

HASTINGS AND ROTHER EMPLOYMENT STRATEGY AND LAND REVIEW UPDATE



Jointly prepared by Hastings Borough Council and Rother District Council



August 2011

Front cover photographs courtesy of SeaSpace, Bob Mazzer and Rother District Council Estates Department. The photographs show the Enviro 21 Innovation Park, South Queensway, St Leonards on Sea and also the Elva Business Centre, Elva Way, Bexhill

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Section 1: Introduction

- 1.1 Hastings and Rother Councils jointly prepared an 'Employment Strategy and Land Review' for their combined area in May 2008 (ESLR 2008). Its role is to identify the economic characteristics of the area (and distinct sub-areas), its consequent needs and opportunities for economic growth and to recommend on the overall quantum, broad nature and distribution of land and premises for future job creation.
- 1.2 The ESLR 2008 provides a key element of the evidence base for the Hastings and Rother Councils' draft Core Strategies, published in May 2008 and November 2008 respectively; and particularly for their economy and employment floorspace policies.
- 1.3 However, since then, there have been a number of significant events that need to be considered in terms of their implications for the assessment of employment land requirements. These include:
 - (a) The international 'credit crunch' and consequential changes in the financial outlook;
 - (b) The establishment of a new Coalition Government, of Conservative and Liberal Democratic Parties;
 - (c) The approval of PPS4, which now embraces retailing and rural employment;
 - (d) Delays or cancellation of anticipated strategic transport improvements;
 - (e) More recent information on local economic circumstances;
 - (f) The planned abolition of the Regional Spatial Strategy and demise of SEERA, which was responsible for the Regional Economic Strategy;
 - (g) A new Economic Strategy for Rother;
 - (h) The establishment of a new 'Local Economic Partnership' covering East Sussex, Kent and Essex;
 - (i) A draft new 'Local Economic Assessment' for East Sussex;
 - (j) Consultation responses on the respective emerging Core Strategies;
 - (k) More recent work at the local level on housing development potentials and, hence, workforce growth forecasts.
- 1.4 This Update considers the implications of each of these factors upon the recommendations of the ESLR 2008. It does not reproduce all the information and analysis of the earlier document, so needs to be read in conjunction with it. For ease of cross reference, the same document structure is followed

Section 2: Socio-Economic Context

- 2.1 This section reviews the social and economic context that should inform the development of employment strategies and associated land requirements within both Hastings and Rother's Local Development Frameworks.

Resident Population

- 2.2 Hastings has an estimated population of 86,900 and Rother 89,200. In 2009, just under 55% of people living in Rother were of working age (16-64). Hastings has a younger age profile than Rother with 63% of the population of working age. These proportions are some 3% higher than in 2006 for both Hastings and Rother.

Table 1: Total population (2009)

	Hastings (numbers)	Rother (numbers)	South East (numbers)
All people	86,900	89,200	8,435,700
Males	42,200	42,200	4,134,900
Females	44,800	47,000	4,300,800

Source: Office National Statistics (ONS) mid-year estimates

Table 2: Working age population (2009)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
All people aged 16-64	54,900	63.2	49,200	55.2	64.1
Males aged 16-64	27,000	64.0	23,900	56.6	65.0
Females aged 16-64	27,900	62.4	25,400	54.0	63.2

Source: ONS mid-year estimates

Note: % is a proportion of total population

Employment sectors

- 2.3 The public sector is a significant employer accounting for 42.6% of jobs in Hastings and 31.5% in Rother. These jobs are focused on healthcare provision, local authority services and education. The figures compare to the South East average of 25.6%. Distribution, hotels and catering have the next highest proportion at 27.6% in Rother and 24.6% in Hastings. Manufacturing also remains an important industry in Hastings with employment in this sector at 10.3%. Also significant is finance, IT and business activities at 10.6%. In Rother manufacturing is at 6.7% with finance, IT and business activities at 16.6% against the South East at 24%.
- 2.4 Table 3 below shows only marginal change from the data used in ESLR 2008, with a small overall increase in jobs in the study area, together with a slight shift towards services from manufacturing.

Table 3: Employee jobs (2008)

	Hastings (employee jobs)	Hastings (%)	Rother (employee jobs)	Rother (%)	South East (%)
Total employee jobs	29,000	-	25,200	-	-
Full-time	18,400	63.6	15,900	63.2	69.0
Part-time	10,600	36.4	9,300	36.8	31.0
Employee jobs by industry:					
Manufacturing	3,000	10.3	1,700	6.7	8.1
Construction	1,000	3.6	1,200	4.9	4.5
Services:	24,900	85.8	21,500	85.3	85.7
Distribution, hotels & restaurants	7,100	24.6	6,900	27.6	24.6
Transport & communication	900	3.2	900	3.4	5.9
Finance, IT, other business activities	3,100	10.6	4,200	16.6	24.0
Public admin, education & health	12,400	42.6	7,900	31.5	25.6
Other services	1,400	4.9	1,600	6.2	5.6
Tourism related+	2,400	8.4	3,300	13.1	8.2

Source: ONS annual business inquiry employee analysis

Notes: % is a proportion of total employee jobs. Employee jobs excludes self-employed, government-supported trainee and HM Forces

- data unavailable

+ tourism consists of industries that are also part of the service industry

Earnings

- 2.5 The median gross weekly earnings (place of work) in Rother at £401 is 23.43% lower than earnings in the South East. In Hastings earnings at £413.1 is 21.12% lower than the South East.
- 2.6 Local earnings have increased broadly in line with regional and national averages, but still fall well below the regional average in particular. 'Gross weekly pay' in Hastings appears to have fallen further behind average regional earnings.

Table 4: Earnings by workplace (2010)

	Hastings (pounds)	Rother (pounds)	South East (pounds)	Great Britain (pounds)
Gross weekly pay				
Full-time workers	413.1	401.0	523.7	500.4
Male full-time workers	488.1	445.8	574.9	540.5
Female full-time workers	393.5	385.7	444.1	439.8
Hourly pay				
Full-time workers	11.15	9.99	13.29	12.62
Male full-time workers	12.56	10.19	14.33	13.21
Female full-time workers	10.05	9.90	11.84	11.73

Source: ONS annual survey of hours and earnings – workplace analysis

Note: median earnings in pounds for employees working in the area

- 2.7 Analysis of 'job density' is important in terms of the potential to find work locally. The figures below represent the ratio of total jobs to people of working age population (16 – 64 years)

Table 5: Jobs density (2008)

	Hastings (jobs)	Hastings (density)	Rother (jobs)	Rother (density)	South East (density)
Jobs density	34,000	0.63	36,000	0.71	0.82

Source: ONS jobs density

Notes: the density figures represent the ratio of total jobs to population aged 16-64. Total jobs include employees, self-employed, government-supported trainees & HM Forces

- 2.8 The above table shows that compared to the South East, Hastings and Rother have a lower job density – by implication there are therefore fewer jobs per person. The job density relies on businesses supplying the jobs, the fewer or smaller the businesses the lower the job density. Job density may be partly the cause for the higher inactivity rates (and unemployment rates); another main factor is likely to be the supply of units to serve the demand from new and expanding businesses from which new jobs will be created.
- 2.9 A general slight fall in job density in job density can be attributed to several factors, including increases in students in the population, increasing early retirement, and other reasons for economic inactivity, as well as job losses. Hasting job density fell most between 2005 and 2008.

Labour supply

- 2.10 In 2009/10 there were 41,200 people in work in Hastings and 38,000 in Rother, the majority of whom work locally. This represents a steady state since 2006/07, but with an increase in total economically active in the study area of some 1,600 people (with all gains in Hastings), which includes a significant proportion who are unemployed.

Table 6: Employment and unemployment (July 2009-June 2010)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
All People					
Economically active+	44,900	81.3	39,600	75.4	79.1
In employment+	41,200	75.2	38,000	72.0	74.2
Employees+	32,900	59.6	27,000	53.5	63.5
Self employed+	7,900	14.8	10,100	16.6	10.3
Model-based unemployed*	4,000	8.8	2,400	5.9	6.0

Source: ONS annual population survey

+ numbers are for those aged 16 and over, % are for those of working age (16-64)

* numbers and % are for those aged 16 and over. % is a proportion of economically active

- 2.11 In 2009/10, Rother has an activity rate of 75.4%. Hastings is above the South East average, at 81.3%.

Table 7: Economic inactivity (July 2009–June 2010)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
All People					
Economically inactive	10,000	18.7	11,900	24.6	20.9
Wanting a job	3,200	5.9	#	#	5.4
Not wanting a job	6,800	12.7	9,400	19.4	15.5

Source: ONS annual population survey

sample size too small for reliable estimate.

Note: Numbers and % are for those aged 16-64 of resident population

- 2.12 Economic inactivity in Rother is well above the South East average and in Hastings slightly below. Inactivity rates may be influenced by factors in addition to the labour market: A lower skilled workforce, a lower level of business density (see table 5) and fewer business start ups contribute to a higher inactivity rate. The situation contrasts notably with 2006/07, when Hastings had a higher than regional inactivity rate, and Rother a much lower one than now.

Table 8: Employment by occupation (July 2009-June 2010)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
Soc 2000 major group 1-3	14,900	36.5	17,600	46.4	48.3
Group 1: Managers & senior officials	4,600	11.2	7,500	19.7	18.3
Group 2: Professional occupations	4,000	9.7	6,000	15.8	15.0
Group 3: Associate professional & technical	6,300	15.3	4,100	10.9	14.9
Soc 2000 major group 4-5	12,300	30.0	8,600	22.8	21.4
Group 4: Administrative & secretarial	7,300	17.8	3,700	9.6	11.7
Group 5: Skilled trades occupations	4,900	12.0	5,000	13.1	9.7
Soc 2000 major group 6-7	8,100	19.8	7,900	20.9	15.5
Group 6: Personal services occupations	4,700	11.4	4,200	11.1	8.7
Group 7: Sales & customer services occupations	3,400	8.2	3,700	9.9	6.8
Soc 2000 major group 8-9	5,600	13.6	3,800	9.9	14.7
Group 8: Process plant & machine operatives	#	#	#	#	5.0
Group 9: Elementary occupations	4,000	9.7	#	#	9.7

Source: ONS annual population survey

Soc - standard occupational classification 2000

sample size too small for reliable estimate

Notes: numbers & % are for those of 16+, % is a proportion of all persons in employment

Educational attainment

- 2.13 Improvements in educational attainment since 2006 are especially notable in Hastings. 4000 or 7.5% of Hastings' working age residents have no recognised skills (for example National Vocational Qualifications) and 5,900 (12.2%) in Rother, this is against a South East average of 9.1% with no skills. At the higher skills levels Hastings has 24% qualified to level 4 or above, Rother fares better with 31.1% against the South East at 32.6%.
- 2.14 Skills are rightly recognised as an issue for local residents of the Hastings and Bexhill Regeneration Area as they can adversely affect the local population's ability to compete for jobs. The need for skills development has been recognised within sub-regional and local policies and a number of initiatives are underway (for example phase 2 of the University Centre Hastings is currently under construction, the opening 2 new further education colleges in Hastings) with specific objectives to increase higher level qualifications within the workforce.

Table 9: Qualifications (Jan 2009-Dec 2009)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
NVQ4 and above	12,900	24.0	15,100	31.1	32.6
NVQ3 and above	23,300	43.5	23,900	49.2	52.6
NVQ2 and above	33,500	62.5	31,400	64.6	69.0
NVQ1 and above	42,900	80.1	38,000	78.2	83.0
Other qualifications	6,600	12.4	4,600	9.5	7.8
No qualifications	4,000	7.5	5,900	12.2	9.1

Source: ONS annual population survey

Notes: Numbers and % is a proportion of resident population of the area aged 16-64.

Unemployment

- 2.15 The claimant count measure only counts those people out of work who are claiming Job Seekers Allowance. Not surprisingly, the number of JSA claimants has increased substantially in the last 3 years.
- 2.16 JSA claimant rates are above the regional average, such that if Hastings and Rother had a Job Seekers Allowance (JSA) rate equivalent to South East rate (2.5%) there would be 1,831 and 212 less JSA claimants respectively as at January 2011. In other words, an extra 2,043 people would be in work.

Table 10: Total JSA claimants (January 2011)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
All people	3,203	5.8	1,442	2.9	2.5
Males	2,308	8.5	993	4.2	3.4
Females	895	3.2	449	1.8	1.6

Source: ONS claimant count with rates and proportions

Note: % is a proportion of resident population of area aged 16-64 and gender

Table 11: JSA claimants by age and duration (January 2011)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
By age of claimant					
Aged 18-24	865	27.0	445	30.7	26.2
Aged 25-49	1,780	55.8	705	49.1	55.6
Aged 50 and over	520	16.2	265	18.5	17.9
By duration of claim					
Up to 6 months	2,000	62.5	940	65.2	70.6
Over 6 up to 12 months	490	15.3	220	15.1	14.8
Over 12 months	710	22.2	285	19.6	14.6

Source: ONS claimant count – age & duration

Note: % is a proportion of all JSA claimants

Benefit Claimants

- 2.17 The table below gives the breakdown of the type of claimants, those on Job Seekers Allowance will be counted in the Claimant Count (i.e. the number of people out of working and seeking employment), the others will not. It can be seen that those on Incapacity Benefit (IB) make up by far the largest group in both Hastings and Rother. It is this group which has been targeted by the 'Pathways to Work' programme, started in April 2008 and providing a national back-to-work programme for those claiming incapacity benefits and Employment and Support Allowance (ESA). This programme ended in April 2011. The Government is to introduce the 'Work Programme' by summer 2011. The 'Work Programme' is aimed at longer-term claimants into work.

Table 12: Working-age client group – key benefit claimants (May 2010)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
Total claimants	12,400	22.6	6,730	13.7	10.7
By statistical group					
Job seekers	3,050	5.6	1,300	2.6	2.4
ESA and incapacity benefits	5,760	10.5	3,190	6.5	4.6
Lone parents	1,470	2.7	710	1.5	1.3
Carers	790	1.4	600	1.2	0.8
Others on income related benefits	540	1.0	260	0.5	0.4
Disabled	660	1.2	540	1.1	0.9
Bereaved	130	0.2	120	0.2	0.2

Source: DWP benefit claimants – working age client group

Note: % is a proportion of resident population of area aged 16-64

Deprivation

- 2.18 Problems of multiple In common with a number of coastal areas in the UK, Hastings and Rother have suffered from several discouraging economic trends in recent years: a vulnerable and low wage mainly service sector economy, unemployment issues and significant levels of deprivation.
- 2.19 The socio-economic conditions in Hastings are particularly acute; the Government's Indices of Multiple Deprivation (IMD 2010) ranks Hastings as the 19th most deprived area in England (out of 326), which is 12 places lower than its 31st ranking of 2007. Hastings continues to be the most deprived community in the South East. Relative levels of deprivation are measured in small areas called Lower layer super output areas (LSOAs). 28% of Hastings' LSOAs are in the most deprived decile for IMD 2010. 45% of LSOAs in Hastings fall into the most deprived 20%, and two are among the most deprived 1% of LSOAs in the Country, Baird and Tressell wards. 40 LSOAs (75%) have a worse ranking than in 2007. Rother is ranked 139th, 27 places lower than its 166th ranking of 2007. There are two LSOAs in Rother that fall into the most deprived decile. Both are in Sidley ward in Bexhill, where multiple deprivation appears to have increased since 2007. Altogether five LSOAs are among the most deprived 20% in England, all in Bexhill except one which is in Rye (Rother 004E). 86% of LSOAs (50 out of 58) have a worse ranking than in 2007.

Travel to work patterns and the Hastings Travel-to-Work Area (TTWA)

- 2.20 TTWAs are officially recognised "labour market areas", defined by the Office for National Statistics (ONS). They are areas in which the bulk (at least 75%) of the resident economically active population also work.
- 2.21 The Hastings Travel to Work Area embraces most of Rother (over 90% of its population) and is bordered by Eastbourne, Tunbridge Wells and Ashford TTWAs.

2.22 The Parishes of Ticehurst, Burwash, Hurst Green and Etchingam fall within the Tunbridge Wells TTWA. The rest of Rother’s parishes, as well as Ninfield in Wealden District, lie within the Hastings TTWA.

Trends in business growth within the area

2.23 This is presented more comprehensively in the Labour Demand section, but in terms of prospects for greater local employment, it is worth looking specifically at the small firms sector.

2.24 Changes in VAT registered firms indicate a fairly “flat” performance in terms of business formation in Hastings and Rother. (This does not necessarily reflect enterprise at sub-VAT registration levels)

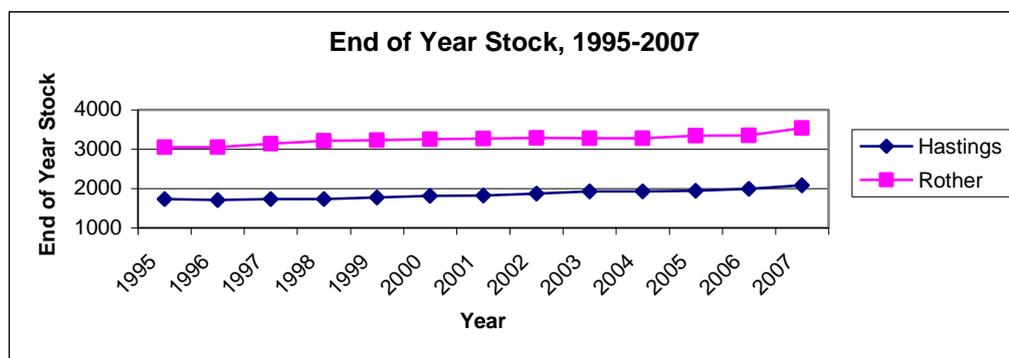
Table 13: VAT registered businesses (2007)

	Hastings (numbers)	Hastings (%)	Rother (numbers)	Rother (%)	South East (%)
Registrations	195	9.4	310	8.8	10.0
De- registrations	170	8.2	250	7.1	7.2
Stock (at end of year)	2,085	-	3,540	-	-

Source: BERR – VAT registrations/de-registrations by industry

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

Figure 1: Business Start-up and closures (1995 – 2007)



Source: ESiF

2.25 Neither do these figures suggest an obvious correlation between in-migration and increased business formation locally. Moreover, it does not show any real progress towards community strategy targets for increases in VAT registered businesses.

2.26 It is noted that the VAT Registration information is not being updated beyond 2007, as it is replaced by new ‘Business Demography’ statistics produced by ONS. This includes the number of ‘active businesses’ each year since 2004. These are defined as businesses that had either turnover or employment at any time during the reference period. Most recent figures for Hastings and Rother are shown below.

Table 14: Business Demography, count of active enterprises 2004-2008

	2004	2005	2006	2007	2008
Hastings	2,755	2,700	2,685	2,700	2,675
Rother	3,960	3,875	3,880	3,970	3,980

Source: ONS (information published 2009)

2.27 For comparison, the number of active businesses in the South East region increased by 5.4% between 2004 and 2008, while the Great Britain increase was 7.5% over the same period.

Communications and Inward investment

2.28 In common with other south coast towns, Hastings and Rother have not developed as locations for inward investment, relying on local business growth and the public sector as economic drivers. This is in part attributed to the poor communication infrastructure of the two areas. Poor road infrastructure and local congestion have prevented 'lorry dependent' business from becoming established, and warehousing is notably under-developed. Poor rail connections may have affected the expansion of the office sector, because of difficulties accessing an appropriate labour pool.

2.29 Since ESLR 2008, the new Coalition Government has undertaken a Spending Review, which has resulted in planned investment in a number of improvements to the A21 being axed. Those which would have particularly benefitted the Study Area were the Kippings Cross to Lamberhurst scheme, Flimwell to Robertsbridge scheme and the Baldslow Improvement. The Tonbridge to Pembury scheme is subject to further consideration, but will not now be undertaken before 2015.

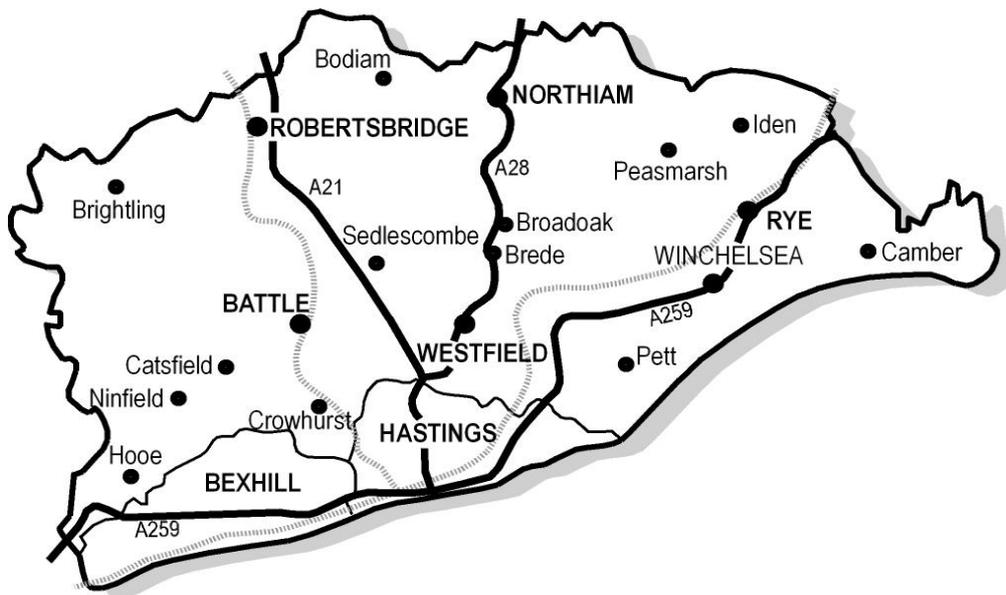
2.30 The funding of the Bexhill to Hastings Link Road is also uncertain, as it now has to compete with other schemes across the country. A decision is due from the Department for Transport in December 2011.

2.31 In the 2007 East Sussex Annual Business Survey, 73.6% of businesses surveyed in Hastings said they had access to the internet, 73.3% in Rother, this is compared to those surveyed in Wealden where 85.1% said they had access; to a degree, effective use of information communication technologies can help reduce barriers to business growth caused by poor road/ rail connectivity. The "early win" regeneration projects by Hastings and Bexhill Task Force – the two Media Centre premises and the Innovation Centre, have both majored on supporting the establishment of businesses that have a high reliance on IT and IT related activities.

2.32 BT has recently announced that Hastings will get superfast broadband in 2012. This follows lobbying by local councils, businesses and business support organizations. The expected benefits include:

- Economic growth
- Retention and growth of small businesses
- Modernising and cost-effectively delivering public services online
- Raising skill and achievement levels
- Avoiding a digital divide
- Retaining and growing employment

Figure 2: Hastings Travel to Work Area and main road and rail routes



Summary

- Together, Hastings and Rother function as an economic area and for planning and economic development purposes the two areas need to be considered together
- Population estimates have increased in the 3 years to 2009, significantly so for Rother with an increase of 1,600 people. There has been a similar increase in the number of people of working age with an increase of 51,800 to 54,900 and 45,200 to 49,200 in Hastings and Rother respectively. Most notably, the proportion of the populations that are of working age has increased in both Hastings and Rother.
- Within Hastings and Rother there continues to be a heavy reliance upon public sector jobs which account for just over 37% of all jobs. 8.5% of jobs are in manufacturing, with distribution, hotels and restaurants accounting for nearly just over 26% of jobs. Just over 13.6% of jobs are in finance, IT or other business activities, which is considerably lower than the regional average of 24%.
- There has been a slight shift in the distribution of jobs in the study area, with a growth in employment in Rother, and a fall in Hastings.
- Although the median gross weekly earnings (place of work) have increased for both Local Authority areas, the gap in pay levels has fallen slightly for Rother in comparison to the south East average and increased for Hastings. Median gross weekly earnings in Rother at £401 are 23.43% (28.3% in 2007) lower than earnings in the South East. In Hastings earnings at £413.1 is 21.12% (18.2% in 2007) lower than the South East average.
- In the 3 years from 2005 to 2008, job density has fallen in both Hastings and Rother and across the region. In Hastings this fall is relatively more than the region.
- In the 3 years to June 2010, labour supply figures have increased for Hastings and fallen in Rother. The numbers of people classified as economically active for Hastings has increased to 81.3% and now exceeds the South East average which has fallen from 82.0% to 79.1%.

Economically active numbers for Rother have declined more markedly from 82.7 to 75.4. Corresponding changes can be seen in figures for economically in-active.

- Improvements in educational attainment can be seen over the 3 year period, and improving figures further still remains a key priority. There is still a significant proportion of the working age population with no qualifications in Rother.
- Unemployment in the 2 years to January 2011 measured by the claimant count (Job Seekers Allowance (JSA)) has risen in both Local Authority areas and across the South East. Unemployment in Hastings in January 2011 stood at 5.8%, up from 3.6% and Rother at 2.9%, up from 1.9%, against the South East average of 2.5%. This represents current Job Seekers Allowance (JSA) claimants of some 3,203 in Hastings and 1,442 in Rother.
- There are other people of working age who are not on JSA and who are inactive the majority of whom are on Employment and Support Allowance (ESA) and incapacity benefit (IB) (others may be lone parents, carers, early retired etc). The May 2010 ESA and IB figures remain broadly similar to May 2007 figures.
- Overall, the 2010 IMD highlights an increase in relative deprivation in both Hastings and Rother.

Section 3: Planning Policy Context

PPS4

- 3.1 This PPS consolidates and updates guidance previously in the earlier PPG4, PPS6 and parts of PPS7 as they relate to employment in rural areas.
- 3.2 The ESLR, 2008 already took account of the draft PPS4, and the thrust of the final version remains the same. The weight to be afforded PPS4 is increased by virtue of its status as current national policy.
- 3.3 Indeed, in the new economic climate, its objectives (PPS4 paragraph 10) must have high priority. These are:
 - To improve economic performance in both urban and rural areas
 - To reduce economic disparities and tackle deprivation
 - To reduce the need to travel, especially by car
 - To promote the vitality and viability of town and other centres
 - To promote thriving communities, whilst continuing to protect open countryside
- 3.4 The new PPS4 (Policy EC6.2) emphasises the role of 'local service centres' as the forms of development, including employment development, while also maintaining support for the conversion of suitable buildings for economic uses and otherwise supporting sensitive farm diversification, including for equine enterprises. Tourism and leisure developments receive specific policy consideration (Policy EC7.1), while the related Good Practice Guide remains.

The South East Plan

- 3.5 At the time of preparing the ESLR 2008, the South East Plan was awaiting final adoption. This happened in May 2009. However, following an announcement in July 2010 by the Communities Secretary, the Coalition Government has since confirmed its intention to abolish all 'regional spatial strategies' (RSSs) as part of the proposed changes to the planning system contained in the Localism Bill.
- 3.6 However, at this time, the courts have held that the RSSs, including the South East Plan, remain part of the statutory 'development plan'.
- 3.7 In addition, the CLG Chief Planner has noted (in advice to LPAs in July 2010) that the evidence base underpinning the RSSs will still be relevant and helpful to LPAs in determining their own strategies and development targets based more on local circumstances.
- 3.8 Unlike housing, the South East Plan does not provide district-level, or labour market area, employment targets. There are indicative targets for the wider Sussex Coast Sub-Region in the supporting text, which was added following examination, as previously reported.
- 3.9 Both Hastings and Rother Councils both strongly supported the focus on regeneration that is contained in the South East Plan for the coastal towns of Hastings, Bexhill and Rye. Therefore, even though the imminent demise of the South East Plan will remove the statutory policy onus on a regeneration, rather than housing, led strategy for this area, this is not likely to deflect the Councils approach to regeneration and growth across Hastings and Rother.
- 3.10 On the reasonable assumption that the South East Plan will cease to form part of the 'development plan', it will be necessary to ensure that there are no consequent 'policy gaps'. In particular, it is noted that the South East Plan currently gives clear guidance in relation to the retention and

management of existing employment sites and premises, the priority to economic development and to the potentials for economic activity and transport improvements at 'hubs' such as Hastings.

- 3.11 The freedom for LPAs to revisit housing growth is a key policy area. Both Councils have indicated that they may reduce their housing requirements. However, this is more related to the capacity of infrastructure (especially for Bexhill), the new economic environment and the availability of sustainable development site opportunities, rather than a fundamental shift in the emphasis on regeneration as set out in the South East Plan.
- 3.12 Work undertaken by Hastings and Rother Council's planning departments to date suggests that they are likely to look to reduce their housing figures somewhat, as well as presenting them as being from 2011 to 2028, rather than from 2006. For the purposes of this Update, the levels of net housing growth are 3,660 dwellings in Hastings and 3,900 dwelling in Rother over this period. It is emphasises that these figures are subject to confirmation by the respective Councils.

Coalition Government policy statements

- 3.13 In March 2011, the Chancellor and Business Secretary published the 'Plan for Growth' alongside the Budget. It sets out a package of measures to create a new model of economic growth by achieving four overarching ambitions:
1. To create the most competitive tax system in the G20,
 2. To make the UK the best place in Europe to start, finance and grow a business,
 3. To encourage investment and exports as a route to a more balanced economy, and
 4. To create a more educated workforce that is the most flexible in Europe.
- 3.14 In a parallel statement, the Minister of State for Decentralisation added:

"The Chancellor of the Exchequer has today issued a call to action on growth, publishing an ambitious set of proposals to help rebuild Britain's economy. The planning system has a key role to play in this, by ensuring that the sustainable development needed to support economic growth is able to proceed as easily as possible. We will work quickly to reform the planning system to achieve this, but the Government recognises that many of these actions will take some months to deliver, and that there is a pressing need to ensure that the planning system does everything it can to help secure a swift return to economic growth."

"The Government's top priority in reforming the planning system is to promote sustainable economic growth and jobs."

Section 4: Other Relevant Strategies

Regional Economic Strategy and new Local Enterprise Partnership

- 4.1 The Government is disbanding Regional development Agencies, including the South East England Development Agency (SEEDA). This means that its current 'Regional Economic Strategy' will not be updated.
- 4.2 The Coalition Government is establishing business-led 'Local Enterprise Partnerships (LEPs) to lead on sub-regional economic growth. In place of SEEDA, the Government has supported a proposal for a LEP covering East Sussex, Kent and Essex. Work is underway to agree priorities.
- 4.3 The 'Coastal South East: A Framework for Action', Draft report January 2008, referred to in the ESLR, 2008 was not progressed beyond the draft stage. Therefore, little weight can be attached to it.

Community Strategies

- 4.4 'Pride of Place' remains the relevant county-wide Sustainable Community Strategy.
- 4.5 In Rother, the Local Strategic Partnership has recently reviewed its priorities for action. These are:
 - Active communities
 - Jobs and skills
 - Carbon reduction

Hastings and Bexhill Task Force

- 4.6 The Task Force is continuing to provide the strategic direction for regeneration in Hastings and Bexhill, as well as perform a steering group function for 'SeaSpace'. Although part of SEEDA, SeaSpace has developed a strong track record over the last 8 years in delivering key economic regeneration projects. Although its activities have been part funded through SEEDA, there is a good prospect – and desire by all local authorities – that its role will continue beyond the closure of SEEDA.
- 4.7 The completed business projects have included:
 - The Creative Media Centre in the town centre and the Innovation Centre at Churchfields, which provide managed business start-up and move-on space;
 - Queensway South Enviro21 Business Park and the Innovation Exchange
 - One Priory Square, part of Priory Quarter (now occupied by Saga)
 - Lacuna Place, also part of Priory Quarter (partially occupied)
- 4.8 SeaSpace and the Task Force have also secured a complete overhaul of education provision in the area with the introduction of higher education through the two phases of the University Centre, the new Sussex Coast FE College (on two campuses); and major changes underway to Secondary Education provision.
- 4.9 The schemes have provided modern floorspace with additional capacity for 1700 jobs – significant progress towards the Task Force target of 5,700 business and education jobs.

- 4.10 Looking ahead, the priorities for continuing investment will be:
- further phases of Priory Quarter (planning permission for Phase 3 anticipated shortly)
 - a second phase of Queensway South Business Park
 - the major business development proposals for North East Bexhill.

Central St Leonards Regeneration Framework

- 4.11 This is a programme of physical and supporting social regeneration activities for Central St. Leonards. Central St Leonards is one of the most deprived areas in England. It contains 3 super output areas in the worst 10% in England, 2 of these being in the worst 5% (IMD 2010). Central St Leonards has a complex mix of social, environmental and economic challenges. The Central St Leonards Regeneration Framework was adopted in 2005 and is a 10-year plan from 2005-2015 focusing on key physical, social and economic interventions to bring about a 'step change' in the area. The funding regime for regeneration projects has changed since 2010 but our ambitions for the area remains. We are working with various private and public sector partners to bring about change in peoples' perception of Central St Leonards, to achieve long-term economic growth, inward investment and a better quality of life for the local community.

Local Enterprise Growth Initiative (LEGI) and Working Neighbourhood Fund

- 4.12 These were time-limited programmes that were merged with the Hastings 'area-based grant', and which the Government has now terminated.

Hastings and Bexhill Area Investment Framework

- 4.13 This SEEDA-funded programme ended in 2009. Any future programme would be a matter for the new LEP (see above), but there is currently no funding identified.

Local Authority Economic Development Strategies

- 4.14 Rother District Council has recently adopted a new Economic regeneration Strategy 2010 – 2015. This identifies the Council's overall approach to the local economy, establishes priority areas, and how it will dovetail with other agencies. It also provides a framework for measuring success.
- 4.15 The Strategy has three themes – Innovation, Inclusion and Inspiration. Within these themes, particular priorities relevant to spatial planning are:

Innovation:

- support to agencies providing business support services
- lobbying for investment into strategic transport infrastructure
- lobbying for investment into ICT infrastructure
- lobby for a rail halt at Glyne Gap, Bexhill
- promotion of the A21 "Enviro 21 Corridor" for eco-industries
- planning policies to support the provision of new business accommodation
- planning policies to protect employment sites
- encouraging inward investment
- targeting knowledge-based industries
- providing incubator space
- improving the range of the tourism offer
- developing town centre strategies

Inclusion:

- supporting skills development
- helping to overcome barriers to work in both urban and rural areas
- provision of affordable housing
- improving service delivery to deprived neighbourhoods and rural areas

Inspiration:

- emphasising and making best use of competitive strengths

Regional Growth Fund

- 4.16 This recent funding programme has been introduced by the Government to fund both capital and revenue projects for private-sector driven schemes, especially where there is a high dependency on public sector jobs – as is the case locally.
- 4.17 A bid has been made by SeaSpace for a further phase of the Priory Quarter development and the Enviro 21 Business Park in Hastings.

Section 5: Assessing Employment Land Requirements

Labour supply

- 5.1 The ESLR, 2008 identified a projected reduction of some 3,881 working adults between 2006 and 2026 based on forecast demographic changes and house building rates.
- 5.2 This has now been updated based on the revised likely housing growth levels and taking account of more recent projections. These factors have combined to suggest a lower workforce, particularly in Rother district.

Table 15: Total workforce aged 15 - pensionable age

	2001	2008	2013	2018	2023	2028
Hastings	37,190	38,590	38,590	37,852	36,792	35,752
Rother	33,109	34,960	34,151	32,873	31,336	29,464
Hastings and Rother	70,298	73,549	72,741	70,725	68,128	65,216

Source: ESCC policy-based demographic projections, May 2011

- 5.3 An important qualification about these projections is that they represent what is projected to happen based on the current population structure and past patterns of migration, as well as prevailing economic activity rates (2008 base). However, as previously highlighted, account also needs to be taken of policy factors in interpreting them, notably:
- The national policy imperative outlined in section 3 to stimulate economic growth
 - The strong local commitment to reverse the economic fortunes of the area, as outlined in section 4, not least to address relatively low economic activity and high unemployment
 - The political desire to foster a balanced demographic profile, especially in Rother, in order to maintain and improve economic vitality.
- 5.4 The implications of (a) in relation to land supply are considered in section 6.
- 5.5 The earlier ESLR supported adoption of the Regional Economic Strategy target to increase economic activity rates across the South East from 82% to 85% by 2016, as it reflects local economic priorities and policy objectives.
- 5.6 The workforce requirements assuming an 85% economic activity rate have been recalculated using more recent population projections (see section 3). This is done for the period 2008-2028, as the Councils respective Core Strategies are now looking at this 2-year extended time horizon, with the change applied from 2018.

Table 16: Target workforce to achieve regional economic activity rate

	2008	2013	2018	2023	2028
Hastings	38,590	40,577	42,071	41,067	39,949
Rother	34,960	35,639	35,740	34,257	32,372
Hastings and Rother	73,549	76,220	77,811	75,325	72,321

Source: ESCC (Calculated by multiplying total population by target economic activity rate)

- 5.7 This indicates that an additional 7,105 people would be economically active if the regional economic activity rate were achieved (the difference between 65,216 and 72,321 in Tables 15 and 16). The workforce is projected to increase in the medium term, to 2018, with a net increase of 4,262 people to 2018. However, beyond then, there is still a projected small fall in the total workforce across the study area by 2028, albeit with Hastings itself seeing a small increase.

- 5.8 In relation to point (c) above, it is considered that the current projections do not (and cannot) take account of policy shifts, including the provision being made for employment creation and family housing, that are intended to alter the characteristics of in-migration, which is the main driver behind the projected population change and the net additional overall housing requirement.
- 5.9 The reasoning behind looking to promote a greater number of economically active people in the population is highlighted by the following table which shows how many older (over 64) people depend on people of working age (16 to 64), expressed as a percentage, on the basis of current projections.

Table 17: Elderly dependency ratio

	2008	2011	2016	2021	2026
East Sussex	48.2	51.2	57.3	64.8	74.3
Hastings	34.5	36.3	40.6	46.4	52.8
Rother	63.9	68.4	76.3	85.9	98.6

Source: ESiF

- 5.10 As regards Hastings, the updated Table 18 below shows that job density in Hastings is low and has fallen relatively more than the region between 2005 and 2008. The figures in brackets appeared in the 2008 ESLR.

Table 18: Job density (2008)

Great Britain	South East	East Sussex	Eastbourne	Hastings	Lewes	Rother	Wealden
0.83	0.86 (0.88)	0.76	0.88	0.66 (0.71)	0.78	0.79 (0.74)	0.73

Source: Jobs density, Office National Statistics

Notes: The density figures represent the ratio of total jobs to working-age population. For example, a job density of 1.0 would mean that there is one job for every resident of working age. Total jobs include employees, self-employed, government-supported trainees and HM Forces

- 5.11 The implications of the local job density are discussed briefly in section 2, while it also shows the potential for an increase in the number of jobs in Hastings, notwithstanding its relatively young age profile.
- 5.12 It is therefore considered reasonable to plan for a somewhat greater workforce, particularly for Rother district. The potential for a radical change is very limited, given the already relatively high proportion of working age people in Hastings, and the relatively limited growth in Rother. However, an increase in the workforce in Rother of 7.5% by 2018 and 15% by 2028, and Hastings 2.5% by 2018, and 5% by 2028 (relative to the is considered reasonable. The results of this are shown in the Table 19 below, where the target growth in the workforce has been applied to the 2008 data in Table 16.

Table 19: Workforce to achieve target economic active population

	2008	2018	2028
Hastings	38,590	43,123	41,946
Rother	34,960	38,421	37,228
Hastings and Rother	73,549	81,544	79,174

Source: ESCC

- 5.13 Hence, the overall workforce increases over the 20 year period can be assumed to be 3,356 in Hastings, and 2,268 in Rother, equating to an additional 5,625 in the workforce overall. In terms of the impact on the overall population structure, these increases would imply only modest changes. As Table 20 below shows, the workforce in 2028 would represent 44.2% of the population, compared to 40.4% without any policy intervention or change in the area's attractiveness to the working age population:

Table 20: Workforce as percentage of total population – policy relative to baseline

	Base 2008	Policy 2008	Base 2018	Policy 2018	Base 2028	Policy 2028
Hastings	44.7	44.7	48.3	49.5	45.1	47.4
Rother	39.1	39.1	39.9	42.9	35.7	41.1
Hastings and Rother	41.8	41.8	44.1	46.7	40.4	44.2

Source: ESCC

- 5.14 The ESLR 2008 made the case for making an allowance for an increase in jobs relative to workforce changes, to achieve a better balance of homes and jobs locally. These remain valid today, so long as there is the critical transport investment in the Bexhill to Hastings Link Road and complementary measures.
- 5.15 The success of economic development schemes led by the local regeneration company, SeaSpace, has demonstrated the potential to create new employment and entrepreneurship locally, and its attraction of Saga has been a major boost. Conversely, the cancellation of several A21 schemes may have a negative impact on the relative strength of the local TTWA, although it may also add pressure for people to be able to work locally.
- 5.16 Overall, the potential to reduce net out-commuting estimated in ESLR 2008 is still considered realistic, but with the target date for a greater reduction in net out-commuting extended from 2026 to 2028. It may be noted that there would still be a net outflow of workers from the TTWA under this scenario, of -10% in 2018 and -5% in 2028, from a base of -13.5% in 2001.
- 5.17 By applying these target reductions in net out-commuting to the figures in the Table 19 above, the jobs (as opposed to workforce) requirement would be:

Table 21: Total job requirements based on commuting assumptions

	2008	2018	2028
Hastings	33,380	38,811	39,849
Rother	30,240	34,579	35,367
Hastings and Rother	63,620	73,390	75,216

- 5.18 Table 21 assumes the net commuting at 2008 is the same as at 2001 (see paragraph 2.22 of the 2008 Study). The number of jobs needing to be provided actually within Hastings and Rother would be 13.5% less than the labour force, meaning that the local jobs provision at 2008 would be 63,620 (using the 2008 data from Table 16 that is 73,549 x 86.5%). As put forward in the 2008 ESLR, a robust economic development strategy could see net out-commuting reducing over a twenty year period such that an additional 11,596 jobs would need to be provided locally (6,469 in Hastings and 5,127 in Rother) as a result of this higher level of self-containment.
- 5.19 Therefore, the forecast number of jobs to be accommodated in the study area would be 73,390 by 2018 and 75,216 in 2028 and this represents an increase of 9,770 between 2008 and 2028.

Labour demand forecasts

- 5.20 The above scale of job growth will rely on a continued robust economic development strategy and programme to achieve sustained improvement in the face of strong competition from the more buoyant parts of the region, as well as in response to prevailing weak economic growth forecasts.
- 5.21 No further employment forecasts have been produced since those for SEEDA in 2007, as contained at Table 34 in ESLR 2008. Those identified forecast labour demand (as opposed to supply) for an additional 6,515 workers between 2006 – 2020. A straight line extrapolation would suggest a demand up to 2028 of some 10,000 jobs. This compares reasonably with the jobs

requirement set out paragraph 5.19 above, this suggests that the jobs targets above, based on policy considerations, are not unduly optimistic.

Business Needs

- 5.22 In this section we also consider the business survey evidence of the state of the East Sussex business community, its needs and issues including the demand for employment space. Our analysis draws on a number of information sources, including the East Sussex Annual Business Surveys 2007 - 2011 (ESBS/ESCC/EDS) and identifies issues and opportunities that affect businesses in the County and the individual Districts.
- 5.23 The East Sussex Annual Business Survey (ESBS) involves around 1,000 local businesses and is generally undertaken early spring each year. The Surveys include businesses of all sizes and a wide range of sectors selected and weighted to reflect the make up of the East Sussex business communities. The East Sussex Business Surveys do not include public sector establishments, information relating to the education, health & social care sector is therefore based on privately owned businesses.
- 5.24 Of the interviews around 16% take place in Hastings, and 22% in Rother plus an additional boost sample in Bexhill of around 7%.

Key findings

- The most frequent business registrations for VAT in Hastings and Rother are in respect of: construction; wholesale, retail and repairs; hotels and restaurants and; real estate, renting and business activities. (leave: latest data still 2007)
- Between 1997 and 2007 (latest) Hastings business stock increased by 325 businesses (18.5%) and Rother by 355 businesses (11%) against the South East at 24%. These figures relate to a period before the recession hit in 2009. The 2009 ESBS indicated that around 14% of businesses in Hastings and Rother, and 15% in Bexhill were 'struggling' (likely not to survive) with a further 22% in Hastings, 20% in Rother and 15% in Bexhill reporting as 'vulnerable'. The latest 2011 survey has however shown an improvement across the county in respect of the state of business with an average decrease of 7% stating their state was 'poor' (from 17% in 2009 to 10% in 2011). Hastings and Rother are both around the average. It should be noted that the creation of business stock (net increase or decrease) in Hastings and Rother is historically lower than that of the South East, it is suggested therefore that when later figures are released this is unlikely to have improved.
- East Sussex businesses have historically traded locally – within only 10 miles – and this incidence of localised trading seems to have increased from 28% in 2009 to 36% in 2011 – perhaps as a result of the recession causing businesses to pull back to more localised 'safe' market away from the Euro zone and global markets. Rother based businesses are the most locally minded amongst the Districts with 43% seeing Rother as their main market; Bexhill businesses are even more locally focused at 52%. Hastings is not an exception to the average. In terms of expanding the geographic market across East Sussex 24% of businesses say they intend to do so against 15% in 2010; manufacturing and engineering companies were most expansionist, Rother based businesses reported as the least likely to seek to expand their geographic markets.
- The 2007 survey showed Hastings, Rother (and Eastbourne) are more likely to recruit locally – this may be a reflection of having relatively large urban centres to draw on (Bexhill in Rother). East Sussex businesses in general recruit locally: more than four out of five (84%) mostly

recruit staff from within 10 miles of their location, including 47% who recruit from the town or village where they are based.

- The 2011 ESBS showed that post the recession a reducing number of posts have been made redundant at 3% compared to 6% in 2010 and 11% in 2009. On average 17% of businesses had advertised vacancies in the last 12 months; Bexhill businesses reported 25% advertising vacancies suggesting either more robust growth or a higher staff turnover, or a combination of the two.
- Both Hastings and Rother have a low number of people educated to NVQ4+ or equivalent – this will affect entrepreneurship, innovation, and potentially business growth in the two areas. Hastings overall has major issues with skill levels, especially that of young people not in employment, education or training, both areas however need to address the number of people with no qualifications.
- The top 4 priorities for skill training are the same in Hastings and Rother as across East Sussex: customer services (the main priority); IT, technical and 'job specific'. It's worth noting that customer service has been the top priority for a number of years; an important message for the focus of enterprise and skills training providers.
- At key stage 4 (GCSE) Hastings, at 47.6% has the lowest percentage of students achieving 5 or more A* - C GCSE passes (including Maths and English), Rother is about average at 57.6% (ESIF 2009/10).
- In the 2011 survey businesses were asked what they most required in terms of business support; 'access to relevant business networks' was seen as most important at 22%, followed by 'general advice on financing' at 20%, equal with 'marketing advice'. In respect of differences between Boroughs, more Hastings' businesses wanted 'staff training advice' (at 22% against an average of 16%). Rother tended to report a lower percentage than the average across all the potential support areas; perhaps suggesting that business support was less required or that more areas tended to be seen as equally as important, or both.
- As at 2004 43% of existing office units in Hastings are deemed to be below the mean size, the problem also exists in Rother but on a smaller scale. In terms of industrial space the positions are reversed. The build of new office space by SeaSpace in Hastings will have partially helped the situation in Hastings (as opposed to Rother) but not in respect of existing/ second hand office space.
- The number of businesses looking for alternative or additional accommodation has seen a slight reversal in numbers over recent years with the proportion falling from 25% in 2007 to 14% 2008 and 10% in 2010 but increasing to 12% in 2011, this includes those who have been looking over the past 12 months. 12% of the estimated VAT registered 22,000 businesses in the county gives a number of 2,600 businesses likely to be looking or have recently looked for alternative or additional accommodation. Small businesses (11 – 49 employees) are the most likely to be looking or have looked. Across the industry sectors manufacturing businesses were the most likely to be looking, construction and wholesale and retail the least likely. When asked if they would take on additional staff if appropriate premises could be found 34% said 'definitely' and 43% said 'probably'.
- The 2011 ESAB identified that of those businesses in East Sussex seeking alternative or additional accommodation 41% required office space (82% requiring this under 1,000 sq.ft.) and 23% required light industrial with 46% requiring under 1,000 sq.ft. and 54% requiring up to 2,000 sq.ft. The top 5 requirements of the new alternative spaces were: 'good second hand' (39%); 'flexible tenancy' (38%); 'leasehold' (36%); 'flexible with room to grow within the building' (33%) and; 'access to faster broadband' (32%).

- The majority (45%) of businesses are looking for accommodation within their existing town or village (compared to 40% in ESBS 2010 and 36% in ESBS 2008). Those looking to relocate in Kent/West Sussex has however increased from 0% in 2008 to 8% in 2011 but note that overall 89% wished to relocate within the county.
- The 2011 survey also asked businesses about features within their current location that the businesses thought to be positive or negative; this yielded the responses as below where the more positive (despite any negatives) are shown with a higher '+' number; the more negative (despite any positives) with a higher '-' number.

Table 22: 'Positive attributes' versus 'needs improvement' net scores by East Sussex District

	East Sussex average (1000)	Eastbourne (156)	Hastings (127)	Lewes (189)	Rother (177)	Wealden (350)
Being close to customers	+52	+55	+51	+50	+50	+52
Local Post Office services	+40	+36	+46	+34	+51	+37
Good local business support network	+39	+31	+36	+49	+30	+45
Being close to suppliers	+30	+36	+33	+30	+22	+33
On site car parking	+24	+1	+3	+25	+15	+41
Availability of appropriately skilled labour	+23	+34	+17	+36	+16	+16
Mobile phone coverage	+17	+42	+33	+26	+29	-12
Links to major rail / road routes	+8	+8	-27	+29	+2	+10
Availability / cost of finance	+6	-2	+5	+14	+9	+4
High speed broadband	+5	+13	+8	+25	+5	-10
Good reliable public transport	+3	+20	+6	+27	-5	-15
Ease of obtaining appropriate planning permission	-3	+2	-3	0	-4	-5
Cheap rents	-3	-17	+13	-5	-8	+2
Local road network	-36	-32	-56	-14	-52	-35

Source: East Sussex annual business survey 2011 (ESCC)

Notes: The above shows that being close to customers is the most positive attribute of any district this finding perhaps is reflected in the local nature of the East Sussex business market. The most notable in relation to Hastings and Rother are:
 > Rother: *being close to suppliers* – this is more negative than for the rest of East Sussex and may indicate difficulty with accessing supplies locally and/or transport of same.

> Hastings: *on site parking* – this suggests that this is not so readily available as in other areas, the fact that Eastbourne the other main urban area, also cites this as a problem suggests this is a large town issue.

> Hastings/Rother: *the availability of appropriately skilled labour* – this appears as an issue in both areas.

> Hastings: *links to major rail/road routes* – this shows as a major issue in Hastings and also features in Rother.

> Hastings/Rother: *cheap rents* – Hastings is the only area to not see this as an issue although even though it remains as a positive it is not a strong positive, Rother is above average in terms of negativity.

> Hastings/Rother: *local road network* – both Hastings and Rother see this as the most important area for improvement; both areas see this as the most negative compared to the other districts.

- In East Sussex the 2011 ESABS identified that concerns with private transport have risen across the county from 26% in the 2010 ESABS to 49% in 2011; this has implications for aspirations to enlarge the geographic market. Not surprisingly road tax and fuel costs were a

major feature especially given fuel costs are estimated at around 10% of a company's costs. When asked which aspects of East Sussex transport could most usefully be improved 'better roads' (e.g. the condition of the roads) and 'better access to road links/infrastructure' were the top two. The need to improve access to, across, and out of the county cannot be ignored if East Sussex is to achieve its economic potential.

- The 2007 ESBS specifically asked business to identify roads that were a particular issue (if any): Hastings and Bexhill businesses both strongly identified the A259 road link as being a major cause in their reduction of competitiveness. The Bexhill to Hastings Link Road is therefore a very important proposed infrastructure improvement in terms of lifting transport related barriers to growth.
- In the same survey when asked about Hastings as a business location the strengths identified by more than one in ten Hastings businesses included the lifestyle provided by the area, Bexhill also scored top in this area. In Hastings the level of regeneration activity, and the town's relatively low house prices also featured. Surprisingly transport links and road infrastructure were viewed as high scoring positive and negative features by Bexhill business – this variation at near opposite ends of the scale may be explained by their interpretation of 'transport links' over 'infrastructure' where 'infrastructure' may be seen as the totality of the system including rail and the condition of roads.

Stakeholder Views – update

5.25 Rother District Council held a workshop for a wide range of businesses and business organisations as part of its 'Consultation on Strategy Directions' in January 2009. Notes of the workshop are contained in its Consultation Statement, but finding of particular relevance to the supply of land and premises were:

Space requirements

- Current/further vacant space
- Large stock of older space functional
- Potential need for technology firms (success of Innovation Centre)
- Little "oven ready" sites
- Demand mostly for < 1500sq.ft. – "incubator"
- Need space in short timescale
- Specialist premises – meet new legislation
- "Trades counter"

Affordability

- Some potential for new quality space – emerging by SeaSpace
- Also need "cheap and cheerful"
- Impact of Section 106 costs

Locations

- North of Rother stronger market
- Attractive live/work location
- Where good broadband
- Accessible to workforce

Implications

- Promote local sourcing
- Public sector role in bringing forward sites and small units
- Mixed use sites
- Marketing area (perception)

- Step up from working at home – support services
- Distribution relies on improved connections (including EU)
- Work with existing firms
- Live/work potential – reasons?
- Strengths – sectors – environmental technology/food

Property Market Analysis

The Hastings Office market and the role of the Task Force – update

- 5.26 The Hastings office market has traditionally been underdeveloped compared with other towns. Until recently, this marked lack of office development – both in the town centre and within the other employment areas, reflected a combination of small and predominantly local demand market and very low rents.
- 5.27 As part of a major initiative to reverse this low development scenario, the Creative Media Centre in Robertson Street Hastings, a SeaSpace initiative, was opened during 2004-5 in two phases. The CMC is designed to offer start up and expansion space for small firms in the heart of the town. In total this has provided some 1,800m² or 19,400sq.ft. space and also provides support to businesses to maximise use of the Internet. Currently (2011), the building houses 40 small companies and services 11 “virtual” companies, supporting 186 jobs. Occupiers are primarily local start up businesses in the creative and media sector, although the BBC also has some space in the scheme. We understand that this space has created new rental highs for the town, reported as £25 per sq.ft. (£248 per m²) fully serviced (including heating, reception, rates etc).
- 5.28 The quality of space available in Hastings town centre has changed markedly with the completion of Lacuna Place (2008) and One Priory Square (2009), again a SeaSpace initiative. These form a key element of the comprehensive regeneration of the Priory Quarter and provide some 3,981m² (42.852sq.ft.) and 5,263m² (56,652sq.ft.) respectively of high quality office and retail space. Both these schemes were built speculatively as a conscious strategy to attract inward moving employers to the town. The schemes sought to demonstrate the scope for Hastings to support higher quality space and ‘kick-start’ investor, occupier and developer interest. Currently (2011), Lacuna Place has 65% of its available space taken up while One Priory Square has been fully taken up by Saga as sole occupier. Planning permission was approved in July 2011 for a third phase of development of 8005m² (86,165sq.ft.) on the site that includes Queensbury House.
- 5.29 Away from the Town Centre, other significant development in the employment areas includes the Innovation Centre (ICH) at Churchfields. Completed by SeaSpace in 2006, the ICH provides 2,000m² office and 1,000m² workshop space. Currently (2011) ICH houses 34 companies and 11 “virtual” companies supporting 189 jobs. Occupiers include new local start-ups with 1-3 employees in the IT sector, as well as some general small businesses. The development represents a notable improvement in the specification of small unit space available within Hastings and we understand has asking rents are in the order of £23 per sq.ft. (£248 per m²) fully serviced (including heating, reception, rates etc).
- 5.30 As elsewhere demand for freehold office space is reported as healthy. In recent years between 10 and 16% of office/B1space sought through enquiries to Locate East Sussex have been specifically for freehold space.

Recent Completions

Rother

- 5.31 In terms of business completions in Rother since ESLR 2008 (which presented data up to 2006/07), there has been a further 15,551m² built in the last 4 years (2007/08-2010/11), an average of 3,890m² per year, which is 2.8 times more than during 2001-2007 (paragraph 5.113 of ESLR 2008 refers). Further details are contained in Appendix 1A.
- 5.32 Most development was in 2007/08, with a large manufacturing/office and storage scheme in Rye Harbour Road, Rye. In 2008/09, most development was in the rural areas, including significant schemes at Flimwell and Marley Lane. The key completion in 2010/11 was the Elva Way Business Park, in Sidley, Bexhill. Plans for this development by Rother District Council were previously referred to in ESLR 2008. It has already seen most of the total of 2,260m² occupied.
- 5.33 The supply of land has little changed since ESLR 2008, with allocated sites remaining. However, following the completion of several sites previously under construction, there are now only outstanding planning permissions for some 4,700m² of business floorspace, most of which is in Rye.

Hastings

- 5.34 Just over 18,000m² (18,138m²) of employment floorspace has been completed in Hastings in the last 4 years (2007/08-2010/11). This includes a major new office development in Hastings town centre which forms part of the Priory Quarter development (see paragraph 5.28).
- 5.35 Other key schemes include the development of an allocated employment site at Marline Fields on land west of Queensway (2009/10). This is being developed by Sea Space on behalf of the Taskforce, the scheme – known as the South Queensway Enviro 21 Business Park, comprises the development of B1 office and light manufacturing space together with an energy centre. The construction of the scheme is on going, some 2,355m² of floorspace has been completed to-date.
- 5.36 Land supply data is shown in appendix 2B.

Section 6 – Conclusions and strategy implications

- 6.1. The ‘Context’ remains as previously, with further evidence of the weakening state of the local economy, and increasing relative deprivation. This backcloth reinforces the established ‘Policy aims’ to vigorously pursue economic regeneration.
- 6.2. The ‘Current initiatives and strategy direction’ also remains the same, albeit the earlier support of SEEDA is no longer available.
- 6.3. Updated demographic workforce projections, incorporating current housing provision, suggest a lower workforce than previously. However, these figures assume a continuation of the “status quo”. Workforce projections incorporating increasing economic activity rates, growth in workforce numbers and greater self-sufficiency (reducing out-commuting)’ suggest that an additional 11,406 jobs would need to be provided locally (5,114 in Hastings and 6,293 in Rother)
- 6.4. The earlier ESLR concluded that the anticipated proportion of employment that would be in B class sectors over the period 2006-2020 would be 26.5% in Hastings, 33% in Rother, with a combined 30.2%. Hence, the overall increase in jobs was related to business employment by taking 30% of the total jobs requirement. It has been noted that ESLR 2008 omitted to include ‘Metals, minerals & chemicals’ in its calculation of B class uses. If these were included, then it would increase the proportion of employment in B class uses from 30% to 33%. Set against this, it can also be seen that there is a small downward trend in manufacturing employment. On balance, it is considered that, as a guideline for the purposes of likely employment land requirements, 30% represents a reasonable approximation.
- 6.5. PPS4 encourages the planning system to make provision for a choice of sites and not to be unduly restrictive. This was acknowledged in the 2008 and is being carried forward here.
- 6.6. Therefore, and having regard to the large geographical area of Rother, it is reasonable to make more than an exact provision. This allows a choice of sites, different timescales and the potential of delays in some sites coming forward.
- 6.7. Table 47 of ESLR 2008 has been updated using the most recent information set out in the preceding sections:

Table 23: Employment land/floorspace requirements 2008-2028

	Rother	Hastings	Rother and Hastings	Notes
Policy led approach				
Workforce projections (with increases in economic activity)	+2,268	+3,356	+5,625	
Jobs requirement (also with increases in self-sufficiency)	+5,127	+6,469	+11,596	
Net business floorspace requirement	67,676m ²	68,571m ²	136,247m ²	See note 1
Gross business floorspace requirement, with choice of sites	81,211m ²	82,285m ²	163,496m ²	See note 2
Total requirements	81,000m²	82,000m²	163,000m²	

Notes:

1. The calculation at row 4 multiplies the jobs requirement firstly by the proportion of jobs that are expected to be in B class use, as estimated at paragraph 6.5 (namely 26.5% & 33% for Hastings & Rother respectively), and secondly by an estimate of average worker densities. In putting forward any estimate it is acknowledged that it will vary widely for different uses, as shown by Tables 39 and 40 of the 2008 Study. Given the likely mix of uses, an average of 40m² per worker is assumed here.
2. Employment Land Review (ELR) guidance and PPS4 accepts that there may be need to provide for a range of sites. In the local circumstances, because of the large geographic area and number of communities covered, the wide

range of types of provision sought and the dominance of a few major sites, it is proposed that a supply of 20% above the requirement would provide such choice.

6.8. It is noted that the above overall requirement is some 20% less than proposed in ESLR 2008.

Business land supply

6.9. As highlighted in ESLR 2008 paragraph 6.38, the Study Area will benefit from the strategic employment site proposed to the north east of Bexhill. In view of the fact that this will meet some of the employment needs arising in Hastings, it is recommended that the distribution of employment land over the plan period should be as follows:

Hastings	65,000 – 70,000m²
Rother	95,000 – 100,000m²

Distributional aspects

6.10. Bexhill – no substantive changes, with the existing site to the north east of the town still offering the strategic opportunity for significant business investment in the area. While Elva Way Business Park has recently been completed, and contributes valuable new accommodation, especially within a more deprived area of the town, the net increase in space is relatively limited.

6.11. Battle – no substantive changes.

6.12. Rye - no substantive changes.

6.13. Rural areas – there has been a continuation of ad hoc developments across the rural parts of the district since 2007/08, totalling over 4,000 m². This represents a significant proportion of what was previously suggested as a target for the rural areas from 2006. Rather than deduct this contribution, it is considered that the original target of 10,000 m² should apply from 2011. This would recognise the continuing potential for business accommodation in rural areas, and its contribution to the vitality of the district, as well as to sustaining a working countryside

Appendix 1A

Rother Completions

Table 24: Rother completions

Year	Site	Ward	Gross area (m ²)	PDL	Use class(es)	Total (m ²)
2001/02						2,542
2002/03	-	-	-	-	-	0
2003/04	Station Approach, Battle	Battle	1,000	Y	B1	1,000
2004/05	Six Acres – rear of Stoddards Lane	Rother Levels	202	Y	B1	3,912
	Catlepost Farm Products, Harbour Road	Eastern Rother	245	Y	B2	
	Rye Wharf, Harbour Road	Eastern Rother	1350	Y	B8	
	The Mint	Eastern Rother	-208	Y	B1 to C3	
	Parsonage Farm	Ticehurst and Etchingham	545	Y	B1	
	Wheel Farm Business Park. Wheel Lane	Brede Valley	260	Y	B1	
	Bodiam Business Park	Salehurst	440	Y	B1	
	Higher Nature plc, Burwash Common	Darwell	(250 Net) 202	Y	B8	
	Tudor Oak ltd	Ticehurst and Etchingham	419	Y	B8	
	45 Turkey Road	Sidley	(159 Net) 755	Y	B1	
	Bodiam Business Park	Salehurst	(670 Net) 237	Y	B1	
2005/06	-	-	-	-	-	0
2006/07	-	-	-	-	-	0
2007/08	Orchard Farm, Iden	Eastern Rother	1403	Y	B1, B8	8873
	Spun Concrete	Eastern Rother	7470	Y	B2/B8	
2008/09	Woodland Enterprise	Ticehurst and	180	N	B1/B2	3957

Year	Site	Ward	Gross area (m ²)	PDL	Use class(es)	Total (m ²)
	Centre	Etchingham				
	Perrymans Farm, Burwash	Darwell	570	N	B8	
	Redlands Farm, Fair Lane	Salehurst	350	N	B1/B2	
	Readers Farm, Readers Lane	Eastern Rother	406	N	B2	
	Gate Court Farm, Station Road	Rother Levels	149	N	B1	
	Luck Farm, Vicarage Lane	Darwell	2074	Y	B1	
	Manroy Engineering Limited	Rother Levels	228	Y	B1	
2009/10	Great Park Farm, Catsfield	Crowhurst	-6	Y	B1 to A3	362
	33 High Street, Battle	Battle	-16	Y	B1 to A1	
	The Barn, Whydown Road	St. Marks	55	Y	B1	
	Unit 10-12 Beeching Close	Kewhurst	-204	Y	B1 to Sui-Generis	
	Gibbs Reed Farm	Ticehurst and Etchingham	166	Y	B2	
	Old House Farm, Peasmarsch	Rother Levels	75	N	B8	
	The Nursery, Guestling	Marsham	52	Y	B8	
	Perrymans Farm, Burwash	Darwell	240	N	B8	
2010/11	Ox Lodge Farm Building	Darwell	120	Y	B1/B8	2359
	Unit 1 - Parsonage Farm	Ticehurst and Etchingham	-100	Y	B1 to D1	
	3-15 Wellington Place	Central	71	Y	B1c	
	Sidley Goods Yard	Sidley	2268	Y	B1	

Source: Rother District Council Planning Policy team
Note: PDL = Previously Developed Land

Appendix 1B

Hastings Completions

Table 25: Hastings completions

Year	Site	Scheme	Use Class	Net Floorspace completed (m ²)	Net Floorspace lost (m ²)
2007/08	51 Queens Road	Change of use of 1st Floor flat to office for electrical contractor	B1a	115	
	Salisbury Yard	Completion of 2 workshops as part of mixed use scheme	B1c	200	
	110 Manor Road	Change of use of workshop to residential	B1c		70
	132-134 Bohemia Road	Change of use of workshop to residential	B1c		114
	6 Wainwright Close	Extension to existing factory	B2	142	
	6-8 Dorset Place	Extension of existing premises for ancillary office use	B8	214	
	Courthouse Street	Change of use of existing storage unit to History Centre (D1)	B8		81
		Totals		671	265
		Total Net Floorspace		406	
2008/09	Land Known as the Gap Site (Lacuna Place)	mixed use scheme, comprising of A1/A2/A3 and B1a floorspace		8,091	
	Wiseaction House, Gresley Road	Construction of steel framed storage unit at existing premises	B8	915	
	Phase 2 Haywood Way	Construction of new light industrial and storage units	Mixed B	4,150	
	Land East of Stirling Road	Construction of business start up units (26-100 m ²)	Mixed B	1,034	
		Totals		14,190	0
		Total Net Floorspace		14,190	
2009/10	13 Newgate Road	Change of use of vacant offices to residential	B1A		100
	23 Havelock	Change of use of 1st and 2nd	B1A		500

Year	Site	Scheme	Use Class	Net Floorspace completed (m ²)	Net Floorspace lost (m ²)
	Road	floors from offices to 4 x 1 bedroom flats			
	41 Earl Street	Conversion of 1st floor from office to 2 x 1 bedroom and 1 x 2 bedroom flats	B1A		180
	Morrisons, 170 Queens Road	New warehouse extension to existing superstore	B8	567	
	Marline Fields, land west of Queensway	Development of B1 office and light manufacturing space together with an energy centre.	Mixed B	2,355	
		Totals		2,922	780
		Total Net Floorspace		2,142	
2010/11	402 The Ridge	Change of use of 1st from residential to offices	B1A	1,500	
	85-86 Castleham Road	Change of use to Council Archive Unit	B2		477
	85-86 Castleham Road	Change of use to Council Archive Unit	B8	405	
	85-86 Castleham Road	Change of use to Council Archive Unit	B1A	72	
	Little Ridge Farmhouse	Change of use form B8 storage to office accommodation	B1A	101	
	Little Ridge Farmhouse	Change of use form B8 storage to office accommodation	B8		101
	Regent Electrical, Plot Small U1	Change of use from offices/warehouse to taxi/private hire control office with mast & car body repairers and sprayers (water based paint only)	B1A		62
		Totals		1,500	0
		Total Net Floorspace to date		1,500	

Source: Hastings Borough Council Planning Policy team

Appendix 2A

Rother: Site review of existing allocations and sites with planning permission

Table 26: Sites with planning permission as at April 2010 - Under Construction (Rother)

Location	Ward	Area	Land Available	PDL	Use Class(es)	Status	NEW, COU or CON	Description
Woodland Enterprise Centre, Hastings Road, Flimwell	Ticehurst and Etchingham	900	0.35	N	B1/B2	RR/2005/395	NEW	Construction of new industrial units
lackman, Pavie & Ladden Site, Marley Lane, Battle	Battle Town	2848	1.9	Y	B1, B8	RR/2006/3234 RR/2006/3467 RR/2005/2457 RR/2005/2847	NEW	Erection of detached office building, proposed industrial building and associated forecourt and parking areas including provision of new vehicular access pursuant to outline planning permission RR/2000/105/P as revised by planning permission RR/2004/3163/P, erection of extension to process building & new industrial buildings including for reprovision of building areas lost to fire and incorporation of existing outbuilding floor areas and associated external works.
Sidley Goods Yard	Sidley	2268	1.25	Y	B1	RR/2007/3515	NEW	Demolition of former railway buildings & single storey industrial building. Erection of two single storey buildings and a two storey building for category B1 business use
Land adj. to Beechdown	Battle Town	988	0.37	Y	B1	RR/2007/1125	NEW	Construction of research and development and solar panel production

Location	Ward	Area	Land Available	PDL	Use Class(es)	Status	NEW, COU or CON	Description
Sawmills, North Trade Road								facility (B1) with onsite energy production with provision of twenty two parking spaces and cycle rack and alteration to an existing access.
Bugsell Mill Farm Hurst Green	Salehurst	296	0.13	N	B1	RR/2008/2038	COU	Conversion, refurbishment and change of use of existing agricultural barn to form new workshops with extension to form toilet and kitchen area and office. New vehicular roadway to serve the same.
Ox Lodge Farm Building, Brightling Road, Brightling	Darwell	120	0.13	N	B1, B8	RR/2008/1931	COU	Change of use of redundant farm building to B1/B8 uses.
Total		7420	4.13					

Source: Rother District Council Planning Policy team

Note: PDL = Previously Developed Land, COU = Change of use, CON = Conversion

Table 27: Sites with planning permission as at April 2010 – Not Yet Started (Rother)

Location	Ward	Area	Land Available	PDL	Use Class(es)	Status	NEW, COU or CON	Description
Homestead Farm, Brightling	Darwell	213	0.05	N	B1a	RR/2009/993/P	COU	Conversion of redundant sussex barn into offices, together with demolition of part adjoining modern farm buildings.
16 Eversley Road, Bexhill	Central	-153	0.02	Y	B1a	RR/2009/2652/P	COU	Change of use from offices to ground floor shop with residential unit above.
Advartex LTD, Ticehurst	Ticehurst and Etchingham	119	0.24	Y	B1c	RR/2009/1949/P	NEW	Proposed extensions
Unit 1 - Parsonage Farm, Ticehurst	Ticehurst and Etchingham	-100	0.02	Y	B1	RR/2009/1020/P	COU	Change of use from B1 to D1 (office to dental surgery).
Rye Wharf, Harbour Road, Rye	Eastern Rother	1642	4.65	Y	B1, B8	RR/2000/1041	NEW	Extension to existing warehouse building and provision of lorry/car park
Johns Cross Garage Battle Road, Mountfield	Darwell	270	0.46	Y	B1 (110) B8 (160)	RR/2008/3349	NEW	Demolition of existing valeting building and erection of new valeting and storage building.
Watts Palace Farm, Ewhurst	Ewhurst and Sedlescombe	212 813 468	1.4	N	B1a B2 B8	RR/2005/2277/P	COU	Change of use and alterations from farm buildings to form aircraft restoration premises

Location	Ward	Area	Land Available	PDL	Use Class(es)	Status	NEW, COU or CON	Description
The Mill, Northiam	Rother Levels	-328	0.19	Y	B8	RR/2009/3124/P	COU	Conversion of restaurant to tea rooms. Conversion of kitchen/store to toy museum with additional first floor accommodation. Replacement of corrugated fibre cement roof with powder coated insulated metal roof.
The Old Hall, Iden	Eastern Rother	-67	0.01	Y	B8	RR/2009/3129/P	COU	Change of use to community meeting room, including replacement windows and doors, formation of new entrance path and external storage shed.
Old Mears Site, Harbour Road, Rye Harbour	Eastern Rother	1620	0.43	Y	B8	RR/2006/258	NEW	Bulk store for port related activities.
Total		4709	7.23					

Source: Rother District Council Planning Policy team

Note: PDL = Previously Developed Land, COU = Change of use, CON = Conversion

Appendix 2B

Hastings: Site review of existing allocations and sites with planning permission

Table 28: Land with planning permission for employment use/sites under construction (Hastings)

Major regeneration projects – Hastings Town Centre				
Site name/location	Gross Area	Potential sectors*	Status	Development Issues
Priory Quarter Phase 3	7,850m ² of gross B1 space. Net office space 3,550m ²		Full permission for mixed use scheme, overall gross area 8,225m ²	
Priory Quarter	18,150m ² (office element)	A, C, D	Outline planning permission subject to S106 for comprehensive development for mixed land uses including B1 offices, education, retail, leisure, car parking, new pedestrian bridge, links and other improvement works, 37,725 m ²	
Total	26,000 21,700 (net)			
Major regeneration projects – outside of Hastings Town Centre				
Site name/location	Gross Area	Potential sectors*	Status	Development Issues
South Queensway Enviro21 Business Park (Marline Fields), Queensway	c.5,600m ²	B, C, D, K, M	Scheme underway, first 4 business units completed 2009/10 (2,355m ²)	
Queensway North, Queensway	4.73ha, about c.9,700m ²	B, C, D, K, M	SeaSpace developing proposals for the site, part of the Enviro21 Innovation Parks scheme	
Land in Whitworth Road, West Ridge	2.31ha, about 8,085m ²	R, C, D, B, I, J, M, O	Allocated in 2004 Local Plan for B1, B2, B8	No current development plans identified. Given adjoining uses may face pressure for retail warehousing, access permitting
Ivyhouse Lane, Northern Extension	5.8ha, about 10,000m ²	C, D, E, I, J, K, M, O	Allocated in 2004 Local Plan for B1, B2, B8	
Total	33,385			

Development opportunities within existing employment areas

Site name/location	Gross Area	Potential sectors*	Status	Development Issues
Site NX2 and NX3, Sydney Little Road, Churchfields	NX2: 0.2ha, about 770m ²	C, D, E, I, J, M, O	1994 permission stands for 773m ² B2 development as five units.	Site slope may affect development configuration and cost
	NX3: 0.2ha about 920m ²		1990 permission for 922m ² B1, B2, B8	
Site SX, Sydney Little Road, Churchfields	1,035ha about 1000m ²	C, D, E, I, J, M, O	Expired permission for 1,000m ² B8 extension to warehousing and storage (Marshall Tufflex owned site)	
Sites PX and QX, Churchfields	1.66ha about 6,900m ²	C, D, E, I, J, M, O	Allocated in 2004 Local Plan for B1, B2, B8 6,961m ²	Sites belong to Marshall Tufflex, held for potential future expansion
Site RX2, Sydney Little Road, Churchfields	0.26ha, about 910m ²	C, D, E, I, J, M, O	Allocated in 2004 Local Plan. Sites on either side have been developed by Tunnelling Accessories but central site left undeveloped	
Plot M, Gresley Road, Castleham	0.12ha, about 1,200m ²	B, I, K	Lapsed outline permission for 1,210m ² B1, B2, B8	
Land at rear of Drury Lane, Ponswood	0.22ha, about 770m ²	N, O	Allocated in 2004 Local Plan for B1, B2, B8	Site has access problems
31 Gresley Road, St Leonards, Castleham	0.2ha, 858m ² net	K	Expired permission for a B2 unit of 1,229m ² gross	
Land East of Burgess Road, Ivyhouse	0.4ha, about 1,400m ²	C, D, E, I, J, K, M, O	Allocated in 2004 Local Plan for B1, B2, B8. Site extends into Rother. Rother Local Plan identifies adjacent land for employment uses.	
Total	14,728			

Source: Hastings Borough Council Planning Policy team

Note: *For definition of potential sectors, see explanations on pages 93, 94 and 95 of the Hastings and Rother Employment Strategy and Land Review (ESLR) document 2008.