment sites at Towerfield Drive, Vanguard Way and Campfield Road. Whilst there are some vacant premises, the areas are generally all in good use. The condition of premises at Towerfield Road is reasonable, if not slightly dated in quality, but the area is well used.
- 3.47 It is recommended that vacancy levels at both Vanguard Way and Campfield Road should be kept under review. Our view is that whilst these sites are in reasonable use for employment purposes they are not ideally located for many of the warehouse/distribution uses currently located within them. Campfield Road, in particular offers the opportunity to knit the old and new Shoebury together. Over time we believe companies could relocate to other employment locations with better strategic access to the A127, following development or redevelopment in those areas. The major benefit of Shoeburyness is the lower rental values, which could lead to continued use in the future. All three sites need to be considered as part of the Shoeburyness AAP due to the need for the AAP to consider all the options available to provide for the local community and floor space demand for the town.
- 3.48 We recommend the redevelopment of Terminal Close for a mixed use employment led development. The site is currently in poor use, with high vacancy rates and dilapidated stock. Strategic and local road access is below average, but the site is located next to a railway station. The recommendation for mixed use is proposed to enable the redevelopment of the site at a higher employment density, whilst providing a better

relationship with existing residential properties to the North. The site should therefore be protected to safeguard employment use and ensure redevelopment does not lead to a net loss of employment.

- 3.49 Redevelopment for an employment led mixed use scheme should help to create good quality small scale employment uses and achieve a better relationship with surrounding residential uses. Whilst the site has relatively poor road access, there is potential for local access to be improved and sustainable travel promoted via the railway station.
- 3.50 The Garrison Phase 1 currently has several new units available for rent, which are of good quality and should be retained for employment uses. Part of the remaining Garrison Phase 2 area has been promoted to the SHLAA (CON 111) for residential use. The Core Strategy suggests an indicative job number of 1,500 for Shoebury, which would require approximately 4.3 ha of the allocation set out in the original Development Brief for the Garrison Phase 2 area (11.27ha). The Garrison Phase 2 is one of the few employment land opportunities within the urban area and its future use is dependant on demand assessments in sections 4 and 5. Overall the Garrison Phase 2 should be protected for employment use, however, the Council should consider it alongside other sites in the Shoeburyness AAP to determine the future direction of development in the wider Shoeburyness area.

District and Local Centres

- 3.51 The district centres of Leigh Broadway and Hamlet Court and local centres of Southchurch Road and West Road/Ness Road provide for a mix of employment uses, but predominantly provide a retail and service function. Following site survey no specific sites have been identified that could accommodate future B class uses. Whilst these locations will continue to provide valuable employment, it is likely to be within C and D class uses, including hotels, restaurants, tourism and leisure.

4. Analysis of past trends and future demand projections

- 4.1 This section discusses the economic background of the Borough, analyses past economic trends and discusses the economic strategies and evidence that has informed the production of existing economic forecasts. Southend-on Sea Borough Council is already providing for forecast employment growth through the Core Strategy and a key aim of the ELR has been to utilise this information to inform the detailed distribution of future employment growth undertaken in section 5.
- 4.2 Considerable employment work has been undertaken to date to inform the Core Strategy and to provide a picture of past economic performance. Rather than simply reinvent the wheel, this study has used information already available to illustrate past trends and potential future demand. The analysis presented below is sourced primarily from the following documents:
- The Regional Economic Strategy (RES)
 - A Renaissance for Southend, Baseline: Stage 1A – the Evidence (RTP 2006)
 - The East of England Plan
 - Economic Growth Aspirations for Southend (2006)
 - “Making Culture Count”, the Cultural Strategy for Southend

Economic background

- 4.3 The Regional Economic Strategy (RES), ‘A Shared Vision’, sets the long-term vision for the sustainable development of the East of England. It sets out how sustainable economic growth can be achieved throughout the East of England. It outlines eight strategic goals to achieve its vision for the region, including:
- a skills base that can support a world class economy;
 - growing competitiveness, productivity and entrepreneurship;
 - high quality places to live, work and visit;
 - social inclusion and broad participation in the regional economy;
 - making the most from the development of international gateways and national and regional transport corridors;
 - an exemplar for the efficient use of resources.
- 4.4 The Regional Economic Strategy (RES) has been considered alongside the spatial planning framework provided by the Regional Spatial Strategy, the ‘East of England Plan’. The East of England Plan sets out a spatial distribution of job growth required to achieve the RES and other spatial policy objectives across the region for the period 2001-2021.
- 4.5 The East of England Plan sets out sub-regional policy concerning the Essex Thames Gateway regeneration and growth area. Essex Thames Gateway is given an indicative target of 55,000 net new jobs. An overall aim is to achieve a better alignment in the ratio of jobs to homes so that the proportion of people travelling to work outside the area is materially reduced.

- 4.6 Southend is one of the three complementary regeneration areas. Southend should become a cultural and intellectual hub, secure a full range of high quality sub-regional services and facilities and provide for mixed use development to secure new jobs and homes (Policy ETG4). Policy ETG5 of the East of England Plan requires the Core Strategy to provide for at least 13,000 net new jobs between 2001 and 2021.

Southend-on-Sea Core Strategy

- 4.7 Core Strategy Policy CP1: Employment Generating Development, states that provision should be made for not less than 6,500 net additional jobs by 2011, and not less than 13,000 net additional jobs by 2021. The policy provides an indicative distribution over the 2001-2021 period:
- Town Centre and Central Area 6,500
 - Shoeburyness 1,500
 - Seafront 750
 - Priority Urban Areas 2,750
 - Intensification 1,500
- 4.8 Due to the build up nature of Southend and tightly defined administrative boundary, land is a scarce resource and economic growth is a prime requirement, which needs to take precedence over other land uses. The main issue with economic development is the relatively lower land values compared to other land uses such as residential. This means that land in employment uses or desirable locations for employment development in market and sustainable terms, needs to be safeguarded or allocated to facilitate economic growth.
- 4.9 In the Core Strategy the Borough Council states that it will “vigorously ensure that proper use is made of land and buildings in Southend so as to provide for the needs of all sectors of the economy. It is essential to help create new jobs and protect existing ones. This will be the focus when considering the use of land and buildings within the town although there will sometimes be situations where the wider regeneration needs of Southend will be better served by replacing poorly located employment uses with other types of development” (paragraph 3.7).

Past employment growth in Southend

- 4.10 Table 4.1 below sets out the past employment growth by sector.

Table 4.1: Past employment growth 2001 to 2006

Standard Industrial Classification (2003)	2001	2002	2003	2004	2005	2006	Change 2001-2006
Total	60900	60400	61600	64800	63000	65300	4500
Mining, Manufacturing, Electric, Gas & Water, Agri, Fishing	5800	6000	5000	4800	4600	4500	-1200
Construction	1700	1600	2000	1900	1800	1900	200
Sale maintenance Motor vehicles	1200	1000	1100	1100	1100	1100	0
Wholesale and commission trade (except vehicles)	1900	2000	2000	2500	2000	1900	0
Retail trade repair of HLLD goods	7400	7600	7900	8200	7900	7700	200
Hotels and restaurants	3300	3600	3600	3400	3500	3800	500
Financial Intermediation	5500	5000	5300	5300	3300	3000	-2500
Real Estate, Renting and Business	8100	8300	8800	10100	11400	12900	4800
Public Admin and Defence	4900	5000	5100	5600	5900	4500	-400
Education	5000	5400	5800	6200	5000	6300	1300
Health and social work	9100	8800	8900	9600	10000	11400	2200
Other	7000	6200	6100	6100	6400	6400	-600

Source: Southend-on-Sea Borough Council

- 4.11 Table 4.1 shows that past growth sectors have been real estate, renting and business services, health, education, hotels and restaurants, retail trade and construction. Future growth prospects are likely to be based on continued growth in these sectors. Finance, manufacturing, public administration and other services have all declined. If Southend-on-Sea Borough is to achieve higher growth levels then interventions will be required to reduce the decline in manufacturing industries and to support positive employment growth in other sectors.

Future growth prospects

- 4.12 The Council's in depth scrutiny project "Economic Growth Aspirations for Southend" (2006) sets out how the Council should utilise its assets, policies, powers and influence to assist in achieving the net additional jobs target of 13,000 additional jobs within a sustainable economic base. It identifies the economic growth areas for Southend based on existing nuclei and clusters of activity and those that are aligned with a number of sectors identified in the RES:
- aviation/airport and associate industries;
 - health and medical industries;
 - business and financial services;
 - cultural and intellectual hub and HE centre of excellence;
 - tourism and leisure, and long term opportunities from Olympics.
- 4.13 "Making Culture Count" is the cultural strategy for Southend, providing an overarching strategic vision for the development of Southend's cultural sector. Its aims and objectives seek to improve health, regenerate the town, increase participation and life-long learning

and develop communities through the use and promotion of culture. Its vision is to develop a cultural infrastructure and facilities which are recognised as being of regional significance and which offer demonstrable benefits to everyone who lives in, works in or visits the Borough.

- 4.14 The following paragraphs provide a summary of sectoral analysis and interventions identified through the review of existing evidence for the five key sectors.

Aviation/airport and associate industries;

- 4.15 London Southend Airport and a number of industrial estates support some high tech manufacturing and engineering companies. The proposed expansion of London Southend Airport is one of the most significant economic developments in Southend. The key obstacles to overcome in the short term relate to the planning framework, which the draft Joint Area Action Plan (JAAP) produced by Southend-on-Sea and Rochford District Councils is currently seeking to address.
- 4.16 The existing Maintenance, Repair and Overhaul (MRO) activities related to the airport are critical to the Southend economy. Over 1000 jobs in MRO are supported by the airport, many of which are highly skilled, well paid professions unique to the local area. It is vital that these jobs are retained in Southend and that this cluster is encouraged to develop through the JAAP. Growth in jobs directly related to the airport will not require additional land. The JAAP has identified that potentially 1,180 jobs could be created.
- 4.17 It is important that this unique opportunity is complementary to other objectives and does not undermine the take up of employment space in other locations. Given the constrained nature of Southend, the JAAP will provide a major contribution to the town's economic growth and should be phased appropriately. There is a fine balance to be had with the regeneration of existing employment areas and the promotion of central Southend as a major employment destination.

Health and medical industries;

- 4.18 Key Med, which manufactures medical equipment, is one of the most important employers in the local area, providing highly skilled, high value-added jobs. A number of smaller companies dealing in medical instruments have also emerged in the surrounding area, either directly or indirectly linked to KeyMed.
- 4.19 There should be opportunities to facilitate links with the public sector around the procurement of medical instruments and the exploitation of research and development. Both Southend and Basildon hospitals are expected to expand. At Basildon, the potential for training and enterprise facilities is being explored, building on the investment in a specialist cardiothoracic centre. Moreover, in Southend the university is planning to expand its health school, with a particular focus on dentistry. This is an opportunity for Southend and locations well related to Key Med, the hospital and university could provide an opportunity to create a cluster for health and medical industries to grow.

- 4.20 It has been identified that EEDA is particularly active in developing these links through its Health Enterprise East initiative, which aims to identify, evaluate and exploit intellectual property that exists within the NHS Trusts across the region.

Business and financial services;

- 4.21 A high proportion (23%) of the Southend workforce is employed in financial and business services - above the Eastern and Great Britain averages. Whilst its not expect that there will be back office relocations of the scale once seen in Southend, there could still be a market for small to medium-sized professional services companies looking for a workforce skilled in administrative and financial activities and the comparatively lower rents and good transport connections of central Southend.
- 4.22 A major constraint at present is the quality of Southend's offer to finance and business services. The vast majority of the town's office stock is based along Victoria Avenue, detached from the town centre and considered by many to be unfit for the needs of modern businesses. Smaller office units in the town centre are seen to be attractive to companies seeking good access to London via rail and potential growth links in well with a more attractive retail, leisure and cultural offer which will make central Southend an attractive place to live and work.
- 4.23 Barclays has identified Southend as one of the start-up 'hotspots' outside London with 122 new firms per 10,000 people of working age. However, there is also evidence of a high closure rate; the number of VAT deregistrations per 1,000 population is significantly above the regional and national averages according to ONS data. A number of consultation respondents have identified the need for more managed accommodation for new companies, particularly grow-on space from the Business Incubation Centre. It is important the future provision provides choice in terms of location and premises size for business services. If Southend is to facilitate growth in managed accommodation, medium sized premises are required in a variety of locations and rental levels.

Cultural and intellectual hub and HE centre of excellence;

- 4.24 The Southend Economic Development & Outline Tourism Strategy states that "there is an emerging cultural and creative sector in Southend and a united aspiration to see this sector grow and become a catalyst for economic change". Major investment is taking place in local schools, colleges and the university with the aim of raising the skills base of the local workforce. The new iconic further and higher education campus in the town centre is transforming the town and demonstrates what can be achieved.
- 4.25 Creative and educational sectors represent a good opportunity for Southend. According to research by the Arts Council, there is a significant concentration of creative and cultural businesses located in and around Southend, particularly at Leigh-on-Sea. The University of Essex and South East Essex College both have an expanding cultural and creative focus and the University will soon provide a second home for East 15 Acting School courses.
- 4.26 Together, Southend's cultural assets, attractions and companies are approaching a critical mass that could define a new character for the area. However, this will take time to develop;

Southend's image outside the area is not one associated with culture and creativity. Therefore, any strategy promoting cultural and creative activities will be met with a degree of scepticism from public and private sector agencies. To gain credibility, local partners need to speak with one voice about what the existing assets are, what the concept of the 'cultural hub' means and the key interventions to support further growth of the sector.

- 4.27 The Council has recently produced the Southend Cultural Strategy 2007-2012. This sets the vision for Southend and identifies the main components of Southend's cultural offer and priorities for the future. The Department for Culture, Media and Sport (DCMS) defines the creative industries sector as "Those industries which have their origin in individual creativity, skill and talent which have the potential for wealth and job creation through the generation and exploitation of intellectual property".
- 4.28 Based on this definition, the Arts Council has mapped companies working in the creative and cultural industries sector in South Essex. The mapping clearly shows a proliferation of companies in Southend and Leigh-on-Sea, notably in arts and antiques, architecture, digital media, design, music and performing Arts. The creative sector falls within several employment sectors including other services and business services.
- 4.29 Culture and education are important sectors for Southend-on-Sea. Whilst total job growth in these sectors is likely to be relatively modest, they play a significant part in developing the reputation of Southend and underpinning the growth in business services, particularly in the town centre. The further provision of creative office space is recommended. We are aware of several developments of former industrial areas, building on the character of their historic fabric to offer bespoke accommodation for creative industries mixed with other uses, such as residential, exhibition space and cafes/bars. Overall, creative office space needs to be small in scale with potentially hybrid units that allow combined office and workshop provision.

Tourism and leisure

- 4.30 Between 2001 and 2005, job creation in sectors traditionally associated with strong tourism-based economies such as retailing, hotels and catering, and other services has been weak. Job losses were recorded in hotels and restaurants. With a large number of new tourism and cultural developments in the pipeline, Southend has an opportunity to focus on the positive messages. The niche conference market is buoyant which in the future Southend could be well placed to serve.
- 4.31 The potential to re-launch Southend as a conference destination with a Visitor Conference Bureau service should be welcomed in the medium term, aiming initially at medium sized day conferences from the not-for-profit sector and later at overnight conferences, once 4/5 star hotel accommodation is in place. In the short-term, niche markets should be encouraged, such as English as a foreign language (EFL) students, initially based in student accommodation when available during holidays, and later at a new residential language school in Southend.
- 4.32 Like education and cultural employment growth, tourism and leisure growth will build the reputation of Southend as a vibrant cosmopolitan urban centre. It is particularly difficult to

predict the employment floorspace/land requirement for this sector, given the variety of potential uses within it. The key consideration is that when determining the level of employment provision to be made within the Southend central area, tourism and leisure should be recognised as valuable uses and supported in an appropriate way.

Economic forecasts

- 4.33 Defining Southend for forecasts purposes is relatively straightforward. Existing forecasts are provided on a Local Authority basis. However Rochford District to the north of Southend contains the majority of Southend Airport and future growth in Rochford District will primarily be located surrounding the airport. Through the Airport and Environs Joint Area Action Plan (JAAP), it has been agreed that half the floorspace provision and job growth surrounding the airport will contribute to Rochford's growth targets. This effectively removes the need to specifically factor in the cross boundary issue.
- 4.34 At present there have been two employment forecasts conducted for Southend. It has not been considered beneficial to conduct a new economic forecast for the ELR. The two economic forecasts examined in this study are:
- East of England Regional Spatial Strategy Forecast by Cambridge Econometrics
 - Work undertaken by Roger Tym and Partners for Renaissance Southend Ltd
- 4.35 The first has been undertaken as part of the development of the East of England Plan by Cambridge Econometrics. This represents a constrained economic model that robustly projects forward past trends of economic growth and its spatial distribution. This forecast for 2001 to 2021 has identified the 13,000 job target for Southend contained in the Core Strategy. Table 4.2 below shows the projected economic growth.

Table 4.2: East of England Plan forecasts by Cambridge Econometrics 2001 - 2021

Sector	2001	2021	Change
Agriculture	20	0	-20
Mining	0	0	0
Utilities including Gas and Electric	1,690	150	-1,540
Manufacturing	6,790	6,500	-290
Construction	2,940	1,600	-1,340
Wholesale, including Retail and Motor Trade	13,140	12,420	-720
Hotels and Restaurants	4,820	6,950	2,130
Transport and Communication	3,840	5,500	1,660
Finance	5,830	4,880	-950
Business Services	12,050	18,810	6,760
Public Administration	4,140	3,970	-170
Education	4,110	4,740	630
Health and Social Care	8,040	12,530	4,490
Other	5,020	7,380	2,360
Southend Total	72,430	85,430	13,000

- 4.35 Table 4.2 shows that, like past trends, the economy is likely to grow in several sectors, such as business services, education, health and social care and hotels and restaurants. In addition growth potential exists within other services and the transport and communication sector. Declining sectors are likely to include manufacturing, public administration, finance and utilities.
- 4.36 The second forecast has been undertaken on behalf of Renaissance Southend Ltd. A Renaissance for Southend by Roger Tym and Partners (2006) examined planned and capacity forecasts for Southend to 2021, to identify a scenario based on existing capacity for economic growth, primarily from identified schemes and initiatives. The forecasts have not been used within the ELR due to the lower level of job growth projected. Whilst it could be considered more robust, drawing its basis from actual initiatives and interventions, rather than simply projecting trends, its main weakness is the ability to forecast over the long term. The strength and primary reason for continued use of econometric models is the robustness of forecasting at a regional level over the medium term.
- 4.37 Baker Associates does however recognise the benefit of local forecasts, particularly in instances where regionally aggregated models have projected low levels of economic growth based on poor past performance. In these cases there is considerable justification to challenge these forecasts on the basis that a settlement should not continue to plan for poor levels of future growth, when an aspirational, but realistic target would be more beneficial.
- 4.38 In Southend a key objective is to increase employment, reduce out commuting and improve self containment. If Southend-on Sea is to achieve this it will require economic growth in excess of future housing provision.
- 4.39 The joint production of the SHLAA and ELR has led to the conclusion that planning for lower economic growth will undermine sustainability objectives in Southend and ultimately be self fulfilling by limiting supply and undermining potential growth. The link between housing supply and employment floorspace/job growth has led to the use of RSS targets to be used in the Translation of Jobs to floorspace in section 5.

5. Employment scenario translation

- 5.1 Given the extent of work undertaken on the past and likely future performance of the Southend economy, the main component of stage 2 is the translation of economic forecasts into land and floorspace requirements. Baker Associates has used a translation model making several assumptions building on government guidance "Employment Land Reviews: Guidance Note" (ODPM, 2004).
- 5.2 As set out in section 3, the ELR has endeavoured to undertake analysis and provide information in a spatial way to inform LDF document production. Translating employment job growth into employment land and floorspace requirements requires a number of assumptions to be made. These include the location, type of premises, job density and plot ratios for individual sectors to be identified.
- 5.3 The first consideration has been spaceless growth. All new jobs will not directly generate a requirement for new employment floorspace. With increased home working and flexible employment premises a degree of future employment growth will be spaceless growth. For the jobs to floorspace translation it has been assumed that 10% of all future employment growth will be spaceless. It must be noted that for sectors such as education and health, a large proportion of future growth will occur within existing or new community facilities. We have assumed that 80% of future growth will occur in this way.
- 5.4 A similar concept is that of spaceless decline. Job redundancies do not always result in the immediate availability of floorspace and therefore land for alternative purposes. Production efficiencies and existing rent/lease agreements can all lead to firms maintaining existing premises. Premises and land will become available, but generally at a slower rate than the equivalent land and floorspace required to support new growth. For the jobs to floorspace translation it has been assumed that 70% of all future employment decline will be spaceless and not result in surplus employment land. Overall figures for employment growth forecasts (13,000) have been adjusted accordingly and are presented in Table 5.1 on spaceless growth.

Table 5.1: Spaceless growth

Employment Sector	Job Growth 2001 - 2021	Spaceless	Jobs Requiring New Floorspace
A : Agriculture, hunting and forestry	-20	100%	0
B : Fishing	0	100%	0
C : Mining and quarrying	0	100%	0
D : Manufacturing	-290	70%	-87
E : Electricity, gas and water supply	-1,540	70%	-462
F : Construction	-1,340	70%	-402
G : Wholesale and retail trade; repair of motor vehicles etc	-720	70%	-216
H : Hotels and restaurants	2,130	10%	1,917
I : Transport, storage and communication	1,660	10%	1,494
J : Financial intermediation	-950	70%	-285
K : Real estate, renting and business activities	6,760	10%	6,084

L : Public administration and defence; compulsory social security	-170	70%	-51
M : Education	630	80%	126
N : Health and social work	4,490	80%	898
O : Other community, social and personal service activities	2,360	10%	2,124
Total Future Job Growth	13,000		11,140

- 5.5 Table 5.1 identifies that approximately 11,140 jobs will require new employment provision. This masks a gain of 12,643 jobs requiring new floorspace and a decline of 1,452 jobs releasing floorspace and land.

Locational preferences

- 5.6 The second step is to determine the locational preferences of each employment sector and therefore the breakdown of future employment growth by specific locations, as this influences the type of premises, plot ratios and floorspace per worker which translates jobs to land. Locational preferences are considered the key determinate of the translation model and this has been informed in three ways:
- Location of existing business
 - Market demand
 - Sustainability objectives
- 5.7 The first approach has been to establish a baseline view of employment distribution based on the existing situation. This analysis has been undertaken in section 3 and incorporated into the spatial area summaries. The second area has been informed by consultation with the market to get a view on the desirability of particular locations, their attractiveness for particular employment sectors and what premises might be required to facilitate growth. The third area has been to take a view on the sustainability of particular locations in terms of the desirability to support a sustainable spatial strategy for Southend
- 5.8 It is important to note that market demand and a sustainable spatial strategy are not entirely complimentary, e.g. high market demand for business park locations with good access to the A127 may undermine the planning objective to enhance the town centre and build on the existing public transport network. The issue is one of balance, without market demand the strategy cannot be delivered, but left unchecked what the market might deliver may not be sustainable.
- 5.9 The locations identified in Table 5.2 below have been established by analysis of existing employment sectors by location, responses made through the consultation exercise and examination of the Southend-on-Sea Core Strategy objectives. These factors together have lead to what we consider an achievable spatial distribution to meet future employment requirements. Table 5.2 shows the specific locational preferences for each sector, the assumption on the level of future employment growth that could/should occur in each location, and the likely premises type requirement.

Table 5.2 Locational preference assumptions

Sector	Locational Preferences	% of Growth/Decline*	Likely Premises
D : Manufacturing	Existing manufacturing employment areas	100%	Low density industrial, flexible small to medium sized units.
F : Construction	Existing employment areas	100%	Storage yards and depots, low density industrial
G : Wholesale and retail trade; repair of motor vehicles etc	Town/District/Local centre's A127/Airport	70% 30%	Retail units Low rise double height distribution and 2 storey car showroom units
H : Hotels and restaurants	Town Centre	100%	High density with active ground floor uses
I : Transport, storage and communication	A127Airport (transport/storage) Business Park (communication) Town Centre (communication)	40% 45% 15%	Low density industrial Low density office High density office
J : Financial intermediation	Town Centre Business Park	35% 65%	High rise office Low rise office
K : Real estate, renting and business activities	Town Centre Business parks such as A127/Airport Other urban Locations	30% 60% 10%	High density office Low density office Low density office
L : Public administration and defence; compulsory social security	Existing public facilities	100%	Public facilities
M : Education	Within existing facilities Business Park locations	65% 35%	Low density office
N : Health and social work	North fringe Business Park Existing health and social facilities	35% 65%	Low density office
O : Other community, social and personal service activities	Town Centre Other urban locations	70% 30%	High density office Mid density hybrid units

* The breakdown of future growth has been based on: where it is now, where businesses would like to go or where possible provision should be made.

- 5.10 The key assumption has been the split between particular locations for each sector, as this has determined the overall land requirement. For example business services would require both town centre and business park locations, with very different plot ratios. It must be noted that retail provision must be tested through a specific retail assessment process which is beyond the remit of this study.

Floorspace per worker and plot ratios

- 5.11 The final series of assumption used in the translation model have been made to convert jobs by location into floorspace and land requirements. Assumptions on the level of floorspace required per worker and the building plot ratios in each location have been made. Table 5.3 overleaf shows, by premises and location, the floorspace and plot ratios used to translate employment growth into floorspace and land requirements.

Table 5.3: Floorspace and plot ratio assumptions by location

Premises by location	Floorspace per Worker	Site Plot Ratio
Town Centre, 3 storey office or hotels etc	20 sq m	0.8
Town Centre, 2 storey office/workshops	32 sq m	0.4
Business Park, 2 storey Office	20 sq m	0.3
Industrial Park, 2 storey industrial units	32 sq m	0.4
Warehousing 1 storey double height units	65 sq m	0.5

- 5.12 Table 5.4 below summaries the floorspace and land requirements for each broad spatial location.

Table 5.4: Location floorspace and land requirements

Location	Floorspace	Land
Town Centre/Seafront	124,605 sq m	9.17 ha
Business Park	105,574 sq m	17.60 ha
Existing Industrial (loss)	-32,499 sq m	-5.75 ha
Other Urban Locations	22,788 sq m	3.80 ha
District Centres	5,751 sq m	0.24 ha
Overall Gross Gain	258,718 sq m	30.81 ha
Overall Gross Loss	-32,499 sq m	-5.75 ha

- 5.13 Table 5.4 identifies an overall requirement for 258,718 sq m of provision and this is likely to equate to 30.81ha of employment land. It also identifies a loss of 5.75 ha of employment land. Dependant on the view of supply, then these could represent sites released for alternative uses or sites suitable for redevelopment for employment purposes. This issue will be discussed in section 6.
- 5.14 It must be noted that some of the locations are more specific than others e.g. Town Centre/Seafront. The business park category generally refers to the airport, north fringe and existing A127 employment locations. It represents demand for non town centre, business

and industrial premises on low density campus style employment sites and within existing employment areas in these locations. These two locations combined are considered the primary locations for future provision. Other urban locations include secondary employment locations such as Shoeburyness or central fringe sites such as Grainger Road

- 5.15 Table 5.5 overleaf shows the floorspace and land requirements for each sector by 2021 in more detail.

Table 5.5: Floorspace and land requirements by sector

Employment Sector	Jobs by Location	Sq m per worker	Floorspace	Building Height	Plot Ratio	Land	Locational Preference
D : Manufacturing	-87	32	-2784	2	0.4	-0.35	Existing Industrial areas
E : Electricity, gas and water supply	-370	20	-7392	2	0.3	-1.23	Existing Industrial areas
	-92	20	-1848	2	0.3	-0.31	Other Locations
F : Construction	-402	32	-12864	1	0.4	-3.22	Existing Industrial areas
G : Wholesale and retail trade; motor trade	-151	NA	0	NA	NA	NA	Retail (Town/District/Local Centres)
	-43	50	-2160	1	0.5	-0.43	Distribution (A127/Airport)
	-22	40	-864	2	0.45	-0.10	Motor Trade (A127/Airport)
H : Hotels and restaurants	1725	30	51759	3	0.8	2.16	Town Centre/Seafront
	192	30	5751	3	0.8	0.24	District/Local Centres
I : Transport, storage and communication	224	20	4482	3	0.8	0.19	Town Centre
	1270	20	25398	2	0.3	4.23	Business Park
J : Financial intermediation	-100	20	-1995	3	0.8	-0.08	Town Centre
	-185	20	-3705	2	0.3	-0.62	Business Park
K : Real estate, renting and business activities	1825	20	36504	3	0.8	1.52	Town Centre
	3650	20	73008	2	0.3	12.17	Business Park
	608	20	12168	2	0.3	2.03	Shoebury and Central Fringe
L : Public administration and defence;	-18	20	-357	3	0.8	-0.01	Town Centre
	-33	20	-663	2	0.3	-0.11	Business Park
M : Education	82	NA	0	NA	NA	NA	New/Existing Education Facilities
	44	20	882	2	0.3	0.15	Business Park
N : Health and social work	584	NA	0	NA	NA	NA	New/Existing Health Facilities
	314	20	6286	2	0.3	1.05	Business Park
O : Other services	531	20	10620	2	0.3	1.77	Shoebury and central fringe
	1593	20	31860	2	0.3	5.31	Town Centre
Total Future Job Growth (Net)	11,140		226,219			25.06	

6. Supply against demand

- 6.1 Section 4 and 5 have taken stock of the existing employment situation and assessed the demand of future provision. Section 6 is the culmination of these two stages to identify gaps in future provision and confirm which sites should be released.

Existing supply

- 6.2 Section 5 identified a requirement for 258,718 sq m of provision and a loss of 5.75 ha of employment land. Table 6.1 below summarises the floorspace and land requirements for each broad spatial location:

Table 6.1: Location floorspace and land requirements by 2021

Location	Floorspace	Land
Town Centre/Seafront	124,605 sq m	9.17 ha
Business Park	105,574 sq m	17.60 ha
Existing Industrial (loss)	-32,499 sq m	-5.75 ha
Other Urban Locations	22,788 sq m	3.80 ha
District/Local Centres	5,751 sq m	0.24 ha
Overall Gross Gain	258,718 sq m	30.81 ha
Overall Gross Loss	-32,499 sq m	-5.75 ha

- 6.3 Section 4 identified that existing employment permissions resulted in a loss of 2.38 ha of employment land, reducing the potential loss to 3.37 ha. The first consideration is the recommendations on existing supply. Several older industrial sites could potentially be released from employment purposes by 2021 when they become vacant. These include:
- Southchurch Business Park (0.59 ha)
 - Prince Close (0.9 ha)
 - Boscombe Mews (0.21)
- 6.4 Overall these sites combined would result in a loss of 1.7 ha in existing employment areas. Section 4 also identifies several sites as potentially suitable for future employment provision. These included a combination of existing allocations (The Garrison Phase 2) and other existing employment sites where redevelopment of vacant or poor quality units with modern employment premises is recommended. The sites include:
- Progress Road
 - Prittle Brook Industrial Estate
 - Terminal Close
 - The Garrison Phase 2
 - Grainger Road
 - Sutton Road
- 6.5 Progress Road and Prittle Brook Industrial Estate offer significant regeneration opportunities over the long term. Progress Road has several vacant units, many in a poor state of repair. It is clear that redevelopment for modern employment uses over the long

term is required and the Council is already working in partnership to redevelop the site on a plot by plot basis in line with a development brief. One site was promoted through the SHLAA/ELR consultation by Renaissance Southend Ltd CON096 (1.45 ha), which is currently disused. This site combined with other long term vacant/derelict units off Stephenson Road identified in the site survey (0.98 ha), represent the redevelopment opportunities likely to come forward in the short to medium term. Based on 2.43 ha of available land, the site could support intensification of approximately 17,000 sq m towards business park requirements. This is based on a plot ratio of 0.35 and job density of 26 sqm.

- 6.6 Prittle Brook Industrial Estate is available for comprehensive redevelopment. Approximately two thirds of the site has been cleared at the time of the survey and it is considered that overall a low plot ratio of 0.3 i.e. 3,000 sq m per ha would mean that the 6.76 ha site could provide in the region of 40,000 sq m. This would be at an average employment density of 20 sq m per worker for B1 use and assume 2 storey buildings. Given the size of the site, 3 storey would be appropriate if they were positioned away from residential neighbours or graded across the site. In this case, If 0.5 ha footprint was to be developed at 3 storey the site could provide nearer 50,000 sq m. As half of the site is currently in use for employment purposes it is considered realistic to only count half of the overall provision towards meeting future needs, resulting in an additional 25,000 sq m towards business park requirements.
- 6.7 Terminal close is currently in a poor state. The site could be redeveloped for a mixed use scheme, to provide modern good quality provision in the centre of Old Shoebury. The site has good railway station access and could provide a better relationship with residential properties to the north. It is considered that a mixed use proposal, whilst resulting in a loss of employment land will actually enable a similar level of employment due to the increased job density. It is considered that the site should be primarily retained for employment uses providing a minimum of 4,000 sq m of hybrid office/workshop units to support business service and potentially creative industries/start ups businesses. It is acknowledged that a flexible approach to redevelopment might require a mix of uses potentially including residential to make the redevelopment a viable and attractive prospect. This location will meet future demand in other urban locations and provide for market choice and valuable local employment.
- 6.8 The Garrison Phase 2 is currently allocated employment land. The existing Phase 1 has several new good quality units available for rent and should be safeguarded. Part of Phase 2 was promoted to the SHLAA (CON111). The original allocation in the Development Brief for the Garrison consists of approximately 11.27 ha of land. To illustrate the potential employment capacity of Phase 2 we have applied the translation model assumptions. At an employment density of 1 job per 20 sq m. two storey buildings and a plot ratio of 0.3 would provide a business park capable of supporting 67,620 sq m on all the 11.27 ha Phase 2 site, enough to support 3,381 new jobs. It is understood that pre-outline application discussions between the land owner and key stakeholders in the Shoebury area have indicated an acceptance for approximately 1.64 ha of this site to be given over for school provision with a further 1.8 ha allocated for leisure purposes to provide much needed infrastructure in the Shoeburyness AAP area. This would leave approximately 8ha remaining as business park allocation. There is also interest in 1.3 ha of this remaining 8 ha allocation being used for health service provision. Whilst all employment land in Southend is a valuable commodity, it is considered that in the medium term to 2021 there is

significantly lower demand for employment land in this location.

- 6.9 To support Core Strategy objective of 1,500 jobs in Shoeburyness, 4.3 ha of the Garrison site will be required and this would support, 25,800 sq m of floorspace to meet future requirement in other urban locations. This however is in excess of demand and could potentially compete with other locations such as the town centre, A127 and central fringe. To meet forecast demand in this area a minimum of 3.2 ha is required to support 19,000 sq m by 2021. The use of remaining land (should be determined through the production of the Shoeburyness AAP), which can consider this site alongside other employment sites in Shoeburyness, such as Campfield Road and Vanguard Way. One option is to safeguard the site for employment use for the post 2021 period. This approach has been used by other authorities to safeguard valuable employment land of strategic importance for the long term.
- 6.10 Grainger Road and Sutton Road are located outside the town centre area. Grainger Road consists of older industrial units with some vacant units, whilst Sutton Road is mixed quality post war units with higher vacancy rates. Grainger Road is considered a good opportunity to create a live work development within a historical neighbourhood in central Southend. Grainger Road specifically represents a similar opportunity to the Paintworks development in Bristol. Both sites comprise historic Victorian brick employment units, within a terraced neighbourhood. We recommend that Grainger Road is protected for employment uses and redeveloped with an employment led scheme including a mix of other uses to provide a better relationship with surrounding residential uses.
- 6.11 It is also recommended that Sutton Road is also redeveloped but with a residential led scheme that provides active commercial and retail uses on the ground floor. Given the potential for loss of employment space and the fact that Sutton Road is already being targeted for alternative uses, it is considered that this site could contribute towards meeting the remaining 0.95 ha of employment losses identified in the translation model.
- 6.12 The design study for the area suggested that the Grainger Road site could provide approximately 17,000 sq m of floorspace towards town centre requirements, 24 residential units, a café and potential exhibition space. Whilst not strictly the town centre it is recommended that the central fringe provides for market choice which will maximise economic growth and improve residential amenity of the surrounding area.
- 6.13 Existing employment sites are considered to have continued value in employment use and therefore should continue to be protected from loss in the first instance. These sites include:
- Thanet Grange
 - Comet Way
 - Airborne Close
 - Airborne Industrial Estate
 - Laurence Industrial Estate
 - Temple Farm
 - Stock Road
 - Priory Works
 - Vanguard Way

- Towerfield Road
- Campfield Road
- Garrison Phase 1
- Short Street
- Tickfield Avenue

Summary of supply

- 6.14 Based on this summary of existing supply, it is considered that existing employment site/allocation could provide 82,000 sq m of floorspace of future requirements. Based on projected demand this will leave a requirement of 176,718 sq m. Table 6.2 provides a summary of the identified gaps in future provision by broad spatial location:

Table 6.2: Identified gaps in floorspace and land requirements by 2021

Location	Redevelopment of Existing Supply	Future Demand Gap
Town Centre/Seafront	17,000 sq m	107,605 sq m
Business Park	42,000 sq m	63,574 sq m
Other Urban Locations	23,000 sq m	0 sq m*
District/Local Centres	0 sq m	5,751 sq m
Total	82,000 sq m	176,718 sq m

*Sub area total not reduced below zero therefore only 22,788 sq m subtracted from overall total

Future supply

- 6.15 The two main locations for future demand are the A127 Corridor/Airport and the Town Centre/Seafront. Considerable work has already been undertaken on future development proposals for both areas. Renaissance Southend Ltd has produced the town centre Regeneration Framework and Masterplan and Southend-on-Sea Borough Council and Rochford District Council are jointly producing the Joint Area Action Plan for the airport. The following paragraphs set out the current proposals compared with forecast demand identified through the translation model.

Regeneration Framework and Town Centre Masterplan

- 6.16 The Regeneration Framework sub divides the Town Centre/Seafront into seven sub areas. Employment proposals for each sub area are presented in Table 6.3 below:

Table 6.3: Central Area Regeneration Framework Floorspace Provision

Location	Employment
Faringdon	5,750
Victoria Avenue Office Quarter	10,000
Clarence Road and Alexandra Street	2,800
St John's Quarter	26,500 + hotel
Warrior Square	25,000
London Road	25,000
Total	95,050

- 6.17 Table 6.3 illustrates that Renaissance Southend is proposing up to 95,050 sq m of

floorspace.

Joint Area Action Plan (JAAP) for the Airport

- 6.18 The preferred option for the JAAP is to pursue high scale employment growth within the area that will make a significant contribution towards sub-regional employment aspirations. The JAAP area will take a pro-active role in encouraging employment development for both aviation-related growth (associated with airport growth) and targeting the delivery of accommodation for high-tech industries and offices (specifically in planning use classes B1 and B2).
- 6.19 Given the current constraints of the local property market, this opportunity will give Southend the greatest chance of creating employment capacity and attracting investor demand for new business park premises. The market analysis recognises that the area will be attractive to companies and investors and that new development within the JAAP area will help to provide an offer that is currently lacking in Southend and the wider the sub-region.
- 6.20 It is proposed that land is allocated to accommodate up to 124,000 sq m of floorspace. However half of future provision is specifically provided to meet job growth in Rochford District. Table 6.4 below illustrates the distribution of future provision contributing to Southend employment requirements.

Table 6.4: JAAP floorspace provision (Southend target only)

Location	Employment
Saxon Business Park	37,000 sq m
Aviation Way	15,000 sq m
Nestuda Way	10,000 sq m
Total	62, 000 sq m

- 6.21 The Councils propose that the JAAP area will be developed as a strategic employment area to support the delivery of an additional 7,380 jobs, including employment directly related to the airport. This total will contribute to the delivery of the jobs totals for Rochford District and Southend-on-Sea Borough allocated through the East of England Plan. As already noted, the apportionment to each district will be based on a 50-50 split of the overall jobs/floorspace total. The JAAP will provide an additional 62,000 sq m toward business park growth requirements in Southend-on-Sea Borough.

Summary of Supply

- 6.22 Based on this summary of future planned supply, it is considered that future employment proposals could provide 157,050 sq m of floorspace of future requirements. Based on projected demand this will leave a requirement of 19,880 sq m. Table 6.4 provides a summary of the identified gaps in future provision by broad spatial location.

Table 6.4: Identified gaps in floorspace and land requirements by 2021

Location	Future Development Supply	Future Demand Gap
Town Centre/Seafront	95,050 sq m	12,555 sq m
Business Park	62,000 sq m	1, 574 sq m
Other Urban Locations	0 sq m	0 sq m
District/Local Centres	0 sq m	5,751 sq m
Total	157,050 sq m	19,880 sq m

- 6.23 Table 6.4 illustrates that the Regeneration Framework and JAAP proposals will result in a shortfall in supply of 19,880 sq m. This includes 12,555 sq m of floorspace within the Town Centre/Seafront area, 1,574 sq m in a business park location and 5,751 sq m within the district and local centres.
- 6.24 Table 6.5 overleaf sets out the overall supply and demand table, including demand, and supply from future sites and the regeneration of existing employment sites.

Table 6.5: Overall supply and demand

Location	Floorspace Demand	Floorspace Supply from regeneration of existing employment sites	Floorspace supply from future sites	Total supply	Demand Gap
Town Centre / Seafront					
Farringdon [Elmer Square]			5,750 sq m	5,750 sq m	
Victoria Avenue			10,000 sq m	10,000 sq m	
Clarence Road/Alexandra Street			2,800 sq m	2,800 sq m	
St John's			26,500 sq m	26,500 sq m	
Warrior Square			25,000 sq m	25,000 sq m	
London Road			25,000 sq m	25,000 sq m	
Grainger Road		17,000 sq m		17,000 sq m	
Total	124,605 sq m	17, 000 sq m	95,050 sq m	112,050 sq m	12,555 sq m
Business Park					
Progress Road		17,000 sq m		17,000 sq m	
Prittlebrook Industrial Estate		25,000 sq m		25,000 sq m	
Saxon Business Park			37,000 sq m	37,000 sq m	
Aviation Way			15,000 sq m	15,000 sq m	
Nestuda Way			10,000 sq m	10,000 sq m	
Total	105,574 sq m	42,000 sq m	62,000 sq m	104,000 sq m	1,574 sq m
Other Urban Locations					
Terminal Close		4,000 sq m		4,000 sq m	
The Garrison Phase 2		19,000 sq m		19,000 sq m	
Total	22,788 sq m	23,000 sq m		23,000 sq m	
District Centres	5,751 sq m				5,751 sq m
Overall Total	258,718 sq m	49,499 sq m	157,050 sq m	206,549 sq m	19,880 sq m

7. Future employment proposals and policy development

- 7.1 The following bullet points summarise the key recommendations from the study. The findings indicate four categories of employment land/sites and are summarised as follows:
- a) Existing employment land/sites/estates that should be released from current employment uses for other appropriate uses:
 - Southchurch Road Business Park
 - Boscombe Mews (subject to further monitoring to assess demand)
 - Sutton Road
 - Prince Close (subject to further monitoring to assess demand)
 - b) Existing employment sites that have potential to provide for increased / modern supply and should be retained and regenerated for employment uses by means of a flexible approach to regeneration through planning briefs and / or AAPs;
 - Progress Road
 - Prittle Brook Industrial Estate
 - Terminal Close
 - Grainger Road
 - The Garrison Phase 2
 - Short Street
 - c) Sites that should be protected for employment uses as part of comprehensive regeneration to provide for modern employment floorspace as part of mixed use redevelopment schemes, appropriate to the town centre location, and/or cognisant of the demand for modern employment floorspace requirements in the central area
 - Victoria Avenue office quarter
 - Elmer Square
 - Clarence Road/Alexandra Street
 - St John's Quarter
 - Warrior Square
 - London Road
 - d) Employment sites that should be retained and protected for employment uses:
 - Thanet Grange
 - Comet Way
 - Airborne Close
 - Airborne Industrial Estate
 - Laurence Industrial Estate
 - Temple Farm
 - Stock Road
 - Priory Works
 - Vanguard Way
 - Towerfield Road
 - Campfield Road
 - Garrison Phase 1
 - Tickfield Avenue

- 7.2 Table 7.1 below sets out the overall spatial site recommendations. Sites to be protected are identified in green and those to be redeveloped for employment uses in blue.

Table 7.1: Summary of potential supply:

Location	Floorspace demand	Floorspace supply from existing sites	Floorspace supply from future sites	Total supply	Demand gap
Southend Central Area					
Farringdon [Elmer Square]			5,750	5,750	
Victoria Avenue			10,000	10,000	
Clarence Road/Alexandra Street			2,800	2,800	
St John's			26,500	26,500	
Warrior Square			25,000	25,000	
London Road			25,000	25,000	
Grainger Road		17,000		17,000	
Short Street					
Tickfield Avenue					
Total	124,605	17,000	95,050	112,050	12,555
Shoeburyness					
Terminal Close		4,000		4,000	
The Garrison Phase 2		19,000		19,000	
Vanguard Way					
Towerfield Road					
Campfield Road					
Garrison Phase 1					
Total	22,788	23,000		23,000	0
Airport					
Saxon Business Park			37,000	37,000	
Aviation Way			15,000	15,000	
Nestuda Way			10,000	10,000	
Sub Total			62,000	62,000	
A127/North Fringe					
Progress Road		17,000		17,000	
Prittle Brook		25,000		25,000	
Thanet Grange					
Comet Way					
Airborne Close					
Airborne Industrial Estate					
Laurence Industrial Estate					
Temple Farm					
Stock Road					
Priory Works					
Sub Total		42,000		42,000	
Total	105,574	42,000	62,000	104,000	1,574
District and Local Centres	5,751				5,751
Overall Total	258,718	49,499	157,050	206,549	19,880

- 7.3 Implementation should be taken forward as part of the LDF process and in line with site specific design and development briefs. The Council should prepare and implement AAPs for:
- London Southend Airport and its environs to reflect its significance as a Regional Gateway Site (Draft RSS review Policy E3) and to support growth and regeneration of the cluster of significant sites along the A127/Airport Corridor”
 - Central Southend to take account of the Regeneration Framework and Town Centre Area Masterplan [CAM] and reflects the clear demand for B1 floorspace and small scale business units
 - Shoeburyness so that a strategic approach can be developed for the employment and regeneration opportunities and reflect the job and community needs of the area
- 7.4 The Council should ensure appropriate monitoring and phasing to support the regeneration objectives of the Borough and avoid undermining delivery in particular spatial locations. The strategic issues which will need to be considered by the Council as a result of this report include:
- Identification of growth areas and strategic locations
 - Achieving town centre growth and regeneration
 - Proposals for the use of vacant and underused land
 - Management and phasing of land release
 - Mixed use sites and linking new housing with employment
 - Joint working with adjacent authorities Rochford in coordinating the strategy for Southend
- 7.5 The specific policy issues that will need to be addressed include:
- Safeguarding sites for employment uses
 - Use of compulsory purchase powers
 - Use of and requirement for developer contributions
 - Redevelopment of surplus employment sites
 - Restriction on uses at certain sites to cater for specific growth sectors
- 7.6 Supporting economic growth and stimulating regeneration in the growth employment sectors is a complex task. This will require comprehensive and coordinated use of all the available tools to achieve the necessary outcomes. An important aspect of delivering the right growth within Southend will be achieved by setting objectives at the strategic level that can be combined with the use of policy tools and techniques which encourage and support appropriate types of new and alternative development at the right locations across the town.
- 7.7 The issue of protecting employment sites needs further comment in the context of an overall finding of a few declining employment sectors against the likely land requirement to enable the economic potential of the area to be achieved. The issue is more complex than simple numbers. The consideration of development proposals that would result in the loss of a site currently or previously used for employment must be made according to policies that are to take forward the overall economic development strategy. This means that proposals that would lead to the loss of smaller poorer quality employment areas, including

those targeted by residential developers because of their location, are no longer dealt with on a piecemeal basis, but relate to a wider context. Appropriate policies for the LDF AAP's will need to:

- provide for decisions to be made in the context of an economic strategy which sets out to deliver what economic potential exists, which recognises the role of land and premises as part of the delivery of that strategy, and which recognises the role of smaller as well as larger sites
- include tests relating to accessibility to employment opportunities from residential areas
- require a variety of types of site to be part of the overall portfolio, including sites suitable for lower cost base operations, and perhaps relate this requirement to different parts of the Borough in the spatial strategy.

- 7.8 Overall, clear direction is required to ensure that there is no over or under supply of employment provision. Through the supply and demand analysis we have considered that a variety of employment sites are provided to enable market choice and improve/maintain existing residents' opportunities to work locally. With these broad requirements on future proposals considered, there would presumably be other tests to do with the suitability for other uses of a site in its context, as part of the more generic criteria policies in the plan.
- 7.9 The use of phasing and managed release mechanisms will be an essential part of achieving the preferred spatial vision for Southend. These mechanisms can offer a valuable tool in achieving co-ordinated and sustainable development. Importantly, for Southend to achieve higher economic growth and to co-ordinate regeneration initiatives at the town centre, existing employment sites and Shoebury, it is essential that there is a managed development of sites and that monitoring manages the achievement of outcomes related to the strategic objectives and essential targets set out in the Core Strategy.
- 7.10 There are a number of different policy approaches that can be used to set up a robust phasing or management process which creates a direct relationship between allocations, actual built development and monitoring. It will be important to establish what is to be achieved and clarify the opportunities offered by these techniques and their appropriate use in different parts of the LDF.



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