Chichester District Council

CHICHESTER EMPLOYMENT LAND REVIEW

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Final Report

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GLOSSARY

ABI (Annual Business Inquiry) - Company employment information produced by the Office of National Statistics.

Allocations - Areas of land identified for development in Local Plans or Local Development Frameworks.

B-Class/B-Space/Business Space – Covers offices, industry and warehousing land use class in the Town and Country Planning (Use Classes) Order 1987.

Brownfield Land - Land previously developed or land that contains/contained a permanent structure and associated infrastructure.

CDC – Chichester District Council.

CIDs - The West Sussex County Council Commercial and Industrial Development Survey. annual monitoring survey on planning permissions and appeal decisions related to relevant uses extracted from planning application records in West Sussex.

Core Strategy - A Development Plan Document that sets out the vision and strategic spatial objectives for development in the local planning authority area as part of the. Local Development Framework.

Development Plan Document (DPD) - spatial planning documents covering specific policy areas within the Local Development Framework.

Economically Active - All persons aged 16 or over who are employed, self-employed, unemployed or on a Government training scheme. They represent the total potential workforce in an area.

Economically Inactive - All persons aged 16 or over who are neither retired, in employment or registered unemployed and have not sought work in the last four weeks and are not available to start work.

Effective Demand - The “willingness to pay”. In the case of the ELR this is the demand from occupiers that are able to pay market rents or prices for when supply is available.

Employment Density - The size of a workspace based on a ratio of floorspace area (sq m) per job.

Employment Land/Sites - Land allocated in Development Plans for business (B1), industrial (B2) and storage / distribution (B8) uses.

Experian/Experian Business Strategy (EBS) - An economic forecasting service. Experian produced the employment and economic forecasts informing the South East Plan.

Floorspace - The area enclosed by the exterior walls of a finished or unfinished building.

Frictional Supply - A level of supply of necessary vacant land or premises in the market to allow for choice and easy movement of occupiers without impacting on business output and/or property market prices beyond their long run state.

Greenfield Land - Land that hat has not previously been built on.

GVA (Gross Value Added) - The value of goods and services produced after discounting the cost of supplies and services which are used up in production.

Index of Multiple Deprivation (IMD) - A composite measure of deprivation based on seven domains relating to income, employment, health and disability, education, skills and training, housing and services, living environment and crime.

Knowledge Based Sectors - The OECD definition for sectors of the economy with a high element of knowledge creation through research, technology and innovation. This covers knowledge based services and high-tech manufacturing.

Latent Demand - Demand in an imperfect market, which is to a large extent hidden and only becomes apparent when suitable supply is provided.

Local Development Documents (LDD) - Local Development Framework documents covering both Development Plan Documents (DPDs) and Supplementary Planning Documents (SPDs).

Local Development Framework (LDF) - A new framework comprising statutory planning documents that local planning authorities are required to prepare. This development framework document will replace the Local Plan to set the spatial planning strategy for the area.

Location Quotients (LQ) - Measures how well-represented a sector is in an area compared to the national economy. It equals the sector’s share of the area’s total employment divided the sector’s share of national employment.

Mixed Use - A scheme or development combining more than one type of use, such as residential, office, industrial, retail, service, community facilities or leisure uses.

Natural Churn - Where old/obsolete stock is replaced by new stock to meet changing business requirements.

ONS - Office for National Statistics

Plot Ratio - The ratio of floorspace within a building to the site area where it sits.

Proposals/Allocations Map – The development plan area covered by the Local Plan or Local Development Framework which specifies policies related to sites and areas with in it.

Regional Spatial Strategy (RSS) – Strategic plan covering broad spatial policies relating to the development and use of land in the region. The Plan is prepared by the regional planning body and approved by the First Secretary of State.

R&D - Research and development.

Resident Self-containment – The proportion of working residents working within the district of their residence.

SMEs – small to medium sized enterprises employing less than 250 employees.

South East England Development Agency (SEEDA) – The Regional Development Agency for the South East Region. There are nine regional development agencies covering the nine English regions.

South East England Regional Assembly (SEERA) – The representative assembly producing the South East Plan, dealing with spatial development in South East region. The Assembly comprises 112 members and a secretariat of planning and transport officers.

Standard Industrial Classification (SIC'03) – Codes for grouping economic sectors into similar activity categories.

Strategic Housing Land Availability Assessment (SHLAA) – A process that local authorities and their partners are required to follow, to identify land availability for housing in their areas over a 15 year period.

Take Up/Transactions - Floorspace let, assigned or sold.

Use Class - Land use activities with common characteristics as defined by the Town and Country Planning (Use Classes) Order 1997.

Vacancy Rates – The available stock of built premises.

VOA – Valuation Office Agency, which is the government agency that sets business rates.

Windfall Sites – Sites that have a non-planned led change of use.

Workforce - The total number of residents aged 16 or over in a given area who are employed, unemployed or on a Government training scheme.

Workplace Self-containment - The proportion of jobs within the district filled by residents of the same district.

WSCC - West Sussex County Council

1 INTRODUCTION

1.1 This employment land review has been carried out by Roger Tym & Partners and Vail Williams. The review was commissioned in August 2008 by Chichester District Council to inform the employment space policies in their forthcoming Local Development Frameworks (LDF).

1.2 This review complies with the Government Guidance Note on Employment Land Reviews[1]. Government policy and guidance indicates that the role of employment land reviews (ELR) is to provide sound evidence to inform local planning authorities in planning for employment land uses. To inform these decisions, ELRs should:

- Audit the supply of land already identified for employment;
- Assess how much land will be required for employment during the plan period, based on market conditions and policy objectives;
- Compare requirement with supply, both quantitatively and qualitatively;
- Consequently make recommendations about:
  - Any further land that should be identified for employment;
  - Any existing or committed employment sites that should be released for other uses, having regard to their realistic prospects of coming forward;
  - Other planning policies relating to employment land as appropriate; and
  - Economic development and regeneration policies that bear on employment land.

1.3 ELRs cover only the B-class and similar land uses[2]. These accommodate more than four in ten jobs in Chichester district and the national economy. Other land uses supporting jobs, such as retail, are planned for in other ways and are not considered in this study.

1.4 Additional to the ELR, the consultants are jointly carrying out the Chichester Strategic Housing Land Availability Assessment (SHLAA). These two strategic studies are being undertaken in tandem in response to recent Government guidance and other best practice recommendations for ensuring that competing land uses are considered together to better inform an appropriate allocation of land uses.

The Study Area

1.5 The employment land review study area covers Chichester district in West Sussex, which is shown in its South East context on Map 1.1. This map also shows district sub-areas, each with differing physical and economic characteristics. We refer to these three sub-areas as:

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[1] CLG (formerly ODPM), *Employment Land Reviews: Guidance Note*, (2004)

[2] Employment space (property and land) in this study refers to the Business Use Classes, B1, B2 and B8 and sui generis uses which occupy similar space. It covers offices, industrial and distribution space. It excludes many activities that do provide employment but operate in other kinds of space, such as retail, leisure, education and health.

- North of Chichester - which is a largely rural area mainly within the South Downs, but covering most of the district's land area;
- Chichester (City) and Tangmere - which are located in the A27 Corridor; and
- South of the A27 - which is a large rural peninsula, stretching from Merston to Selsey and West Wittering.

1.6 The defined sub-area geographies were identified using wards in the previous Arun and Chichester employment land review[3] and, where possible, we have followed these in our findings to inform spatial conclusions and recommendations on employment land policies.

Consultations

1.7 Stakeholder discussions were held with local property agents and developers, local and county council officers and representatives of economic partnerships. This included a workshop specifically for the employment land review where interim findings were discussed by some 30 attendees with practical experience of the market, including local businesses, commercial property agents, property developers and investors, and council/agency representatives.

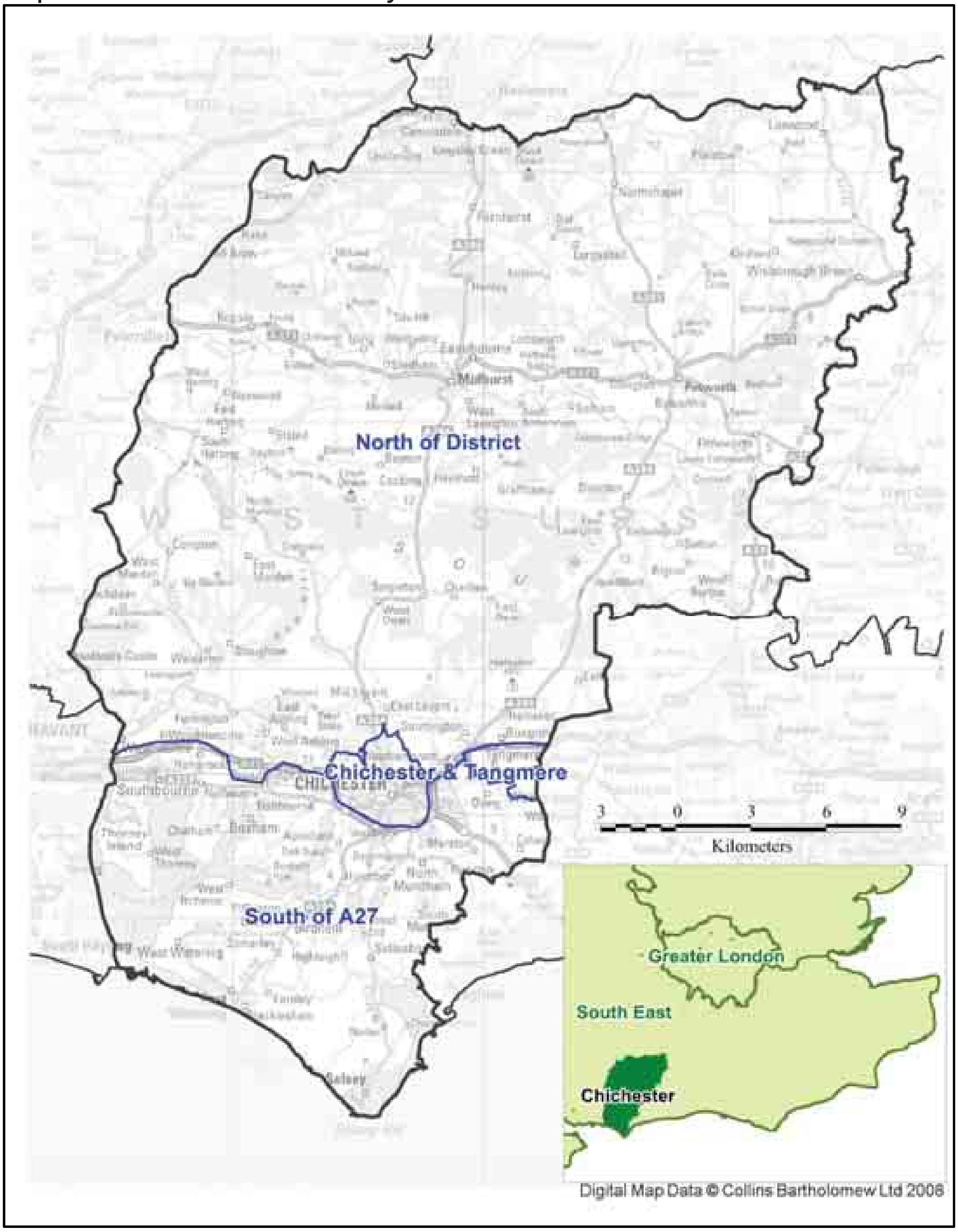
The Report

1.8 Following this introduction:

- Chapter 2 reviews the policy background, showing the wider objectives that the District Council need to consider, and the strategic guidance they should follow, in deciding on their employment land policies;
- Chapters 3 and 4 analyse the present condition of the local economy and property markets, establishing the baseline for future change;
- Chapter 5 then looks forward by quantifying the amount of employment space that should be planned for over the term of the LDF;
- Chapters 6 carries out an audit and assessment of allocated and existing employment sites in qualitative terms; and finally
- Conclusions and recommendations on future employment land allocations and policies are set out in Chapter 7

[3] Atkins (2005), *Assessment of Employment Needs and Land Use Requirements, Appendix 1,* for Arun District Council and Chichester District Council

Map 1.1 The Chichester ELR Study Area



2 POLICY CONTEXT

Introduction

2.1 In this chapter, we summarise:

- National policies and strategic employment land policies;
- Local employment land policies currently in force; and
- Other relevant research, reports and policy initiatives that may have a bearing on future employment land policies within Chichester district.

National Guidance

PPS1: Delivering Sustainable Development

2.2 The Government set out four aims for sustainable development in its 1999 strategy[4], which are:

- Social progress which recognises the needs of everyone;
- Effective protection of the environment;
- The prudent use of natural resources; and
- The maintenance of high and stable levels of economic growth and employment.

2.3 The development plan is the obvious means by which planning authorities can deliver sustainable development. PPS1 sets out the general approach to delivering sustainable development, which planning authorities should adopt when preparing their development plans. The relevant considerations for this study require planning authorities to:

i) Bring forward sufficient land for housing and industrial development, which is of suitable quality and in appropriate locations, to meet the expected needs.
ii) Allocate sites on the basis of their accessibility and sustainable transport needs, and the provision of essential infrastructure, amongst other issues.
iii) Provide improved access to jobs by ensuring that new development is located where everyone can access services on foot, bicycle or public transport rather than having to rely on access by car.
iv) Focus developments that attract a large number of people, including offices, within existing centres to promote their vitality and viability, social inclusion and more sustainable patterns of development.
v) Reduce the need to travel and encourage accessible public transport provision by actively managing urban growth to make full use of opportunities for increasing public transport patronage.
vi) Promote the more efficient use of land through higher density, mixed use development and the reuse of suitably located previously developed land and buildings.

[4] A Better Quality of Life - A Strategy for Sustainable Development for the UK (May 1999)

PPS 1 Climate Change Supplement

2.4 The Climate Change Supplement to PPS1 sets out how planning should contribute to reducing emissions and stabilising climate change, including through selecting land for employment development. When considering sustainable development and employment opportunities in rural areas, local authorities are recommended to accept sites for development even where they are only accessible by private car.

PPS3: Housing

2.5 PPS3 came into force in November 2006 and reflects the latest Government thinking on housing and, in particular, responds in part to the Barker Review of Housing Supply, (March 2004). It has relevance to employment land supply in the form of its proposals for the transfer of employment land to housing as part of its wider thrust to deliver urgently needed housing in a sustainable manner.

2.6 Key proposals for Local Development Documents include the re-use of industrial and commercial sites as part of mixed-use town centre development (paragraph 38), and strategies, targets and trajectories for bringing previously developed land into housing use. It lists ways of implementing these, which include "… considering whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development" (paragraph 43-44) - subject to the outcome of an employment land review.

PPG4: Industrial, Commercial Development & Small Firms

2.7 PPG4 was published in November 1992 and thus is rather out of date. Nevertheless its basic objectives remain relevant in terms of the delivery of sustainable development, requiring planning authorities to:

i) Aim to ensure that there is sufficient potential employment land available which is readily capable of development and well-served by infrastructure;
ii) Ensure that there is a variety of sites available to meet differing needs;
iii) Consider the locational needs of business and the potential implications for transport; and
iv) Seek to bring under-used or vacant land back into beneficial use to aid the regeneration of urban areas.

2.8 In summary, PPG4 takes a positive approach to new business developments so long as they support a reduction in road travel by car and do not create significant environmental harm. It states that development plans should give industrial and commercial developers and local communities greater certainty about the types of development that will or will not be permitted in a given location. Planning authorities should therefore ensure that their development plans contain clear land-use policies for different types of industrial and commercial development and positive policies to provide for the needs of small businesses.

2.9 However, it is felt that PPG4 needs updating to address a number of new issues including managed workspaces or incubator units that require a new approach and more flexibility, and to enable a reformed planning system that will more positively support economic development.

Consultation Paper on a new PPS4: Planning for Sustainable Economic Development

2.10 The consultation draft of the new national Planning Policy Statement 4, Planning for Sustainable Economic Development, was published in December 2007. The Ministerial Foreword states the key objectives of the new guidance:

> *"This draft Planning Policy Statement aims to…provide the tools for regional planning bodies and local planning authorities to plan effectively and proactively for economic growth...As a result of this new policy, regional and local planning bodies will support economic development by ensuring that they understand and take into account what their economies need to remain competitive [and that they are] responsive to the needs of business and factor in the benefits of economic development alongside environmental and social factors.' In other words, 'The Government wants planning policy to support economic growth."*

2.11 Consequently, local planning authorities should plan positively to meet business needs. To achieve this, PPS4 says that local planning authorities should follow five key principles:

- Undertake employment land reviews to assess the supply and demand for employment land, where possible at the same time as housing land assessments, to ensure that competing land uses are considered together;
- Plan to accommodate and support existing economic sectors, new or emerging sectors, clustering and knowledge-based and high-technology sectors;
- Locate key distribution networks and freight-generating developments so as to minimise carbon emissions;
- Aim to locate larger office developments in town centres on edge-of-centre sites, consistent with the sequential approach in PPS 6, except where offices are ancillary to other economic activities located elsewhere;
- Where appropriate, collaborate with other authorities and in some cases plan on a sub-regional basis;

2.12 A key challenge for all planning authorities will be to balance the need to be directive enough for businesses and investors to feel confident about future land uses whilst allowing for the flexibility needed to evolve along with business needs. A flexible planning framework can be delivered by:

- Using criteria-based policies to identify new employment sites and where necessary to safeguard existing employment sites from other uses;
- Wherever possible, avoiding to designate sites for single or restricted use classes;
- Catering for start-up and SME (small to medium enterprise) accommodation as well as larger units and considering how the authority can deliver development, using interventions such as land assembly;

- Avoiding carrying forward existing allocations; if there is no reasonable prospect of a site being used for economic development during the plan period, it should be actively considered for other uses;

2.13 More specifically, it urges local planning authorities to:

- Thoroughly assess the supply of land for economic development through an employment land review;
- For B1a office developments, follow a sequential approach to site selection, giving preference to sites in or on the edge of town centres for larger office development;
- Avoid designating sites for single or restricted use classes wherever possible;
- Set criteria to safeguard land from other uses and identify a range of sites to facilitate a broad range of employment uses, including for mixed-use development;
- Not to retain allocations if there is no realistic prospect of the site being used for economic development;
- In rural areas, support farm diversification schemes for business purposes that help to sustain agricultural enterprise and support small-scale economic development where it provides the most sustainable option in villages that are remote from, and have poor transport links with, local services.

2.14 A summary of the key issues and consultation responses was published in August 2008.

PPS 6 Town Centres

2.15 PPS 6 seeks to promote the vitality and viability of town centres. This relates mainly to Chichester city in Chichester district and covers sites for retail, leisure and office uses. Assessments of local need for office floorspace in town centres should be informed by regional assessments, as well as the capacity of town centres to accommodate additional office development. More specifically, in terms of assessing the need for new office space, PPS6 states that future employment levels should be forecast and suitable broad locations identified in regional spatial strategies.

2.16 PPS 6 also states that weight should be given to the benefits of regeneration and employment in the site selection process. Under “Other Relevant Matters”, PPS6 focuses specifically on economic/employment factors to be considered in the site selection process, highlighting in particular the following elements:

- Physical regeneration;
- Employment - considering net additional employment opportunities, particularly in deprived areas; and
- Economic growth - increased investment resulting from employment land allocations and improvements in productivity.

PPS7 Sustainable Development in Rural Areas

2.17 Given the rural nature of Chichester district, and the growing trend in diversification of farm buildings for non-agricultural employment uses and its expansion, we review government guidance PPS7 which focuses on country towns, villages and the largely undeveloped countryside up to the fringes of larger urban areas.

2.18 PPS7 follows the principles set out in PPS1 in terms of concentrating development in, or next to, towns and villages and near public transport links. In particular, the focus should be on:

- Identifying suitable sites for future economic development, particularly in those rural areas where there is a need for employment creation and economic regeneration;
- Setting out criteria for permitting economic development in different locations, including the future expansion of business premises, to facilitate healthy and diverse economic activity in rural areas.

2.19 In the countryside, the main priorities relevant to the ELR are to:

- Support other country-side based enterprises and activities which contribute to rural economies and/or promote recreation in, and the enjoyment of, the countryside;
- Favour the re-use and replacement of buildings for economic development purposes.

2.20 PPS7 reflects the importance that the Government attaches to effective planning for sustainable farm diversification projects and the re-use of redundant farm buildings. The guidance (PPS7 paragraph 30) states that local planning authorities should be supportive of farm diversification schemes for business purposes that are consistent in their scale with their rural location.

2.21 This should be considered with respect to paragraph 31 in PPS7, which recognises that "…farm diversification should not result in excessive expansion and encroachment of building development into the countryside".

PPS12: Local Development Frameworks

2.22 A number of factors should be taken into account when planning authorities allocate sites for development, and those decisions must be supportable by "sound" evidence. The new PPS12 (creating strong safe and prosperous communities through Local Spatial Planning) published June 2008 notes that for a core strategy and DPDs to be "sound", they should be:

- JUSTIFIED, so that the document is:
  - founded on a robust and credible evidence base; and
  - the most appropriate strategy when considered against the reasonable alternatives.
- EFFECTIVE, so that the document is:
  - deliverable;
  - flexible; and
  - able to be monitored.
- And consistent with NATIONAL POLICY.

Regional Planning Guidance

The Regional Spatial Strategy - The South East Plan (SEP)

2.23 The South East England Regional Assembly (SEERA) submitted the draft South East Plan (2001-26) to the Government in March 2006. The Examination in Public was completed at the end of March 2007, and the Panel's report was published in October 2007. The Secretary of State's proposed changes to the SEP were out for consultation until the 24th October 2008 and the SEP was published in May 2009.

2.24 The SEP's overall vision, adopted from the Regional Sustainability Framework, is:

> *"A socially and economically strong, healthy and just South East that respects the limits of the global environment. Achieving this will require the active involvement of all individuals to deliver a society where everyone, including the most deprived, benefits from and contributes to a better quality of life. At the same time the impact of current high levels of resource use will be reduced and the quality of the environment will be maintained and enhanced."*

2.25 There are two core objectives set out in the SEP relevant to the economy and employment land review:

i) A sustainable balance between planning for economic, environmental and social benefits will be sought, to help improve quality of life for everyone in the South East; and

ii) Economic growth and competitiveness in the region will be sustained, with Gross Value Added (GVA) in the region increased by 3% over the period 2006-16.

Policies

2.26 The SEP offers some guidance on the quantity and quality of employment land that should be set aside.

2.27 *Policy SP1 - Sub-Regions of the South East* identifies the Sussex Coast sub-region as an area requiring a policy focus on regeneration (see below).

2.28 And the SEP's Sustainable Economic Development chapter contains three relevant policies:

i) *Policy RE1: Contributing to the UK's Long Term Competitiveness.* This policy requires that sufficient flexibility be developed in Local Development Documents to respond positively to changes in the global and regional economy, and so ensures the regional economy contributes to the UK's long term competitiveness.

ii) *Policy RE2: Supporting Nationally and Regionally Important Sectors and Clusters.* Policy RE2 seeks that the development of nationally and regionally important sectors and clusters be supported through the collaboration between local authorities, local strategic and economic partnerships, SEEDA and the business community. To achieve this, the policy seeks that the following be promoted through Local Development Documents:

- Land and premises are available to meet the specific requirements of these sectors and clusters; and
- Enhance, develop and promote local assets that can facilitate the development of such sectors and clusters.

iii) *Policy RE3 - Employment and Land Provision* - prompts local authorities to have regard to strategic and local business needs, and also the relevant sub-regional strategy facilitate the flexible supply of land to meet the varying needs of the economic sectors. The policy states that, based on the evidence of employment land reviews and other market intelligence, Local Development Documents should make provision for a range of sites and premises to meet more general needs.

iv) *Policy RE6 - Competitiveness and Addressing Structural Economic Weakness* - aims to maintain and enhance the competitiveness of the most economically successful parts of the region, and address those areas identified as having structural economic weakness; this includes the Sussex Coast sub-region. Local Development Documents will assist such areas in releasing their economic potential by:

- Giving priority to delivering economic development in allocating land;
- Protecting sites for industrial and commercial use where there is a good prospect of employment use; and
- Consider whether any upgrading or improvement of existing sites is required.

Sussex Coast Sub-Region

2.29 The southern part of the Chichester district is in the Sussex Coast sub-region, which stretches from the Hampshire/West Sussex Border to Rye and includes Chichester City and the Manhood Peninsula. The Sussex Coast is identified in the SEP as an area of structural economic weakness, with significant variation in economic and social needs within the sub-region. Accordingly, an improvement of economic performance is one of the challenges identified in the SEP for the Sussex Coast. A number of policies are included to address this challenge, with those relevant to employment land being:

i) *Policy SCT1 - Core Strategy* - aims at reducing intra-regional disparities and bringing the performance of the Sussex Coast sub-region up to the South East average. This will, in part, be addressed through a sustainable urban extension in Chichester, at the City or, if this is not a viable option, then at some other appropriate location in the district.

ii) *Policy SCT2 - Enabling Economic Regeneration* includes improving transport links east-west and north-south.

iii) *Policy SCT3: Management of Existing Employment Sites and Premises.* This policy seeks that sufficient appropriate sites be delivered for business and other uses. The policy has four main focus points:

- The development of delivery mechanisms for existing allocated business parks, other important sites that have remained undeveloped and strategic

sites with economic development potential (none are identified in Chichester district);
- Being prepared to identify and bring forward mixed use sites on existing or allocated sites;
- Seek to improve existing industrial estates; and
- Protect existing and allocated employment land in rural areas, where they are demonstrated, in employment land reviews, to be essential for small business.

iv) *Policy SCT4 - Employment Priority in New Land Allocations* states that priority should be given to strategically accessible sites when allocating employment land, while at the same time providing sufficient space to:
- Retain existing firms and enable their expansion or relocation (within the sub-region);
- Create attractive opportunities for inward investment and new uses; and
- At least match anticipated increases in the resident workforce.

It also states that new employment allocations should be included as appropriate within sustainable urban extensions in several districts, including Chichester.

v) *Policy SCT5 - Housing Distribution* identifies a housing target of 7,100 additional dwellings in Chichester (part of), which is an increase of 1,000 on the Draft SEP target. This should be considered within Chichester's SHLAA.

The South East Regional Economic Strategy

2.30 The third Regional Economic Strategy (RES) for the South East sets out a 10-year framework for economic development for the period 2006-2016. It recognises the challenges facing the region are global competitiveness, the need to achieve smart growth through raising productivity and adopting sustainable development.

2.31 The RES strategy is to address each challenge by adopting three objectives to:

- Assist firms to become globally competitive, for example by increasing R&D (research and development) expenditure, encouraging collaboration and the development of new and improved products and securing improved infrastructure;
- Encourage smart growth, through means of increasing the regions stock of businesses, improving skills levels, improving travel choice and public transport, ensuring sufficient and affordable housing and employment space, including mixed use developments; and
- Support the quality of life in the South East by ensuring sustainable prosperity and the protection of the natural environment and resources.

2.32 One of the actions to achieve smart growth is to improve workforce productivity and increase economic activity from 82% to 85% by bringing 110,000 net additional South East working age residents into the labour market by 2016; this is a step towards bringing up to 250,000 residents into the labour market by 2026.

2.33 Three broad "economic contours" are identified within the region: the Inner South East, the Rural South East and the Coastal South East. Chichester district straddles the last two contours. The challenges in the rural areas are identified as managing the diversification of agriculture, maintaining rural jobs, addressing rural deprivation and harnessing the potential of ICT for rural businesses. In the coastal area the challenge is to address the issues such as skills shortage and regeneration and harness the potential for innovation and leisure based growth.

2.34 As well as recognising the regional hubs defined in the SEP, the RES identifies eight “Diamonds” which have major concentrations of potential for investment and growth. Chichester district falls outside any of the Diamonds, the nearest being Brighton and Hove, Southampton/Portsmouth and Gatwick.

Local Development Plan

The Chichester District Local Plan

2.35 The District Local Plan was adopted in April 1999 and was prepared in conformity with the West Sussex Structure Plan (1993). Together, the Local Plan and the Structure Plan formed the Development Plan for Chichester district. But the Structure Plan has been replaced with the publication of the South East Plan, and when the new Local Development Framework (LDF) for Chichester is approved, this will replace the Chichester Local Plan. A number of Local Plan policies have been saved prior to the adoption of the LDF.

2.36 The policies for business, industry and warehousing development provide a framework of control to ensure that in better times employment does not increase beyond the needs of the local workforce.

2.37 The northern area of the district is largely rural. Policy B5 ensures that proposals for extensions to existing buildings for business, industry or warehousing in the rural area will be permitted provided that they are only of modest scale in relation to the size of the existing buildings.

2.38 Policy B6, Redevelopment of Authorised Uses states that the redevelopment of existing developed sites in the rural area with established uses or with planning permission will be permitted providing that there is no expansion of the uses in site area or floorspace and it does not involve a change of use.

2.39 Policy B8 safeguards business floorspace and prevents any change of use unless there is an existing provision which meets the requirements for the district.

Horticultural Development Areas (HDAs)

2.40 The adopted Plan considers the horticultural and glasshouse industries to be important to Chichester district’s economy and for job creation. To promote this sector while protecting the environment and amenities, the Plan has a policy (Policy RE11A) that defines certain areas as ‘Areas for Horticultural Development’, where “applications for commercial horticulture development will be permitted provided that there will be no adverse impacts upon the surrounding environment.”

2.41 In other areas, there will be a considerable constraint on such development and proposals will be considered under policy RE11A and Policy RE11B which will only permit glasshouses and packhouses where they replace existing facilities or are well screened. However in general, favourable consideration will be given to glasshouse replacements and extensions throughout the Plan area, provided that they are not intrusive in the landscape in areas not in the AONBs. The Plan also notes that "*sites of disused glasshouses should not be considered as ripe for redevelopment for some type of urban use*". We would assume therefore that no B-class employment uses sites should be identified in these areas.

Other Relevant Strategies

Sustainable Community Strategy, 2009-2026

2.42 *Chichester District - A Very Special Place* is the name of the Sustainable Community Strategy. The strategy sets out the long term vision for the area which is shared by the Local Strategic Partnership partners and has been subject to public consultation. The strategy is for the period 2009 to 2026.

2.43 The overall vision is that Chichester district will be a place of sustainable, vibrant and thriving communities. The challenge is recognised to be in identifying the isolated pockets of deprivation and to address the issues associated with rural deprivation, such as access to services and transport and low income.

2.44 The strategy notes that Chichester district has very low levels of unemployment and has wage levels lower than the South East average, but close to the West Sussex average. There are issues around low pay for part time workers. The intention is for the district to have employment opportunities and a choice of high quality local employment for those looking for work. There is a strong focus on the development of innovation and entrepreneurship to provide well-paid and secure opportunities. In achieving this, inward movement and growth of appropriate businesses are to be encouraged.

2.45 To achieve these ambitions the strategy requires there to be enough suitable and affordable commercial properties for new and existing businesses; and promoting key business support through agencies to ensure businesses have the right help and information.

2.46 The strategy sets out a number of core objectives, of which the following are relevant to this employment land review:

- Ensure that all communities have a reliable infrastructure (good transport links, broadband connectivity, etc);
- Reduce the carbon and ecological footprints of the district;
- Improve the well-being of the community by promoting local distinctiveness; and
- Develop a wider, more diverse economy to break out of the low skills, low wage loop and encourage the growth of social enterprise that supports the local communities.

Economic Development

2.47 The Economy Section of the Sustainable Community Strategy aims to tackle the issues identified above. To tackle the problems above and to achieve prosperity within

Chichester district, four key areas for developing the economy are identified, which are to:

- Create a strong local economy where businesses can thrive and grow. The focus is on improving advice and support facilities available to local businesses, and encouraging creativity and diversification.
- Encourage employees with good skills relevant to local employers, prepared for national and international competition and with well-paid and secure jobs. The focus is on aligning of employer demands with skills taught at local schools, colleges and universities.
- Achieve vibrant and sustainable City and Market Towns, with a good range of business and retail types. By supporting its role with a sub regional retail centre and as an attractive destination in its own right.
- Develop a reputation as a centre for creative and innovative industries building on the district's rich arts and heritage base. The objective is to develop a niche market for the district which will add to its sense of place. The strategy is therefore seeking to forge links between the arts and heritage sites and the local colleges through mediums such as the South Coast Design Forum[5]. A number of the colleges are noted to be specialising in arts and creative studies. It also looks to achieve this by encouraging expert designers in the district to develop employment opportunities for creative and innovative businesses. Through these specialisms, opportunities in generating more high-tech manufacturing and research are being sought.

2.48 The list of objectives and priorities is not exhaustive, and other measures to advance the economy of the district are considered. Ultimately, the aim is to ensure sustained long-term economic growth and well-being for the district economy and its residents.

Conclusions

2.49 The thrust of Government employment land policy is to ensure that adequate supplies of good quality and easily accessible land are available to meet the needs of the market. However pressure on scarce land resources means that surplus employment land should not be retained and PPS3 requires planning authorities to review their employment sites to see how far they are still suitable and needed for employment over the life of the Plan. Any employment site whose retention is not supported by an up-to-date review may be considered available for re-allocation to housing.

2.50 Draft PPS4 emphasises the importance of supporting economic development. It expects planning bodies to develop a robust evidence base to underpin their decisions and to ensure that they have a flexible and responsive approach to providing for the needs of business, not simply by identifying a supply of land but by making better use of market information to inform their decision making.

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[5] The South Coast Design Forum was formed in Chichester in 2007 to promote design and innovation activity, in its widest sense, in Chichester and along the coast from Portsmouth to Brighton.

2.51 The SEP seeks to build a prosperous region with a high quality of life for residents and a healthy environment. The SEP emphasises the importance of contribution of the region to the UK's long term competitiveness. It encourages Local Development Documents to be flexible and respond positively to the changes in the global economy and the economic needs of the region.

2.52 The southern part of the Chichester district falls within the Sussex Coast sub-region and the north of the district is part of a "areas outside of sub-regions" area. The planning objectives for each area differ. The policy imperative gives more support for employment growth in the Sussex Coast area than elsewhere in West Sussex.

2.53 The Local Plan was adopted ten years ago and much of the research and evidence informing the Plan is even older. Consequently, it is becoming increasingly out of date with current national policy guidance. It will shortly be replaced with a new Local Development Framework (LDF), which this study will help inform. In the meantime the Local Plan sets the current employment land allocations and policies for the district,

2.54 The Chichester District Community Strategy is seeking to develop a strong and thriving economy, improving employment opportunities for all skills and diversifying the economy. It wants to support local businesses and the residents specifically in the more rural areas where employment is relatively low paid. In addition, the district economic strategy stresses the need to diversify the economy and establish the district as a leading place for innovation and entrepreneurship. Within this strategy there is an economic plan for encouraging innovation and enterprise, particularly in art and design strongly supported by local colleges, and to link this in with high-tech manufacturing and innovation. The availability of suitable premises is considered key to meeting existing local policy objectives.

3 THE LOCAL ECONOMY

Introduction

3.1 This chapter aims to provide an insight into Chichester district's economy, profiling the economy under three main headings:

- The workplace economy, comprising the businesses and jobs located in the study areas;
- The residents and the workforce that live in the study area; and
- The labour market, which brings together the labour demand generated by the workplace economy with the labour supply provided by the resident population.

3.2 The analysis is shaped by four broad questions:

- What are the growth prospects for the District's workplace economy?
- What is the character of the economy and what does it imply about the competitiveness of the district in terms of productivity & value added, and demand for employment space?
- How well off are working residents, and how does their economic well-being relate to the performance of the local economy?
- How sustainable is the district in terms of residents' journeys to work.

3.3 In assessing the current performance of the district's economy, we have benchmarked Chichester district with neighbouring districts, namely, Arun, Horsham, East Hampshire and Waverley as well as the wider county (West Sussex), regional (South East) and national (England) averages.

3.4 Data allowing, we also look at the economic characteristics and performance of the three Chichester district sub-areas, i.e. North, South and the A27 Corridor of Chichester & Tangmere.

Workplace Economy

3.5 The businesses and jobs located in a particular district are defined as the workplace economy of that district. Analysing the workplace economy allows us to determine the growth potential exhibited by Chichester district in terms of employment generation and competitiveness (productivity). Measurements such as industrial structure, earnings, knowledge based jobs and entrepreneurship provide an insight into the competitiveness of an economy.

Economic Structure

3.6 According to the latest (2006) figures on employment (see Table 3.1), there were some 50,400 jobs in Chichester district. More than half (27,000) are located in Chichester & Tangmere, 13,500 jobs are in the north of the district, and 10,000 jobs are in the south.

Table 3.1 Total Employment in Chichester, 2006

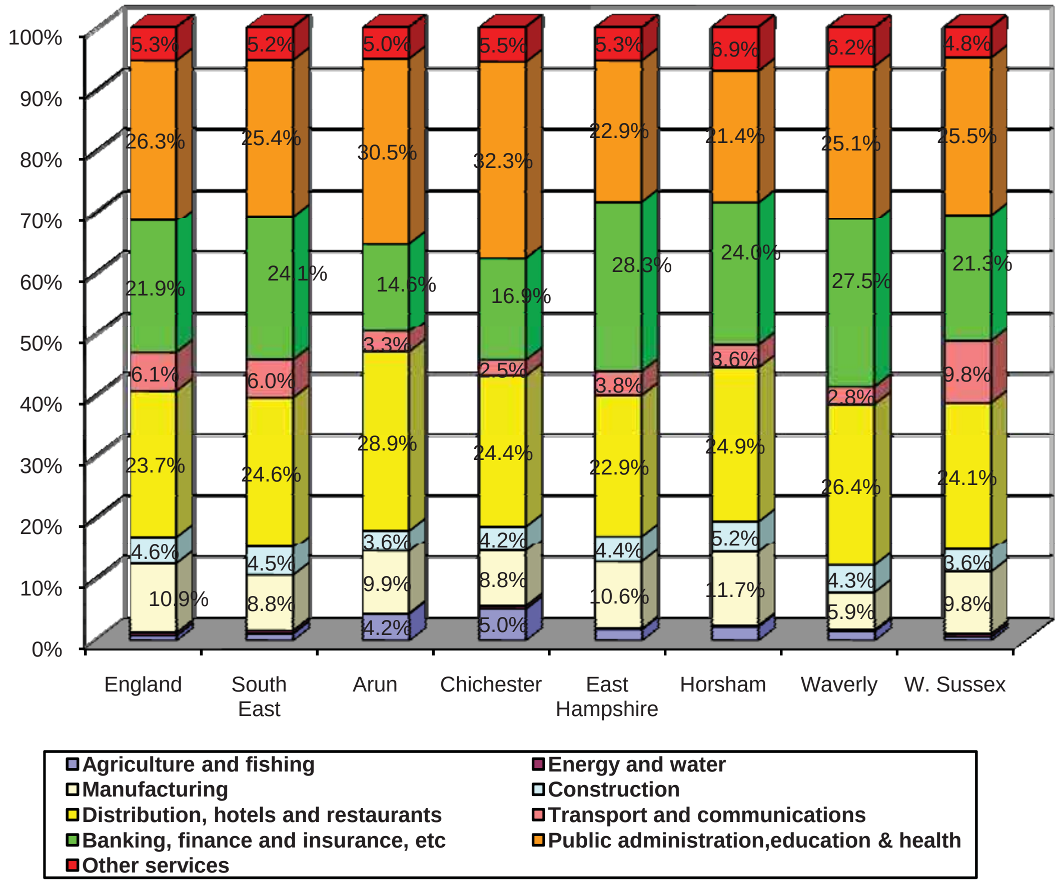
	No.	District share
North of District	13,500	27%
South of A27	10,200	20%
Chichester & Tangmere	26,700	53%
Chichester district	50,400	100%

Source: Annual Business Survey (ABI)

3.7 As Figure 3.1 shows, Chichester district generally has a similar economic structure to neighbouring areas, but variations do exist. Firstly, Chichester district has a relatively lower proportion of jobs in the Banking, Finance and Insurance sectors while a relatively higher share of public service jobs, i.e. Public Administration, Health and Education compared to all benchmark areas except Arun. This is unsurprising given the role of Chichester city as the prime location for the both the district and county councils, significant Further (FE) and Higher Education (HE) provision and large hospitals. While these jobs dominate, only a small share (largely public administration) is likely to be accommodated in B-class space.

3.8 Given its rural nature, agricultural jobs represent 5% of all the jobs in Chichester district - higher than in the benchmark areas. Horticulture, which is a dominant sub-sector of agriculture, has been a significant local activity since the early part of the last century. With changes in consumer preferences, the sector has evolved into providing fresh and packaged local produce to national supermarkets. This sector has afforded protectionist planning policies in the district (see Chapter 2), with the designation of Horticultural Development Areas (HDAs). Appendix 1 singles out this sector for specific attention.

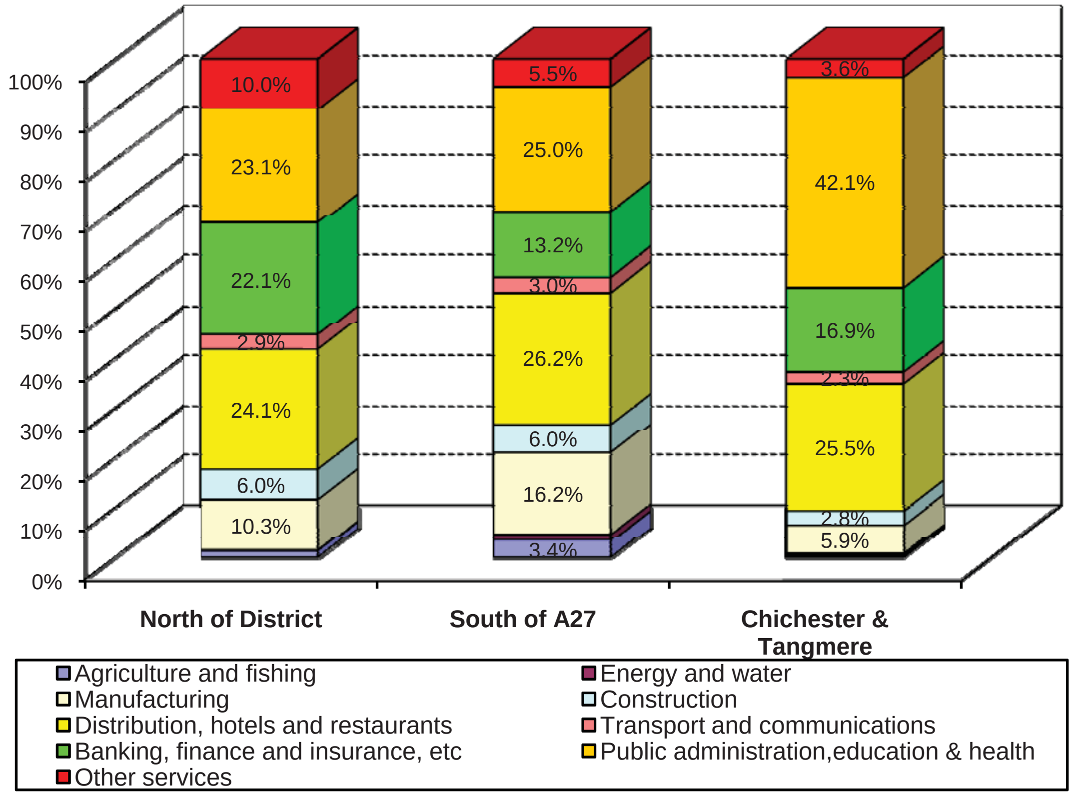
Figure 3.1 Employment Structure, 2006



Source: Annual Business Inquiry

3.9 Figure 3.2 shows the employment structure of the three Chichester district sub-areas. The North and South are similar, but Chichester & Tangmere has a higher share of employment in Public Administration, Education, and Health sectors. The North of the district tends to have a higher proportion of jobs in Banking, Finance and Insurance etc. while a relatively higher share of employment in manufacturing is found in the South compared to the other two sub-areas.

Figure 3.2 Employment Structure in Chichester District's Sub-areas, 2006



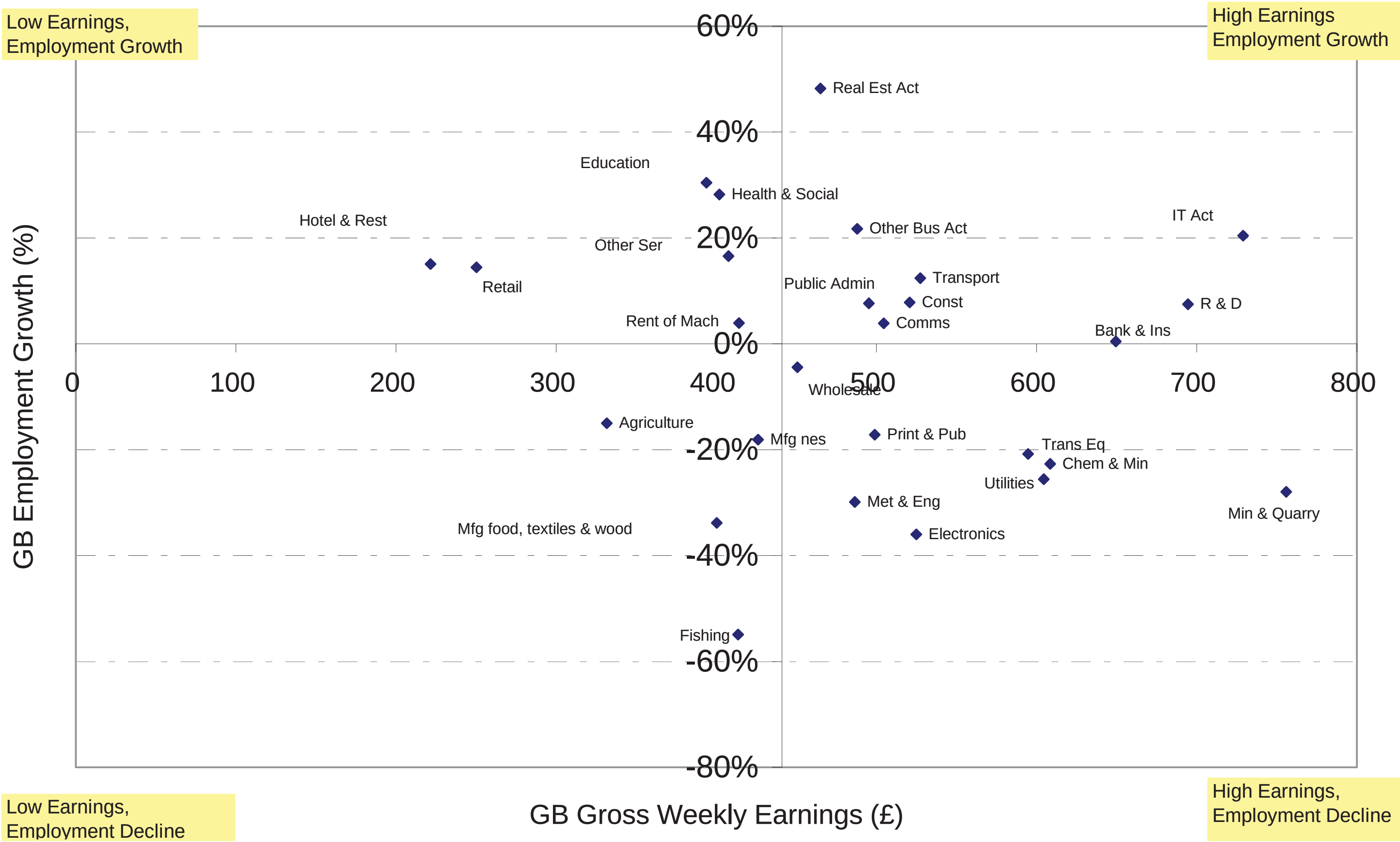
Source: Annual Business Inquiry

Growing and High-Value Sectors

3.10 We identify how far the economic structure of Chichester district's economy is likely to be conducive to growth by reviewing its representation of higher-value growth sectors in the national economy. We start with Figure 3.3 which plots national gross weekly earnings for each economic sector against its recent national growth rate (1998-2005[6]). This analysis uses a finer-grained classification of employment than shown in Figure 3.1; the full definitions of these sectors are listed below Figure 3.3.

[6] The Annual Business Inquiry (ABI) is a key information source used in this section and we use the latest year (2006) data for the current profile. However, due to changes in data recording in 2006, for past changes over time we use 1998 to 2005 data to avoid discontinuities and to provide a consistent series.

Figure 3.3 Earnings and Employment Growth, Great Britain, 1998-2005



Source: RTP; ABI; ASHE

Abbreviation used in Figure 3.3	SIC 2003 categories
Ag	01: Agriculture, hunting and related service activities 02: Forestry, logging and related service activities
Fishing	05: Fishing, operation of fish hatcheries & fish farms; service activities incidental to fishing
Min & Quarry	10: Mining of coal and lignite; extraction of peat 11: Extraction of crude petroleum and natural gas; service activities incidental to oil and gas extraction excluding surveying 12: Mining of uranium and thorium ores 13: Mining of metal ores 14: Other mining and quarry
Mfg Food, Textiles & Wood	15: Manufacturing of food and beverages 16: Manufacture of tobacco products 17: Manufacture of textiles 18: Manufacture of wearing apparel; dressing and dyeing of fur 19: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear 20: Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
Print & Pub	21: Manufacture of pulp, paper and paper products 22: Publishing, printing and reproduction of recorded media
Mfg Chem & Min	23: Manufacture of coke, refined petroleum products and nuclear fuel 24: Manufacture of chemicals and chemical products 25: Manufacture of rubber and plastic products 26: Manufacture of other non-metallic mineral products
Mfg Metals & Eng	27: Manufacture basic metals 28: Manufacture of fabricated metal products, except machinery and equipment 29: Manufacture of machinery and equipment not elsewhere classified
Electronics	30: Manufacture of office machinery and computers 31: Manufacture of electrical machinery and apparatus not elsewhere classified 32: Manufacture of radio, television and communication equipment and apparatus 33: Manufacture of medical, precision and optical instruments, watches and clocks
Mfg Transp Equip	34: Manufacture of motor vehicles, trailers and semi-trailers 35: Manufacture of transport equipment
Mfg nes	36: Manufacture of furniture; manufacturing not elsewhere classified 37: Recycling
Utilities	40: Electricity, gas, steam and hot water supply 41: Collection, purification and distribution of water
Construction	45: Construction
Wholesale	50: Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel 51: Wholesale trade and commission trade, except of motor vehicles and motorcycles
Retail	52: Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
Hot & Rest	55: Hotels and restaurants
Transport	60: Land transport; transport via pipelines 61: Water transport 62: Air transport 63: Supporting and auxiliary transport activities; activities of travel agencies
Communication	64: Post and telecommunications
Bank & Ins	65: Financial intermediation, except insurance and pension funding 66: Insurance and pension funding, except compulsory social security 67: Activities auxiliary to financial intermediation
Real Est Act	70: Real estate activities
Rent of Mach	71: Renting of machinery and equipment without operator and of personal and household goods
IT Act	72: Computer and related activites
R & D	73: Research and development
Other business activities	74: Other business activities
Public Admin	75: Public administration and defence; compulsory social security
Education	80: Education
Health and Social Work	85: Health and social work
Other Community, social and personal act	90: Sewage and refuse disposal, sanitation and similar activities 91: Activities of membership organisations not elsewhere classified 92: Recreational, cultural and sporting activities 93: Other service activities 95: Private households as employers of domestic staff 99: Extra-territorial organisation and bodies

3.11 In Figure 3.3, the sectors above the horizontal axis generated employment gains between 1998 and 2005. The higher up the relevant point, the faster the growth has been over the seven-year period; the opposite is true for sectors below the horizontal line. Sectors to the right of the vertical line provide more than the national average in employment earnings, with the reverse for sectors to the left. These growing sectors can be subdivided into two groups:

- The north-east quadrant of the chart shows sectors that are of high-value as well as high-growth. The further to the right the point is located the higher the earnings. The quadrant is dominated by office-related activities such as Computing and Related Services, Research & Development, Other Business Activities, Real Estate, Public Administration and Banking & Insurance. There are also some industrial and warehousing related activities such as Construction and Transport & Communications.
- In the north-west quadrant are sectors which have been growing, but produce low earnings. Most of them are consumer and public services like Retail, Education, and Health, which serve, and are dependent on, the local population.
- Below the horizontal axis are sectors that have lost jobs nationally. As expected most of these sectors are Manufacturing, and are mostly clustered in the south-east quadrant showing that, although losing jobs, these industrial activities are high-value sectors.
- The south west quadrant contains sectors that are both declining and low-value. These sectors comprise Agriculture, Fishing and two light manufacturing sectors: Food, Textiles & Wood, and Manufacturing nes[7].

3.12 An important finding from this table is that high value and growth opportunities are not the same. Some of the fastest-growing sectors in the national economy are consumer and public services, which also produce some of the lowest wages. If an area is aiming for fast employment growth, it may be well advised to encourage these activities, but may have to accept that many of the new jobs are relatively low-paid.

3.13 Policy should particularly encourage those sectors in the north-east quadrant of Figure 3.3 because they generate both new jobs and higher earnings. Table 3.2 uses location quotients (LQs) to show how well-represented these sectors (with more than 200 jobs) are in Chichester district.[8]

[7] nes = not elsewhere classified.

[8] If the LQ is above one, the sector is over-represented in the area; if it is lower than 1, the sector is under-represented in the area.

Table 3.2 Chichester District Employment Location Quotients, 2005

NW Quadrant	No of Jobs	LQ
Retail	6,400	1.1
Hotels and Restaurants	4,900	1.3
Education	5,500	1.1
Health and Social Work	7,700	1.2
Other Community, social & personal	2,800	1.0

NE Quadrant	No of Jobs	LQ
Construction	2,100	0.8
Transport	1,000	0.5
Communication	400	0.4
Banking and Insurance	1,000	0.5
Real estate activities	1,400	1.6
Computer and related activities	600	0.6
Other business activities	4,200	0.6
Public Admin	5,100	1.7

SW Quadrant	No of Jobs	LQ
Agriculture	2,600	5.7
Mfg Food, Textiles & Wood	1,000	0.9
Mfg not elsewhere classified	300	0.7

SE Quadrant	No of Jobs	LQ
Mining and Quarrying	200	1.6
Printing & Publishing	900	1.2
Mfg Chemicals & Minerals	400	0.4
Mfg Metals & Engineering	500	0.4
Mfg Electrical & Optical Prod	400	0.6
Mfg of Transp Equip	700	1.2
Wholesale	2,900	0.9

Source: Annual Business Inquiry

3.14 In general, the high-value growing sectors are poorly represented in Chichester district. Of the nine sectors in the north-east quadrant of the chart, only two (Real Estate Activities and Public Administration) have an LQ greater than 1, and are the second and third most well represented sector.

3.15 Agricultural, with 2,600 jobs, is also the most well represented but has low-value earnings and nationally is in decline.

3.16 Hotels and Restaurants, together with Health and Social work, are also highly represented in Chichester district. However, these sectors, although growing, reveal low-value earnings.

3.17 Table 3.3 shows the recent change in employment numbers for broad sector. Manufacturing in Chichester has been declining in line with the benchmarks. Agriculture has been declining more slowly compared to the regional and national average, probably because of the strong horticultural sector.

3.18 On the other hand, although there has been growth in Public Administration and Transport, Chichester district reveals an opposite trend.

3.19 Table 3.4 shows the employment change by sector across the three sub-areas. This covers the very recent period only, 2003-2006, due to changes in ward definitions used in defining the sub-areas. Nevertheless, the figures below provide an indication of growth and decline of employment sectors within the district sub-areas.

3.20 Banking, finance and insurance have been gaining employment over time across the three sub-areas, while agricultural employment has been on a slight decline. No similar pattern of decline or rise is observed in other sectors sub-areas. For instance, there is a negative change in employment in Manufacturing in the North and Chichester & Tangmere sub-areas while a positive change exists in the South. More inconsistencies exist in other sectors re-emphasising the fact that the local context in Chichester district's sub-areas is varied.

3.21 The large changes in the Energy and Water sector is distorted because of lower absolute job numbers in the district, which becomes more pronounced at the sub-area level.

Table 3.3 Employment Change by Sector, 1998-2006

	England	South East	Chichester
Agriculture and fishing	-21%	-15%	-6%
Energy and water	-24%	-21%	158%
Manufacturing	-29%	-27%	-21%
Construction	15%	13%	-8%
Distribution, hotels and restaurants	4%	2%	5%
Transport and communications	9%	2%	-17%
Banking, finance and insurance, etc	22%	22%	51%
Public administration,education & health	23%	18%	-11%
Other services	22%	22%	22%
Total	8%	7%	1%

Source: Annual Business Inquiry

Table 3.4 Chichester's Sub-area Employment Change by Sector, 2003-2006

	North of District	**South of A27**	**Chichester & Tangmere**
Agriculture and fishing	-13%	-4%	-1%
Energy and water	-55%	85%	127%
Manufacturing	-13%	31%	-3%
Construction	0%	9%	-24%
Distribution, hotels and restaurants	16%	-3%	-3%
Transport and communications	-13%	32%	4%
Banking, finance and insurance, etc	51%	32%	22%
Public administration,education & health	-4%	17%	-2%
Other services	4%	9%	-17%
Total	**8%**	**14%**	**0%**

Source: Annual Business Inquiry

Knowledge Based Sectors (KBS) Jobs

3.22 Employment in knowledge-based sectors is recognised as a key driver of productivity and competitiveness. The Government White Paper, Our Competitive Future: Building the Knowledge Economy (DTI, 1999), states:

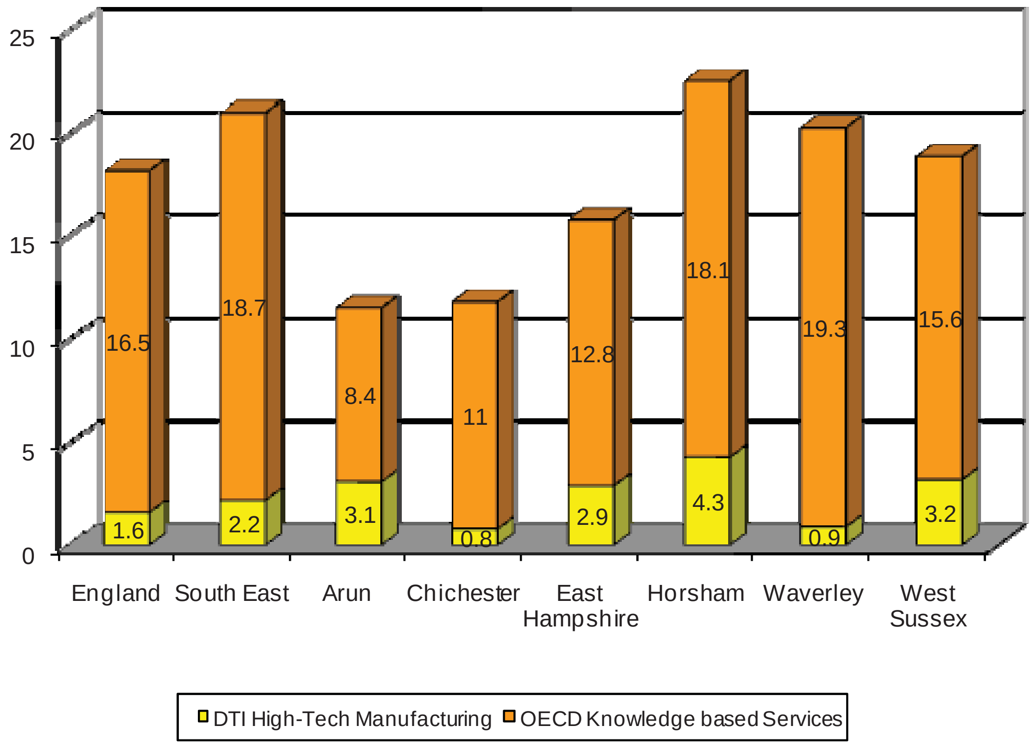
> *"In a knowledge-driven economy….the generation and exploitation of knowledge has come to play the predominant part in the creation of wealth. Companies in countries with higher labour costs, such as the UK, therefore have to innovate and adapt continuously to retain their competitive edge."*

3.23 The knowledge industries tend to have high and fast-growing productivity; and also contribute to higher productivity in the industries they serve by spreading technical progress and efficient business methods. Consequently, the size of these industries may be an indicator of future as well as current competitiveness. But it is not necessarily an indicator of employment growth: rising productivity may translate into fewer jobs.

3.24 Figure 3.4 depicts the proportion of jobs found in the knowledge-based sectors (KBS) using the OECD definition, which cover knowledge based services and high-tech manufacturing. Knowledge based services are mainly sub-sectors of the Financial and Business services (FBS) categories, i.e. financial intermediation, computing and related activities, R&D. And the Department for Trade & Industry (now the department for Business Enterprise and Regulatory Reform) high tech manufacturing definition, which aggregates manufacturing sub-sectors where sustained innovation is a characteristic, includes chemicals, scientific instruments, manufacture of aircraft, electrical equipment, and office machinery and computers.

3.25 Chichester district has the lowest proportion of employment in high-tech manufacturing (0.8%) and the second lowest proportion (11%) of employment in KBS after Arun (8.4%) compared to other benchmark areas. Being in the South East region, which has a relatively higher proportion of jobs in the knowledge based sector than anywhere else in the UK, Chichester district is clearly lagging in this sector.

Figure 3.4 Knowledge Based Sectors, 2006



Source: Annual Business Inquiry

Business Space Occupiers

3.26 In this study we focus on jobs in office, warehousing and industrial accommodation, jointly referred to as B-space jobs. We identify these jobs using specific sectors from the Standard Industrial Classification (SIC) 2003, shown in Appendix 3. Industrial jobs comprise manufacturing industries and parts of the construction industry, motor repairs/ maintenance and sewage and refuse disposal. Warehousing is occupied by a variety of transport and distribution activities which are widely spread across the Standard Industrial Classification. For offices we use the CLG (formerly ODPM) definition (shown in Appendix 3) but include public administration and some temporary workers (within the labour recruitment sector).[9]

3.27 Business space (B-space) employment accounts for a total of 36% of all jobs in Chichester district. Table 3.5 shows this to be lower than the South East (41%) and national (42%) averages. Within types of B-space, most representation (21%) are found in offices, followed by industrial (10%) and warehousing (5%). This trend is similar in line with the South East and England averages.

[9] The correspondence between sectors and types of space is not perfect and hence our definitions of office and industrial/warehousing jobs are approximations. However, they are the best approximations, developed through a series of employment space studies.

Table 3.5 Business Space Employment, 2006

	Chichester		South East	England
Industry	No.	% of all Jobs	% of all Jobs	
Industrial	5,300	10%	11%	13%
Office	10,900	21%	22%	21%
Warehousing	2,400	5%	8%	7%
B-Space	**18,700**	**36%**	**41%**	**42%**
Non B-Space	33,700	64%	59%	58%

Source: Annual Business Inquiry

3.28 Table 3.6 shows the share of B-Space employment in Chichester district sub-areas. The North (40.5%) and South (39.3%) sub-areas have higher representation of B-Space, largely because of higher shares in industrial and warehousing employment. But Chichester & Tangmere have more B-space jobs and a higher share of office jobs.

Table 3.6 Business Space Employment in Chichester's Sub-areas, 2006

	North of District	% of all jobs	South of A27	% of all jobs	Chichester & Tangmere
Industrial	1,995	15%	1,974	19%	1,407
Office	2,697	20%	1,390	14%	6,770
Warehousing	773	6%	639	6%	1,006
B-Space	5,465	41%	4,003	39%	9,183
Non B-Space	8,023	60%	6,194	61%	17,564
Total Jobs	**13,488**	**100.0%**	**10,197**	**100.0%**	**26,747**

Source: Annual Business Inquiry

Size of Establishments

3.29 According to ABI (Annual Business Inquiry) records, there are over 6,500 business units[10] in Chichester district (see Table 3.7). Chichester district, like the benchmarks, is dominated by smaller-sized businesses. Approximately 86% employ between 1-10 employees, while 11% have between 11-49 staff. Together, they represent almost 97% of the establishments in Chichester district.

[10] Units are not the same as firms. A company may have several branches and offices in a town, each of which would be counted as a separate unit, even though they are the same firm. A single work place may also be counted as two data units where there are two distinct business activities at the same site.

Table 3.7 Employment Units by Size, 2006

Employee no.s	1-10	11-49	50-199	200+
England	84.6%	11.9%	2.8%	0.7%
South East	86.1%	10.8%	2.5%	0.5%
West Sussex	85.8%	11.1%	2.5%	0.6%
Arun	86.8%	10.7%	2.2%	0.3%
Chichester	**86.4%**	**11.3%**	**1.9%**	**0.4%**
East Hampshire	89.3%	8.8%	1.6%	0.3%
Horsham	88.2%	9.4%	2.0%	0.4%
Waverley	89.1%	8.7%	2.0%	0.2%

Source: Annual Business Inquiry

3.30 Less than half a percent of establishments in the district employ more than 200 employees. This is in line with the benchmarks, although the biggest employers in the district tend to operate in the public rather than the private sector.

3.31 Medium sized firms (employing 50-199) are underrepresented in Chichester district, and this may reflect a lack of expansion opportunities, particularly in the North and South sub-areas of the district (see Table 3.8). Chichester & Tangmere does have a larger proportion (18%) of medium sized firms.

Table 3.8 Employment Units by Size in Chichester District Sub-areas, 2006

Employees	North of District	South of A27	Chichester & Tangmere
1-10	90.5%	89.8%	77.0%
11-49	8.4%	8.8%	18.2%
50-199	1.0%	1.2%	3.7%
200	0.2%	0.2%	1.1%

Source: Annual Business Inquiry

Entrepreneurship

3.32 In comparison to the benchmark areas, Chichester district had a similar proportion of new businesses registering and existing businesses de-registering for VAT, which is shown in Table 3.9. And the (1-year and 3-year) survival rates of VAT registered businesses were similar to those in neighbouring districts, suggesting no unusual entrepreneurial pattern.

Table 3.9 Business Stocks and Survival Rates, 2002

	Arun	Chichester	East Hants	Horsham	Waverley
Registered					
No. of Businesses	420	430	495	480	540
Percentage	10%	8%	10%	9%	9%
De-registered					
No. of Businesses	425	415	390	425	445
Percentage	10%	8%	8%	8%	8%
Stocks at year end	4,285	5,215	5,010	5,580	5,835
1 Year Survival Rate	90%	95%	94%	94%	94%
3 Year Survival Rate	68%	79%	77%	72%	75%

Source: BERR

3.33 However, Table 3.10 reveals Chichester to have a relatively high level of self-employed resident workers at 19%, which is nearly one in five employed residents. This is notably higher than in neighbouring districts, the region (14%) and nationally (13%).

3.34 This is likely to reflect its rural employment and tourism characteristics, which attract self-employment. This would also suggest a high level of entrepreneurial activity to exist among resident workers.

Table 3.10 Self Employment by Area, 2007

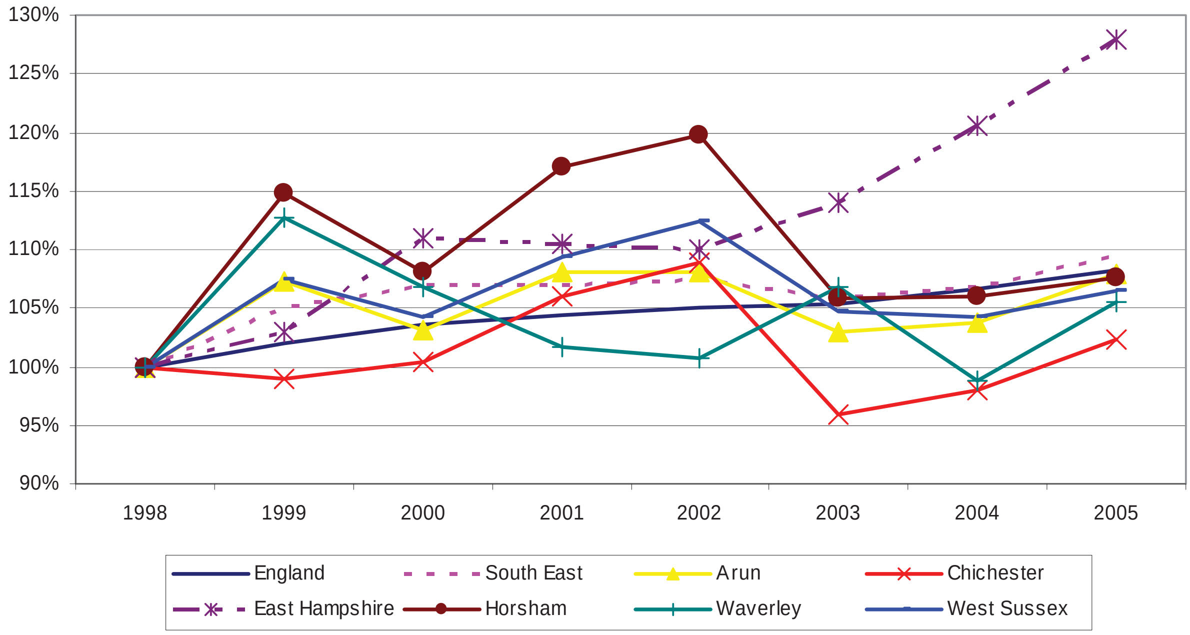
England	13%
South East	14%
Arun	15%
Chichester	**19%**
East Hampshire	15%
Horsham	13%
Waverley	18%
West Sussex	15%

Source: Annual Population Survey

Employment Change

3.35 In the recent past, employment change in all areas has followed an upward trend. Chichester however has seen the lowest level of growth, with just 3% more jobs over seven years. Yet employment in England and the South East has grown 8% and 10% respectively over the same period.

Figure 3.5 Employment Change, 1998-2006



Source: Annual Business Inquiry

3.36 Despite a temporary decline in employment between 2003 and 2004 in Chichester district, employment has once again continued on an upward path. This decline and upward trend was also experienced in neighbouring districts over the same period (see Figure 3.5). An exceptional case is in East Hampshire, which is due to a statistical anomaly.

The Residents

3.37 Thus far, the economic analysis has focused on the workplace economy, considering businesses and the people who work in the district regardless of where they live. In this section we focus on the attributes of the Chichester district resident population regardless of where they work, to identify their economic well-being and the potential exhibited by the resident workforce for supporting future growth.

Demographics

3.38 Mid-year (2006) population estimates shows that Chichester district, with 109,000 residents, is the least populated relative to neighbouring districts. It also has the lowest proportion of working age or younger residents, suggesting a relatively small existing and future labour supply. This is compounded by Chichester district having an above average proportion of student households than other West Sussex districts and boroughs, and the region[11], but this group may support a high skilled local labour force in the future.

Table 3.11 District Mid-year Population Estimates, 2006

	0-15 yrs		16-64 yrs		65+yrs		Total pop
District	*No.*	*%*	*No.*	*%*	*No.*	*%*	*No.*
Arun	24,100	17%	84,000	58%	37,600	26%	145,700
Chichester	**18,900**	**17%**	**64,600**	**59%**	**25,400**	**23%**	**108,900**
East Hampshire	21,900	20%	69,400	63%	18,800	17%	110,100
Horsham	25,900	20%	80,100	62%	22,300	17%	128,300
Waverley	23,900	20%	72,000	62%	20,800	18%	116,800

Source: ONS

3.39 Population estimates show the North and the South have relatively similar population numbers, while Chichester & Tangmere is the least populated of the three by a significant margin.

3.40 This is the reverse order to the district share of jobs shown in Table 3.1, suggesting a lower density of jobs per population in North and South sub-areas; given the nature of three sub-areas, this is unsurprising since Chichester & Tangmere is a City sub-area and therefore we would expect to find a high ratio of jobs to residents.

[11] GVA Grimley (October 2008) *Coastal West Sussex Strategic Housing Market Assessment* Revised First Stage Report for West Sussex Local Authorities

Table 3.12 Chichester District Sub-area Population, 2006

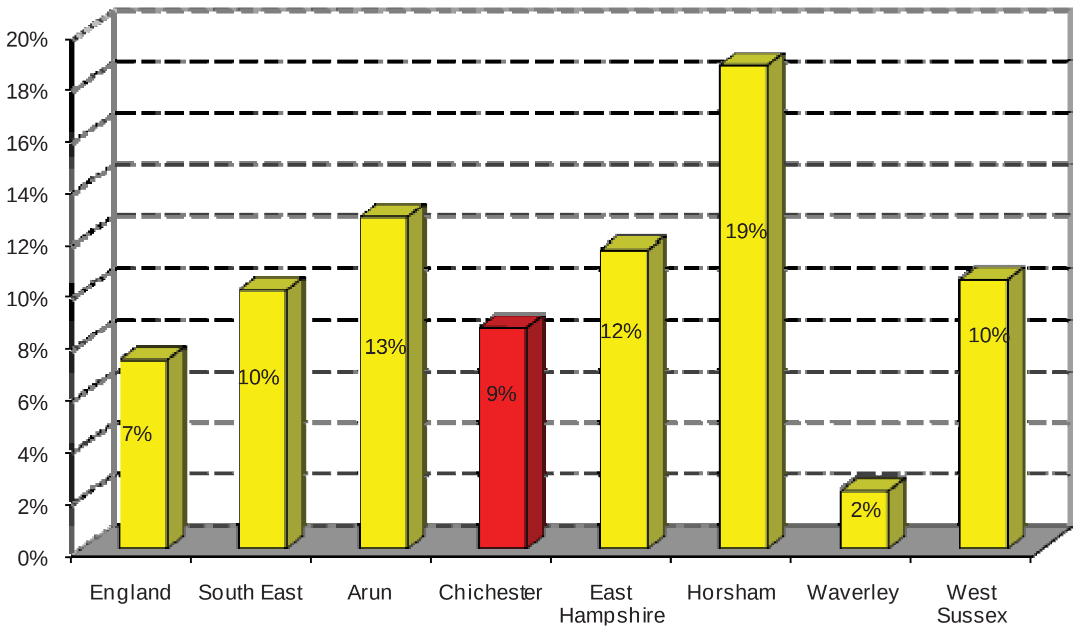
	0-15 yrs		16-64 yrs		65+ yrs		Total Pop
Region	Number	%	Number	%	Number	%	Number
North of District	7,854	19%	24,963	60%	9,026	22%	41,843
South of A27	6,717	17%	23,090	57%	10,479	26%	40,286
Chichester & Tangmere	4,303	16%	16,568	62%	5,930	22%	26,801

Source: ONS

3.41 As seen in Figure 3.6, Chichester district's population grew 9% between 1985 and 2006; this is slightly higher than the national figure (7%) but in line with the rest of the South East Region (10%). In comparison to neighbouring districts, Chichester district's population change has generally been lower. The largest change was in Horsham (19%), while Waverley exhibits very little growth (2%).

3.42 There has been negative natural population change in Chichester district resulting from a higher number of deaths to births within the district. Consequently, Chichester district's population increase is due to net in-migration, largely of the older age groups from elsewhere in the South East and London.[12]

Figure 3.6 Population Change, 1985-2006



Source: ONS

Deprivation

3.43 The Index of Deprivation measures of multiple deprivation within neighbourhoods. The Index consists of eight domains, income, health & disability, employment, education, skills & training, barriers to housing & services, living environment and crime. Table

[12] Ibid.

3.13 shows the rank of each local authority area based on the average index score in 2007, where 1 is the most deprived and 354 the least.

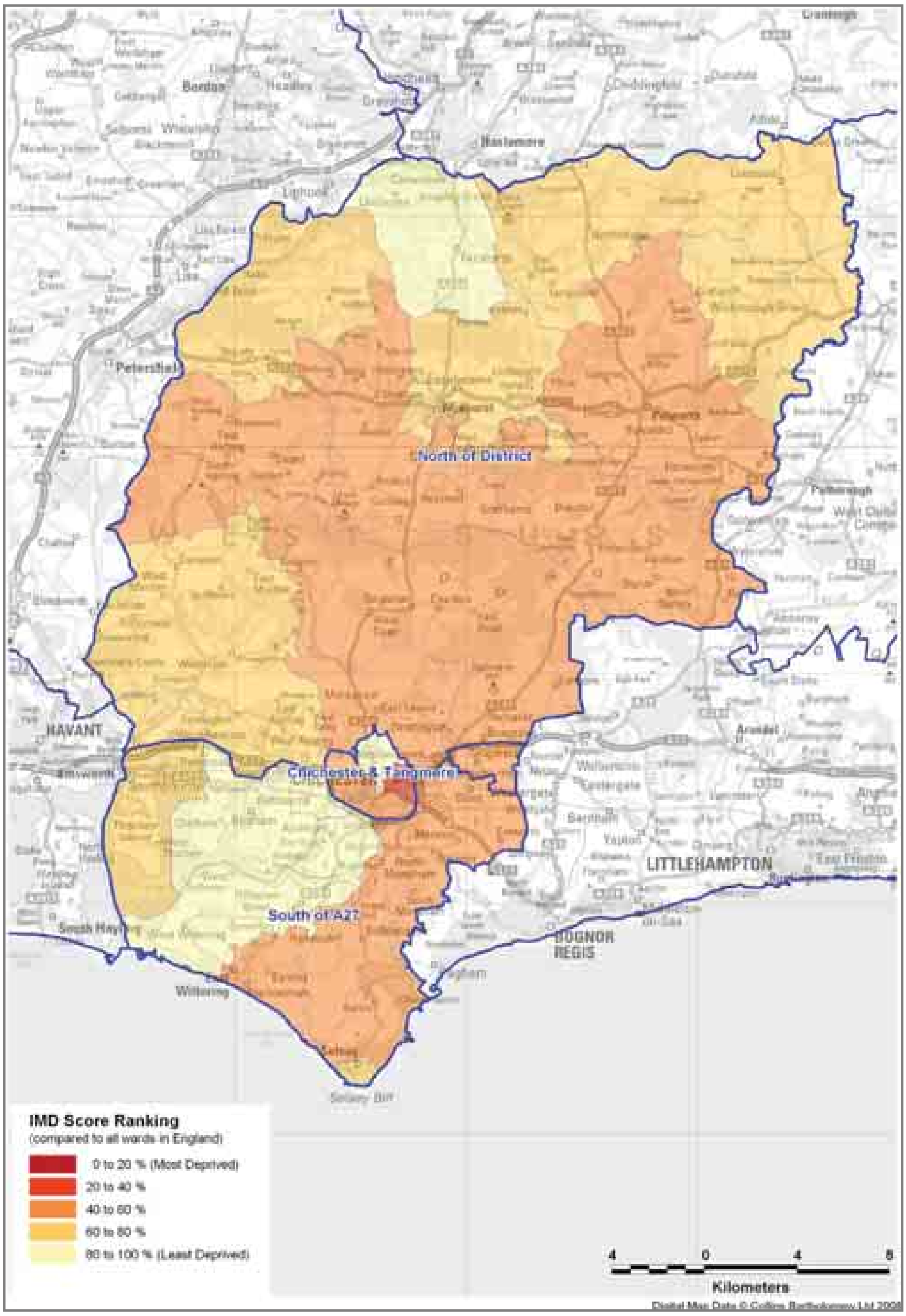
3.44 At the district level, Chichester and all the local benchmark areas (with the possible exception of Arun) are relatively non-deprived and are high by national standards. Chichester District's overall ranking is 259, performing better still on employment than income deprivation. However, within Chichester district there are pockets, as can be seen in Figure 3.7 which reveals some pockets of deprivation (ie, within most deprived 20% of neighbourhoods nationally) to exist in the southern part of the district, in and around Chichester city and Selsey.

Table 3.13 Deprivation Rankings, 2007

	Rank of Average Score	Rank of Income Scale	Rank of Employment Scale
Arun	187	134	153
Chichester	**259**	**241**	**280**
East Hampshire	332	283	292
Horsham	337	278	284
Waverley	348	291	298

Source: Index of Deprivation 2007

Figure 3.7 Neighbourhood Derivation Levels in Chichester District, 2007



Source: Index of Deprivation 2007

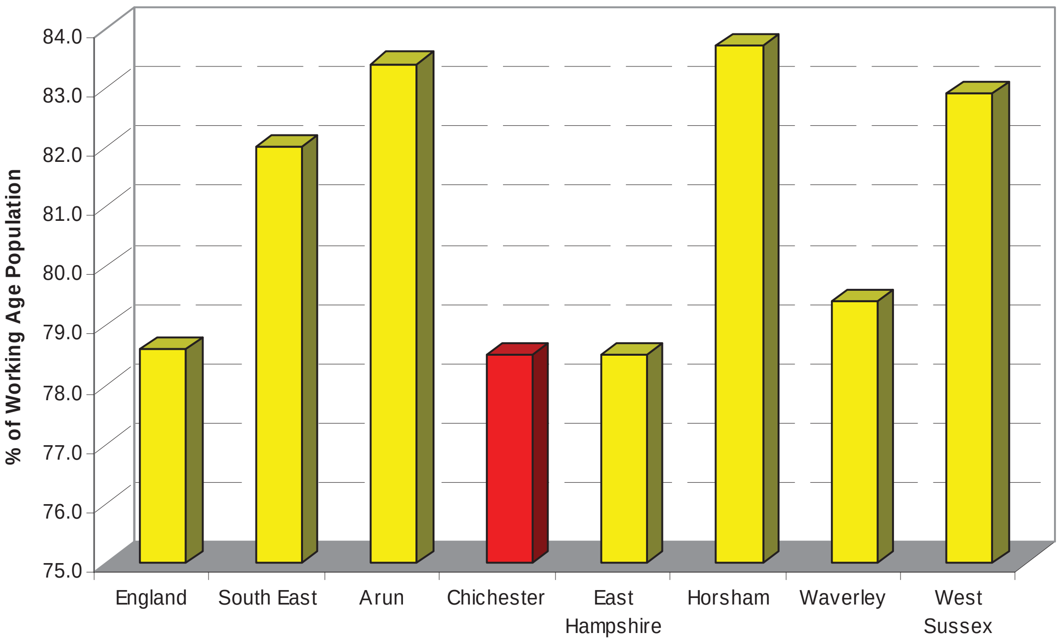
Low Economic Activity Rate

3.45 Figure 3.8 provides an indication of labour supply since it incorporates working age residents in employment or those not in employment but are available and willing to commence employment within two weeks.

3.46 Chichester district has a similar economic activity rate in comparison to the national average. But the South East region average is almost four percentage points higher.

Moreover, neighbouring districts achieve higher economic activity rates than Chichester district.

Figure 3.8 Economic Activity Rates, 2006



Source: Annual Population Survey

Unemployment

3.47 Table 3.14 shows unemployment in Chichester district (4.4%) to be relatively higher than its neighbouring districts (except Waverley). It is almost on par with the regional average (4.3%) but is below the national average (5.4%).

Table 3.14 Unemployment Rate, 2007

	%
England	5.4
South East	4.3
Arun	3.2
Chichester	**4.4**
East Hampshire	2.7
Horsham	2.2
Waverley	4.9
West Sussex	3.2

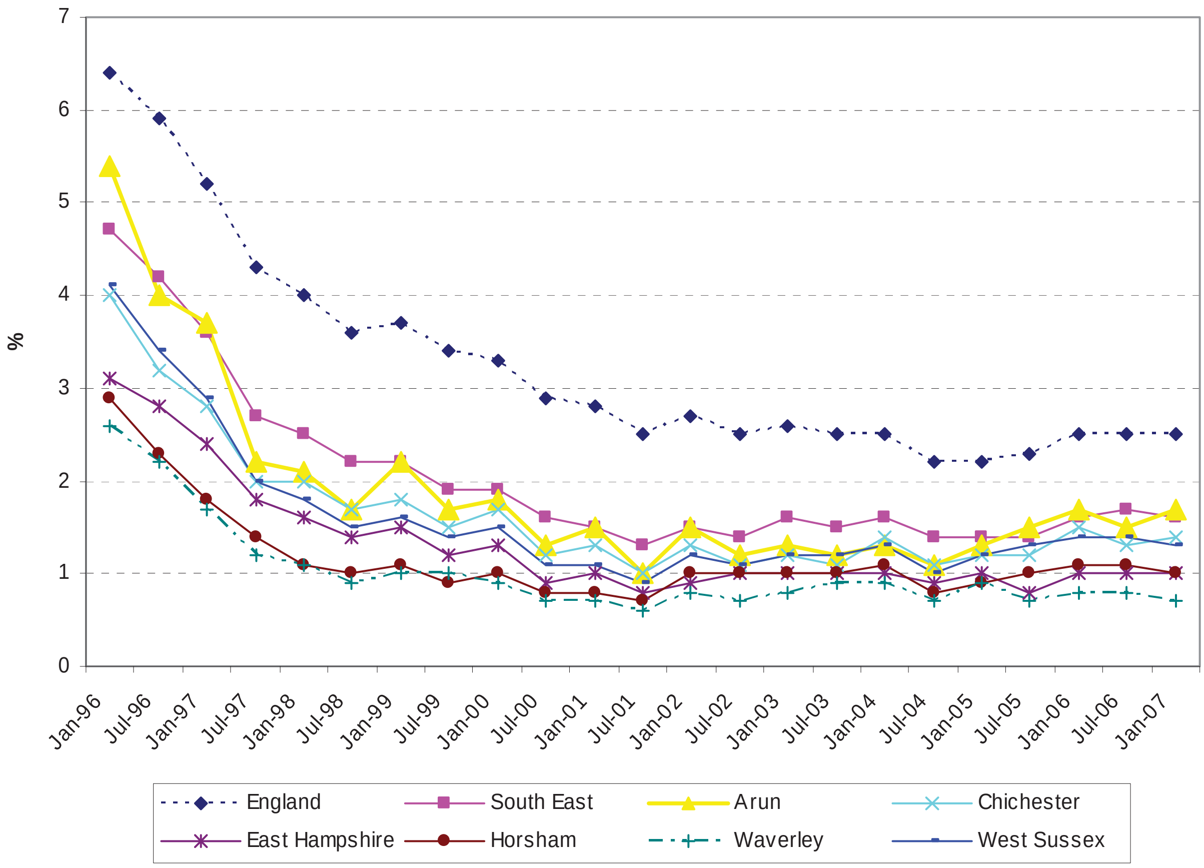
Source: Annual Population Survey

3.48 Looking over time in Figure 3.9, Chichester district has experienced a general decline in unemployed jobseekers in line with other benchmark areas[13]. However, the period after January 1999 until January 2007 reveals a relatively stable unemployment trend

[13] Due to different recording methods, Claimant Count unemployment rates tend to be lower than ILO unemployment rates that we show previously. The ILO rate are the official rates, however Claimant Count rates provide more reliable estimates when looking for trends.

in all areas. Since 1999, unemployment in all benchmark economies have converged significantly below the national average (possibly to their long run steady state of full employment for some of them) and have remained steady since.

Figure 3.9 Unemployed (Claimant Count Jobseekers), 1996-2007



Source: Labour Market Trends - Claimant Counts

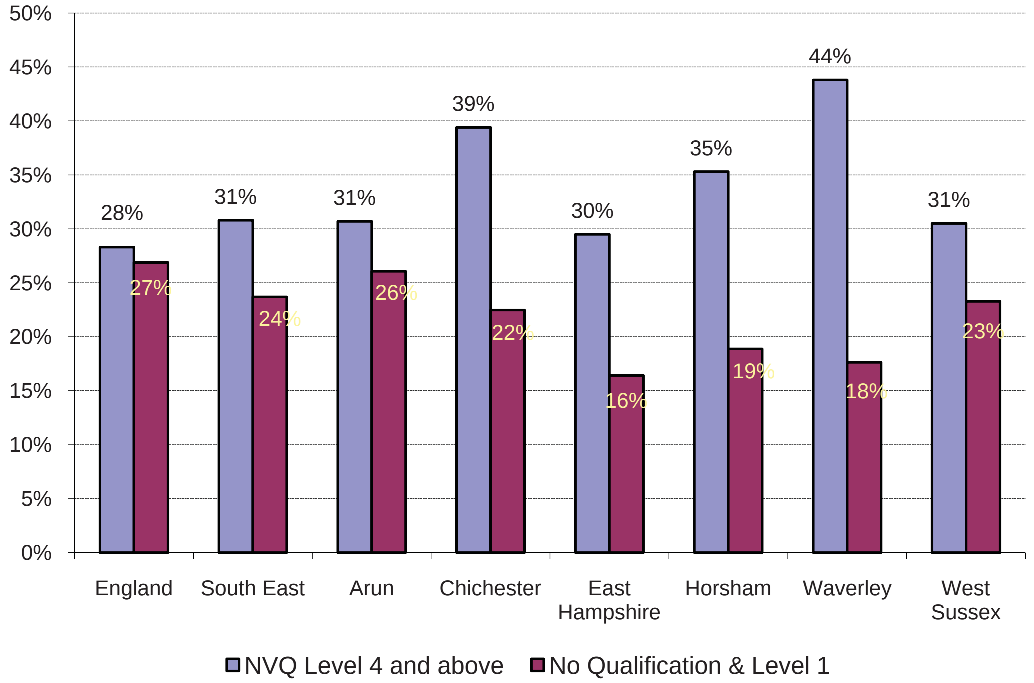
Qualifications

3.49 Figure 3.10 depicts two categories of qualifications of residents: those with no qualification and NVQ Level 1, and those with NVQ level 4/5 which are equivalent to degree level or better.

3.50 Chichester district's residents represent a strong share of NVQ level 4/5 (39%) which is higher then the national (28%) and South East region (31%) averages. Chichester district's residents are also better qualified than neighbouring districts, except in Waverley. Earlier in this section it was also noted that Chichester has a higher proportion of student population than its neighbouring benchmarks.

3.51 But some 22% of Chichester district's residents have no or minimum qualifications. Although lower than the national (27%) and South East regional (24%) levels, this proportion is higher than in neighbouring benchmark districts. Consequently, there are a range of resident skill levels in the district, and each is likely to have separate employment needs and opportunities.

Figure 3.10 Qualifications of Residents (working age)



Source: Annual Population Survey

Labour Market

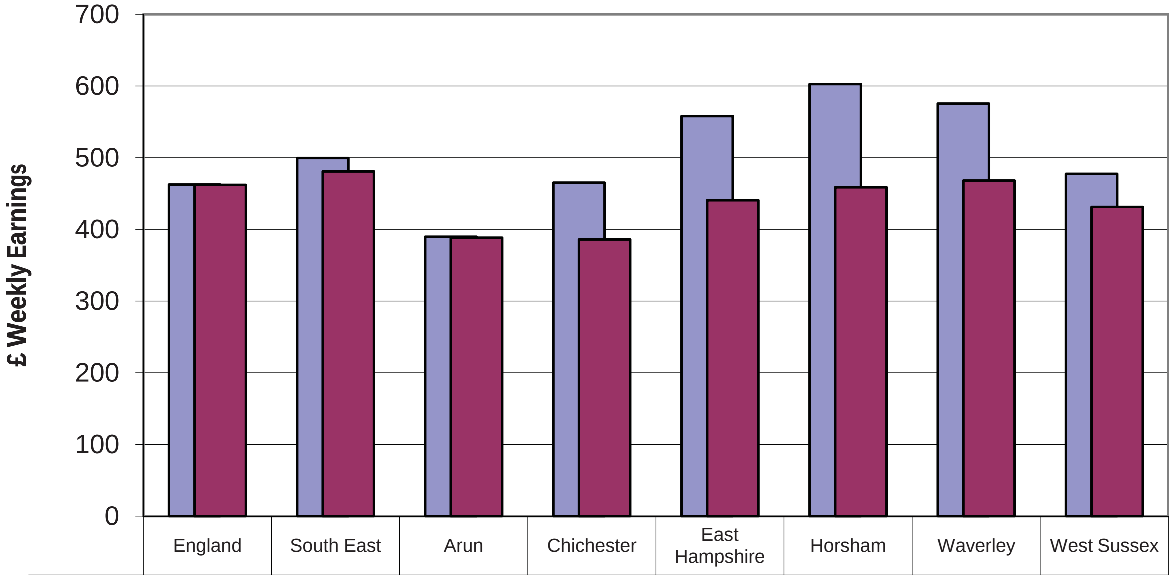
3.52 In this last section we look at Chichester district's labour market performance, covering earning levels and travel to work patterns.

Earnings

3.53 Figure 3.11 shows gross weekly earnings for 2007. Every district's resident earnings are higher than the district workplace earnings. This means that those with higher salaries are working outside the district.

3.54 In Chichester district, gross weekly resident earnings are £465 while gross weekly workplace earnings are £386. Both earnings are lower compared to neighbouring areas (except Arun) as well as the national and South East region level. Three neighbouring areas (East Hampshire, Horsham and Waverley) have average earnings of £550+ and £440+ per week for residents and workplace respectively, which are far higher than in Chichester district.

Figure 3.11 Gross Weekly Earnings, 2007



	England	South East	Arun	Chichester	East Hampshire	Horsham	Waverley	West Sussex
Resident	462.6	499.6	389.7	465.2	558	602.7	575.4	477.5
Workplace	462	480.7	388.5	386	440.7	458.8	468.1	431.2

Source: Annual Survey of Hours & Earnings, 2007

Travel to Work

3.55 A refined analysis of travel to work flows in the following tables show where Chichester district's residents are commuting to and where the district's workers are commuting from. These tables also enable us to determine that 69% of working residents work in the district, which is a high resident self-containment rate[14] (and a useful measure of sustainability). The tables also show a slightly lower workplace self-containment rate[15] with 64% of the district's workplace jobs being filled by the district's residents (this is a measure of prosperity suggesting 36% of local salaries are taken earned by those living outside of the district).

3.56 In Chichester district in 2001, the labour market of the district faced an overall deficit, with an overall net in-commute because of the 3,100 jobs in excess of the resident workforce population, as shown in Table 3.15.

[14] Proportion of working residents working within the district.

[15] Proportion of jobs within the district filled by residents in the same district.

Table 3.15 Chichester District 's Commuting Patterns

Chichester's residents commuting to...	*No.*	*Share*
Chichester	32,757	69%
Arun	2,032	4%
Portsmouth UA	1,632	3%
Waverley	1,407	3%
Havant	1,323	3%
Horsham	1,164	2%
East Hampshire	1,130	2%
Guildford	620	1%
Westminster	438	1%
Crawley	404	1%
Worthing	346	1%
Fareham	341	1%
City of London	294	1%
All Other	3,922	8%
Chichester's workers commuting from...	*No.*	*Share*
Chichester	32,757	64%
Arun	7,970	16%
Havant	2,290	4%
East Hampshire	1,415	3%
Portsmouth UA	1,279	3%
Horsham	962	2%
Worthing	530	1%
Waverley	463	1%
Fareham	313	1%
Brighton and Hove UA	312	1%
All Other	2,607	5%

Source: Census of Population, 2001

3.57 Sub-area travel to work patterns for residents and workers in North of the District are shown in Tables 3.16. The district sub-area resident self-containment rate is 52%. A small share, no more than 8%, travel to work in Chichester & Tangmere, followed closely 7% commuting to neighbouring Waverley district. Only 2% travel to work in the South of the district. The workplace self-containment rate is higher at 62%, and only 8% of workplaces are filled by residents from the rest of the district (split evenly across the two sub-areas).

Table 3.16 Commuting from North of District

North Chichester's residents commuting to…	*No.*	*Share*
North of District	9,796	52%
Chichester & Tangmere	1,455	8%
Waverley	1,251	7%
Horsham	880	5%
East Hampshire	847	4%
Guildford	546	3%
Chichester South of A27	414	2%
Portsmouth UA	376	2%
Arun	363	2%
Havant	358	2%
Westminster	294	2%
All Other	2,432	13%
North Chichester's workers commute from…	*No.*	*Share*
North of District	9,796	62%
East Hampshire	979	6%
Arun	940	6%
South of A27	670	4%
Chichester & Tangmere	598	4%
Horsham	549	3%
Waverley	450	3%
Havant	391	2%
Portsmouth UA	175	1%
Guildford	119	1%
All Other	1,046	7%

Source: Census of Population, 2001

3.58 South of A27 sub-area travel to work patterns for residents and workers are shown in Tables 3.17. The district sub-area resident self-containment rate is 45%, which is the lowest of the three sub-areas. A large share (23%) travel to work in Chichester & Tangmere, and 4% travel to work in the North of the district. The workplace self-containment rate is higher at 64%, and only 3% of workplaces are filled by residents from Chichester & Tangmere and 1% from the North of the district.

Table 3.17 Commuting from South of A27

South Chichester's residents commuting to…	*No.*	*Share*
South of A27	7,636	45%
Chichester & Tangmere	3,942	23%
Portsmouth UA	820	5%
Arun	801	5%
Havant	746	4%
North of District	670	4%
Fareham	200	1%
East Hampshire	187	1%
Horsham	144	1%
Winchester	133	1%
Worthing	127	1%
All Other	1528	9%
South Chichester's workers commute from …	*No.*	*Share*
South of A27	7,636	64%
Arun	1243	4%
Chichester & Tangmere	844	3%
Havant	643	2%
North of District	414	1%
Portsmouth UA	310	1%
Fareham	90	0%
East Hampshire	69	0%
Gosport	60	0%
Horsham	51	0%
All Other	554	2%

Source: Census of Population, 2001

3.59 Finally, Chichester & Tangmere's travel to work patterns for residents and workers are shown in Table 3.18. The district sub-area resident self-containment rate is relatively high at 62%. The other two district sub-areas account for the most likely place of work after Arun for the sub-area's residents. Workplace self containment, at 31% of all jobs, is lowest in Chichester & Tangmere sub-area, and a high proportion of the sub-area's jobs are filled by residents from Arun, followed by South of Chichester district. The north of Chichester district only make up a small share of workers in the sub-area compared with the other two, but it is the fourth most common place of residents for Chichester & Tangmere's workers.

Table 3.18 Commuting from Chichester & Tangmere

Chichester & Tangmere's residents commuting to…	*No.*	*Share*
Chichester & Tangmere	7,439	62%
Arun	897	8%
South of A27	844	7%
North of District	598	5%
Portsmouth UA	420	4%
Havant	277	2%
Horsham	144	1%
Worthing	136	1%
East Hampshire	97	1%
Fareham	96	1%
Crawley	78	1%
All Other	912	8%
Chichester & Tangmere's workers resident in…	*No.*	*Share*
Chichester & Tangmere	7,439	31%
Arun	5,890	25%
South of A27	3,942	17%
North of District	1,455	6%
Havant	1,309	6%
Portsmouth UA	764	3%
Worthing	416	2%
Horsham	394	2%
East Hampshire	340	1%
Brighton and Hove UA	233	1%
All Other	1,575	7%

Source: Census of Population, 2001

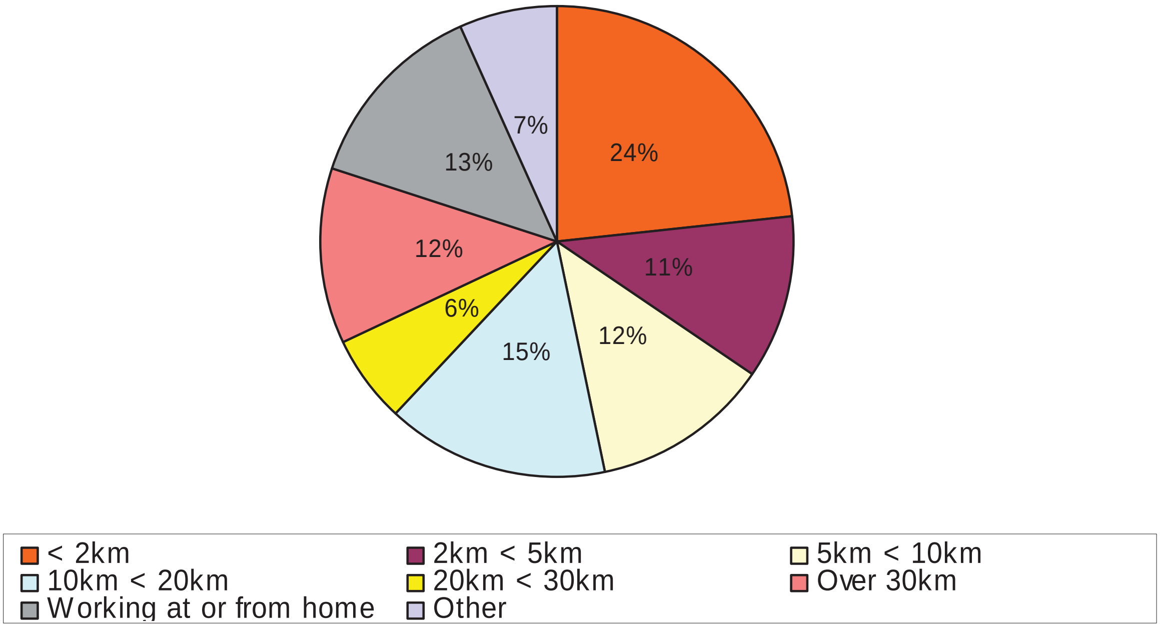
Distance and Mode of Travel

3.60 Long journeys to work can have various adverse impacts. They may affect the quality of life and real incomes, put pressure on infrastructure and - especially if made by car - they may cause traffic congestion and environmental damage. The earlier analysis on inter-district commuting do not tell us much about these adverse affects, because a journey which crosses a local authority border is not necessarily longer or more undesirable than one that does not.

3.61 As proxy measures of the possible adverse impact of commuting, Figure 3.12 and Figure 3.13 show distances and mode of travel to work. It was also determined that Chichester district residents' average journey to work is 11.6km, which is in line with the national (11.2km) and regional (9.6km) averages.

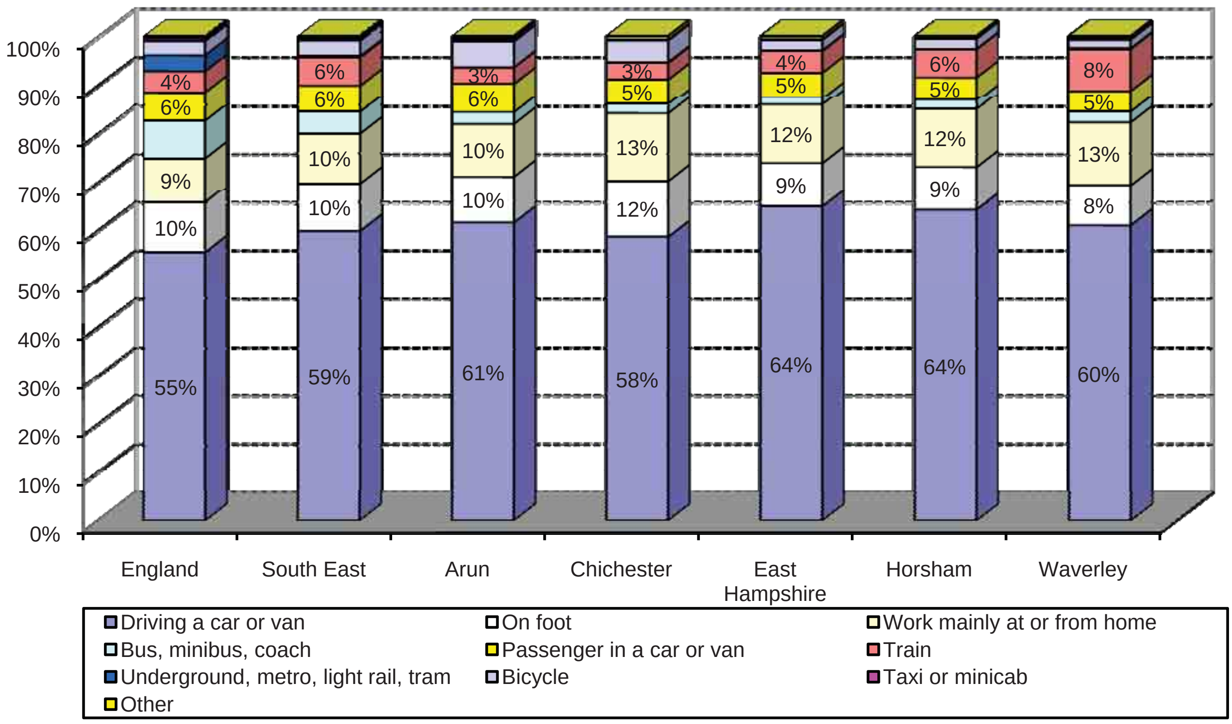
3.62 Some 58% also commute by car or van, which is higher than the national average (55%) and marginally below the regional average and all the other benchmark areas. This is comparatively lower because of the greater proportion of homeworking (13%) rather than better use of public transport in Chichester district. Chichester district residents' commuting patterns are typical and therefore not exceptionally the most, nor least, sustainable.

Figure 3.12 Distance Travelled to Work by Residents, 2001



Source: Census, 2001

Figure 3.13 Mode of Travel to Work, 2001



Source: Census, 2001

Conclusion

3.63 This chapter profiled and reviewed four aspects of Chichester district's economy, as follows:

Potential for Employment Growth

3.64 Chichester district is lacking in those activities with the greatest potential for growth. Real Estate Activities and Public Administration are the main growing sectors that are well represented, particularly in the Chichester & Tangmere sub-area. However neither of these sectors add significant value to the economy in terms of employment productivity, and their growth may even crowd-out more productive sectors.

3.65 The district's growth prospects would be improved if it attracted more growth sector activities. Most of these sectors are in office-based business services sector and high-tech manufacturing and research activities. This strategy will help boost the amount of knowledge based activities currently taking place in Chichester district, which is lagging compared to the benchmarks.

3.66 The relatively higher level of entrepreneurship is probably a factor conducive to growth. Employment land policy should support and nurture this entrepreneurship.

Competitiveness (Value Added and Productivity)

3.67 The lack of strong representation in high value added and knowledge-based activities are likely to impact on Chichester's competitiveness.

3.68 The presence of a high-quality labour force is an advantage which should make Chichester district more attractive to employers in high-value, office-based sectors, especially since the district at present does not offer enough jobs to match these skills. It must utilise this asset, which is likely to be commuting out of the district to find relatively higher paid and better quality jobs.

Residents' Economic Well-being

3.69 Although ranked high (less deprived) on the indices of deprivation, other measurements are less positive. Chichester district is marked with a relatively low economic activity rate compared to benchmark areas in this study. Further, workplace earnings in the district are lower than resident earnings, and are generally low for the South East region. Hence, residents commute out of the district in order to obtain higher earnings and more access to quality jobs.

Sustainability

3.70 The location of economic land uses impacts on sustainability through journeys to work: the further people travel, and the more travel by car, the higher are carbon emissions. Chichester district residents' average distances and mode of travel to work are in line with national and regional averages, suggesting that sustainable travel may be no more than a national concern in the district. Nonetheless, this still emphasises the need to encourage more public transport use and minimising the need to travel as set by the current central government agenda.

4 LAND AND PROPERTY MARKET

Introduction

4.1 This chapter considers the markets for employment floorspace and land in Chichester district and the three district sub-areas. The purpose of the property market profile is to provide a market perspective on commercial property demand and supply.

4.2 The main information sources for the land and property market overview is from the CLG and Valuation Office Agency (VOA) statistics, Vail Williams's in-house records, Estates, FOCUS information system[16], and deals/letting information circulated by other agents or through searching their websites. In addition, a Chichester District Employment Land Review workshop was held in September 2008, which was attended by a mixture of landowners, developers, agents and other businesses. Some that were unable to attend have also been consulted on request. We refer to some of the comments received by consultees in this chapter, and a full note from the discussion workshops are presented in Appendix 2.

Supply and Demand in Chichester District

Supply: Floorspace Stock and Vacant Supply

Table 4.1 Summary of vacancies and stock of B-space within Chichester district

	Premises available (sq m)	Stock data (sq m)	Implied vacancy rate
Offices			
Commercial offices		92,000	
Other offices		41,000	
All offices	*5,935*	*133,000*	*4.5%*
Industrial			
Factories		294,000	
Warehouses		185,000	
All industrial	*17,912*	*479,000*	*3.7%*
Total	23,847	612,000	3.9%

Source: Vail Williams Research, property market agents and Focus

16 FOCUS is a database of verified UK commercial property information. This provides information on recent transactions and details on available properties which we supplement with further checks to increase overall coverage. While this is fairly comprehensive, it is unlikely to capture all market activity, for example we would expect a small amount of employment floorspace to be marketed through word of mouth or self advertisement board promotion, which are very difficult to monitor.

Offices

4.3 According to the latest CLG (Valuation Office Agency) data, the overall stock of offices in the district in 2006 was some 133,000 sq m. Most of this space (92,000 sq m) is in the commercial office sector (see Table 4.1 above).

4.4 Offices currently (2008) being marketed extend to about 10,000 sq m but this includes marketing campaigns for pre-lets which have been deducted to avoid double counting with land supply. For example, undeveloped plots at Chichester Business Park at Tangmere extend to 4.1 ha, of which 1.12 ha is being marketed with consent for office space of 5,249 sq m (56,502 sq ft). Furthermore, pre-lets are being sought prior to construction at 1-6 Cedar Park, at Chichester House (Terminus Road in Chichester) and at Vinnetrow Business Park, Runcton. The amount of space registered as built and available in Chichester district is in the order of 5,935 sq m (63,884 sq ft). This excludes the former Syngenta HQ near Fernhurst which is a long term vacant property awaiting fresh proposals.

4.5 When compared to the overall built stock, this equates to a small vacancy rate of about 4.5%. A specific (frictional) vacancy rate is necessary to allow for choice and therefore easy movement of occupiers within the market without impacting on business output or property market prices beyond the long run equilibrium rate[17]. Discussions with local and national property agents suggest that this frictional supply is somewhere between 5 and 10 percent. Because the vacancy rate is just below the market average space, this points towards a tight demand within the existing stock.

4.6 West Sussex County Council has plans to vacate space in Chichester city centre.[18] We are informed that a range of buildings will be given up during 2009 and some posts relocated to Horsham. When combined with currently known surplus space in the private sector, this amounts to an extra 3,036 sq m (32,682 sq ft) that will become vacant in the city centre. If this were available today then the adjusted vacancy rate would be 6.7%, which is closer to the optimal market rate for space.

Industrial/Warehousing

4.7 In the industrial property market, the overall stock in the district is about 479,000 sq m. As shown in Table 4.1 above, factories account for 294,000 sq m and the remaining 185,000 sq m is for warehousing type activities (excluding retail).

4.8 The amount of industrial/warehousing space registered as built and available in Chichester district is in the order of 17,900 sq m (192,800 sq ft). When compared with built stock, this equates to a vacancy rate of just below 4%, which again is below

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[17] With constant changes in businesses' operating processes and working environments, it should be considered that at anyone time there will be local occupiers searching for new premises. When these occupiers move from their premises, or soon after, they release space for other businesses to move into and meet their needs. This is how the market functions. A lack of available space results in a lack of choice and opportunity to move on, reducing business efficiency or increasing rent beyond a normal market (equilibrium) rate. Similarly, if there is too much space then prices may be deflated against their optimal market level resulting in less developer interest in providing new stock.

[18] This information came from discussions with local agents and has not been confirmed (see also http://www.chichester.co.uk/chichester/County-council-office-exodus-in.4390155.jp).

where it should be to allow for frictional vacant space within the market, suggesting over demand.

Rural Areas

4.9 Observations from the site investigations, in addition to comments received at the Employment Land Review workshop, suggest that there is additional or “hidden” supply, particularly within the rural areas. While our figures pick up the substantial part of marketed vacancies, there may be some supply that is being marketed through word of mouth or other channels. For example, Appendix 7 (site assessments) refers to Old Station Yard in Elsted Marsh, where close by Bridgelands Farm (north east of Elsted Station) are marketing farm buildings providing 122 to 2,340 sq ft for employment uses.

4.10 With the decline in income from agriculture, the main reason for farmers converting and letting their buildings is economics. While it is possible to earn additional income from holiday lets, the alternative of letting space for offices and workshops require less investment, involve less day to day management and are more secure in generating a regular income.

4.11 Currently most demand for farm conversions is for small office units, which has shifted in the recent past from larger units for storage or workshop use. These premises mostly attract people who wish to move out from working at home.

4.12 In those situations where farmers live close to converted employment uses, they are more likely to favour quieter and cleaner activities such as offices. If farms are located nearer to main roads, then warehouse and distribution uses may be more acceptable. But anti-social uses such as car repairs, spray booths or retail which generates significant visits, are generally considered to be less acceptable by farm owners.

4.13 One of the main advantages for occupiers is low comparative rents. Farmers are not letting premises to make money but simply to provide enough to allow them to stay on the farm. This is in contrast to a developer who seeks market rental in order to make a profit on his investment. Other potential advantages for occupiers include plentiful parking space and reverse commuting to work resulting in easier and less stressful journeys.

4.14 But despite the possibility of some additional space, we would expect that the cost of adapting farm buildings is likely to prevent delivery of supply in excess of market requirements. In addition, farm diversification schemes are dispersed and often in isolated location on farms, which limits their suitability for employment land supply. Certainly their employment potential will be low and they are less likely to appeal to businesses requiring access to many workers. Also they are likely to offer less in the way of site infrastructure, including access to shops. From a planning perspective, farm conversions may also detract from focus on key employment estates.

Demand: Take-up and Rents

4.15 One measure of demand is the take-up of floorspace. It should be noted that take-up is a gross figure based on property acquisitions; it does not reflect the space vacated as part of the same transaction. The annual take-up of floorspace has been calculated by reference to the Focus database of transactions maintained by agents. The early years of the database record fewer deals than expected but we consider the entries since 2004 to be more reliable. As with supply, it is possible that some transactions (especially in rural areas) may have been “off-market” or disregarded, so we have adopted the average of reported take-up per annum since 2004 as a proxy indicator of demand.

Offices

4.16 The average take-up for offices in Chichester district since 2004 is circa 1,546 sq m (16,649 sq ft) per annum.

4.17 Office rental growth has been fairly flat - anecdotally at £13 per sq ft per annum in 1989 compared to £14.50 to £16.50 per sq ft now for a letting up to 4,000 sq ft over a two to five year term. For example, the Cluttons’s Businesslines (2008) publication refers to the York House and Exeter House next to Chichester Business Park at City Fields at Tangmere to be letting space from 750 to 8,700 sq ft for £14.50 per sq ft per annum, while Chichester Business Park is seeking pre-lets at £16.50 per sq ft for the proposed 30,000 sq ft Meteor Court office development.

4.18 Assuming average project costs, it is generally considered necessary to achieve rents in excess of £16.00 to £17.00 per sq ft for offices to make a development viable. Therefore further growth in office rents is required to make new construction truly viable.

Industrial/warehousing

4.19 The average take-up rate for industrial space is about 5,675 sq m (61,085 sq ft) per annum, which is some four times the amount for offices.

4.20 Industrial rents vary markedly according to the size of unit and the flexibility of the letting terms. Market comment indicates that £6 to £6.50 per sq ft per annum is achievable on a unit of around 930 sq m (10,000 sq ft) but £9 per sq ft per annum could be achieved on small units. Trade counters, which are occupying some of this B-space, command a higher (premium) rent.

4.21 Assuming average project costs, it is generally considered necessary to achieve rents in excess of £7.50 to £8.00 per sq ft for industrial space to make a development viable. For some locations, and small space, this is likely to be achievable.

Demand for Employment Land

4.22 Market feedback raises particular concerns about the supply of employment land in the district, both now and in the longer term. Commercial rents and development viability on the south coast have historically lagged behind the larger centres along the motorway corridors of central southern England. This means that the supply of development finance has been less freely available with more muted rates of construction and take-up of allocated land as a consequence.

4.23 There is clearly a tension between demand and supply to the extent that the market will not respond with new construction unless it is viable. That is, demand needs to be “effective” in being able to pay market rents or prices at the right level to overcome the cost of development.

4.24 There is an aspiration for more development but also recognition that viability is finely balanced. Comments on this from the commercial agents and stakeholders that attended the ELR workshop included:

> *"We need new quality space but development viability is hampered by 'empty rates…'"*
> *"There's a positive perception of office demand at the smaller end, but with a 'risk' of a two-year void…"*
> *"Encouraging take-up of 'trade counter' units but new supply probably satisfies medium term demand…"*
> *"Rents are lower in the rural areas but the cost of new construction is the same - hard to make it work…"*

4.25 There are also differences between the current state of the market and longer term views. Issues of the moment include the state of the economy, the rural economy and expectations arising from housing targets, including the outcome from the SHLAA study which might identify new housing sites on existing employment land. Market feedback included:

> *"Everyone is very cost sensitive at present…"*
> *"New housing may swell demand for business space…"*
> *"Some evidence of farm workshops being created as farmers diversify…"*

4.26 A particular hindrance to confidence in the property market in Chichester district is isolation in some of the rural community areas and congestion in and around Chichester city. Road improvements and car parking are inextricably linked with the property market. Statements about congestion and road infrastructure are commonly heard elsewhere and the A27 corridor is no exception. Transport related comments that are specific to Chichester's appeal in the marketplace made by commercial agents and other stakeholders include:

> *"Firms still want ample parking for their offices - hard to get into Chichester town centre…"*
> *"May see more offices on the industrial estates in future?"*
> *"Must lobby for further road improvements…"*
> *"Roundabouts could become flyovers to ease the traffic?"*

District Sub-Area Market Areas

4.27 Different market supply and demand conditions were found across the district. The district's commercial property market can therefore be split into the three market geographies, in line with the sub-areas identified and shown on Map1.1 in Chapter 1.

Chichester & Tangmere

4.28 The market is dominated by Chichester & Tangmere. Transport links are predominantly east-west, and therefore enable these two urban locations to capture more market share. Certainly, the route of the A27 is an important factor in the commercial success of Chichester & Tangmere, as well as the viability of property development. However, there are persistent concerns about the level of traffic congestion during the rush hour. The A27 becomes the M27 west of Havant, putting the Southampton to Portsmouth area within easy reach.

4.29 The M27 corridor represents an economic opportunity, being an area in which Chichester district's businesses can trade. It is also earmarked as a "growth area" (Partnership for Urban South Hampshire) which also could be seen as a competing location for inward investment and development finance. The south coast railway line runs almost parallel with the M27/A27 and has regular stops between Southampton and Brighton (and beyond).

4.30 The focus of B-class development is primarily on Chichester city. The two largest employment estates are Council owned. One of these, Quarry Lane Industrial Estate, has evolved into a "trade counter" location but has other light industrial space for retention. The other is Terminus Road Industrial Estate, which is closer to the station and town centre which explains why parts are attracting interest from office, leisure and hotel operators.

4.31 Whilst this study is focused more on the District Council's planning policy role rather than Estate Management, the following comments on the council owned sites were picked up at the Employment Land Review Workshop:

> *"The council should be flexible on ground lease negotiations to encourage upgrading of Terminus Road/Quarry Lane - these are low grade frontages that create a poor image…"*
> *"The estates desperately need new signage…"*

4.32 A prominent gateway site to the west of the City has been suggested for a "park and ride" operation but this would be a wasted opportunity to replace a prominent development site for a park and ride use that may be better situated in a less prominent location, possibly to the south of the A27.

4.33 There is also significant potential for developing office floorspace through comprehensive redevelopment of the bus depot site close to Chichester train station.

4.34 There is also strong demand surrounding Chichester city, particularly along the A27 Corridor to Tangmere. Although a village outside of Chichester city, Tangmere has a significant proportion of employment space for the size of its population. It is the location of Chichester Business Park which is unique in this area as an out-of-town business park. Success to date includes development of large warehouse/office operations and there is important capacity for more of the same or pure offices. This should be recognised as a strategic location for employment, although office demand is increasingly focused on town centres which may alter its importance for this particular role.

4.35 Goodwood is notable for the Rolls Royce factory at Westhampnett, located to the north east of Chichester City. The Rolls Royce factory is unobtrusive but important as a "flagship" operation and major employer. There are also major motor and horse racing events held in this area, which provide further economic value to the local economy outside of typical B-space sectors.

4.36 This sub-area is the district's prime location for employment, aided by its high population density compared to other parts of the district, as well as its road access. There is already capacity for growth at Tangmere, with plots available at Chichester Business Park. In addition, there is land nearer Chichester and its existing employment areas and alongside the A27 which would be suitable, in market terms, for increasing floorspace provision.

North of Chichester

4.37 In the north of the district the A272 is the main road link. This also runs in an easterly-westerly direction from Hampshire towards Kent connecting with the north-south A286 at Midhurst. The principal north-south trunk roads (the A3 and A24) are outside the district but within striking distance.

4.38 B-class employment sites are few and far between across this largely rural area. Here there are a number of smaller industrial estates and these are largely in active use. There are examples of business units, workshops and stores within former farm buildings (as well as residential conversions).

4.39 One of the larger employment sites is Stedham Sawmill, which has relatively low specification space and open storage for which there is clearly demand (at a price). However, the site is not fully utilised at present and the viability of new development is a concern. Mixed use with housing would help attract investment to subsidise new employment space if required.

4.40 Midhurst is a good example of a rural town that has sufficient critical mass to support its current stock but will have difficulty regenerating its older premises and redundant depots. Estates in active use need to be retained but there are sites that have fallen out of use, for example off Pitsham Lane and Bepton Road, that will depend on mixed use or alternative uses to bring development forward.

4.41 Fernhurst also has some B-class supply to meet the needs of the local market (e.g. Fernhurst Business Park). Exceptional however, is the former Syngenta HQ complex, situated in a rural setting near Fernhurst, which has become redundant since the company downsized and redeployed its UK based research. Demand for facilities of this type and size in this location cannot be relied upon, especially for single occupation. Subject to market testing and valuation advice, the site may be suitable for some kind of business use, or partial business use, in the future. It is currently being promoted for mixed use development including residential and as previously developed land it may assist in supplying some of the residential requirements north of the Downs.

4.42 There is clearly demand for business space in this sub-area, as evidenced by the take-up of converted farm buildings and the relatively few vacant units on the estates. However, there are also examples of land that has not been developed (e.g. Stedham Sawmill, vacant plots at Bepton Road, Midhurst and at Hampers Common, Petworth). The key issue is one of viability; developers lack confidence in demand compared to construction costs. Mixed use with housing can help subsidise creation of business space but such proposals should be judged against policy criteria, including market testing.

South of the A27

4.43 The district is very rural to the south of the A27. Like in the north of the district, here there are a number of smaller industrial estates. These are largely in active use.

4.44 The coastal area (south of the A27) is attractive for horticulture and tourism. There are also examples of successful manufacturers (e.g. Oceanair at Selsey) but they are the exception rather than the rule because the area is somewhat isolated in terms of its commercial catchment. Consequently, demand for employment space in this area has been low and with no major changes anticipated, we consider it unlikely that there will be major demand for space within this area in the future.

4.45 That said, businesses have grown around one of its important assets - the sea - with a number of small to medium sized businesses within the various industrial estates involved in the marine sector. SEEDA are producing an imminent “Solent Waterfront Strategy” that may have opportunities for these business activities, and demand for land and premises for the sub-regionally important marine sector.

4.46 Farm buildings and former nurseries on the Selsey Road have been successfully let as small office units and workshops (examples include Enbourne Business Park, Trident Business Park at Coles Farm and Ferry Yard Industrial Park).

4.47 To the south, at Selsey, new industrial units have been disappointingly slow in uptake, which is likely to reflect the limited road access and catchment of this location and sub-area more generally. The marketing agent for Selsey Gate describes the units as “competitively priced” and offers are invited, preferably on a freehold basis. Demand is expected to come from local businesses south of the A27, which is a limiting factor on demand.

4.48 Although Landberry Industrial Estate, Selsey appears to be in use, it is an example of a location that would not be viable for B-class redevelopment of high quality. It fulfils a role for the current occupiers but relies on refurbishment and adaptation to sustain itself because redevelopment is probably too costly unless a pre-let could be achieved.

4.49 There are several industrial estates on the A286 between the Witterings and Chichester (such as Allmans and Birdham Business Park) which are in active use and are expected to remain so through ongoing refurbishment of their buildings. The older properties should be monitored in case they fall into disuse. A proactive approach to estate management may be required to sustain them in the long term or a change of use may become necessary.

4.50 The successful take-up of new space in former farmyards, as well as barn conversions, has been very encouraging but it is locations closest to Chichester that appear to attract the most interest. The southern part of this sub-area has had difficulty attracting demand (e.g at Selsey), with the exception of Oceanair - a local company that has expanded successfully. We note also that Enbourne Business Park is succeeding because a private developer has worked hard to produce a competitively priced property. It is hard to justify the need for increasing floorspace provision in this sub-area without other measures to increase demand (via economic development initiatives for example) or cross-subsidy (such as enabling development) to help finance business space.

Horticultural Development Areas

4.51 Additionally, analysis of land use indicates the predominance of "Horticultural Development Areas" (HDAs) to the south of the A27 and these areas limit the amount of land required for offices, warehouses and industry. That said, the HDAs run by large scale operators include a significant amount of warehousing space of a B-class nature. For example, Chichester Food Park, within the Runcton Horticultural Development Area, includes a modern warehouse of 2,854 sq m (30,725 sq ft) which is currently available. However, its use is restricted in accordance with policies for development within Horticultural Development Areas (HDAs) as set out in paragraphs 2.40 to 2.41.

4.52 The HDAs are land hungry uses. Some of the smallholdings within the HDAs, some with redundant glasshouses e.g. at Sidlesham and Almodington, may no longer be viable. This brings into question how their land might be used in future and whether the operators need to achieve greater critical mass or work as co-operatives. Even the large operators are facing competitive pressures from abroad and take the opportunity to import crops during the UK's winter season. They are then packaged locally and distributed to supermarket customers. This helps to sustain customer relationships until the next UK harvest. This highlights the importance of helping horticultural firms to add value within the food industry's supply chains, otherwise horticultural companies may have unused capacity in future, and this suggests that there may be room for some further consolidation.

Areas Adjacent to Chichester District

4.53 Other commercial property market areas just outside the district's border include Havant/Portsmouth and Petersfield. These are set to benefit from improvements to the A3 as a result of the new Hindhead tunnel.

4.54 Guildford and the Blackwater Valley are also significant market areas to the north. The Billingshurst/Horsham/ Crawley market area lies to the north-east and Worthing/ Brighton to the east. Although the north of the district is rural, it is relatively close to these market areas over the "border" as well as Chichester district.

Employment Land Review Workshop and Consultations

4.55 Comments received from commercial agents and other stakeholders that attended the Employment Land Review workshop were generally in favour of the protection and allocation of employment land in the district (see notes in Appendix 2). Perceptions include:

> *"Planning over a 15/20 year period requires more protection and allocation of land for business use"*
> *"Hope to see more office based employment to help the economy diversify"*
> *"Need to focus on 'quality' to stimulate rental growth that makes development viable"*
> *"Mixed use development should include actual delivery of employment uses up front - e.g. a condition of a housing consent at Selsey"*

4.56 Discussions at the Employment Land Review Workshop included reference to potential new land allocations. These would need to be subject to further consideration by the council if finalising its strategy for employment development. Sites discussed at the workshop included, for example, open storage land/bunkers/depots just south of the A27, between Chichester & Tangmere, which could certainly be put to better use. Development of new industrial units here may have the side effect of facilitating redevelopment of the older estates, such as Terminus Road, which could evolve over the long term into more of an office location.

4.57 There is further land south of Shopwhyke Road, which is on the eastern edge of Chichester city, between Oving Road and Tangmere. This area would also be especially well suited to business because of its close proximity to the A27. This land also has easy access to Oving Road which leads towards the town centre.

4.58 Land to the north of the A27 and east of Graylingwell Hospital in the northern part of Chichester city is also being promoted for development. This is a large landholding, of some 100 hectares. Its size means that large parts are on the rural edge of Chichester, less well suited to business. However, it has sufficient critical mass to deliver a comprehensive mixed use scheme including B-class employment appropriate to new neighbourhoods. The southern part in particular could be linked to existing employment areas and the A27.

Conclusions

4.59 The current property market is in short supply of space, with below optimal vacancy rates in both offices and industrial/warehousing sites. This is considered to reflect the lack of land and viable rents due to investor confidence for bringing forward employment space in Chichester district. At present, rents in offices are yet to achieve the level for developing speculative development on a large scale, but rents for industrial/warehousing supply are more likely to be viable. A main concern is the availability of suitable land supply for developers to meet local occupier demand. The physical nature of available sites has been a constraining factor.

4.60 The main employment, and particularly industrial, locations in Chichester district are Chichester and Tangmere. The level of vacant floorspace is low and there is very little land currently available within the established areas for industrial development or redevelopment. Some of this may be due to the pressures from trade counter uses that support higher rental levels.

4.61 Demand for business space in the North of Chichester sub-area is apparent. But developers lack confidence in demand compared to construction costs to build employment space here.

4.62 The Southern part of the A27 district sub-area has had difficulty attracting demand for B-space, particularly in the more southern parts of the sub-area which are very isolated. It would therefore be hard to justify increased floorspace provision without other measures to promote economic development as a catalyst for generating employment development interest. The northern part, close to Chichester & Tangmere, is more successful in attracting interest, however significant land supply is constrained by designated areas for horticultural uses.

4.63 Supply throughout the district is constrained because no new industrial land or office sites have been allocated in the district for more than ten years. Two sites with a large potential for development on the edge of Chichester but within the main corridor of employment activity have been identified by developers, and we review these opportunities later in Chapter 6. Similarly, there is potential within Chichester city from the redevelopment of the well located bus depot site.

4.64 There is some hidden supply largely in converted farm buildings that are advertised through word of mouth. For example, the rural parts of the district in the North and South of the A27 are meeting demand for B-space on small industrial estates or recently converted farm space. Although not an agreed proactive policy position, recent farm diversifications are, at least anecdotally, generating a degree of local prosperity in some parts of the district and meeting a need for small scale, competitively priced, business premises. These areas are showing healthy demand and are being actively used, but we do not expect that the supply produced by farm diversification in excess of market requirements is likely to amount to much.

5 THE QUANTITY OF EMPLOYMENT SPACE

Introduction

5.1 In this chapter we estimate the future market balance for employment space in Chichester district to 2026. The market balance relates to future *market requirement* or demand for B-space (i.e. industrial/warehousing and office space) compared with *planned supply* - comprising the land currently identified by the planning system for B-class development/redevelopment.

5.2 The analysis of market balance is in five stages:

- First, we estimate employment change for the Chichester district based on the Experian employment forecasting model;
- Second, we translate employment change into a space requirement;
- Third, we allow for a frictional margin of space over and above the forecast demand, which enables the smooth operation of the market;
- Fourth, we calculate supply of space based on remaining planned allocations and commitments identified in the planning system and the site assessments undertaken by Vail Williams used to inform what is likely to come forward over the plan period; and
- Finally we assess market balance - the relationship between forecast demand and planned supply for employment space.

5.3 The analysis focuses on a 20 year planning horizon, from 2006 to 2026. We treat 2006 as the base year because this is the latest year for known information about the number and type of jobs in Chichester district[19]; any year after 2006 is considered a forecast. It is also the start date for the South East Plan (SEP).

5.4 Please note that throughout the analysis, calculations of space relate to floorspace capacity expressed in square metres.

Demand for Employment Space, 2006-2026

Chichester District Employment Forecasts

5.5 The principal component of estimating future change in B-space requirements is to use future employment as a proxy of demand for employment space. Specifically, we use the latest Experian[20] employment projections from their Spring '08 Regional Planning Service forecasting model which have been provided by SEEDA. Experian projections were used to inform the SEP, so these forecasts are consistent in approach to those

[19] The ONS Annual Business Inquiry (ABI) is the most reliable source of employment data, and 2006 is the latest year used in Experian's employment forecasts.

[20] Experian (Business Strategies Ltd) are a company that provides national, regional and local employment forecasts based on an in-house macroeconomic model.

used for the SEP but have been updated with the latest data series. The SEP Panel of Inspectors' recommended their use for LDF purposes.[21]

5.6 We treat these as the base forecasts for planning future employment space in Chichester district; but they should not been seen as prescriptive or the only possible outcome. For example, they reflect a business as usual trend without incorporating any policy ambitions or significant breaks from the past. They do, however, account for the draft SEP district housing targets, which has an impact on the labour supply and therefore final employment forecasts for each district.

5.7 Experian's forecasts, summarised in Table 5.1 (Appendix 4 includes more detailed results), anticipate that Chichester district will grow by 9,100 jobs (15 percent) over 2006 to 2026. Marginally more jobs are expected in the first ten years.

Table 5.1 Employment Projections and Change, 2006 - 2026

		2006	2011	2016	2021	2026
Stock of jobs		62,900	65,500	68,200	70,300	72,000
Change	**#**		2,600	5,300	7,400	9,100
from 2006	**%**		4.2%	8.5%	11.8%	14.5%

Source: Experian, Spring 2008

5.8 The Chichester district employment forecasts (see Appendix 4) indicate that the highest job growth is projected in Business Services, which has a relatively low starting base in Chichester district, but with growth of more than 70% this accounts for more than half the total employment growth. Some minor job losses are projected in the primary (including agriculture) and secondary (manufacturing) sectors.

Reality Check on Forecasts

5.9 Forecasts reflect a snapshot in time and, as is well known, are never certain and often wrong. Nevertheless, we must use them because no other tools are available to help us plan for the long term - which is a requirement of national and regional guidance. Because population is an important factor in job growth, we look at Chichester district's population projections as a way of identifying whether the above employment forecasts are in line with the impact for a sustainable labour market balance sheet, which we discuss further below.

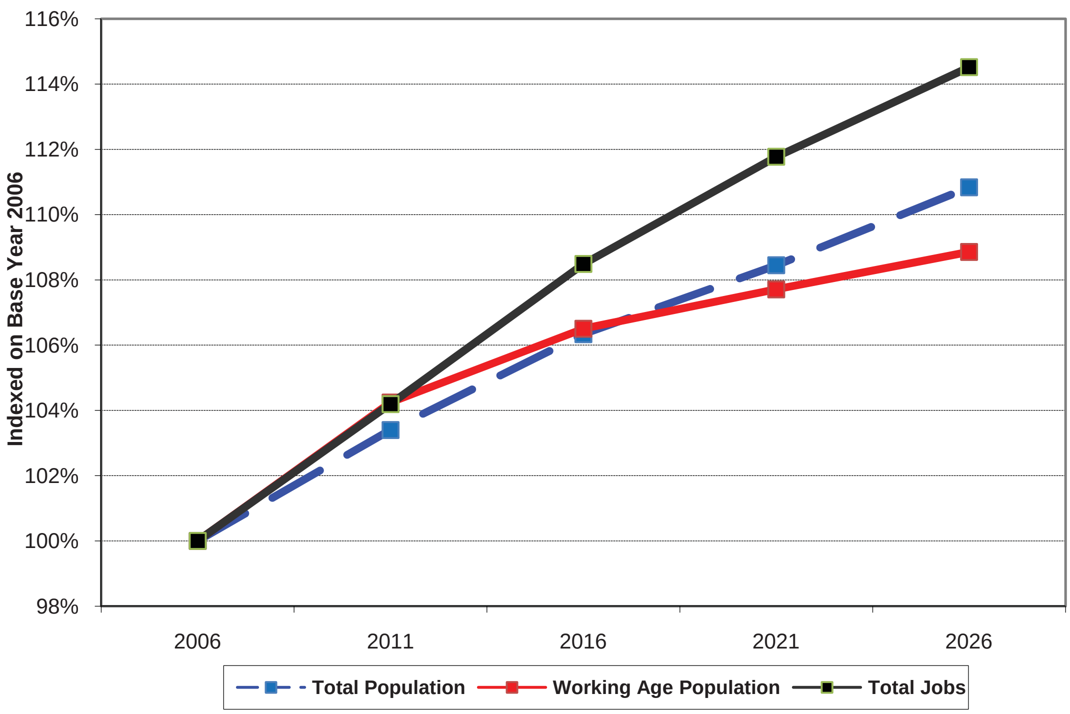
5.10 In looking at this, we use the West Sussex County Council (WSCC) dwelling-led population projections. These population projections have been informed by the draft SEP district housing target numbers and WSCC's demographic model. The population

[21] The Panel Report on the SE Plan noted at para 6.33 that: '"We are content to accept the advice of SEEDA that the Experian published forecasts for the South East region are the best starting point for this RSS." Para 6.77of the report encourages the use of the Experian forecasts, at least prior to new work at a regional/sub-regional level: "In the meantime, the Experian standard forecasts could be used as a guide to inform LDF work, as these are available at district level although we fully accept the uncertainties involved in projecting to local level."

projections were produced independently of Experian's employment projections, so they offer a useful basis for reality checking the employment forecasts.

5.11 Figure 5.1 plots Experian's employment and population projections for Chichester district between 2006 and 2026. It shows that the resident population will increase by 11,800 (11%); with working age (16-64) population increasing by 5,720 residents, which is a slightly lower rate of growth at 8.8% compared to the non-working age (65+) group. During the same period, Experian projects the number of all jobs to increase by approximately 9,130 (15%), which is greater both in percentage and absolute number change than the increase in working age residents. Consequently an increase in net in-commuting would result, which we estimate using a labour market balance sheet approach.

Figure 5.1 Chichester District Employment and Population Projections, 2006-2026



Source: SEEDA, Experian RPS Spring, 2008; WSCC Population Projections

Reality Checking using Labour Market Balance Sheets

5.12 Assuming that Chichester district's economic activity rate converges with the current South East average, and unemployment rates (which currently are below the SE average) remain constant, then under this base case projections for employment and population growth in Chichester district, by 2026 there would be nearly 2,000 more workers in-commuting into the district (see Table 5.2). The relative size of this increase against all commuting flows in and out of Chichester district suggests that this is reasonable. Therefore the projected base case jobs forecast is a realistic proposition on which to base future employment land supply projections. However, since these are only indicative, we look at alternative scenarios based on adjusting demand and supply conditions in relation to different population projections

5.13 We start with the SEP, which increases the planned housing numbers for Chichester district by 1,000 additional dwellings. We refer to this as Scenario 1, which results in a larger resident labour supply of 706 and therefore a smaller net in-commute of 1,300 workers into Chichester district.

5.14 Scenario 1 above adjusts the labour supply but not demand. Therefore we test for another scenario (Scenario 2) which follows WSCC population projections but changes labour demand by maintaining the current (2006) balance of jobs to working age population. This generates some 3,500 fewer jobs than the base case, resulting in an undersupply of jobs relatively to population growth. This would reverse the in-commuting to a net out-commuting figure of 1,400 resident workers.

5.15 And in a final scenario (Scenario 3) we combine the changes in supply and demand in the previous two scenarios. The result is further net out-commuting of more than 2,000 workers.

5.16 The summary impacts on the future (2026) net in-commuting patterns in Chichester district are summarised in Table 5.2. Further explanation and the labour market balance sheet for each scenario are included in Appendix 5.

Table 5.2 Changes in Labour Market Balance, 2006-2026

	Dwellings	Econ active pop	Jobs	Net commuting balance
Base case	8,600	6,951	9,130	-1,972
Scenario 1	9,600	7,657	9,130	-1,292
Scenario 2	8,600	6,951	5,569	1,410
Scenario 3	9,600	7,657	5,569	2,091

NB: A negative net-commuting figure indicates in-commuting, and vice-versa

Source: RTP

5.17 Of these scenarios, Scenario 1 is preferred over the base case because it is closer to self-contained commuting levels, therefore achieving higher prosperity and reducing travel to work. Scenario 2 is favoured less than the base case because net out-commuting is likely to increase travel to work journey distances and a leakages in the district's economic prosperity. The least favoured scenario is Scenario 3 since this would reduce prosperity further and result in potentially more journeys to work.

5.18 Since the base case and Scenario 1 are the two favoured scenarios, and since they both follow the Experian employment projections, we consider the Experian forecasts to be suitable for planning future employment space in Chichester district.

Uncertain Future Growth

5.19 In late 2008, the UK was heading into recession and significant variations from the recent buoyant past are expected in the short-term. How long this downturn in the economy lasts is difficult to predict, but in the next two years at least there is likely to be reduced or even negative growth in the national economy and jobs, and Chichester district's economy is unlikely to be impervious to this.

5.20 Owing to the time delays in receiving economic variables feeding Experian's forecasts, these short-term changes are unlikely to show in the ELR forecasts. However, the impact is less because the study plans over the longer term - the study timeline is 20 years - and with any long term forecast we would expect the economy to fluctuate around a long term average.

5.21 Therefore the growth projection after 20 years should not differ significantly if they start from a downturn in the economy or from a period of positive growth, and this reasoning applies to the long-term forecasts informing this study.

Impacts for Business Space Jobs

5.22 Using the employment sector forecasts, we translate jobs into demand for employment space. To this end, we translate jobs by sector into jobs by type of space, using sector-to-space mapping.

Converting Employment to Business Space Forecasts

5.23 The definition of B-space sectors comprises office jobs, industrial and warehousing jobs and is often referred to as business or B-space jobs. To identify these jobs we use a range of economic sectors based on the Standard Industrial Classifications (SIC'03), shown in Appendix 3.[22] Broadly, our analysis assumes that offices (which include R&D) are occupied by financial and business services, a sub section of public administration, and publishing. Industrial space is occupied by manufacturing, sewage and refuse disposal, some parts of construction, and motor repairs and maintenance. Warehousing is occupied by a variety of transport and distribution activities.

5.24 We merge production and distribution space (industrial and warehousing) into one category, called "industrial/warehousing" because our experience suggests that data on the supply of space - such as CLG floorspace statistics and planning data on completions and commitments - do not distinguish accurately between industrial factories and warehouses. This is not surprising since production and distribution can generally operate in the same buildings and, furthermore, subject to size limitations, space can be transferred between production and distribution without planning permission.

5.25 Table 5.3 shows the forecasts jobs mapped into B-space sectors. This projects a minor loss of jobs (almost no change) in the industrial/warehousing sector. But this is insignificant in relation to the very strong growth in the office-based jobs sectors - some 41 percent - which also outperforms growth in non B-space sectors of the economy.

5.26 Overall B-space jobs are forecast to grow by 4,100. Growth is stronger in the initial period to 2016, with an overall increase of 13 percent from the total of 20 percent projected by 2026.

[22] The 'goodness of fit' between sectors and types of space is not perfect; hence our definitions of office and industrial/warehousing jobs are no more than approximations. But these are the best possible estimators we have for B-space employment and we have developed these through a series of employment space studies. Government Guidance on Employment Land Reviews (ODPM, 2004) endorses this approach.

5.27 Should the County Council relocate some of its employees outside of the district, as commented on in Chapter 4, then potentially the job figure may be lower. Because the intentions and impact are unknown at present, we have not allowed for any potential job losses in Table 5.3. However, we do know the amount of space this may free up, which is referred to later in the chapter.

Table 5.3 Chichester District B-space Employment Projections, 2006-2026

				Change 2006-16		*Change 2006-26*	
	2006	2016	2026	*#*	*%*	*#*	*%*
Manufacturing jobs	4,678	4,763	4,352	85	2%	-325	-7%
Other industrial jobs	2,239	2,253	2,318	14	1%	79	4%
Warehousing jobs	2,666	2,591	2,558	-75	-3%	-108	-4%
Total Ind/Whsg jobs	**9,583**	**9,607**	**9,228**	**24**	**0%**	**-354**	**-4%**
Offices jobs	**10,999**	**13,739**	**15,457**	**2,740**	**25%**	**4,458**	**41%**
All B-Space jobs	**20,582**	**23,346**	**24,686**	**2,764**	**13%**	**4,104**	**20%**
All jobs	62,892	68,229	72,022	5,337	8%	9,130	15%

Source: RTP; Experian

Demand for Business Space

Employment Projection Requirements

5.28 To translate the B-space employment forecasts into demand for space, we use employment densities based on a 1997 study by Roger Tym & Partners for SERPLAN.[23] These are:

- Offices: 21 sq m (18 sq m net external) per worker;
- Manufacturing: 30 sq m per worker; and
- Warehousing: 40 sq m per worker[24].

5.29 We prefer the densities above to the available alternatives, including those put forward by DTZ Pieda for SEERA[25], because they are supported by a large and statistically rigorous survey.

5.30 Using employment densities, Table 5.4 translates employment change into net change in floorspace take-up. This shows total demand in Chichester district will be for some 80,000 sq m of net additional office space over the plan period and a minor net lose of 12,000 sq m in industrial/warehousing space demanded. The overall growth in B-space requirement is therefore some 67,600 sq m.

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[23] Roger Tym & Partners for SERPLAN (1997), *The Use of Business Space: Employment Densities and Working Practices in South East England*.

[24] This is for general warehousing; however this figure could be higher in strategic distribution warehouses, where densities may average around 80 sq m + per worker.

[25] The DTZ Pieda (2004) study for SEERA found similar densities (18 sq m net for B1, 34 sq m for B2 and 41 sq m per B8).

Table 5.4 Projected Changes in Floorspace Take-up in Chichester District, 2006-2026

Floorspace type	Sq M
Industrial	-7,800
Warehousing	-4,300
Industrial/warehousing	**-12,100**
Offices	**79,800**
Total B Space	**67,600**

Source: RTP; Experian

Recent Completions

5.31 Some of the future demand from 2006 to 2008 will have been accommodated through changes in B-space in the district since 2006. The West Sussex County Council monitoring data (CIDs), which we summarise in Table 5.5. show that between 2006 and 2008, the Chichester district B-space stock increased by 31,300 sq m, with gains in both industrial/warehousing space and offices.

5.32 The recent gains in industrial/warehousing space will further increase the potential for releasing industrial/warehousing space over the plan period.

Table 5.5 Completions of B-space Floorspace, 2006-2008

Floorspace type	Sq M
Industrial/warehousing	12,500
Offices	18,800
Total B Space	**31,300**

Source: WSCC (CIDS)

Committed Losses

5.33 In estimating future B-space requirements we discount committed (but not completed) losses of B-space from future stock. We obtain this information from WSCC's CIDS monitoring data, and include existing floorspace and available sites that are planned for release. The summary is shown in Table 5.6, and suggests that some 46,000 sq m of B-space, mostly industrial/warehousing space, should be added to future requirements to replace committed future losses.

Table 5.6 Committed Gross Losses of B-space at 2008

	Sq M
Industrial/warehousing	29,000
Offices	17,000
Total B-Space	**46,000**

Source: WSCC (CIDS)

Frictional Margin

5.34 In accordance with the Government Guidance on Employment Land Reviews (2004), before comparing demand with supply, we need to take account of the frictional margin of land in the planning and development pipeline. The frictional margin for land is always positive, even when the total floorspace is declining. This is because even in a falling market, there needs to be room for 'churn', whereby old/obsolete stock is replaced by new.

5.35 This margin comprises the land which at any one time is allocated or permitted for B-Class development but cannot yet provide floorspace, for example because it is under construction or awaiting infrastructure or detailed planning permission. Logically, the land in the pipeline equals the annual gross take-up (i.e. completions) times the average time that land spends in the pipeline. Thus, if the average time between a site being allocated or permitted for development and building completion on the site is one year, then at any one time the land in the pipeline will equal one year' take-up. If sites take two years to go through the pipeline, then at any one time two years take-up will be in the pipeline, and so forth.

5.36 For Chichester district we assume two years to be a typically adequate time for achieving planning consent, site preparation and construction. We then multiply this against the annual average (over the past seven years) gross completion of floorspace in Chichester district taken from WSCC CIDs data. The resulting frictional margins are shown in Table 5.7.

5.37 For industrial/warehousing jobs, the frictional requirement is for 53,500 sq m of space. So despite the little anticipated growth in industrial/warehousing jobs, there is likely to be a significant requirement for frictional space, which will in part provide for a natural (market equilibrium) level of churn in the market. With offices being a much smaller market, there currently is a much lower requirement of 9,400 sq m in frictional space requirement.

Table 5.7 Frictional Land Supply

	Sq M
Industrial/warehousing	53,500
Offices	9,400
Total B Space	**62,900**

Source: WSCC (CIDS)

Total Requirement

5.38 Table 5.8 shows the sum total future requirements of the above components, or how much employment land Chichester district will need to provide over the life of the Plan. This shows total outstanding requirements in 2008 to be 87,400 sq m of additional office space and 57,500 sq m of additional industrial/warehousing space.

Table 5.8 Chichester District B-space Requirements, 2006-2026

Floorspace Change, sq m	Offices	Ind/Whsing	Total B-space
Net demand (take-up), 2006-26	79,796	-12,163	67,633
- actual net floorspace change, 2006-08	18,808	12,472	31,279
Sub-total net demand, 2008-26	**60,989**	**-24,635**	**36,354**
+ Committed losses at 2007	16,959	28,695	45,654
Gross demand, 2008-26	**77,948**	**4,060**	**82,008**
+ Gross margin (pipeline)	9,417	53,437	62,854
Gross requirement, 2008-26	**87,364**	**57,498**	**144,862**

Source: RTP

Historic Comparison - Reality Checks

5.39 As a reality check, Table 5.9 compares the employment forecasts with past annualised change, between 1998 and 2004. The comparison shows future employment change in industry and warehousing follows a similar pattern to the recent past, although with marginally less annual losses. In offices, there is positive growth in line with the recent past, but the projected rate of growth was higher in the past.

5.40 Overall, the pattern is for future employment change to follow the recent past, but the growth in office employment projected considerably slows down together with a slow down in the decline of industrial and warehousing employment.

Table 5.9 Annual Employment Change in Chichester District , Past and Future

	Industrial/warehousing		Office	
	#	%	#	%
1998-2006 Past Trend	-89	-1.09%	489	5.73%
2006-2026 Base Case	-71	-0.19%	892	1.72%

Source: RTP, ABI

Planned Supply of Employment Space

5.41 The planned (or committed) supply of employment space is the land currently identified by the planning system to accommodate change in the B-class land uses. This is the sum of:

- Current surplus floorspace stock based on the current (2008) vacant stock that is over and above the 'equilibrium vacancy' required for smooth operation of the market (estimated at 7.5% of stock); and
- Outstanding net planning commitments and available land at 2008 sourced from the WSCC (CIDS) monitoring data.

Surplus Vacant Built Space

5.42 As noted in Chapter 4, vacant space is necessary to provide choice in the market place for the market to operate smoothly.[26] Discussions with local and national property agents suggest that this frictional supply is somewhere between 5 and 10 percent, averaging at 7.5 percent.[27] Where there is vacant space above this mark, then this would constitute surplus vacant supply and should be carried forward into future supply. If vacant space is below 7.5% there may be too little built space readily available, and therefore further allocations are necessary to enable choice of built stock in the market place.

5.43 As shown in Chapter 4, and repeated in Table 5.10 below, the current vacancy rate in offices in Chichester district is some 4.5 % of built stock. This is less than optimal, and an additional 2.5% or 4,000 sq m of built stock will be needed to bring the current property market into equilibrium. Should the County Council vacate some of its office space in Chichester city as reported in Chapter 4, and this space become available for reuse (with no change of use permitted), then this would greatly add to the necessary stock of vacant space, plus some more for the future planning pipeline.

5.44 The current vacancy levels in industrial/warehousing space in the district is lower still at 3.7%, suggesting that some 18,000 sq m of additional space should be found to bring current stock to an optimal supply.

Table 5.10 Vacant and Surplus Floorspace, 2008

	Offices	Ind/whsing
Stock (sq m)	133,000	479,000
Vacant space (%)	4.5%	3.7%
Optimal vacancy rate (%)	7.5%	7.5%
Surplus vacant space (%)	-3.0%	-3.8%
Surplus vacant space (sq m)	**-4,000**	**-18,000**

Source: RTP; CLG/VOA; Vail Williams

Committed Gross Supply

5.45 For committed gross supply we use WSCC CIDS data. This lists sites with permission for B-space uses and the remaining employment (Local Plan) allocations at 2008. A summary is included in Table 5.11.

5.46 Based on monitoring data, current commitments support more space for industrial/warehousing uses than offices, which probably reflects current market conditions and the undersupply of industrial/warehousing vacant built stock identified above. The available allocated land space is also better suited for

[26] This calculation is for frictional requirement in space already built and should be distinguished from the frictional requirements of land in the development pipeline calculations that were made earlier in this Chapter.

[27] This is supported by empirical evidence in a study by King Sturge, *European Office Property Markets*, *2005*, which found the mean average office vacancy for Western Europe had been 7.2% over the last 15 years from 2005.

industrial/warehousing uses, with little or none planned for offices. However, the future suggests that this position may need to change, which we come to later when we look at the future market balance. In total, some 32,300 sq m of industrial/warehousing space and 54,400 sq m of office space are planned or have land allocated at 2008.

Table 5.11 Committed/Land Available (including dev started) at 2008

Floorspace type (Sq M)	Committed Gains	Available Land	Total Commitments
Industrial/warehousing	36,000	12,100	48,100
Offices	38,600	0	38,600
Total B Space	**74,800**	**12,100**	**86,900**

Source: WSCC (CIDS)

Total Planned Supply

5.47 In Table 5.12 we sum the above components of future B-space supply, to show how much employment land is currently identified and planned for meeting future requirements in Chichester district. This gives a total supply of B-space in the district of 64,900 sq m; the outcome of a gain of 34,600 sq m of office space and 30,300 sq m of industrial/warehousing.

Table 5.12 Chichester District Planned Supply of Business Space, 2008 - 2026

Floorspace Change, sq m	Offices	Ind/Whsing	Total B-space
Surplus vacant floorspace at 2008	-4,000	-18,000	-22,000
Outstanding commitments at 2008	38,600	36,200	74,800
Available land at 2008	0	12,100	12,100
Gross planned supply	**34,600**	**30,300**	**64,900**

Source: RTP; WSCC (CIDS)

5.48 Unlike for past completions (2006 to 2008) and surplus vacant built space ready for occupation, it is difficult to assume when the current planned supply will be ready to accommodate the gross requirements for space. This may depend on any necessary land remediation, new/upgraded infrastructure, acquiring detailed planning permission and eventual build, which on large sites will normally be in several phases. We assume that all commitments at 2008 will be available to the market in the longer term, i.e. over 18 years from 2008 to 2026.

Future Market Balance

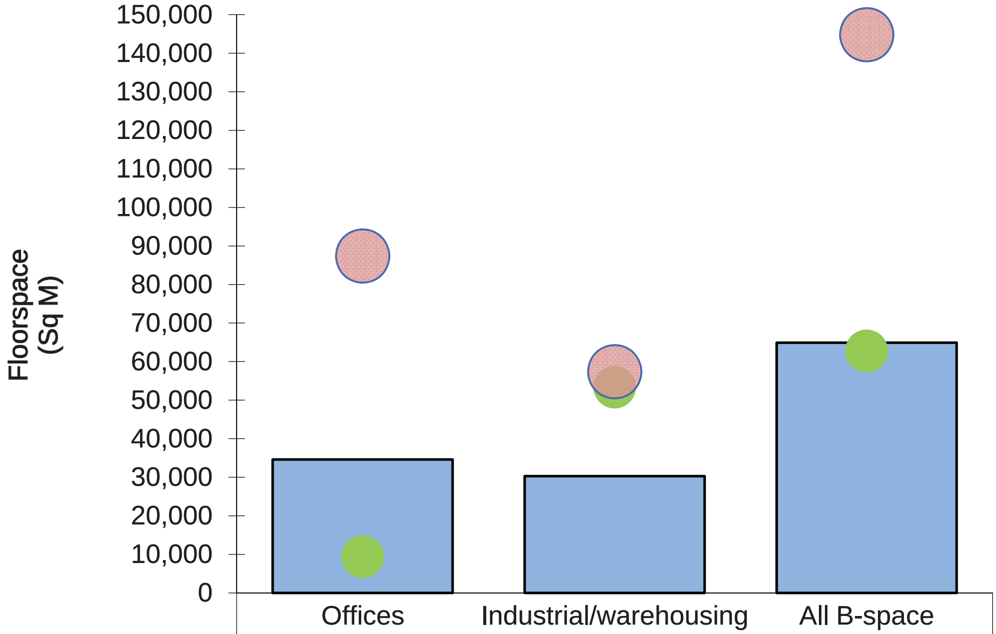
Comparing the future supply of business space with future demand

5.49 At this stage, we compare total supply of B-space in Chichester district from Table 5.8 with requirements to 2026 in Table 5.12. This gives a 'base case' future market balance in which to identify how much over or undersupply of B-space there may be. This is summarised in Figure 5.2, with the chart showing:

- The circles to represent the forecast future space requirement.
  - The green circles identify the frictional margin for space, ie, the amount of available space in the pipeline necessary to cover natural churn, etc; and

  - The larger red circles show total requirement to meet demand from the frictional requirement plus future changes in employment.
- The vertical bars to represent the net floorspace capacity of the planned land supply and planning commitments.
- Vertical distance between the bars and blue circles measure over or under-supply.

Figure 5.2 Chichester District B-space Market Balance, 2008-2026



	Offices	Industrial/warehousing	All B-space
Planned supply	34,600	30,300	64,900
Frictional churn	9,400	53,400	62,800
Base case demand	87,400	57,400	144,800

Source: RTP

5.50 Figure 5.2 shows an undersupply of employment land in Chichester district to meet demand over the course of the Plan. In 2026, the shortfall is for some 80,000 sq m of space, which is equivalent to 20 hectares of land. This includes some 52,000 sq m of office space and 27,000 sq m in industrial/warehousing space that should be found to meet future requirements.

Conclusions

5.51 In this chapter we have focused on the Chichester district's future market balance for employment space. We have looked at this balance from a quantified view only, and base this on recent Experian employment growth forecasts, frictional supplies of land and premises, and current planned supply of space at 2008. It should be noted that the figures presented in this chapter are indicative, covering a 20-year Plan period based on a snapshot view at the time of this study. There is likely to be some variation based on changes in demand and supply conditions, and some reality checking has been undertaken to test this. Overall, the projections used for this ELR are considered suitable for planning employment space over the longer term.

Offices

5.52 It has become apparent that allocating sites to meet future growth in B-space requirements should particularly focus on office based sectors since this is where most of the employment growth in Chichester district is forecast to occur. This position reflects the South East Plan expectation identified through Experian's employment projections. Therefore to be consistent with the SEP, then in moving the local Development Framework forward to the next period, Chichester district should identify some 53,000 sq m of additional space for office uses over the plan period to 2026. This is equivalent to some 13 hectares of land supply in the district.

Industrial/Warehousing

5.53 Industrial manufacturing and warehousing employment is not growing. However, there is a positive requirement for additional industrial/warehousing space over the life of the Local Development Framework to accommodate the changing needs of existing companies through natural churn rather than employment growth. There has been a significant amount of churn in recent years, and this is likely to continue in the future. Consequently, with a tight market for existing built space, little available land and limited amount of planned gross commitments, some 27,000 sq m of additional industrial/warehousing space will be required in Chichester district over the Plan period. This is equivalent to some 7 hectares of land supply in the district.

Quantum and Quality

5.54 While the District Council should identify a suitable quantum of space to plan to 2026, which we have identified here, it is important to consider the type of space that is being offered. This we have looked at in Chapter 4, and in the next chapter we review the suitability of planned supply and existing employment areas to accommodate the future space requirements.

6 THE QUALITY OF EMPLOYMENT LAND

Introduction

6.1 In this chapter, we assess the employment land supply in Chichester district for the purpose of matching it with the market requirements of business occupiers in chapters 4 and 5.

6.2 The assessment looks at development sites allocated for employment (B-space) use and existing industrial estates for employment purposes. The assessment is to help the Council decide:

- Which sites should be retained for employment uses?
- Of these employment sites, which need infrastructure or other improvements to fulfil this function successfully?
- And which might be considered for release to other uses?

6.3 We start by looking at the status of the 13 allocated employment sites in Chichester District's Local Plan to assess their future potential. We also review two examples of non-allocated space which were identified in Chapter 4 as available space that are being promoted by developers/landowners for significant employment uses.

6.4 We finish the assessments by reviewing Chichester district's key employment areas in the district to see if they are likely to remain fit for purpose in their existing use over the plan period.

Allocated Employment Sites

6.5 As recommended in the Government's guidance on Employment Land Study's (2004), we have assessed currently allocated employment sites in the Local Plan on the basis of the following criteria:

- General location - here we consider the location of the area from a sustainability perspective, assessing its location relative to urban/town centres. For example, whether it is in an edge of centre or out of town location, its accessibility by a choice of means of transport and the proximity of facilities that would be of benefit for existing or future occupiers.
- Strategic accessibility - this criterion takes account of the proximity of a site to the strategic highway network, principally the good quality A roads, which is an important locational factor both for industrial and office occupiers.
- Local accessibility - this criterion considers the quality of the area/site in terms of its local access characteristics, for example, whether it is located on unclassified roads, or constrained by congestion or other physical factors.
- External environment - this criterion takes account of the nature and extent of the area's neighbouring uses and in particular, considers the likely risk of conflict arising from existing or potential future employment uses of the area.
- Internal environment - this criterion takes account of the shape, topography, prominence and internal layout of the employment area. It also considers whether there are potential areas of risk that are likely to influence the cost of future

development, such as contamination, environmental or conservation issues (eg, listed status, floodplain, area of landscape value, etc).

- Market conditions/perception and demand - looking at recent market activity, likely market demand and the level of vacancy within the area, in terms of either vacant floorspace or land that is disused or derelict.

6.6 We assessed each allocated site on the basis of a visual inspection by Vail Williams, property agents, during August to October 2008. The overall summary for each allocation is provided in the boxes below. The sites are numbered according to their location on the district maps in Appendix 6.

6.7 There are some 26 ha of allocated land remaining. Based on the following site assessments, we estimate that some 11 ha of the 33 ha are likely to be suitable for meeting future requirements for employment space identified in Chapter 5.

Land between Manor Road and Manor Lane, Selsey

Area no.	1	Map no.	1	Site area	3.9 ha
Market area	South East (B2145 Selsey corridor)				
Comments	Includes the existing development at "Selsey Gate", "Sherington Mews" and "Pulsar Business Park", as well as possible expansion land. The vacant premises cast doubt on the viability of further B-class space. Building homes here may expand demand by increasing/refreshing the labour supply. Consider other job creating uses plus more housing here or south of Park Lane to expand demand.				
Likely use	B1a/c if demand for vacant space accelerates. More likely is non B-class uses, although these should not be mandatory.				

Donnington Park, Stockbridge

Area no.	2	Map no.	2	Site area	1.0 ha
Market area	South West (A286 Wittering corridor)				
Comments	A successful development has completed on part of the site (see assessment 3028 in Appendix 7) where demand is supported by high quality ("barn conversion style") buildings and close proximity to Chichester. The allocation area extends beyond the current buildings and offers helpful capacity for the future.				
Likely use	B1a/c				

Pitsham Lane, Midhurst

Area no.	3	Map no.	4	Site area	1.0 ha
Market area	North West (A285 corridor)				
Comments	The western end of the allocation (as marked) borders what is now a residential area. The present use (bus/coach depot) is very specific and may not be sustained by others if not required by this particular operator or taken up by others for open storage. The site lacks market profile and would not support speculative development. Consider release if vacated.				
Likely use	Depot use may continue otherwise hard to predict demand here.				

East of Hampers Common Industrial Estate, Petworth

Area no.	4	Map no.	5	Site area	2.0 ha
Market area	North East (A285 corridor)				
Comments	This allocation is land adjacent to Hampers Common Industrial Estate. Petworth is a small town (about one third the size of Midhurst) and it is doubtful that it could support as much B-class employment as this allocation could produce. Nonetheless, there is a natural opportunity to extend Hampers Common Industrial Estate which would benefit from a wider choice of higher quality units (possibly including small office units). Market testing would help establish the extent of demand which is unproven in this location. A larger development incorporating the village hall and adjoining builder's yard (North End Yard) would allow a comprehensive, mixed use scheme to be considered.				
Likely use	B1a/c, possibly some small scale B8				

Stedham Sawmill, Stedham

Area no.	5	Map no.	4	Site area	1.3 ha
Market area	North West (A285 corridor)				
Comments	A partly developed underused site with somewhat low grade workshops and open storage (see site assessment ref: 3110 in Appendix 7). Mixed use would help attract fresh investment. The northern part of the site close to the village may be suited to housing with the southern part close to the main road saved for B-class use; in this way it would be possible to create a layout that produces a net gain of floorspace.				
Likely use	B1a/c, possibly some small scale B8				

Chichester Business Park, Tangmere, Chichester

Area no.	6	Map no.	2	Site area	2.1 ha
Market area	A27 Corridor and Chichester				
Comments	Chichester Business Park is located at Tangmere, off the A27 Arundel Road, just east of Chichester. It comprises high quality warehouses with linked office blocks. Subject to planning permission, there is scope for additional land available for the expansion of Philips/Respironics, plus plots 10 (1.86 ac) and 11 (0.77 ac) are on the market (see site assessment 3009). Note however that the allocation (as currently defined) only comprises Plots 1 to 4. It is being marketed as 4.03 ac (1.63 ha) for offices or other 'bespoke' development, subject to pre-lets, hence retention for employment use is recommended.				
Likely use	Possible location for B1a office park, although proven demand includes B8 at present				

Land near Charlton Saw Mill, Charlton

Area no.	7	Map no.	3	Site area	0.6 ha
Market area	North West (A285 corridor)				
Comments	The allocation comprises open land and a very dated, agricultural, dutch barn/store (with low grade blockwork walls and a corrugated asbestos roof). The first parcel of land adjoins new housing development and has the appearance of a "village green" (albeit on the edge of the village). Development of the green area for B-class use would probably exceed the needs of this small settlement. Secondly, the old barn/store adjoins four modern workshops, more open space and a small timber yard (which are outside the allocation as drawn on the project map - see site assessment ref:3045 in Appendix 7). Since the old barn/store is adjacent to the workshops it may be suitable for redevelopment or refurbishment as B-class space. Speculative development would be hard to support and market testing would be required.				
Likely use	Subject to these comments, possibly some more B1c workshops				

Barnfield Drive, Chichester

Area no.	8	Map no.	2	Site area	2.1 ha
Market area	A27 Corridor and Chichester				
Comments	This allocation is situated to the north of a crematorium and is accessed from Barnfield Drive. It is very largely developed and used by Homebase; as such it is closely associated with the "retail park" in Portfield Way. The plan does not exactly follow the outline of the Homebase building and car park. The ground conditions on the northern part of the coloured area may be adversely affected by the River Lavant (subject to investigation). Further development is not foreseeable at present due to lack of undeveloped land within the site boundary.				
Likely use	None available				

Graylingwell Hospital, Chichester

Area no.	9	Map no.	2	Site area	8.4 ha
Market area	A27 Corridor and Chichester				
Comments	The former Graylingwell Hospital features a range of historic buildings where mixed use is now proposed (see planning application 08/03533/OUT and www.graylingwellchichester.com). The site is situated to the east of College Lane and may also be accessible from a new road linked to the housing area off Barnfield Drive. Being in the northern part of Chichester, the site has inferior access compared to the principal employment areas of Chichester. However, the range of character buildings awaiting conversion (some listed buildings) would create an attractive environment for employment uses such as offices (and non-B class employment). The difficulty will be creating a financially viable mix of uses that also enables sensitive treatment of the historic buildings.				
Likely use	Mixed use including some B1a office space				

Terminus Road/ Stockbridge Road, Chichester

Area no.	10	Map no.	2	Site area	4.6 ha
Market area	A27 Corridor and Chichester				
Comments	This is now a "leisure park" complex with cinema and car park.				
Likely use	Already built				

Southern Gate, off Terminus Road, Chichester

Area no.	11	Map no.	2	Site area	1.1 ha
Market area	A27 Corridor and Chichester				
Comments	Southern Gate, off Terminus Road, is situated immediately to the south of the railway line and north of Canal Place. It has been partly developed as offices for Hyde Martlet, John Wiley and Nicola Jane (see site assessment 3010). An office development of some 15,000 sq ft is proposed between the Nicola Jane and Bicentennial buildings (the latter has expansion space for John Wiley and surplus accommodation being let). We recommend retention of this allocation and encouragement of office development to help improve the choice of offices.				
Likely use	B1a				

Land between A27 and Shopwhyke Road, Chichester

Area no.	12 and 13	Map no.	2	Site area	4.5 ha
Market area	A27 Corridor and Chichester				
Comments	These allocations are located to the east of the A27/Portfield Way roundabout. They are extremely well located for prominence to the A27, although access to number 12 is from south of the roundabout near allocation 13. Background traffic noise from the A27 may deter housing development but, subject to any highways constraints, the site would lend itself very well to B1/B2/B8 employment uses. We recommend retention for employment and consideration of a masterplan approach for further development between here and Shopwhyke Road (including land between allocation 13 and the A27).				
Likely use	Probably best suited to B1c/B2/B8. Could also compete with Tangmere as an office park but somewhat removed from the town centre facilities and station. Mixed use allocation is a potential option, with scope for intensifying and increasing employment on site.				

Existing Employment Areas

6.8 We reviewed the main employment areas in Chichester district to evaluate their fitness for purpose. The majority of these 39 employment areas are not designated nor identified for employment uses within the Local Plan, but they are listed in the West Sussex County Council's West Sussex Industrial Estate Directory (2008) as employment estates.

6.9 It is not the aim of the exercise to comment on the quality of the built stock,[28] but rather to provide an overview on the commercial quality of employment areas as a whole, and review whether they would be suitable for current and future employment uses over the longer term. Where sites are suitable, then we recommend that they remain in employment use particularly given the shortfall of existing space in the district identified in Chapter 5.

6.10 Each employment area was assessed by visual inspection by Vail Williams during August to October 2008. Each property was inspected externally to identify their fitness for purpose for employment uses, based on the following criteria:

- Type
  - Established or potential office location
  - R&D/technology/Science Park
  - Warehouse/distribution park
  - General/industrial business area
  - Incubation/SME cluster site
  - Specialised use (depots etc)
- Business identity (e.g. obviously for business use or isolated by other uses such as houses)
- Current 'role' of the area
- Prominence of the estate
- Nature of use and businesses present
- Any floorspace obviously for sale/vacant
- Potential plots (e.g. cleared sites or derelict buildings) within area
- Type of location - urban, urban edge, outside urban/rural
- General quality of buildings/environment and approx age
- General state of external areas, parking and circulation space
- Perception of wider environmental quality
- Local amenities/facilities for workforce
- Ease of access to main road network
- Any comment on workforce catchment
- Comments on demand/market segments
- Comment on the 'role' of the area in future

6.11 We use a scoring mechanism for assessing overall fitness for purpose based on the above criteria. The scores are subjective and unweighted by importance, but have been viewed with consideration for best practice and experience elsewhere based on the knowledge of Vail Williams. The scoring results are presented in Table 6.1, with the full assessments of each employment area included in Appendix 7.

[28] In certain circumstances, it will be necessary to comment on particular elements of the stock, for example where age or condition provides an indication as to the ripeness of all or part of the area for redevelopment.

Table 6.1 Summary Assessment Scores for Chichester's Existing Employment Areas

West Sussex Ind Estates Ref/ Local Plan Ref	Estate / employment area	ELR Sub-area	Market area	Agent's (Vail Williams) Score (1 to 5, where 5 is excellent)						
				Business use identity	Prominence	Public realm	Parking/ circulation	Amenities/ facilities	Ease of road access	Total
3015	Dukes Court, Chichester	Chichester & Tangmere	A27	5	3	3	3	3	4	21
3020	Quarry Lane Ind. Est, Chichester	Chichester & Tangmere	A27	5	5	3	3	3	4	23
3023	City Bus. Ctr, Chichester	Chichester & Tangmere	A27	5	5	4	3	5	3.5	25.5
3029	St James's Works, Chichester	Chichester & Tangmere	A27	4	3	2	2.5	4	4	19.5
3030	St James's Ind. Est, Chichester	Chichester & Tangmere	A27	5	3.5	3	4	4	4	23.5
3031	Ben Turner Ind. Est, Oving Road, Chichester	Chichester & Tangmere	A27	5	3.5	3.5	3.5	3.5	4	23
3050	Clovelly Rd, Southbourne	Chichester & Tangmere	A27	4	2	2	2	1.5	2.5	14
3055	Broadbridge Bus. Ctr, Bosham	Chichester & Tangmere	A27	4	1	4	4	2.5	2	17.5
3058	Southfield Ind. Prk, Bosham	Chichester & Tangmere	A27	4	1	2.5	3.5	1.5	2	14.5
3009 & alloc 6	Chichester Bus. Park	Chichester & Tangmere	A27	5	3.5	4	5	2	4	23.5
3010 & allocs 10 & 11	Terminus Rd, Chichester	Chichester & Tangmere	A27	5	5	3	3	3	4	23
3032 & allocs 12 & 13	Shopwhyke Ind. Est, Chichester	Chichester & Tangmere	A27	4	2.5	3	2.5	3	3	18

West Sussex Ind Estates Ref/ Local Plan Ref	Estate / employment area	ELR Sub-area	Market area	Agent's (Vail Williams) Score (1 to 5, where 5 is excellent)						
				Business use identity	Prominence	Public realm	Parking/ circulation	Amenities/ facilities	Ease of road access	Total
3090	Colhook Ind. Prk, near Northchapel, Petworth	North	NE	4	3	4	3	1.5	3.5	19
3080 & alloc 4	Hampers Common, Petworth	North	NE	5	2	3	3	3.5	3.5	20
3035	Kingley Ctr, West Stoke	North	NW	4	3	3	4	1	3	18
3040	Eastmead Ind. Est, Lavant	North	NW	4.5	3	2	3	1	4	17.5
3060	Holmbush Ind. Est, Midhurst	North	NW	5	3	4	4	4	3	23
3065	The Wharf, Midhurst	North	NW	2	1	3	2	4	2.5	14.5
3070	Midhurst Bus Ctr, Midhurst	North	NW	5	2	3	3	3.5	3	19.5
3100	Hurstfold Farm, Fernhurst	North	NW	3	1	1	3	1	1	10
3115	Old Station Yard, Elsted Marsh, Nr Midhurst	North	NW	4	2	3	3	2	1	15
3120	Old Sawmill, Nyewood	North	NW	5	1.5	3	3	1.5	2	16
3041/ 3051	Oldwick Farm, West Stoke Rd, Lavant	North	NW	4	3	3	3	1	3	17
3045 & alloc 7	Charlton Sawmills, Charlton	North	NW	3	1	4	3	1	2	14
3110 & alloc 5	Old Sawmills, Stedham	North	NW	4	2	1	1	1	3.5	12.5
Alloc 3	Pitsham Lane, Midhurst	North	NW	1	1	1	3	2	3	11
	Fernhurst Bus. Park	North	NW	5	4	4	3	1	3.5	20.5
3008	Landberry Ind. Est, Selsey	South	SE	2	2	3	3	4	2	16
3027	North Farm, North Mundham	South	SE	2	1	3	3	2	1	12
3007 & alloc 1	Selsey Gate, Selsey	South	SE	5	4	3.5	3	3	2	20.5
	Enbourne Bus. Prk, nr Sidlesham	South	SE	5	3.5	4	4	1	3	20.5
3000	Allmans/Birdham Bus. Prk, Birdham	South	SW	5	3.5	2	4	1	3.5	19
3002	Northleigh Bus. Prk, Birdham	South	SW	5	3	2	3	3	3	19
3003	Hills Barns, Apuldram	South	SW	4	1	4	3	1	1.5	14.5

West Sussex Ind Estates Ref/ Local Plan Ref	Estate / employment area	ELR Sub-area	Market area	Agent's (Vail Williams) Score (1 to 5, where 5 is excellent)						
				Business use identity	Prominence	Public realm	Parking/ circulation	Amenities/ facilities	Ease of road access	Total
3005	East Wittering Bus. Ctr,	South	SW	5	2.5	3	4	3	2	19.5
3024	Appledram Barns, Birdham Rd, Nr Apuldram	South	SW	4.5	3.5	4	3	1	4	20
3026	Vinnetrow Farm, Runcton	South	SW	4	3	4	3	1	3	18
3028 & alloc 2	Donnington Prk, Stockbridge, Chichester	South	SW	5	3.5	4	3	1	4	20.5
Near 3000	Premier Bus. Prk, Birdham	South	SW	5	3.5	3	3	1.5	3	19

6.12 In Table 6.2, we conclude on the suitability of existing employment areas within Chichester district for continued employment uses over the future planning horizon.

Table 6.2 Conclusions on the Suitability of Existing Employment Areas

Industrial Estates/ (Local Plan Ref)	Estate / employment area	ELR Sub-area	Market area	Conclusion
3000	Allmans/Birdham Bus. Prk, Birdham	South	SW	Retain
3024	Appledram Barns, Birdham Rd, Nr Apuldram	South	SW	Retain
3031	Ben Turner Ind. Est, Oving Road, Chichester	Chichester & Tangmere	A27	Retain
3055	Broadbridge Bus. Ctr, Bosham	Chichester & Tangmere	A27	Retain
3045 (& alloc 7)	Charlton Sawmills, Charlton	North	NW	Retain, consider mixed use if extending
3009 (& alloc 6)	Chichester Bus. Park	Chichester & Tangmere	A27	Retain
3023	City Bus. Ctr, Chichester	Chichester & Tangmere	A27	Retain
3050	Clovelly Rd, Southbourne	Chichester & Tangmere	A27	Retain but promote investment and review
3090	Colhook Ind. Prk, near Northchapel, Petworth	North	NE	Retain
3028 (& alloc 2)	Donnington Prk, Stockbridge, Chichester	South	SW	Retain
3015	Dukes Court, Chichester	Chichester & Tangmere	A27	Retain
3005	East Wittering Bus. Ctr, East Wittering	South	SW	Retain
3040	Eastmead Ind. Est, Lavant	North	NW	Retain
	Enbourne Bus. Prk, nr Sidlesham	South	SE	Retain
	Fernhurst Bus. Prk	North	NW	Retain
3080 (& alloc 4)	Hampers Common, Petworth	North	NE	Retain, consider mixed use if extending
3003	Hills Barns, Apuldram	South	SW	Retain
3060	Holmbush Ind. Est, Midhurst	North	NW	Retain
3100	Hurstfold Farm, Fernhurst	North	NW	Retain but review progress
3035	Kingley Ctre, West Stoke	North	NW	Retain
3008	Landberry Ind. Est, Selsey	South	SE	Retain but review progress

Industrial Estates/ (Local Plan Ref)	Estate / employment area	ELR Sub-area	Market area	Conclusion
3070	Midhurst Bus. Ctr, Bepton Rd, Midhurst	North	NW	Retain, consider mixed use if extending
3027	North Farm, North Mundham	South	SE	Retain but review progress
3002	Northleigh Bus. Prk, Birdham	South	SW	Retain
3120	Old Sawmill, Nyewood	North	NW	Retain
3110 (& alloc 5)	Old Sawmills, Stedham	North	NW	Mixed use
3115	Old Station Yard, Elsted Marsh, Nr Midhurst	North	NW	Retain
3041/ 3051	Oldwick Farm, West Stoke Rd, Lavant	North	NW	Retain
Alloc 3	Pitsham Lane, Midhurst	North	NW	Consider release if vacated
Near 3000	Premier Bus. Prk, Birdham	South	SW	Retain
3020	Quarry Lane Ind. Est, Chichester	Chichester & Tangmere	A27	Retain
3007 (& alloc 1)	Selsey Gate, Selsey	South	SE	Retain, consider mixed use if extending
3032 (& allocs 12 & 13)	Shopwhyke Ind. Est, Chichester	Chichester & Tangmere	A27	Retain, consider mixed use if extending
3058	Southfield Ind. Prk, Bosham	Chichester & Tangmere	A27	Retain
3030	St James's Ind. Est, Chichester	Chichester & Tangmere	A27	Retain
3029	St James's Works, Chichester	Chichester & Tangmere	A27	Retain but review progress
3010 (& allocs 10 & 11)	Terminus Rd, Chichester	Chichester & Tangmere	A27	Retain
3065	The Wharf, Midhurst	North	NW	Consider release if vacated
3026	Vinnetrow Farm, Runcton	South	SW	Retain

6.13 Of the 39 assessed employment areas, 31 are good and therefore given the shortage of space identified in Chapter 5, they should be protected and retained for employment purposes. This should be strongly emphasised given the shortfall of existing space in the district, as identified in Chapter 5, but subject to any policy based criteria.

6.14 Eight sites should be kept under review by monitoring for any voids in situations where there is doubt about demand to replace the current occupants if they leave. Some of these sites may be considered for release once active employment uses have come to an end; this may include mixed uses with an element of employment space uses. These eight areas are:

- Clovelly Road, Southbourne in the Chichester & Tangmere sub-area was considered suitable for employment uses because of its critical mass but would need investment to attract occupiers.
- Hurstfold Farm, Fernhurst is a low scoring location but it appears to have tenants in place. There is also a planning application for B-use. But viability of development is doubtful - therefore we suggest retain but keep under review.
- Landberry Industrial Estate, Selsey is a mid-ranking site (aided by its proximity to shops) but it is not really a commercial location. However, it is in business use at present and therefore we would suggest retaining it but to keep under review.
- North Farm, North Mundham is another isolated location, lacking prominence and profile. However, it has tenants in place which creates confidence that there must be some local demand - hence keep under review.
- Old Sawmills, Stedham is commented on in Chapter 4 and the sites assessments. We would suggest that this is should be considered for mixed use if investment required.
- The bus depot site at Pitsham Lane at Midhurst (also has an allocated site), scores poorly because of its isolated location down a track, it lacks identity and has poor access was not considered a good employment location. However, it is in active use so we should conclude "consider release if vacated".
- St James's Works, Chichester scores well due to the good road access and amenities. It is clearly in business use but adjoins housing too. Ideally the buildings require further investment, and much of this depends on the current occupiers' and owner's intentions. The prominence of the location may suit a showroom type use.
- The Wharf at Midhurst was considered to not have a strong future for employment uses due to the locations poor commercial profile. Redevelopment for offices or workshops is therefore likely to be problematic. So if the site is vacated in the short-term and falls out of business use despite marketing, it should be released for alternative uses.

Other Potential Employment Sites

6.15 In looking for further opportunities for new employment sites to help meet the shortfall identified in Chapter 5, we have investigated the comments and suggestions put forward at the Chichester Employment Land Review Workshop. These largely focused on the A27 as one of Chichester district's key assets. In particular, the A27 corridor is attractive if only for the links it generates with the PUSH area in the west and Sussex Coast Sub-region in the east. For these reasons, in this section we focus on the employment development opportunities along the A27 corridor.

6.16 Although the A27 is sometimes criticised for its traffic congestion, it is still a great asset to Chichester. Ease of road access is a key criterion when considering the viability of potential development sites. At present the A27 acts as a by-pass or ring road for Chichester with comparatively little development immediately outside it. Consequently, Chichester has the advantage of having undeveloped land close to the

A27, and this represents potential capacity for B- space in the short, medium and long term.

6.17 Two particular sites to the east of Chichester city were promoted by landowners at the Employment Land Review Workshop. By way of example of the potential that this land supply may have for employment purposes, we reviewed these sites by following the employment land assessment criteria described in paragraph 6.5. Summary comments are given in the two boxes below.

Additional land south of Shopwhyke Road, west of Sherwood Nursery, Chichester

Site area	14 ha
Market area	A27 Corridor and Chichester
Comments	This site is not an allocation on the study plan, but 41ha has been promoted to the Council in writing and at the Employment Land Review Workshop. The plan supplied by the owner's Planning Consultant indicates a hatched area (about one third) which is suggested for employment use; further land may also be available post mineral workings. Close proximity to the A27 makes it an attractive employment site; the scale of development would also create strong identity in the market. Rearrangement of the access could be an opportunity to introduce some housing on the south side of Shopwhyke Road and enhance this as a residential location that might otherwise be overly dominated by B-class development from the north as well as the south.
Likely use	Probably best suited to B1c/B2/B8. Could also compete with Tangmere as an office park but too far from the town centre facilities and station to make this likely.

Additional land between Madgwick Lane and Stane Street, Westhampnett, Chichester

Site area	3 ha
Market area	A27 Corridor and Chichester
Comments	This site is not an allocation on the study plan but it has been promoted to the Council in writing and at the Employment Land Review workshop. It is located between Madgwick Lane and Stane Street, west of the Rolls Royce factory and Westhampnett. The owners are promoting additional land for housing in conjunction with some 3 ha for employment use. In terms of access it is better located for road dependent employment than Graylingwell Hospital. As a large greenfield site it also offers the benefit of uncomplicated development and critical mass to create its own identity as an employment area.
Likely use	Slightly less prominent than the latter two sites but same comments apply. May be suited to smaller business units to help its integration with new housing.

6.18 These two sites are not necessarily an exhaustive list of the many employment possibilities within the district. There are other sites further south and to the west of

Chichester city that are close to the A27 and could be accessed from it. These sites fall into three broad areas, which we comment on below.

Goodwood Airfield to Bognor Road

6.19 Land between Goodwood Airfield and Bognor Road is well situated for access to the east, towards the coastal towns of Sussex, as well as routes into the town centre such as Westhampnett Road, Shopwhyke/Oving Road and Bognor Road. As noted elsewhere in the report, Portfield Way and Barnfield Drive are associated more with retail warehousing than offices or industry. The area also includes several “brownfield” sites with a more industrial image (e.g. north of Shopwhyke Road and south of the A27, as well as former depots between Bognor Road and the railway line); these are potentially prominent sites which is advantageous in terms of market profile.

6.20 Land off Madgwick Lane and Stane Street is slightly set apart from the A27 and has less prominence, although the south western part of the site benefits from its proximity to a large roundabout which may be helpful to the marketing of employment space. We note that mixed use development is being promoted here and this can have the advantage of using the value generated by housing to help deliver employment space.

Bognor Road to Fishbourne Road

6.21 Land to the south of Chichester, between Bognor Road and Fishbourne Road, is low lying in places (evidenced by lakes between Quarry Lane and North Mundham) and this is an obvious constraint on development. Access to the A27 can be gained from the roads serving, for example, Runcton, North Mundham, Hunston, Stockbridge, Apuldram and Fishbourne; however, direct access to the A27 may be harder to achieve.

6.22 Development in this area may be constrained by the rural setting but, in market terms, successful barn conversions (e.g. off Birdham Road) have demonstrated that there is a market for business units. Also, the location of the land immediately to the south of Terminus Road Industrial Estate is not markedly different to Terminus Road itself, except access to the town centre is more difficult from the south side of the A27. Both Terminus Road and other land off the Fishbourne Road roundabout have the advantage of closer access to commercial locations in nearby Hampshire (including the PUSH growth area) compared to eastern parts of Chichester (the difference between east and west of Chichester is not great in terms of distance, although the traffic between them can be significantly slower at times).

Fishbourne Road to Hunters Race (west of Centurion Way).

6.23 Fishbourne Road to Hunters Race is divided by the railway line. To the north of the railway line, west of Centurion Way, is especially rural and there is no easy point of access to the A27. The southern part is constrained by the existing development at Fishbourne.

Conclusions

Allocated Employment Sites

6.24 As we have seen in this chapter, Chichester district has some 13 employment allocations providing 33 ha of land. Of these, two have been taken up for non B-space uses, and two should be considered for release for alternative uses due to their unsuitability for employment purposes. A further four would be better used for employment in a wider mix of uses. The remaining 11 hectares, in five allocations, have potential for delivering employment uses should they remain allocated.

6.25 The suggested employment allocations above would support some 44,000 sq m of employment floorspace in total.[29] Applying the likely uses of individual sites identified in Table 6.1 to these figures would suggest 26,000 sq m (6.5 ha) of office space and 18,000 sq m (4.5 ha) of industrial/ warehousing space is achievable over the Plan period through these allocations. Based on these conclusions, this would lessen the predicted shortfall of planned office supply identified in Chapter 5 to 37,000 sq m (9.5 ha); and increase the shortfall in industrial/warehousing space to 19,000 sq m (4.5 ha).

6.26 For the purpose of illustrating other potential opportunities that could be available if allocated or permitted, we assessed two further locations to the east of Chichester city identified by agents where we consider employment development a favourable option. These two sites have an estimated 17 hectares of employment space potential, which would more than eliminate the future market balance undersupply should they be brought forward. Therefore we would conclude that there is potential to meet future employment requirements within the district by allocating additional space.

Existing Employment Sites

6.27 We reviewed 39 existing employment areas for their fitness to remain in employment use. Most of these sites have active uses and should be retained for employment uses. But eight were considered slightly poorer sites and their potential for continued employment use should be kept under close review.

New Employment Site Opportunities

6.28 If new employment land is required, then all undeveloped land with easy access to the A27 must be considered for long term development. The delivery of medium/long term employment capacity could be achieved by focusing on brownfield sites close to the A27 as well as mixed use development areas where employment space could be delivered as part of housing schemes. In recent years, housing has been an especially good generator of value and, depending on the state of the market, could be harnessed through mixed use schemes to help deliver B-class employment that might not otherwise be viable.

[29] Without carrying out a detailed site review, where sites are identified for a mix of uses we assume a split of 20% for B-space and 80% for non B-space.

6.29 Additional, longer term development capacity around Chichester may be limited by the sensitivity of its rural setting, as well as highways constraints and other considerations.

7 CONCLUSIONS AND RECOMMENDATIONS

Introduction

7.1 This chapter draws together our conclusions on Chichester district's employment land. We then set out our recommendations to inform the employment space policies in the forthcoming Local Development Framework (LDF).

Conclusions

Summary Context

Policy and Strategy for Employment Land

7.2 The thrust of Government employment land policy is to ensure that adequate supplies of good quality and easily accessible land are available to meet the needs of the market. Unsuitable sites and areas no longer required for employment may be considered available for re-allocation. The emerging government emphasis is on supporting economic development, with a degree of flexibility to be given to the suitability of sites in terms of what they deliver. Therefore Chichester district should have a flexible and responsive approach to providing for the needs of business.

7.3 The South East Plan (SEP) seeks to build a prosperous region in a sustainable manner by balancing the anticipated growth in population with increased employment opportunities in strategic locations; none of these cover Chichester district or any part of it. But the southern part of the district, including Chichester city, is in the Sussex Coast sub-region where there is a policy imperative for improving economic performance and supporting more employment growth, which at a minimum should match resident workforce growth. This sets out policies giving weight to this area for transport improvements, improving existing employment sites, delivering allocated employment sites, particularly those with good strategic access, and protecting employment land in rural area.

7.4 The Local Plan is some ten years from its original adoption; consequently some of the policies are out of date with current planning guidance, and many of the allocated employment sites are fully or partly developed, or no longer fit for purpose. Therefore minor attention is given to existing local planning employment and economic policies, except in two areas. The first is the absence of non-designated employment areas (often shaded brown on Local Plan maps) to reflect existing and future employment uses to be safeguarded. Owing to the absence of the latter, there have been a number of recent losses of employment space to alternative uses. The second is Horticultural Development Areas (HDAs), because of changing needs of horticultural and other businesses that may be competing for space in the district.

7.5 The Chichester District Community Strategy and Economic Development Strategy are seeking to improve economic opportunities by diversifying the economy and generating employment opportunities for all. A strong focus is given to art and design building on the local colleges' specialism in these areas, and seeking to build links with more high-tech manufacturing and research in the district.

7.6 Ultimately, the aim is to ensure sustained long-term economic growth and well-being for the district economy and its residents.

Quality of Life and Economic Performance

7.7 Chichester is a rural district with a population of almost 110,000 residents, more than 5,000 (VAT registered) businesses plus organisations, and together these support some 52,000 employees. Chichester city is the primary urban location, located fairly centrally within the district. Outside Chichester city there are a number of small market towns, with Midhurst the biggest in the north and Selsey in the south.

7.8 Chichester district offers the ingredients for a good quality of life: deprivation is generally low, employment levels are high and large areas are covered by environmental designations providing a pleasant place to live. Consequently, past planning policy has been fairly cautious towards encouraging growth and economic activity for fear of disturbing this finely tuned balance. But this should not result in complacency. To remain a relatively prosperous area, both economically and environmentally, Chichester district needs to adapt and plan accordingly so that there is space to support new jobs which reduce out-commuting from the district and provide space to allow existing businesses to expand and grow without having to relocate outside the district.

7.9 Chichester district is characterised by high levels of employment in sectors that are growing nationally. It also has a highly qualified population but many commute outside of the district to larger employment centres, and a high proportion that do work in the district are absorbed in local public services, health and education employment. Consequently the share of employment in the productive ‘knowledge based’ sectors is low, resulting in lower value added to the economy and less potential for future growth.

7.10 Developing high-tech manufacturing and research through design and art is an aspiration that the district is seeking to achieve through groups such as the South Coast Design Forum. To support this there will be a need for suitable workspaces within the district.

7.11 Whilst quality of life and quality of workforce are the district’s strongest assets it also has a number of weaknesses as an employment location. These include extensive designated environmental protection areas and floodplains limiting the potential land supply for employment uses. There is also argued to be a shortage of premises, as highlighted by low vacancy rates of offices and industrial/warehousing premises stock. This is particularly a problem for small to medium sized businesses that require space for establishing themselves. Added to this is the current status of the local plan, with many of the allocated sites now developed or being unsuitable for significant employment uses principally because of the lack of current and future market expectation.

7.12 Chichester district also has a range of non-business employment sectors, including horticulture and tourism. They form the basis of a large stock of the jobs found within the district and will generate demand for employment space through the business activities that they indirectly support. Despite the large number of low paid temporary workers, these industries do employ a significant number of permanent workers, many of whom will be local, and do support business services in the local economy such as recruiting, marketing and financial functions.

7.13 While the horticulture sector is important, there are other less prominent business activities, namely the users of offices and industry that may be in competition for space particularly as employment levels rise and existing premises and locations become obsolete. Therefore it is important to relook at protectionist policies covering HDAs so that a right balance of businesses and employment sectors is achieved to the maximal prosperity of Chichester district and its role within the sub-region. In addition, the businesses within the HDAs should be supported to maintain their success. However, in doing this it is argued by these businesses that the HDAs should be able to provide space for accommodating the many temporary workers in permanent accommodation facilities. While there may be a benefit for easy and convenient access to its labour force, this would also improve sustainable travel since horticultural workers would not have to travel so far. However, this may also be an opportunity cost (or loss) of potential employment land within the district.

Property Market

7.14 The main industrial locations in the district are established business locations in and on the outskirts of the Chichester & Tangmere urban areas. In the rural parts of the district, to the North and South of the A27, demand for B-space is largely being met by the large number of small industrial estates and, more recently, through converted farm space.

7.15 The current property market is in short supply of space, with below optimal vacancy rates in both offices and industrial/warehousing sites. This is likely to reflect the lack of available land and investor confidence in bringing forward employment space in Chichester district. Rents in offices are yet to achieve the level for developing speculative development on a large scale, but rents for industrial/warehousing supply are more likely to be viable. Where there is pressure for a change of use due to concern that commercial rents may be too low to make new development viable, valuation advice and a period of proactive market testing could act as a check and balance before permitting a change of use.

7.16 Supply is constrained because no new industrial land or office sites have been allocated in the district for more than ten years. Two large sites with a potential for development on the edge of Chichester city, but within the main corridor of employment activity, have been identified at the Employment Land Workshop and were latterly reviewed and found to be potentially suitable for delivering some employment space. These two sites are only examples of where further space may be provided; there could be others. Similarly, there may be potential within Chichester city from the redevelopment of the well located bus depot site and should West Sussex County Council's offices become available, as anticipated, then there is further scope for accommodating office demand.

7.17 There is also potential for some hidden employment space supply in rural areas of the district largely through the conversion of farm buildings advertised by word of mouth.

Although not an agreed proactive policy position, recent farm diversifications are, at least anecdotally, generating a degree of local prosperity in some parts of the district and meeting a need for small scale, competitively priced, business premises. However, we do not expect that the supply produced by farm diversification in excess of market requirements is likely to amount to much.

District Sub-areas

North of the District

7.18 The North of the district does attract B-space occupiers, largely with the take-up of converted farm buildings and there are few vacant units on existing employment estates. However, it lacks interest for new employment development because of developer confidence because of higher value competing uses, notably housing. Consequently little active development has happened in recent years in this area.

7.19 Development sites located in this part of the district may be more likely to come forward through mixed use with housing, but such proposals should be judged against policy criteria, including market testing.

Chichester and Tangmere

7.20 This sub-area has a high population density compared to other parts of the district, and relatively good road access. It is the main industrial location in the district. The level of vacant floorspace is low and there is very little land currently available for industrial development or redevelopment within the established areas. However, some of this may be due to the pressures from trade counter uses that support higher rental levels.

7.21 There is capacity for growth at Tangmere, with plots available at Chichester Business Park. In addition, there is land nearer Chichester and its existing employment areas and alongside the A27 which would be suitable, in market terms, for increasing floorspace provision.

South of the A27

7.22 The southern part of this sub-area has had difficulty attracting demand for employment space. Most successful take-up has been in former farmyards, as well as barn conversions, in the area close to Chichester & Tangmere sub-area.

Future Market Balance of Employment Space

7.23 Chichester district's future requirement for employment floorspace was estimated from sectoral employment forecasts provided by SEEDA, plus a frictional margin to allow for room in the market for choice for businesses seeking new space. The forecasts allow for the draft SEP district housing targets, and were produced by Experian who also produced the employment forecasts informing the SEP.

7.24 We then compared these requirements with the committed and available supply of land coming through the planning system, as identified by WSCC monitoring data, to identify the market balance over the life of Chichester's LDF, and any gap between demand and supply of employment space.

Offices

7.25 The requirement for office type floorspace over the period 2008-2026 is some 87,000 sq m in Chichester district. With existing planned supply delivering some 35,000 sq m of office floorspace, this leaves a gap of 52,000 sq m. The LDF documents should allocate space to fill this gap, which is equivalent to some 13 hectares of land supply in Chichester district. Some of this may come from existing allocations.

Industrial/Warehousing

7.26 Industrial manufacturing and warehousing employment is not growing, with a projected loss in employment over the life of the plan to 2026. But there is a significant requirement for frictional available space because of the large stock of existing industrial/warehousing occupiers found in the district. Overall, there is a positive requirement for some 57,500 sq m of net new space.

7.27 The current supply of available industrial/warehousing space to meet this future requirement total 30,500 sq m, which is tight. Consequently, we project a requirement for some 27,000 sq m of additional industrial/warehousing space beyond existing supply. This is equivalent to some 7 hectares of land supply, which should be allocated for in the LDF documents; some of which may come from existing allocations.

Recommendations

7.28 Based on the above conclusions and the assessments of allocated employment sites and existing employment areas (using criteria in Government guidance), we offer the following site recommendations.

Allocated Employment Sites

7.29 Chichester district has 13 sites allocated in the Local Plan, and all have been reviewed and assessed for employment use.

7.30 Our recommendations are that the following five allocations have potential for delivering B1 (offices and workshop) uses and should remain allocated for employment in the LDF:

- Donnington Park, Stockbridge;
- East of Hampers Common Industrial Estate, Petworth;
- Chichester Business Park, Tangmere; and
- Southern Gate, off Terminus Road, Chichester.

7.31 The following allocation has potential for delivering B2 (industrial) uses and should remain allocated for employment in the LDF:

- Land near Charlton Saw Mill, Charlton.

7.32 The following three sites may be better used for employment as part of a wider mix of uses, including non B-space uses:

- Stedham Mill, Stedham;
- Graylingwell Hospital, Chichester; and
- Two sites at Land between A27 and Shopwhyke Road, Chichester.

7.33 The following two allocations should be considered for release for alternative uses:

- Land between Manor road and Manor Lane, Selsey; and
- Pitsham Lane, Midhurst.

7.34 The last two sites have been completed or have no foreseeable development potential and should be excluded from allocation in the LDF:

- Barnfield Drive, Chichester; and
- Terminus Road/Stockbridge Road.

7.35 The above recommendations support some 44,000 sq m of B-space, the same potential from these sites as identified in the planned supply, and included in the market balance figures above. But the potential for supporting different amounts of B-space uses at these sites changes the required shortfall.

7.36 In following these recommendations, the gap in planned supply over the life of the Plan is now 37,000 sq m office space and 43,000 sq m of industrial/warehousing space. Further sites will therefore need identifying in the local development documents.

Existing Employment Areas

7.37 Most of the existing employment areas are fit for purpose. Given the existing plan potential shortfall, even those sites less likely to be fit for purpose over the life of the plan should be retained for employment while they still have active employment uses on them.

7.38 Eight areas were assessed to be unsuitable or weak employment locations due to lack of effective demand, or requiring some form of assistance for delivering new B-space uses. We therefore recommend that the potential for continued employment use on these sites be kept under close review. The eight areas are:

- Clovelly Road, Southbourne;
- Hurstfold Farm, Fernhurst;
- Landberry Industrial Estate, Selsey;
- North Farm, North Mundham;
- Old Sawmills, Stedham;
- The bus depot site at Pitsham Lane at Midhurst (includes an allocated site);
- St James's Works, Chichester; and
- The Wharf at Midhurst.

7.39 The remaining estates should be protected for future employment uses and identified as such in the LDF. This should include a direction that if any land transfers to other use, then the lost employment capacity will need to be replaced, either through new employment land allocations or by planned intensification at existing sites.

New Sites

7.40 In planning to meet the shortfall of B-space identified in paragraph 7.36, the Council should consider the objectives through the Community Strategy (see Chapter 2) and the LDF process. On this basis, we recommend that the Council should explore the following potential types of development areas:

Chichester (City) and Tangmere

7.41 City Centre office - to create a new modern office development in the city centre. Redevelopment of sites close to the station could present some possibilities. If growth is required in Chichester city, then short/medium term options might include safeguarding town centre offices that may be vacated by the County Council and encouraging the redevelopment of Terminus Road and Quarry Lane to create more modern and intensive business space uses.

7.42 Chichester Business Park, Tangmere - to try to create an office focussed element at this site which is proving a popular business location. However, the market has not yet absorbed land at Chichester Business Park.

7.43 In the longer term, undeveloped land with easy access to the A27 must be considered for long term development.

7.44 Mixed-use urban extensions that build on the back of the findings from the SHLAA, which suggests that a new urban extension is required. An office component could form part of a mixed use scheme on a site close to the A27, which would be an attractive employment location.

7.45 To sustain growth and prosperity, Chichester district needs to expand local enterprise and to make better use of local skills and the opportunities afforded by local education institutions. This is being supported through the Community Strategy and South Coast Design Forum. To enable innovation and enterprise, particularly in the areas of art and design and in pushing for rural enterprise activity, we would recommend the development of small enterprise centres providing serviced space on flexible terms. This would be appropriate for Chichester city with its links to the local colleges and universities.

North of Chichester

7.46 Some provisions of small space should be identified in one the larger northern towns such as Midhurst and Petworth. Both Bepton Road, Midhurst and Hampers Common at Petworth have capacity for creation of more business space to complement existing workshops. Enterprise centres would also allow, or regulate, rural enterprise activity in the north of the district. However, since speculative development would be hard to justify financially, this is likely to require subsidy of some kind, possibly through mixed use development, and there may be scope to work with adjoining landowners on such schemes.

South of the A27

7.47 Owing to the lack of a strong B-space sector market in the south of the district, it would be difficult to justify increasing floorspace provision here without measures to stimulate the economy beyond that focused on tourism and agriculture. Should momentum for employment expansion and development increase, then there may be opportunities for accommodating new B-space in the designated HDAs, particularly those areas close to Chichester & Tangmere and the A27. This would mean amending the planning policies supporting HDAs, and while this study has looked at the horticultural sector in some detail, further investigation would be required to draw conclusions and make recommendations in relation to HDAs and protectionist policies they afford. We would recommend that policy should still recognise that horticulture is an important sector for the district economy.

Windfall Sites

7.48 Some future supply of employment space may come through windfall gains. Similarly, and often more likely, there may be losses though windfall gains in other uses. Since most windfall permissions are likely to be of non-strategic proportions (i.e. sites offering less than 0.25ha towards employment uses), they should be assessed on a site by site basis.

7.49 Should a potential windfall gain offer significant potential, then we would recommend that the site is assessed in accordance with the criteria set out in Chapter 6, with consideration to the need for requirements for employment supply or if this site should substitute an existing allocation(s) because it offers better supply.

7.50 Where there is pressure for a loss of allocated employment space, valuation advice and a period of proactive market testing could act as a check and balance on employment viability before permitting a change of use.

Monitoring

7.51 The above recommendations are subject to regular monitoring of development and economic circumstances. Government guidance on monitoring LDFs[30] should help to guide future monitoring processes of employment land in the district. Appendix 8 includes more detailed comments and recommendations regarding future monitoring and review of employment land.

[30] ODPM, Local Development Framework Monitoring: A Good Practice Guide, March 2005

APPENDIX 1

Horticultural Sector Analysis

Horticulture Sector Study

Introduction

Since the post-war period, horticulture has played an important role in Chichester district's economy. Horticulture is largely the cultivation and proliferation of plants and crop production, and is a subcategory within agriculture (see Table A1.1 below).

Horticulture is not a B-class sector and therefore is not integral to the employment land review recommended by government guidance. But, as noted in Chapter 3, it is important in Chichester district because of the number of jobs its supports locally but also because it either occupies significant land within the district and the current Local Plan has protected land areas for its expansion, some of which may hinder the growth of other forms of employment, namely in B-class sectors.

Table A1.1 Land Use (2007)

	Agriculture (ha)	Horticulture (ha)	%Horticulture of agriculture
England	9,291,357	149,691	2%
South East	1,208,460	22,912	2%
Chichester	51,533	1,771	3%

Source: DEFRA

The purpose of this appendix is to separate the sector from the rest of the analysis in the main report, but to give consideration in this appendix to its economic importance for the purpose of planning for economic development and (B-class) employment land policies in the conclusions and recommendations to this study.

Description of Horticulture

As noted above, horticulture in Chichester district is concentrated on the cultivation and proliferation of plants and crop productions, particularly involving vegetables, fruits, and flowers; a significant proportion of this activity in the district is in freshly prepared fruits and salads for distribution through the main supermarkets in the UK. Genetic engineering of plants and crops also falls within this category, although we are unaware of its presence in Chichester district.

There are three types of horticultural enterprises defined by the UK farm classification system. They are:

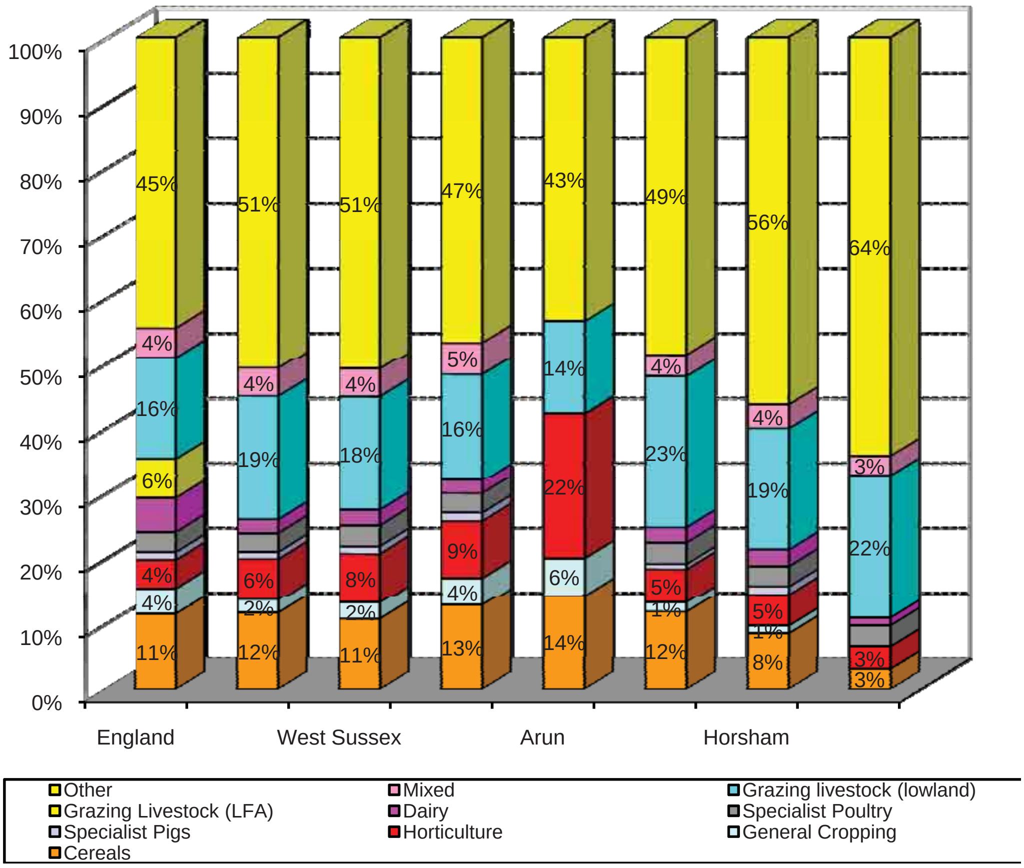
- specialist glass (vegetables, flowers or hardy nursery stock produced under glass);
- specialist fruit; and
- general horticulture

Together, these horticulture enterprises produce a range of crops falling under the following broad categories:

- vegetables;
- protected vegetables;
- apples and other top fruit;
- soft fruit; and
- ornamentals

Horticultural activities take place where favourable land and climate conditions exist. In general, the East and South East of England demonstrate such an environment, and therefore, a larger share of horticultural activities takes place here relative to other regions. Chichester district, along with neighbouring Arun, has particularly strong locational advantages for horticultural activities because of favourable soil and sunlight conditions. Consequently, Figure A1.1 shows that some 9% of farm activity in Chichester district is in horticulture, compared with 4% nationally and 6% in the South East.

Figure A1.1 Farm Product Types



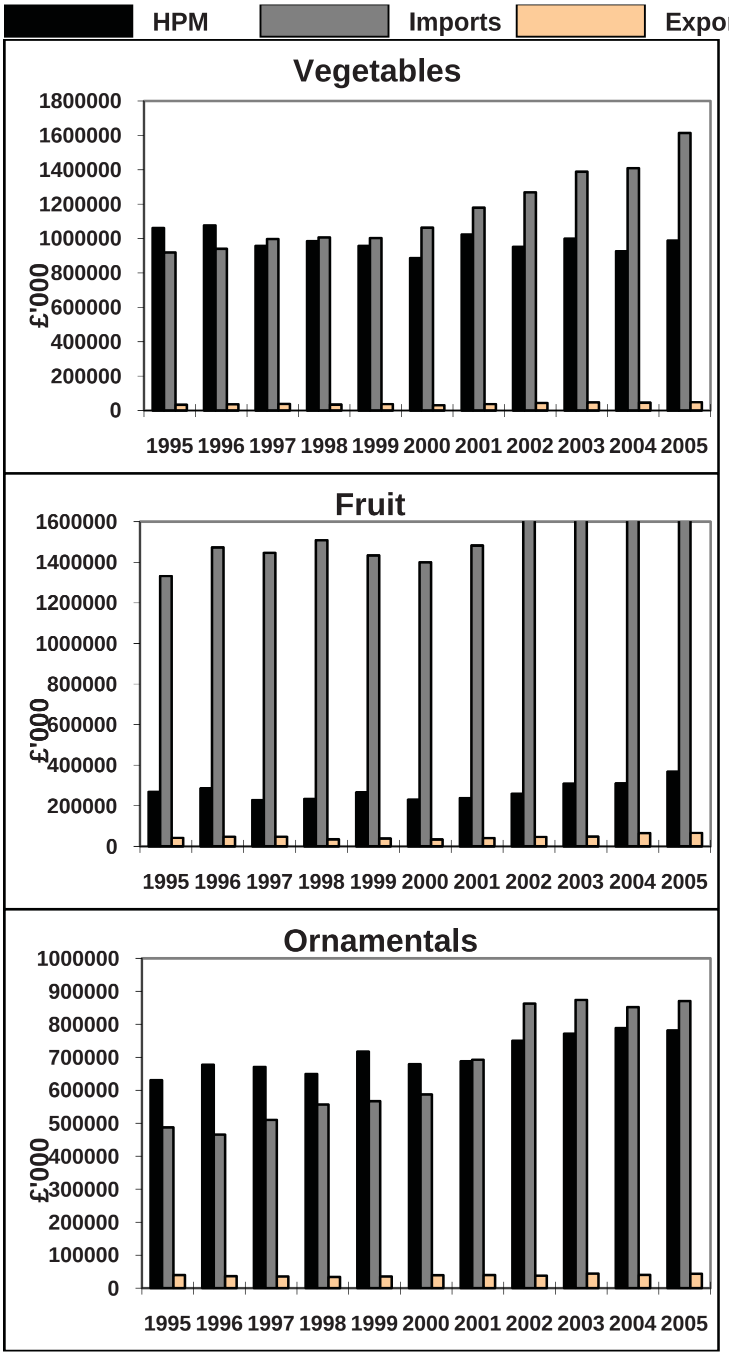
Source: DEFRA

Product Markets

The next three charts (Figure A1.2) compare home value production marketed (HPM) with the overall imports and exports of horticultural products. As can be seen, home production alone is not sufficient for the overall horticultural demands of the nation. This is true for three main types of horticultural products identified in Figure A1.2.

Moreover, since 2000, there has been an increasing trend of imports for all three products. With this in mind, it can be assessed that despite HPM, there is an obvious level of dependency on imports for horticultural products in general.

Figure A1.2 Imports & Exports of Horticultural Goods, England (1995-2005)



Source: Basic Horticulture Statistics, 2006 (DEFRA)

Horticultural Development Areas

The adopted Plan acknowledges the importance of horticultural activities to the district. To protect existing activity and enable future growth, the Plan has a policy (Policy RE11A) for 'Areas for Horticultural Development', where "applications for commercial horticulture development will be permitted provided that there will be no adverse impacts upon the surrounding environment.” There are four designated areas in the district, with two in the South of the district at Aldmodington and Sidlesham, and two in Chichester & Tangmere sub area at Runcton and Tangmere (see Chapter 6 Map 2 in main report). A significant share of these HDAs remain unused.

Horticultural Businesses

Table A1.2 shows that out of the 959 total farms identified in Chichester district, 82 specialise in horticulture. This reveals that 13% of all agricultural holdings in 2007 in the Chichester district are devoted to horticultural activities. This proportion is slightly higher than the South East region as well as the overall nation.

Table A1.2 Farm Holdings, 2007

	Total Agricultural Holdings	Horticulture Holdings	Horticulture Holdings %
England	208,166	14,576	7%
South East	28,098	2,483	9%
Chichester	959	125	13%

Source: DEFRA

This sector is dominated by smaller-sized businesses, however two large horticultural businesses account for the majority of the horticultural produce and employment within the district. These two large businesses are located in Chichester & Tangmere HDAs area, which the smaller holdings are mostly in the Aldmodington and Sidlesham HDAs, in the South of the district.

Many of the small horticultural businesses are under pressure to convert their land holdings for other uses, notably leisure, free space and housing owing to the higher values achieved from the land. These small holdings, which typically include living accommodation with some 4 to 5 acres for cultivation, have been either taken out of productive use and used as spare land, e.g. paddocks for grazing horses, while others have been split into smaller residential holdings.

Employment

In terms of employment (see Table A1.3), the horticulture sector in Chichester district is responsible for providing more than 400 jobs or, or approximately 1% of total employment within the district, although many jobs may be unaccounted for because of seasonal employment within the sector. Generally, the agriculture sector in Chichester district employs a higher proportion of people within this broader sector compared with national and regional proportions.

Table A1.3 Employment, 2006

	Agriculture	% of total employment	Horticulture	% of total employment	Total Employment in all sectors
England	170,534	0.7%	12,878	0.1%	22,766,568
South East	39,058	1.1%	4,140	0.1%	3,668,657
Chichester	2,573	4.9%	419	0.8%	52,363

Source: ABI

Labour Market Needs

The general national trend for horticultural labour is declining indigenous workers and an increasing reliance on cheap, foreign workers. The labour intensive nature of horticultural farming requires a strong seasonal labour pool for which migrant/transient workers are best able to meet.

There is competition for labour amongst competing horticulture nations. Farms in the UK compete with other nations, including the Netherlands and France to attract cheaper Eastern European labour. Moreover, horticulture and agricultural farms also compete with the manufacturing sector attempting to attract the same types of workers.

Despite local and international competition, owing to the nature of the sector activity, seasonal in-migrant workers tend to be lower paid. This is impacting on their ability to find suitable - often temporary - accommodation, and many have to travel quite far to access affordable accommodation. The long commutes will affect the environment and quality of life of these workers. Some of the larger horticultural firms are providing or wanting to provide accommodation for these workers through residential developments within the HDAs.

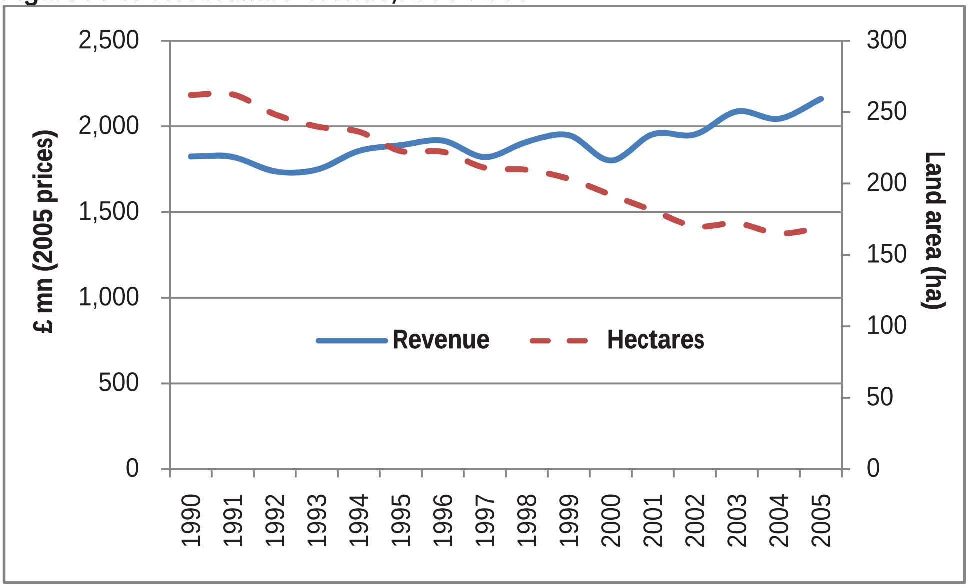
There are a number of permanent workers within the industry that occupy well paid management and administrative roles. These workers are more likely to live locally, but we are unable to provide an estimate of how many.

Trends in Sector

Horticulture’s share in overall agriculture production in England has remained relatively stable (slightly rising 4%) over the last 45 years. The revenue trends shown in Table A1.4 show that between 1990 and 2005, there has been an 18% increase in horticulture output.

The latest statistics provided for the total national horticulture production was estimated to be approximately 14.3% of total agriculture.   In monetary terms, this equates £2.1 billion in 2006. The results in Figure A1.3 show a decline in area (hectares) devoted to horticulture, but the revenue output has remained either similar (vegetables and seeds) or increased (fruits and ornamentals), reflecting greater productivity within the sector, and high value added to the production. This trend in productivity is likely to reflect changes in consumer preferences for fresh, convenient, local produce, for which they are prepared to pay more.

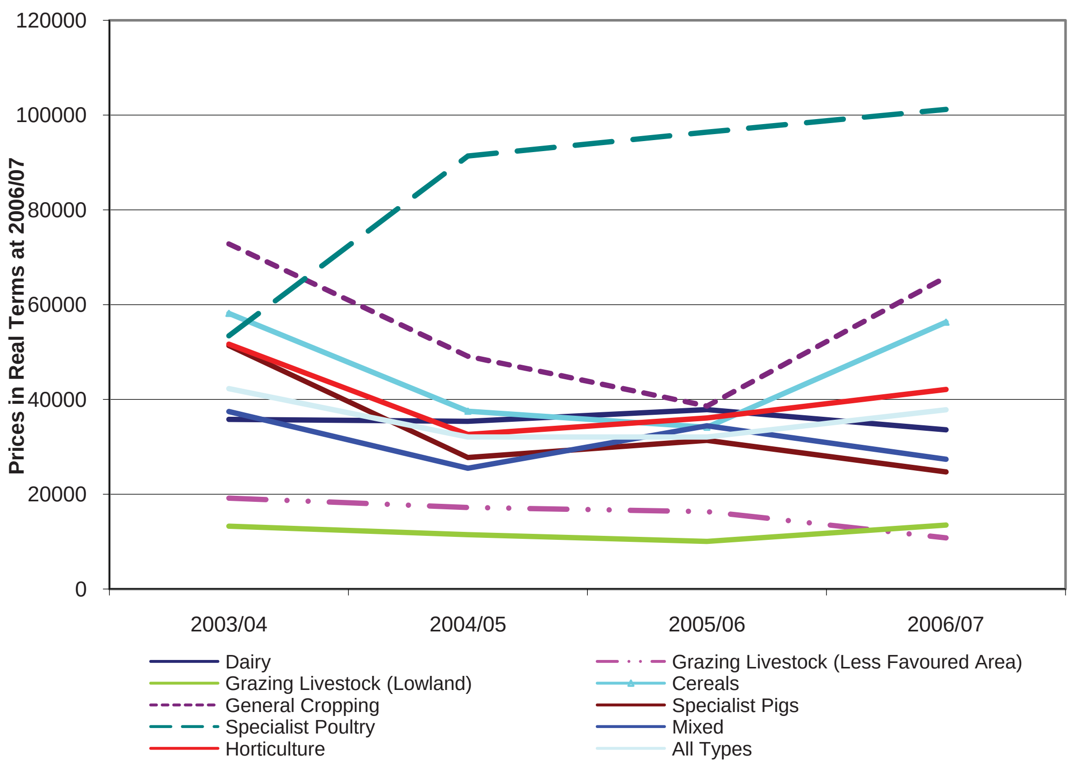
Figure A1.3 Horticulture Trends,1990-2005



Source: DEFRA

The annual Farm Business Survey reveals the trends in the incomes of different farm categories (per business) the total farm income trends and horticulture to have an upward trend in incomes between 2005 and 2007.

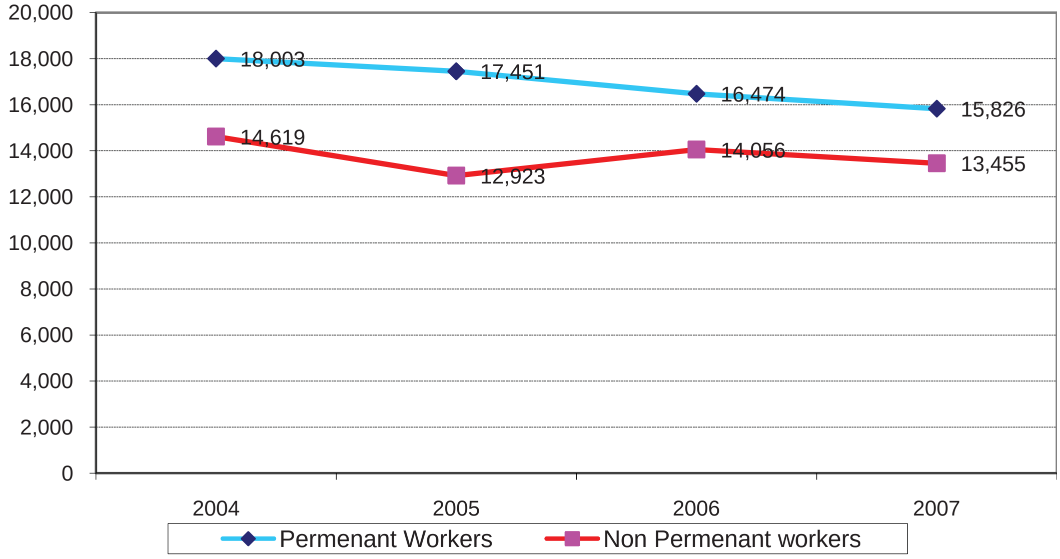
Figure A1.4 Farm Business Incomes, 2007



Source: DEFRA

Turning to workers, a downward trend is witnessed for permanent horticulture workers in England which has declined by 13% from 2004 to 2007. However, given the nature of this field, caution must be taken when analysing employment due seasonality - one in three workers in horticulture are non-permanent. More workers are usually hired during the harvest period and as the trend above shows, there has only been a slight decline in non-permanent workers for the same time period, falling 8%. Again, given the revenue stream, this may be a factor of productivity growth within the sector.

Figure A1.5 Worker Trends, England (2004-07)



Source: DEFRA

APPENDIX 2

Employment Land Review Stakeholder Workshop Notes

Chichester Employment Land Review Workshop Notes

- Date of Workshop: Tuesday 30th September 2008, starting 8.30am and finishing 11am.
- At: Assembly Room at Chichester City Council, North Street, Chichester

Introduction

A workshop was held to discuss the employment land study. At these workshop, the consultants presented their interim findings followed by discussions on key issues relating to employment land and property needs and related planning policy.
Discussions were conducted in two breakout groups (Team 1 and Team 2), among a mix of people with practical experience of the market, including local businesses, commercial property agents, property developers and investors, and Council/agency representatives. Below are the bullet point comments received on specific topics area related to the following four questions:

1. What makes Chichester a good business location?

Team 1

- Chichester is an attractive destination
- Under sell the lifestyle
- Communication allows business firms to be further away
  - 20-30mins journey for senior staff
- Genuine growth is happening
- College is seeing massive investment and this needs to be utilised. Huge potential. University provides art, culture, sports and people leave for Brighton etc. Innovation centre/science park

Team 2

- Great place to live and work. Quality of environment.
- Good place to live - reducing travel to work - long term benefit.
- Live/work/HDA - increase quality sustainable and good base to build on.
- Farming
  - Good light levels, soil
  - Out sourcing for jobs - not available in district - specialist technical base - transfer from lower house price to higher in district
- Technical college & universities need to bring in employment to use those skills. High paying good quality jobs. Have the right courses in the area.

2. What are the major constraints to employment development?

Team 1

- Transport issues. Roads, eg, Stockbridge roundabout.
- Is it that hard to get to? Rather than driving in to Southampton etc
- Retirement ages.

Team 2

- Tensions between business opportunities and location
- The district is also very rural - bad links, poor location
- Transport. Staffing - Issues in the area.
- Technical skills - have to go outside to recruit - elsewhere in county.
- Increase pay above £20k salary industry for Chi is important
- East/West links on both A27and rail links
- Current climate has frightened both supply and demand
- Broadband coverage - hinders business growth and location
- Broadband is a concern especially in rural north of District but pockets south of the district too and patchy in whole district.

3. Is there enough employment space of the right quality, in the right places?

Team 1

- Chichester has issues with limited stock
- Concern over size - struggle to attract large firms into Chichester
- Primary employment base is in Southampton
- Perception of demand for offices is questionable
- Opportunity for office development limited because housing takes over
- Needs to be made clear to land owners that need office space rather than waiting to win residential on appeals
- Evidence of people using units that are out of date, possibly because of lack of good space due to residential take-over
- Residential is Top Dollar, need to be looking at the sites in the long term
- Graylingwell was originally planned as employment, but was posted aside for residential
- Need to have upgrade space available to allow constrained businesses better opportunities
- Accommodation at reasonable prices to feed the growth of employment
- Business parks needed to pose an opposition to other southern cities
- Mixed development sites are needed
  - Tangmere - for business space and residential
  - Portfield Tarmac site is a good location
- High proportion of people owning land (old money)
- A lot of business and relocating
  - No quality of stock for people to commit to 10 years
  - Is there a value in churning over small business and allowing them to leave the district to expand
- HDA's are holding some sites up for Business use.
- Concern over figures

Team 2

- Peoples' need/want for office/industrial space can be unsure.
- Where is the Industrial demand? Don't want all offices.

- Diversification - concern about properties going into disrepair. Could be replaced by high quality stock
- SEEDA should focus on development in rural area hubs & satellites.
- Quarry Lane and Terminus Road have outdated ownership situation, which is a barrier to re-development. Geared leasing, Ground leases stand in way of re-development. Ownership/long lease - barriers to redevelopment & modernising
- Mixed-use redevelopment potential. Most is a ground floor use, redevelopment suggestion going up.
- PCT space for office 25-30 thousand sq ft need.
- Large areas - critical mass. Genuinely deliverable.
- City centre requirement - occupiers' perception that staff find more attractive because of shops et
- There is change from city centre to rural environment.
- South of A27 issue - 50% of people do not want to go South of A27 - can't get new businesses.
- Selsey - relocation of businesses around the area. Reluctance of new business into Selsey
- HDAs
  - Runcton - decent land - small land parcels/footpaths. Increase pack houses but not all used. Grade 2&3
  - Tangmere - a lot of space not used at all
  - Lots of glass in the area. Tangmere plot sizes are big.
  - Runcton - smaller ownerships & units. Good for business estate.
  - No redundant glasshouses there.
  - Sidlesham & Almodington area - considered completely different.
- Lack of supply is effecting market => there is need.
- Sites - want space in Chi not south of A27.
- Some city businesses also want the reverse - want rural/countryside location
- Good access for stuff to shops during lunch hour
- No distinction of B uses - office and manufacture - where do you locate? - No where obvious
- Industrial Estates in the wrong location - develop for housing & rebuild at Bournes & Tangmere
- Terminus Road - good for mixed use - with residential at railway end
- Not spatial issue - provide space for employment then go to school and ask how ties in!!

4. Are there any changes you'd like to see to current policy?

Team 1

- Need clients to support growth
- Poor response in strategic planning to regenerate sites in town centres
- LA's understanding of economic cycles and the need of sites is required
- Delay in LDF is holding back development
- Economics Vision

- Possible failure on new system as employment space needs to catch up with residential development
- How can space be developed away from the A27?
- Capacity of infrastructure
- Public sector should use park and ride and allow parking in town for business
- Charging rates on empty buildings
- Town centre office policy?
- Bus station
- CDC estates policy
- Farm Diversification does need to be addressed as people will still move out of the town

Team 2

- Speed of decision making is good
- LDF process was good previously. Process excellent but result unfavourable. Need brave choices. **LDF process very well engineered - result is poor!!**
  - **Ensure feedback is given. Use info, good quality flexible approach**
  - **Consult with all!!**
- Be positive, forward thinking.
- Positive vision for business.
- Flexible in policy production.
- Issue of conserving the City/District and allowing development for prosperity
- Dated policies in LPAs
- National guidance promotes
- LPAs policies hinder - because dated!
- LPAs cannot deal with technical issues
- Diversification - (RE14 BE1)
- Outbuildings/pdl - convert to general B1 use.
- Policy restrictions - limit the ability to diversify
- Town centre be looked at first
- Re-use of old buildings in rural area.
- Questioning of industrial/manufacturing definition and number in presentation
- Use classes order is not up to date
- If you call something a warehouse it could include lots of offices and laboratories.
- Flex B1, B2 & B8
- Council tax payers need to be considered. Balance need and people's views/wants.
- Positive planning in rural area.
- Opt out of empty rates levy
- Clusters of business environments - attached to hubs/satellites
- Locally distinctive policy
- HDA need to be moved/expanded
  - Runcton turn into office park
  - Tangmere - a lot of space
  - Reclassify HDAs - keep them as business.- expand on them Issues with heating/importing produce/transport costs. Need local label for production.

APPENDIX 3

Economic Sectors and Business Space

RTP Industrial 2003 SIC

	SIC 2003 class (4 digit)
5020:	Maintenance and repair of motor vehicles
5040	: Sale, maintenance and repair of motorcycles and related parts and accessories
	SIC 2003 group (3 digit)
222 :	Printing and services activities related to printing
223 :	Reproduction of recorded media
453 :	Building installation
454 :	Building completion
	SIC 2003 division (2 digit)
15 :	Manufacturing of food and beverages
16 :	Manufacture of tobacco products
17 :	Manufacture of textiles
18 :	Manufacture of wearing apparel; dressing and dyeing of fur
19 :	Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear
20 :	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
21 :	Manufacture of pulp, paper and paper products
23 :	Manufacture of coke, refined petroleum products and nuclear fuel
24 :	Manufacture of chemicals and chemical products
25 :	Manufacture of rubber and plastic products
26 :	Manufacture of other non-metallic mineral products
27 :	Manufacture basic metals
28 :	Manufacture of fabricated metal products, except machinery and equipment
29 :	Manufacture of machinery and equipment not elsewhere classified
30 :	Manufacture of office machinery and computers
31 :	Manufacture of electrical machinery and apparatus not elsewhere classified
32 :	Manufacture of radio, television and communication equipment and apparatus
33 :	Manufacture of medical, precision and optical instruments, watches and clocks
34 :	Manufacture of motor vehicles, trailers and semi-trailers
35 :	Manufacture of transport equipment
36 :	Manufacture of furniture; manufacturing not elsewhere classified
37 :	Recycling
90 :	Sewage and refuse disposal, sanitation and similar activities

RTP Offices 2003 SIC

	SIC 2003 class (4 digit)
7460 :	Investigation and security activities
7485 :	Secretarial and translation services
7486 :	Call centre activities
7487 :	Other business activities not elsewhere classified
9111 :	Activities of business and employers organisations
9112 :	Activities of professional organisations

9120: Activities of trade unions
9132 : Activities of political organisations
9133 : Activities of other membership organisations not elsewhere classified
9211 : Motion picture and video production
9212 : Motion picture and video distribution
9220 : Radio and television activities
9240 : News agency activities

SIC 2003 group (3 digit)

221 : Publishing
741 : Legal, accounting, book-keeping and auditing activities; tax consultancy; market research and public opinion polling; business and management consultancy; holdings
742 : Architectural and engineering activities and related technical consultancy
743 : Technical testing and analysis
744 : Advertising
751 : Administration of the State and the economic and social policy of the community
753 : Compulsory social security activities

SIC 2003 division (2 digit)

65 : Financial intermediation, except insurance and pension funding
66 : Insurance and pension funding, except compulsory social security
67 : Activities auxiliary to financial intermediation
70 : Real estate activities
72 : Computer and related activities
73 : Research and development

RTP Warehousing 2003 SIC

SIC 2003 class (4 digit)

6024 : Freight transport by road
6311 : Cargo handling
6312 : Storage and warehousing
6321 : Other supporting land transport activities
6411 : National post activities
6412 : Courier activities other than national post activities
7482 : Packaging activities

SIC 2003 division (2 digit)

51 : Wholesale trade and commission trade, except of motor vehicles and motorcycle

APPENDIX 4

Chichester Employment Forecasts, 2006-2026

Note: These Experian forecasts were provided by SEEDA to support the development of Chichester's LDF. They should not be quoted in any other publication

Chichester District Total Employment						
Year	2006	2008	2011	2016	2021	2026
Experian Sector						
Agriculture, Forestry & Fishing	3,946	3,939	3,815	3,370	3,052	2,788
Oil & Gas Extraction	-	-	-	-	-	-
Other Mining	240	329	335	327	310	283
Food, Drink & Tobacco	810	830	801	750	688	629
Textiles & Clothing	407	427	432	438	435	420
Wood & Wood Products	290	348	378	371	340	301
Paper, Printing & Publishing	1,142	1,150	1,177	1,206	1,259	1,328
Fuel Refining	-	-	-	-	-	-
Chemicals	33	15	9	7	17	44
Rubber & Plastics	253	252	239	199	139	91
Minerals	198	190	181	170	159	135
Metals	421	436	454	490	515	513
Machinery & Equipment	110	92	71	39	23	21
Electrical & Optical Equipment	436	422	437	452	451	436
Transport Equipment	960	1,026	1,011	987	917	855
'Other' Manufacturing	345	372	392	422	425	425
Gas, Electricity & Water	-	1	1	1	1	1
Construction	4,706	4,924	4,740	4,672	4,830	4,923
Wholesaling	3,189	3,212	3,057	2,982	2,941	2,882
Retailing	6,347	6,535	6,494	6,708	6,858	6,932
Hotels & Catering	4,342	4,463	4,432	4,783	5,087	5,403
Transport	1,189	1,184	1,159	1,138	1,112	1,071
Communications	369	361	363	378	393	399
Banking & Insurance	1,207	1,226	1,218	1,291	1,315	1,332
Business Services	7,074	7,971	8,827	10,298	11,428	12,246
Other F&Bs	1,915	1,967	2,146	2,314	2,381	2,374
Public Admin. & Defence	3,519	3,317	3,319	3,377	3,394	3,425

Year	2006	2008	2011	2016	2021	2026
Education	6,098	6,293	6,266	6,466	6,618	6,897
Health	8,331	8,285	8,548	9,056	9,484	9,967
'Other' Services	5,014	5,058	5,228	5,538	5,723	5,900
Total	62,892	64,625	65,529	68,229	70,295	72,022

APPENDIX 5

Scenario Testing, 2006-2026

Scenario Testing Forecasts

Against the base case we carried out sensitivity tests using alternative scenarios for jobs growth and population change for 2026. For this we established three additional scenarios, which were:

- Scenario 1 - the labour supply increases to reflect the published SEP, which recommends an additional 1,000 dwellings for Chichester district. This is a supply-side change scenario.
- Scenario 2 - the forecast job numbers in 2026 change to maintain the same balance of jobs to working age residents in 2006, after allowing the working age population to grow in line with WSCC's projections. This is a demand-side change scenario.
- Scenario 3 - combines the two previous scenario assumptions (1 and 2 above), to reflect changes in the labour supply with the additional 1,000 dwellings target and changes in jobs to reflect the current ratio of jobs to working age population in Chichester. This is a demand and supply change.

The labour market balance sheet tables below show the changes that these scenarios have in and out commuting patterns in Chichester district in 2026. In interpreting these scenarios, we make the following simple assumptions regarding the preferred outcome for Chichester:

- Most preferable - zero net in or out-commuting, suggesting that the growth in the economy matches the size of its resident population and therefore has the greatest potential for reducing travel to work journeys (in reality this is never the case) and maximising prosperity in the district;
- Modestly preferable - net in-commuting, suggesting that employment growth is bigger than population growth, therefore bringing prosperity but a likely increase in travel to work journey distances;
- Least preferable - net out-commuting, suggesting the changes in employment is smaller than resident population growth, causing a likely increase in the travel to work journey distances and a leakage in economic prosperity.

The labour market balance sheet includes the following assumptions:

- Working age population = 16-64 age group.
- Economic activity rate remains at current level (source: APS 2006) only if above the regional average, otherwise converges to SE average by 2026.
- Unemployment rate remains at current level (source: APS 2006) only if below the regional average, otherwise converges to SE average by 2026.
- Double jobbing is assumed at 5% (source: Annual Population Survey).

Labour Market Balance Sheet

Base Case: Experian Employment Forecasts and WSCC's Population Projections

Calculations		2006	2026	Change
a	Population	108,900	120,700	11,800
b	Working age population	64,594	70,314	5,720
c	*Economic activity rate*	*79%*	*82%*	
d=b*c	Economically active	50,706	57,658	6,951
e	*Unemployment rate*	*3.6%*	*3.6%*	
f=d*e	Unemployed	1,825	2,076	250
g=d-f	No of employed residents	48,881	55,582	6,701
h	No of jobs	62,892	72,022	9,130
i	*Double jobbing*	*5%*	*5%*	
j=h-(h*i)	No of jobs exc: double jobbing	59,747	68,421	8,673
k=g-j	Net commuting balance	-10,867	-12,839	-1,972

Scenario 1: Changes to Labour Supply to Reflect SEP Housing Target Changes (inc: 1,000 extra dwellings)

		2006	2026	Change
a	Population	108,900	121,409	12,509
b	Working age population	64,594	70,314	5,720
c	*Economic activity rate*	*79%*	*82%*	
d=b*c	Economically active	50,706	58,364	7,657
e	*Unemployment rate*	*3.6%*	*3.6%*	
f=d*e	Unemployed	1,825	2,101	276
g=d-f	No of employed residents	48,881	56,263	7,382
h	No of jobs	62,892	72,022	9,130
i	*Double jobbing*	*5%*	*5%*	
j=h-(h*i)	No of jobs exc: double jobbing	59,747	68,421	8,673
k=g-j	Net commuting balance	-10,867	-12,158	-1,292

Scenario 2: Maintained Ratio of Jobs to Working Age Residents under WSCC Population Projections

		2006	2026	Change
a	Population	108,900	120,700	11,800
b	Working age population	64,594	70,314	5,720
c	*Economic activity rate*	*79%*	*82%*	
d=b*c	Economically active	50,706	57,658	6,951
e	*Unemployment rate*	*3.6%*	*3.6%*	
f=d*e	Unemployed	1,825	2,076	250
g=d-f	No of employed residents	48,881	55,582	6,701
h	No of jobs	62,892	68,461	5,569
i	*Double jobbing*	*5%*	*5%*	
j=h-(h*i)	No of jobs exc: double jobbing	59,747	65,038	5,291
k=g-j	Net commuting balance	-10,867	-9,456	1,410

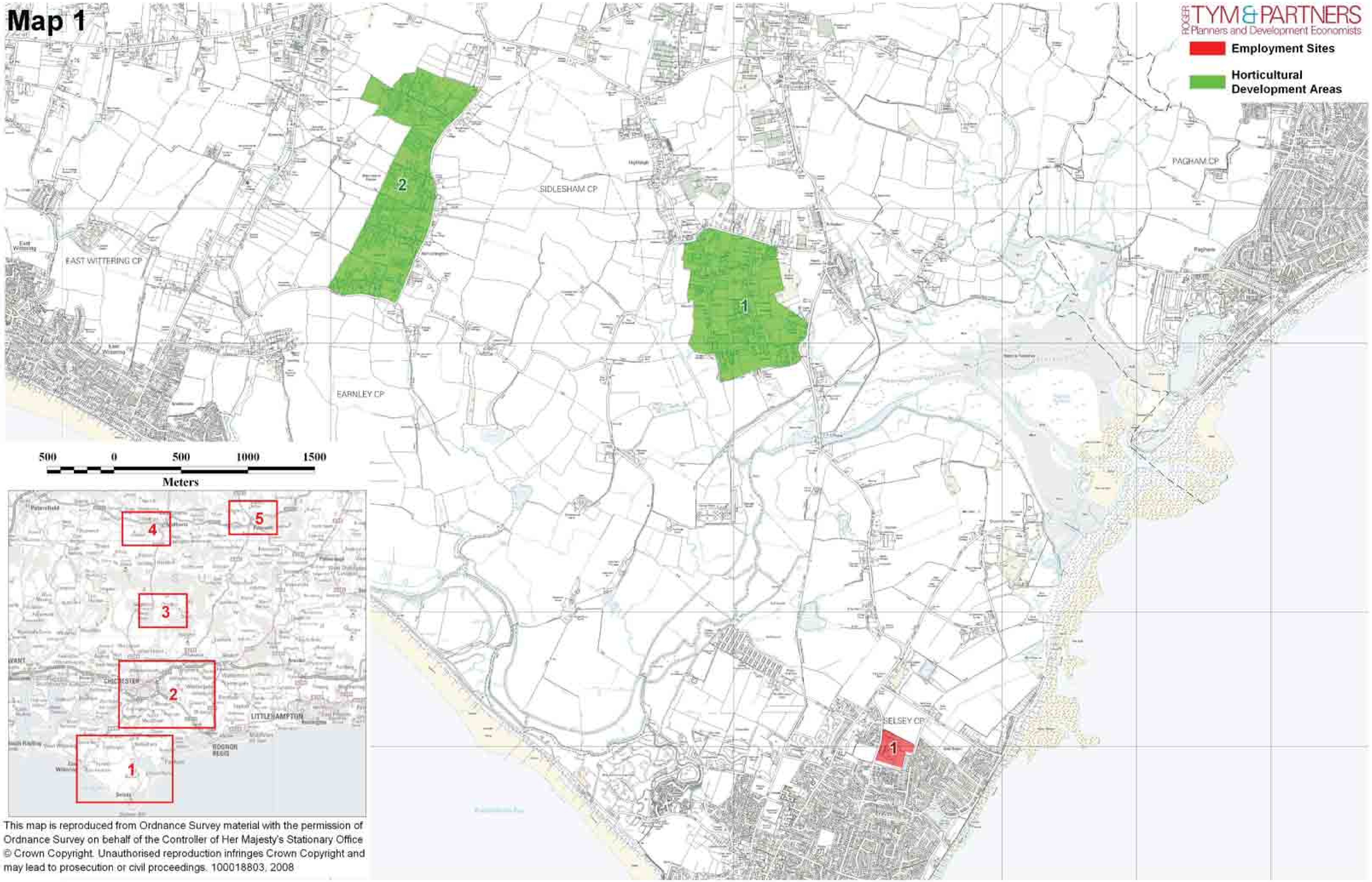
Scenario 3: Scenarios 1 and 2 Combined

		2006	2026	Change
a	Population	108,900	121,409	12,509
b	Working age population	64,594	70,314	5,720
c	*Economic activity rate*	*79%*	*82%*	
d=b*c	Economically active	50,706	58,364	7,657
e	*Unemployment rate*	*3.6%*	*3.6%*	
f=d*e	Unemployed	1,825	2,101	276
g=d-f	No of employed residents	48,881	56,263	7,382
h	No of jobs	62,892	68,461	5,569
i	*Double jobbing*	*5%*	*5%*	
j=h-(h*i)	No of jobs exc: double jobbing	59,747	65,038	5,291
k=g-j	Net commuting balance	-10,867	-8,776	2,091

APPENDIX 6

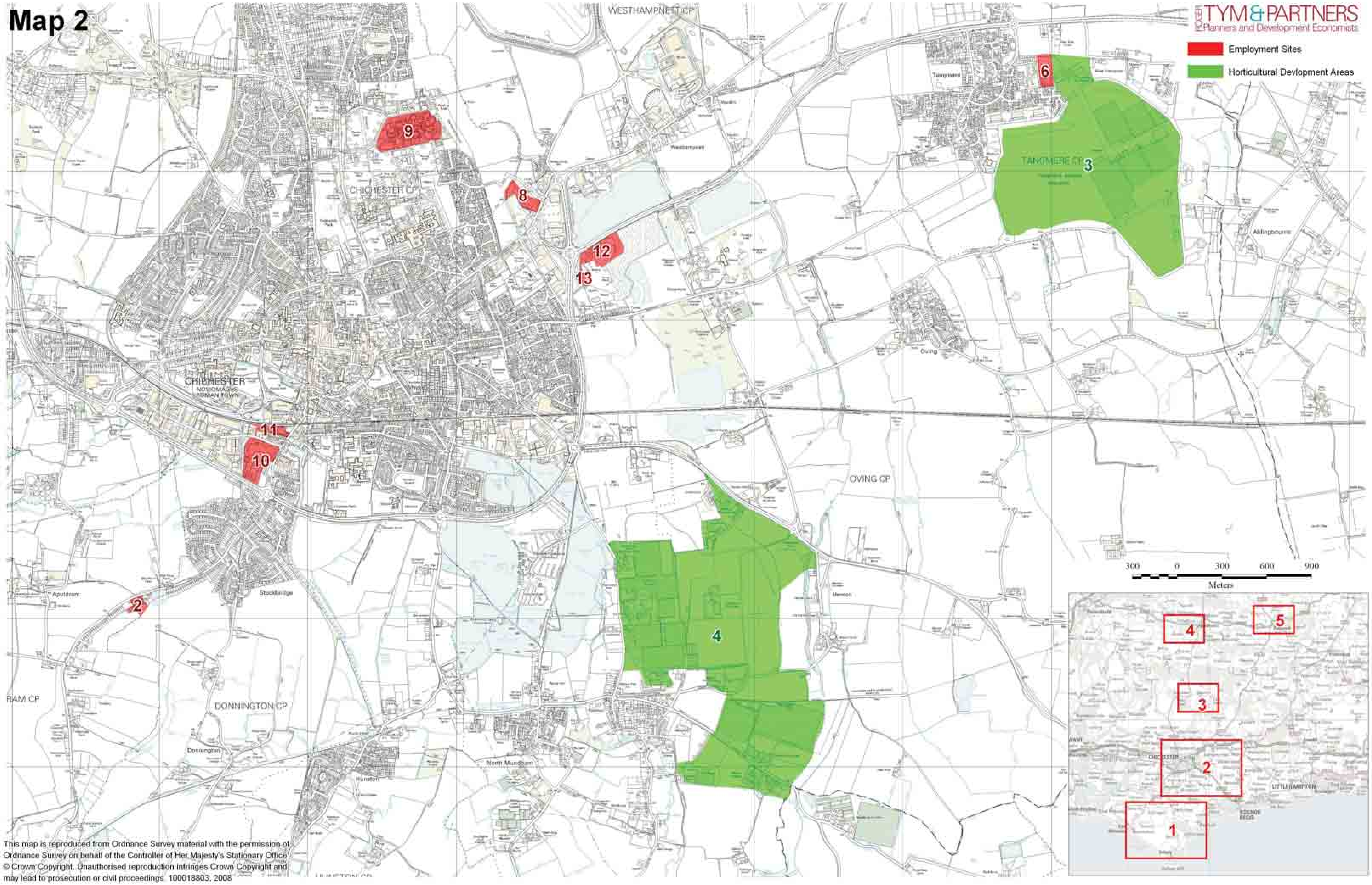
Allocated Employment Sites' Maps

Map 1

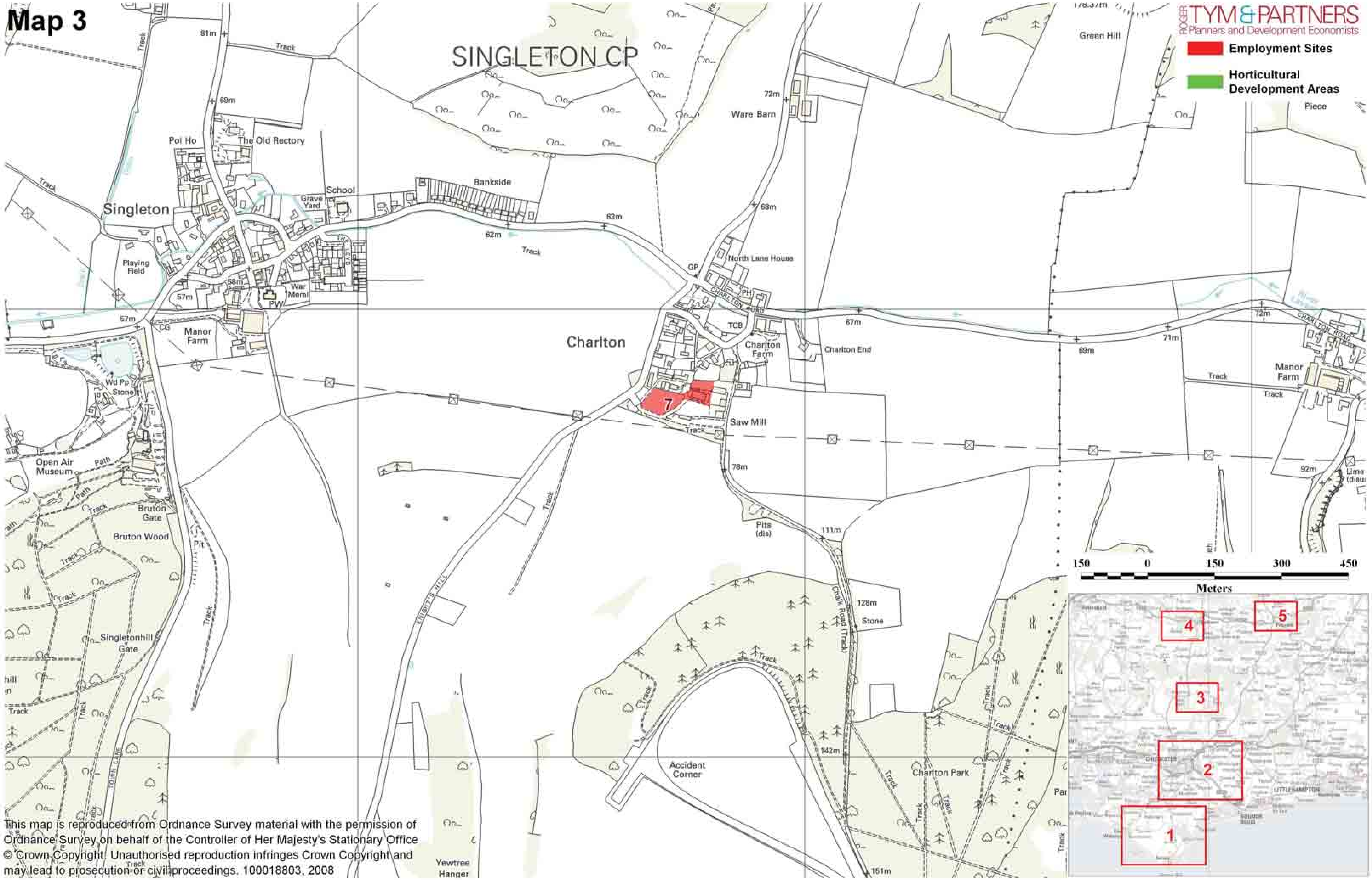


ROGER TYM & PARTNERS
Planners and Development Economists
Employment Sites
Horticultural Development Areas
2
1
SIDLESHAM CP
PAGHAM CP
EAST WITTERING CP
EARNLEY CP
SELSEY CP
500
0
500
1000
1500
Meters
4
5
3
2
1
CHICHESTER
LITTLEHAMPTON
BOGNOR REGIS

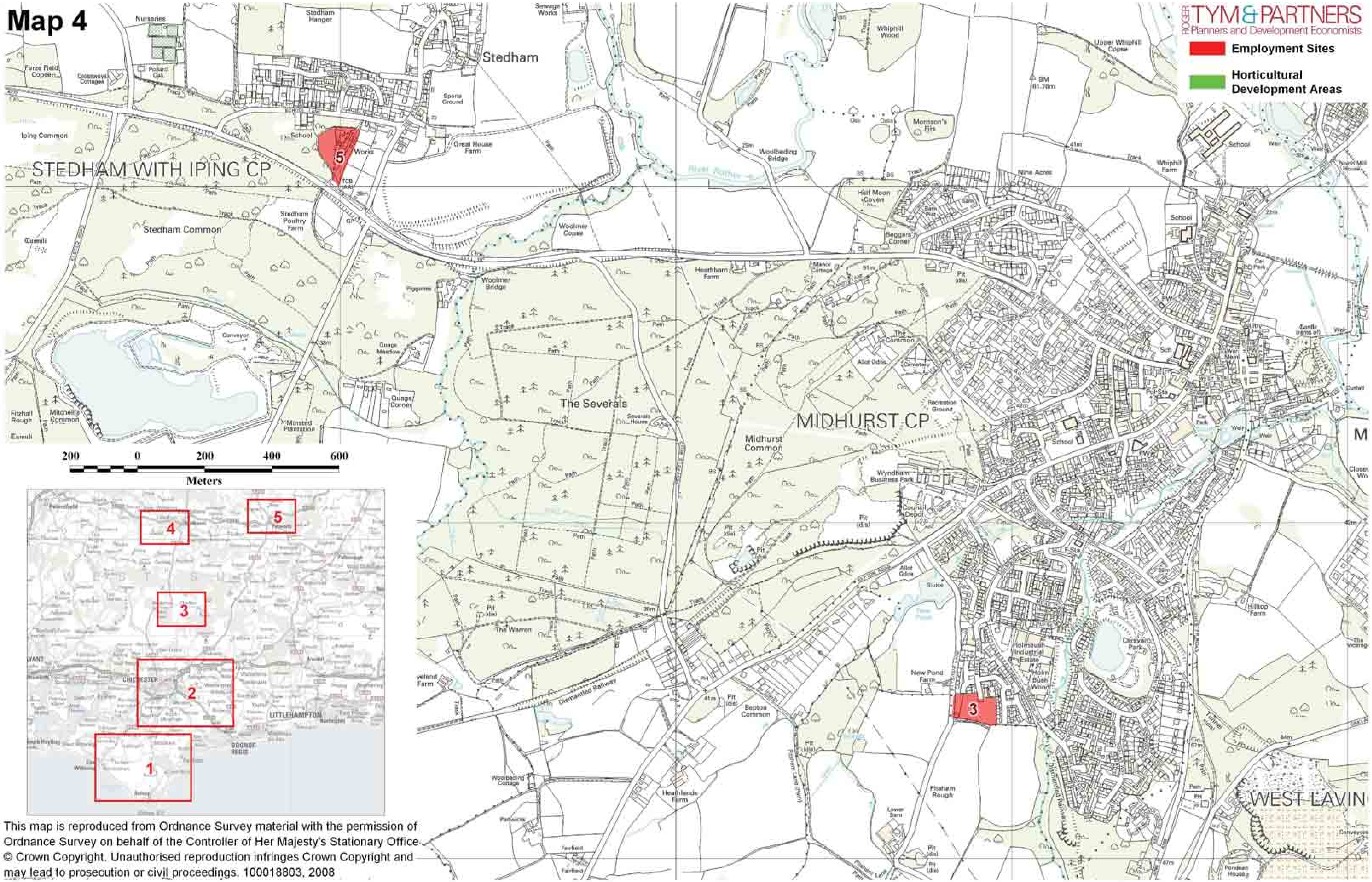
Map 2


ROGER TYM & PARTNERS
Planners and Development Economists
Employment Sites
Horticultural Devlopment Areas
WESTHAMPNETT CP
CHICHESTER CP
CHICHESTER
TANGMERE CP
OVING CP
DONNINGTON CP
RAM CP
Oving
Apuldram
Stockbridge
Donnington
Hunston
North Mundham
Merston
Aldingbourne
Tangmere
Westhampnett
1
2
3
4
5
6
8
9
10
11
12
13
300
0
300
600
900
Meters
CHICHESTER
LITTLEHAMPTON

Map 3

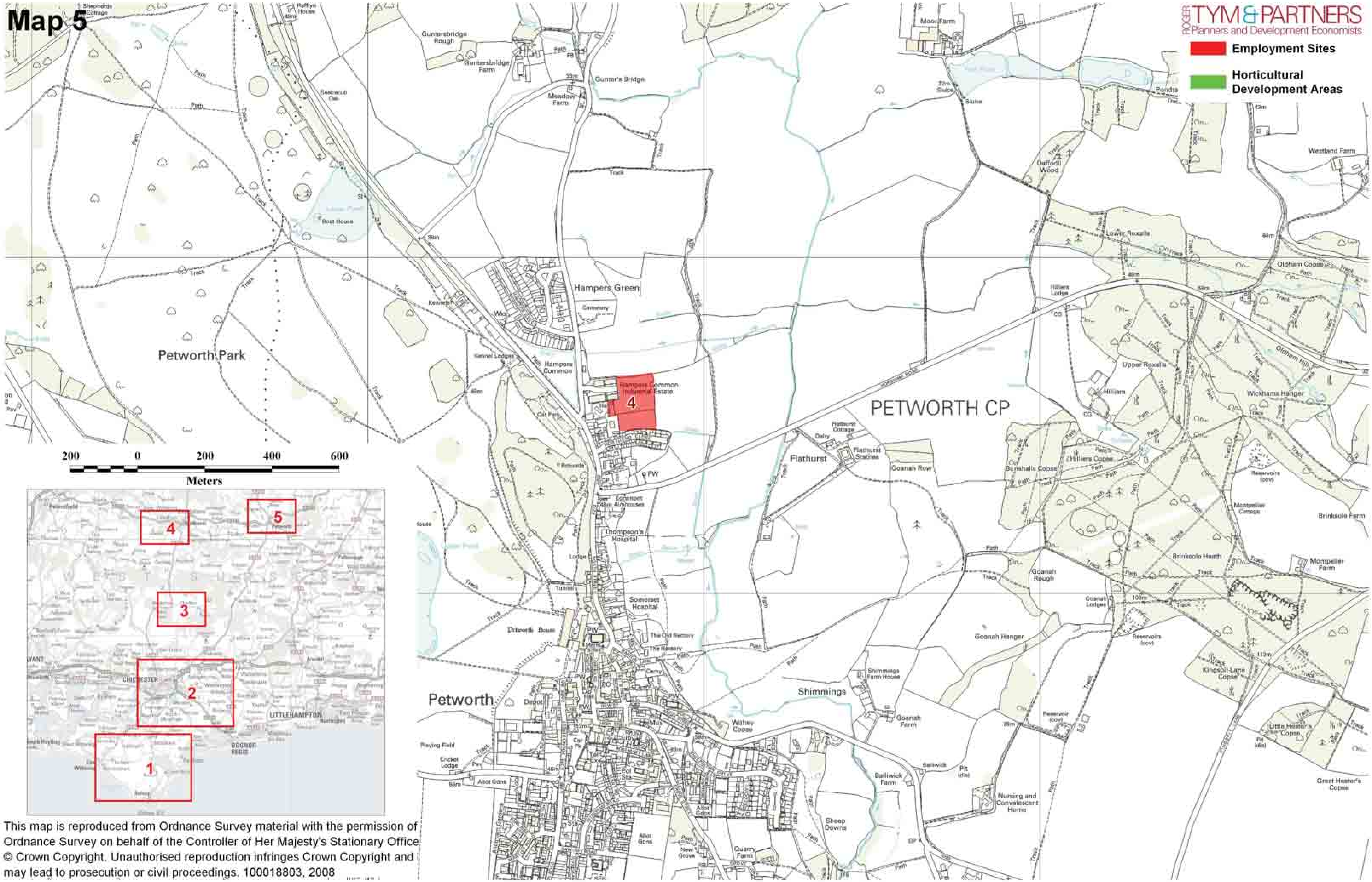


ROGER TYM & PARTNERS
Planners and Development Economists
Employment Sites
Horticultural Development Areas
SINGLETON CP
Singleton
Charlton
7
Saw Mill
Charlton Farm
Charlton End
North Lane House
Manor Farm
Ware Barn
Green Hill
Bankside
School
Grave Yard
Pol Ho
The Old Rectory
Playing Field
War Meml
PW
Wd Pp
Stone
Open Air Museum
Bruton Gate
Bruton Wood
Singletonhill Gate
Pits (dis)
Chalk Road (Track)
Knight's Hill
Town Lane
Charlton Road
Accident Corner
Charlton Park
Yewtree Hanger
Track
150 0 150 300 450
Meters
1
2
3
4
5



Map 4
ROGER TYM & PARTNERS
Planners and Development Economists
Employment Sites
Horticultural Development Areas
Stedham
STEDHAM WITH IPING CP
MIDHURST CP
WEST LAVIN
The Severals
Stedham Common
Midhurst Common
Iping Common
Wyndham Business Park
Holmbush Industrial Estate
Woolbeding Bridge
River Rother
Dismantled Railway
5
3
200 0 200 400 600
Meters
1
2
3
4
5
CHICHESTER
LITTLEHAMPTON
BOGNOR REGIS

Map 5


TYM & PARTNERS
Planners and Development Economists
Employment Sites
Horticultural Development Areas
Hampers Common Industrial Estate
4
PETWORTH CP
Petworth Park
Petworth
Hampers Green
Flathurst
Shimmings
200 0 200 400 600
Meters
1
2
3
4
5

APPENDIX 7

Assessment of Existing Employment Areas

West Sussex Existing Industrial Estates

Source: West Sussex County Council Industrial Estates Directory 2008

District sub-area	North
Estate/employment area	Old Sawmills, Stedham
West Sussex Industrial Estate Directory Reference	3110 and allocation 5 on project map
Market area	North West (A286 corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	General/industrial business area and open storage
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very evidently in business use and well screened by trees
Comment on the 'role' of the area now	The current role is as a low grade location for builders' yards, relatively low specification workshops and open storage.
Prominence	Close to main road but lacks prominence due to mature trees and a narrow entrance.
Base information	
Nature of use and businesses here	Builders' workshops, joinery workshop, other contractors and open storage.
Comment on any floorspace for sale/vacant	No obvious marketing.
Potential plots (e.g. cleared sites or derelict buildings) within area	Only partially developed and the western half in particular has unused capacity, as suggested by the project map (the boundary of the open storage use may change from time to time).
Urban, urban edge, outside urban, rural	Rural
Previously developed land (PDL)?	PDL
	Overgrown in places, may not all be PDL.
Quality of buildings/environment	
Approx age	Mix
	Probably post war with more recent additions and refurbishment
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	One unit has modern, profile metal cladding.
Noise/pollutants (no detailed inspections made)	No dominant road noise. May have some contamination from former timber yard? Not checked.
State of external areas and public realm	Low grade or damaged tracks, muddy in places, overgrown vegetation in places, surrounded by mature trees.
Parking, internal circulation and servicing	Very basic layout with poor quality surfaces and informal parking arrangements.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Well screened from adjoining uses.
Perception of wider environmental quality	Attractive rural environment on the edge of the village.
Local amenities/facilities for workforce	Very limited.
Strategic access or role	
Ease of access to main road network	Good access off the A272 but set back and not clearly marked.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	n/a
Workforce catchment	Close to Stedham village to the north, but very likely to rely upon access by car due to the rural location.
Comment on any site development constraints if known	No obvious physical constraints or amenity issues.
Market conditions/perception of demand	
Comments on local demand/market segments	Fulfils a purpose for rural firms wanting low cost space or open storage.
Differences short/medium/long term?	Hard to see what would drive significant change to demand.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Modest demand, very cost sensitive. Close to A272 so fresh investment may attract new demand if the estate could be made more prominent, but the rural location is limiting upon demand and development viability.
Comment on the 'role' of the area in future	Expect to see continued demand for cheap space but hard to see how the site can be upgraded without special effort or mixed use.
Scope for intensification of use through more efficient use of land over time	Certainly scope for better use of the land which is only partially developed at present.
Conclusion regarding retention or change of use	Mixed use would help attract investment if required. The northern part of the site close to the village may be suited to housing with the southern part close to the main road saved for B-class use; in this way it would be possible to create a layout that produces a net gain of floorspace.

District sub-area	North
Estate/employment area	Old Station Yard, Elsted Marsh, Nr Midhurst
Ref	3115
Market area	North West (A286 corridor)
Classifications	Multiple uses
Type	Established or potential office locations, general/industrial business area and some open storage
Character	Obviously in business use (although one unit is an office building of domestic appearance).
Current 'role'	Mainly light industrial and storage use.
Prominence	Prominent on a minor, rural lane.
Base information	
Nature of use and businesses	Users include agricultural engineers, distributors of health products and other chemicals, amongst others.
Vacancies	No obvious vacancies or marketing. However, there are farm buildings to let at Bridgelands Farm (NE of Elsted Station) where units of 122 to 2,340 sq ft are being marketed.
Potential plots	There is a yard area at the eastern end of the estate.
Location type	Rural
Previously developed?	PDL
	Probably a legacy of a former railway.
Quality of buildings/environment	
Approx age	1950s +?
	Includes blockwork elevations and corrugated asbestos roofing.
Area quality coding	D
Comment on any significant differences within area	Office at western end of the development.
Noise/pollutants	None evident.
External environment	Basic specification including tarmac surface and a hedge typical of the rural setting.
Parking, servicing	Fair, with informal parking.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Part of a hamlet.
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Very limited (pub nearby)
Strategic access or role	
Ease of access to main road network	Situated off a rural road
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to a former railway line (not in use). Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Very limited due to rural setting.
Comment on any site development constraints if known	No obvious physical constraints or amenity issues but fairly close to a few houses.
Market conditions/perception of demand	
Comments on local demand/market segments	Localised demand only.
Differences short/medium/long term?	No suggestion of change.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	As a former station, the property has a degree of 'identity' in the market, but demand is limited by the very rural location.
Comment on the 'role' of the area in future	No change expected - monitor should space become vacant.
Scope for intensification of use through more efficient use of land over time	Very limited (terrace could be extended onto yard area if available).
Conclusion regarding retention or change of use	Retain to support rural employment.

District sub-area	North
Estate/employment area	Midhurst Business Centre, Bepton Road, Midhurst
Reference(s)	3070
Market area	North West (A286 corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location, general/industrial business area and some open storage nearby
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use.
Comment on the 'role' of the area now	Small units for mainly local businesses wishing to be in Midhurst.
Prominence	Tucked away from view in a side street off Bepton Road.
Base information	
Nature of use and businesses here	Mainly motor trade type firms but also includes some office space to let.
Comment on any floorspace for sale/vacant	Station House - refurbished offices (4 self contained office suites from 715 sq ft to 2,638 sq ft). Overgrown planting suggests the offices have been available to let for some time.
Potential plots (e.g. cleared sites or derelict buildings) within area	Adjoining land includes potential plots at the end of the estate and to either side.
Urban, urban edge, outside urban, rural	Urban edge
PDL	PDL
	Includes former railway land/depots.
Quality of buildings/environment	
Approx age	1950s+
	Includes some nursery units dating from circa 1980s.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	The refurbished offices to let (Station House) are arguably of better quality.
Noise/pollutants (no detailed inspections made)	No comment
State of external areas and public realm	Somewhat unkempt in places with brambles penetrating one boundary.
Parking, internal circulation and servicing	Fair with informal parking; some spaces used for car storage. Several vacant spaces at the time of inspection.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Some housing nearby but no obvious conflict between uses at present.
Perception of wider environmental quality	Close to edge of Midhurst but with limited views and little sense of the rural surroundings.
Local amenities/facilities for workforce	Fairly close to town centre amenities.
Strategic access or role	
Ease of access to main road network	Fair access off a minor road on the edge of Midhurst.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to a former railway line (not in use) and a council depot. Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Within easy reach of residential neighbourhoods of the town.
Comment on any site development constraints if known	Land at the end of the estate may depend upon access through the estate?
Market conditions/perception of demand	
Comments on local demand/market segments	Appears to be steady demand from the motor trade (e.g. MOT centre, garages, car sales, tyre and battery sales). Richardsons operate a bus/coach depot at nearby Pitsham Lane (see allocation 3) - it has poor access and is an inferior and surprising location for business, highlighting demand for open storage/depots.
Differences short/medium/long term?	The vacant offices are a concern; this may be due to the somewhat industrial setting rather than an absence of demand - monitor.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Hard to justify speculative development, although the nursery units appear to be well occupied. Further development of any quality would rely on a catalyst of some kind.
Comment on the 'role' of the area in future	The estate is in active use (apart from Station House) and we would expect its role as a local industrial estate to continue.
Scope for intensification of use through more efficient use of land over time	There is spare capacity on adjoining land although this may be difficult to realise through speculative development.
Conclusion regarding retention or change of use	Retain. May require mixed use on adjoining land to help bring forward more units or higher quality business space.

District sub-area	**North**
Estate/employment area	**Pitsham Lane, Midhurst**
Reference(s)	Allocation 3 on project map
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	Bus/coach depot and housing estate.
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Poor
Comment on the 'role' of the area now	The western end of the allocation (as marked) borders a residential area. Used as a bus/coach depot.
Prominence	Tucked away from view off a rural lane.
Base information	
Nature of use and businesses here	Bus/coach depot.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	Could become a development plot if no longer required as a depot.
Urban, urban edge, outside urban, rural	Urban edge
PDL	PDL
Quality of buildings/environment	
Approx age	
	Age not known.
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	Housing next door.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Poor
Parking, internal circulation and servicing	An open layout suited to current use, although access is rather awkward.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	New housing nearby.
Perception of wider environmental quality	Close to edge of Midhurst with rural landscape to south and west.
Local amenities/facilities for workforce	Edge of town.
Strategic access or role	
Ease of access to main road network	Poor access off a minor road on the edge of Midhurst.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Within easy reach of residential neighbourhoods of the town.
Comment on any site development constraints if known	Narrow lane
Market conditions/perception of demand	
Comments on local demand/market segments	In active use as a depot. Clearly performs a useful role in this regard.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	New housing adjacent.
Likely demand and viability without public sector intervention or change of use	Hard to justify speculative development. Sites for the current use (depot) are not easily found so vested interest may help retain this use.
Comment on the 'role' of the area in future	The present use is very specific and may not be sustained by others if not required by this particular company. There may well be other open storage or 'unneighbourly' uses that could locate here but this may conflict with the housing.
Scope for intensification of use through more efficient use of land over time	Development of B-class space would rely on a pre-let - not a good location for speculative development.
Conclusion regarding retention or change of use	Consider release if vacated with no response to market testing.

District sub-area	**North**
Estate/employment area	**Holmbush Industrial Estate, Midhurst**
Reference(s)	3060
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very much a business location with a strong business identity due to its critical mass.
Comment on the 'role' of the area now	A well established industrial estate for medium to larger occupiers.
Prominence	Slightly tucked away from view.
Base information	
Nature of use and businesses here	A range of manufacturing and distribution businesses. Examples include RAK Ceramics, Stanley Plastics, Dexam International, OE Ltd, Hunt Developments (medical packaging), Anderson Bradshaw, C&O Tractors, Proclean and La Pizza Company.
Comment on any floorspace for sale/vacant	Generally well occupied.
Potential plots (e.g. cleared sites or derelict buildings) within area	None apparent at time of inspection.
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1970s/1980s+?
	Some units have been refurbished/fitted-out to suit particular companies.
Typical quality coding(s) for area - A/B/C/D	B/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	The image of the estate is helped by the presence of mature trees and grass verges - a generally tidy estate.
Parking, internal circulation and servicing	Reasonably laid out for all vehicles.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Fairly close to housing nearby.
Perception of wider environmental quality	Urban setting
Local amenities/facilities for workforce	Fairly close to town centre amenities.
Strategic access or role	
Ease of access to main road network	Fair access off a minor road on the edge of Midhurst.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Within easy reach of residential neighbourhoods of the town.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	The estate was well occupied and is clearly filling a need for an industrial estate with medium to large units to complement smaller units such as those at Bepton Road.
Differences short/medium/long term?	No foreseeable differences at present. The estate does not appear to be over reliant on low value manufacturing.
Local or inward investment potential	Mainly local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Demand will be market led. Expect to see occasional, ongoing refurbishment of space.
Comment on the 'role' of the area in future	Continuing role as an industrial estate.
Scope for intensification of use through more efficient use of land over time	No significant scope for change unless more office jobs are introduced over time.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**North**
Estate/employment area	**The Wharf, Midhurst**
Reference(s)	3065
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	A secondary/tertiary location and the business space adjoins residential property.
Comment on the 'role' of the area now	Small business units
Prominence	Lacking prominence due to cul-de-sac location.
Base information	
Nature of use and businesses here	Firms here include small manufacturers, distributors and a print/design/copying company.
Comment on any floorspace for sale/vacant	Frazer Nash, Unit 7, is advertising a small first floor office suite as available.
Potential plots (e.g. cleared sites or derelict buildings) within area	There is a grass area at the eastern end of The Wharf which could accommodate another small building, subject to consent. However, the location lacks profile so speculative development is unlikely to occur.
Urban, urban edge, outside urban, rural	Urban edge
PDL	PDL
Quality of buildings/environment	
Approx age	1950s+
	Includes very dated workshops with corrugated asbestos roofs.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	The Kerry Type building is of a more modern brick and tile construction. The Simson carpentry workshop appears to be a Nissan hut type building.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Mainly streetscape.
Parking, internal circulation and servicing	Limited parking by units and to the east.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Urban/semi-rural setting
Local amenities/facilities for workforce	Within walking of town centre.
Strategic access or role	
Ease of access to main road network	Close to Chichester Road (A286) and the A272.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Reliant upon Midhurst and surrounding settlements.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	May suit local firms that do not require high profile, but reletting the older units once vacated may be difficult.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Unlikely to attract speculative development without thorough market research/promotion.
Comment on the 'role' of the area in future	May change to fit with residential surroundings.
Scope for intensification of use through more efficient use of land over time	Negligible although single storey units could probably be doubled in height if redeveloped.
Conclusion regarding retention or change of use	Consider release if vacated with no response to market testing.

District sub-area	**North**
Estate/employment area	**Kingley Centre, West Stoke**
Reference(s)	3035
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	Established or potential office location, general/industrial business area and includes open storage
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Includes traditional and other farm buildings. The 'business presence' is well signposted upon arrival but is not otherwise apparent.
Comment on the 'role' of the area now	Role includes a base for the farm/estate office as well as office, workshop and storage lettings.
Prominence	On a minor road in the countryside.
Base information	
Nature of use and businesses here	A variety of businesses that matches the variety of buildings, from publishers to weed control to a trust for sick children. The buildings include very traditional brick and flint barns, 1950s/60s Dutch barns, chicken sheds, old milking parlour, sheds and open storage areas.
Comment on any floorspace for sale/vacant	Part of Unit 9 is advertised as to let.
Potential plots (e.g. cleared sites or derelict buildings) within area	Some of the additional farm buildings/yards could be brought into use if available.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	A wide variety
	Includes traditional farm buildings and more recent structures or adaptations.
Typical quality coding(s) for area - A/B/C/D	B/D
Comment on any significant differences within area	We have noted the variety of buildings above. Also includes farm buildings.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Varies between office areas and the farmyard.
Parking, internal circulation and servicing	There appears to be ample space for informal parking arrangements.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land
Perception of wider environmental quality	Attractive rural setting near the South Downs.
Local amenities/facilities for workforce	Very limited.
Strategic access or role	
Ease of access to main road network	Rural lanes and B2178, but within easy driving distance of the A286 and Chichester.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding villages and Chichester. May also attract drivers from further afield.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Well occupied, assisted by the attractive buildings near the road and the availability of storage space, but reliant on rural businesses and possibly some overspill demand from Chichester.
Differences short/medium/long term?	May see steady improvement of poorer space depending on the estate's long term management plan.
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Requires long term estate management with steady reinvestment. Hard to justify speculative development of modern business space. Holiday lettings may be an alternative to consider but these can be management intensive and not appropriate for the more basic farm buildings.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Depends upon buildings that are released from agricultural use as well as the difficulty of achieving a return on the conversion costs.
Conclusion regarding retention or change of use	Retain for employment or agricultural use. Consider alternatives on their merits.

District sub-area	**North**
Estate/employment area	**Eastmead Industrial Estate, Lavant**
Reference(s)	3040
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use but set back behind residential properties.
Comment on the 'role' of the area now	A longstanding industrial estate with both small and large units.
Prominence	Close to the A286 but not prominent as the estate runs lengthways and on a gradient away from the road.
Base information	
Nature of use and businesses here	One modern unit, close to the main road, has a showroom function (interior design/soft furnishings) and the remainder of the estate (about 25 units) hosts a range of more industrial firms, such as: removals, construction, plant, motor trade, shopfitting, machinery sales.
Comment on any floorspace for sale/vacant	Although two units had no sign, there were no marketing boards.
Potential plots (e.g. cleared sites or derelict buildings) within area	The eastern end of the estate has a sizeable parking area but is probably required for that purpose or open storage.
Urban, urban edge, outside urban, rural	Edge of village
PDL	PDL
Quality of buildings/environment	
Approx age	1950s/60s+
	Unit 1 is a modern building close to the entrance to the estate. It is more prominent which explains its use as a showroom/office.
Typical quality coding(s) for area - A/B/C/D	B but mainly D
Comment on any significant differences within area	As above
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional but poor, with concrete roads that are broken in places.
Parking, internal circulation and servicing	Fairly good apart from the condition of the estate roads.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby
Perception of wider environmental quality	Attractive countryside in easy reach
Local amenities/facilities for workforce	Limited
Strategic access or role	
Ease of access to main road network	Close to the A286.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant on surrounding villages served by the A286 and Chichester, possibly Midhurst.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	A well occupied estate despite its age. It is highly probable that at least the six large units perform a distribution function to some extent.
Differences short/medium/long term?	The age of the buildings means that the estate will require further investment (such as re-roofing and re-cladding) in the short to medium term.
Local or inward investment potential	Local/sub-regional
Large, medium or small units?	Large, medium and small based on current offer.
Recent activity of note	New housing between the estate and the road.
Likely demand and viability without public sector intervention or change of use	The estate benefits from a degree of critical mass to help sustain its profile. However, it will require further investment to avoid dereliction in the long term.
Comment on the 'role' of the area in future	Ongoing role but vulnerable if the larger occupiers should vacate for any reason.
Scope for intensification of use through more efficient use of land over time	Negligible unless prevailing upon parking/turning space.
Conclusion regarding retention or change of use	Retain and monitor.

District sub-area	**North**
Estate/employment area	**Oldwick Farm, West Stoke Road, Lavant**
Reference(s)	3041/3051 (same estate)
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	Established or potential office location and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Includes traditional farm buildings and similar additions. The businesses are mainly within a courtyard so its business identity is not immediately apparent were it not for the dedicated signage.
Comment on the 'role' of the area now	Local rural businesses serving the area, some receiving visitors as part of their trade.
Prominence	On a minor road in the countryside.
Base information	
Nature of use and businesses here	Includes offices as well as a saddlery, vet, beauty salon, restaurant and pet grooming business.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	Mixed
	Includes traditional farm buildings and more recent structures or adaptations.
Typical quality coding(s) for area - A/B/C/D	B/C
Comment on any significant differences within area	Includes livery stables
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	A functional courtyard setting.
Parking, internal circulation and servicing	Adequate
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land
Perception of wider environmental quality	Attractive rural setting near the South Downs.
Local amenities/facilities for workforce	Very limited.
Strategic access or role	
Ease of access to main road network	Rural lanes and B2178, but within easy driving distance of the A286 and Chichester.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding villages and Chichester. May also attract drivers from further afield.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Well occupied, assisted by the attractive buildings and proximity to Chichester.
Differences short/medium/long term?	No significant change anticipated.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Will require proactive marketing if vacated; reliant upon current occupiers and any persistent voids may be problematic. Some of the current businesses attract visitors which helps to sustain its profile.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Limited
Conclusion regarding retention or change of use	Retain and monitor should it become vacant.

District sub-area	**North**
Estate/employment area	**Charlton Sawmills, Charlton**
Reference(s)	3045 (adjacent to allocation 7 on project map)
Market area	North West (A286 corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	General/industrial business area and timber yard
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use although access is past a residential area.
Comment on the 'role' of the area now	Small business units and open storage.
Prominence	Rather tucked away on the edge of this small village.
Base information	
Nature of use and businesses here	The few businesses here have a broad range of specialisms, including for example: timber/fencing etc, seating for medical/dental practitioners and plastics engineering. There is also a workshop unit with its own secure yard.
Comment on any floorspace for sale/vacant	There is a post-war agricultural barn (dated blockwork walls and corrugated metal roof). This may be in use for storage but appeared rather dilapidated. It is part of allocation number 7.
Potential plots (e.g. cleared sites or derelict buildings) within area	To the north of the dilapidated barn is a similarly sized plot that could be used for an extension of Unit 5, or to create similar workshops. In addition, there is a possible plot alongside the timber yard, to the south of the access road leading to the workshops. The adjoining allocation also includes some green space (either side of Charlton Mill Way) but this may be regarded as having amenity value as it is, or be better suited to housing.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	Mixed
	Includes workshops of modern appearance with metal cladding and the timber yard building which is clad in timber and looks more rustic.
Typical quality coding(s) for area - A/B/C/D	B/C
Comment on any significant differences within area	Open space which could be developed but may have amenity value.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional
Parking, internal circulation and servicing	Adequate
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land
Perception of wider environmental quality	Attractive rural in the South Downs.
Local amenities/facilities for workforce	Very limited.
Strategic access or role	
Ease of access to main road network	Rural lanes between the A286 and A285.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Limited due to reliance upon surrounding villages in this rural area.
Comment on any site development constraints if known	In common with a number of rural employment sites in the area, the designation of a National Park could be a threat to business expansion unless business interests are championed.
Market conditions/perception of demand	
Comments on local demand/market segments	A small but well occupied development. The businesses here are a reminder that rural locations can support diverse businesses.
Differences short/medium/long term?	No significant change anticipated.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	Fairly new housing nearby.
Likely demand and viability without public sector intervention or change of use	Hard to justify further development unless well researched or promoted on a pre-let basis.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Potential capacity if including the old barn and nearby open space.
Conclusion regarding retention or change of use	Retain but monitor should units become vacant.

District sub-area	**North**
Estate/employment area	**Hampers Common, Petworth**
Reference(s)	3080 (adjacent to allocation 4 on project map)
Market area	North East (A285 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use.
Comment on the 'role' of the area now	A base for small businesses operating along the A285/A283 and A272 corridors.
Prominence	Not prominent (just off the A road).
Base information	
Nature of use and businesses here	Typical of a small industrial estate and features an MOT garage, tyre/exhaust sales, printers, car repairs, graphics and direct mail. A more unusual business is use1.com which specialises in high-tech bike parts.
Comment on any floorspace for sale/vacant	Several units had no tenant signage, but there were no marketing boards.
Potential plots (e.g. cleared sites or derelict buildings) within area	Allocation 4 lies to the east and southeast. This offers a natural extension to the estate subject to demand. In addition, the village hall and North End Yard nearby have dated premises that could be included within a masterplan for the area.
Urban, urban edge, outside urban, rural	Urban edge
PDL	PDL
	The adjacent allocation is greenfield land.
Quality of buildings/environment	
Approx age	1950s/60s+
	Some roofs have been refurbished.
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	All of a similar age/appearance.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Brick elevations help the units stand the test of time but improvement of the public realm would help uplift the estate's image.
Parking, internal circulation and servicing	Adequate
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Attractive countryside in easy reach
Local amenities/facilities for workforce	Fairly close to town centre.
Strategic access or role	
Ease of access to main road network	Close to A283/A285 and A272 but within a rural part of the county.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Petworth, otherwise reliant upon car borne staff.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Suitable for local firms that want basic specification space without high profile. Petworth is a small town so demand tends to be sporadic.
Differences short/medium/long term?	Should sustain demand but a wider choice of sizes and qualities may help by broadening the offer.
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Small units should continue to be popular, especially if they are refurbished and the appearance of the estate is upgraded. The adjacent allocation and the 2 potential plots above, if combined in a phased masterplan approach, could potentially yield a mix of land uses including a new village hall and a better choice of B-class space. Such a plan would depend upon the introduction of a high value use (housing) to subsidise the other elements.
Comment on the 'role' of the area in future	The area may sustain some small offices to accompany the workshops.
Scope for intensification of use through more efficient use of land over time	The estate is already well developed in terms of footprint but only at one level. Redevelopment could include two storey buildings instead (subject to market testing/viability).
Conclusion regarding retention or change of use	Retain for employment. Speculative development of the allocation is unlikely so expansion of the employment area would rely on subsidy, possibly through mixed use.

District sub-area	**North**
Estate/employment area	**Colhook Industrial Park, near Northchapel, Petworth**
Reference(s)	3090
Market area	North East (A285 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use.
Comment on the 'role' of the area now	A base for small businesses operating along the A285/A283 and A272 corridors.
Prominence	Accessed from the A283 but set back.
Base information	
Nature of use and businesses here	Examples include gunsmiths, engineers, sports/corporate clothing printers, suppliers of shotblasting machinery and hospital equipment.
Comment on any floorspace for sale/vacant	Several units had no tenant signage, but there were no marketing boards.
Potential plots (e.g. cleared sites or derelict buildings) within area	There is a picnic area and pond to the east of the units.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	Post war
	The buildings benefit from brick elevations and refurbished roofing.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Concrete yards, some grass verges, mature trees and the picnic area help to enhance the appearance of the estate.
Parking, internal circulation and servicing	Satisfactory
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Attractive rural setting
Local amenities/facilities for workforce	Lacking apart from a garage nearby
Strategic access or role	
Ease of access to main road network	Close to A283/A285 in a rural area.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Isolated and reliant on car borne staff.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	No obvious marketing in progress and helps fill a need for small business units.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	General demand for small units should sustain this development as it appears to be well kept. However, there will be voids from time to time because of the rather isolated location.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Already well developed in terms of site coverage but currently single storey. Redevelopment could include two storey buildings instead (but this is subject to market testing/viability which is a concern in rural areas).
Conclusion regarding retention or change of use	Retain but monitor should units become vacant.

District sub-area	**North**
Estate/employment area	**Fernhurst Business Park**
Reference(s)	
Market area	North West (A286 corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use.
Comment on the 'role' of the area now	General industrial estate for businesses operating around Sussex, Hampshire and Surrey.
Prominence	Prominent to the A286 south of Fernhurst.
Base information	
Nature of use and businesses here	Businesses here include suppliers of, for example: building products, marble, granite, timber buildings, haulage, adhesives.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	We note, but have not inspected for this study, the existence of the former Syngenta research/office complex to the north between here and Fernhurst. Part has been retained in active use as a furniture/art auction room and other workshops. We understand that the remainder of this substantial complex has been closed and sold to a developer pending new proposals.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	Mix
	A mix of ages including buildings that have been re-clad and re-roofed.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	Includes some timber frame buildings on display.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Tidy
Parking, internal circulation and servicing	Fair
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Attractive rural setting
Local amenities/facilities for workforce	Remote
Strategic access or role	
Ease of access to main road network	Directly accessible to the A286 between Midhurst and Hindhead.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Isolated and reliant on car borne staff.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Suits companies distributing products around the region/sub-region. The buildings have been refurbished; the estate is well presented and well occupied which is a reflection of demand.
Differences short/medium/long term?	Ongoing in similar form.
Local or inward investment potential	Local to regional.
Large, medium or small units?	Large, medium or small.
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Will be market led.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Subject to closer inspection, it is doubtful that a significant net increase in floorspace is achievable.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	North
Estate/employment area	Hurstfold Farm, Fernhurst
Reference(s)	3100
Market area	North West (A286 corridor)
Multiple classifications	No
Type, identity, role and prominence	General/industrial business area and former glass houses on land immediately to the east
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously adapted for business use but somewhat dilapidated.
Comment on the 'role' of the area now	Uses include car trade and storage. Former glass houses on land immediately to the east.
Prominence	Lacks prominence due to the isolated location.
Base information	
Nature of use and businesses here	Uses include car trade and storage. There are dilapidated former glass houses once used for horticultural research on the land immediately to the east.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	Planning permission has been granted for redevelopment of the business units (07/04247/FUL), subject to conditions.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	1950s/60s+
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	Many of the glasshouses beyond the built-up area are dilapidated and awaiting clearance.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Tatty
Parking, internal circulation and servicing	Fair but rather tatty.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	AONB
Local amenities/facilities for workforce	Remote
Strategic access or role	
Ease of access to main road network	Poor, via rural lanes.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Isolated and reliant on car borne staff.
Comment on any site development constraints if known	Clearance of former glasshouses may be a costly constraint.
Market conditions/perception of demand	
Comments on local demand/market segments	Buildings are in poor condition and continuing to deteriorate. Whilst there may be some demand for low cost space it will be limited.
Differences short/medium/long term?	Considerable reinvestment is required if the estate is to experience a step change, but the isolated location is a serious concern in terms of demand.
Local or inward investment potential	Local
Large, medium or small units?	Large, medium or small
Recent activity of note	Planning consent for replacement of the existing buildings.
Likely demand and viability without public sector intervention or change of use	The deliverability of the consented scheme is a concern because of potential void periods. An improved choice of units would be of benefit generally to occupiers, but the development may not be viable without pre-lets and careful phasing over a number of years.
Comment on the 'role' of the area in future	At risk of further decline unless the owners can move the project forward in a meaningful way.
Scope for intensification of use through more efficient use of land over time	It is doubtful that a significant net increase in floorspace would be permitted.
Conclusion regarding retention or change of use	Retain if possible but the location may limit the scale of what can be achieved in practice, therefore should keep under review

District sub-area	North
Estate/employment area	Old Sawmill, Nyewood
Reference(s)	3120
Market area	North West (A286 corridor but closer to A272/Petersfield)
Multiple classifications	
Type, identity, role and prominence	Established or potential office location and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use.
Comment on the 'role' of the area now	A base for a diverse range of businesses.
Prominence	Not a prominent location but easily found upon arrival in the village.
Base information	
Nature of use and businesses here	A mix of businesses including the motor trade, premises for a brewery, a dress designer and manufacturer of rubber mouldings. Nearby is a home furnishing/tableware company (John Jenkins) with large warehouses, office complex and shop.
Comment on any floorspace for sale/vacant	No obvious marketing.
Potential plots (e.g. cleared sites or derelict buildings) within area	Quite highly developed, except the John Jenkins property which has much lower site coverage and stands in its own grounds.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	1950s/60s+
	There are more modern units including the John Jenkins shop and offices, as well as an office unit on the main estate.
Typical quality coding(s) for area - A/B/C/D	B/D
Comment on any significant differences within area	John Jenkins is a family run business and it is possible that their property is owner occupied (not checked).
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Mixed
Parking, internal circulation and servicing	Adequate/fair (but ample at John Jenkins).
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Attractive rural setting beyond the built space.
Local amenities/facilities for workforce	Limited
Strategic access or role	
Ease of access to main road network	Short distance to A272 but via country lanes.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Road access via the A3 will improve with completion of the Hindhead tunnel.
Workforce catchment	Isolated and reliant on car borne staff.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Suitable for local firms that want basic specification space in a location without high profile. The presence of John Jenkins is the outcome of long term growth and is not typical of demand here.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small/medium (although John Jenkins has grown to be a large operation).
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Reliant upon continued occupation by the existing users of the space. If a large company were to leave then a like-for-like replacement would not be easy to find.
Comment on the 'role' of the area in future	Ongoing role in its present form, although the older units will require refurbishment.
Scope for intensification of use through more efficient use of land over time	Very limited although there is potentially more room for development at John Jenkins (subject to planning).
Conclusion regarding retention or change of use	Retain but monitor and review should units become vacant.

District sub-area	Chichester & Tangmere
Estate/employment area	Shopwhyke Industrial Estate, Chichester
Reference(s)	3032 (and near allocations 12 & 13 on project map)
Market area	A27 Corridor and Chichester
Multiple classifications	Multiple uses
Type, identity, role and prominence	General/industrial business area, incubation/SME cluster site and open storage
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	A backland site off a road with residential frontages. Clearly in business use upon arrival.
Comment on the 'role' of the area now	A base for small businesses and a location for open storage.
Prominence	Weak prominence
Base information	
Nature of use and businesses here	Small scale light industrial workshops, storage and trade counter type units. Types of business include: signage, heating supplies, plastics for construction, glazing, sandwich makers, car trade and a driving test centre.
Comment on any floorspace for sale/vacant	2 or 3 units (up to 5,600 sq ft) appeared to be available.
Potential plots (e.g. cleared sites or derelict buildings) within area	Land at the rear currently used for open storage, as well as low value housing and a vacant plot nearby. Also adjoins United Marine Aggregates' offices (1980s, 2 storey offices with flat roof) which may have development potential. There is also potential development land on the other side of Shopwhyke Road.
Urban, urban edge, outside urban, rural	Urban edge
PDL	PDL
Quality of buildings/environment	
Approx age	1960s+
	Includes more modern nursery units (1980s?)
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	The older units, of low quality, situated nearer the entrance to the estate.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Low grade and functional with block paving but no landscaping.
Parking, internal circulation and servicing	Parking appeared to be quite tight - often a problem with small unit schemes.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Close to housing
Perception of wider environmental quality	Urban
Local amenities/facilities for workforce	Lacking facilities nearby, but town centre is within walking or cycling distance.
Strategic access or role	
Ease of access to main road network	Close to A27 although the entrance to the estate itself is rather tight.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Some housing along Shopwhyke Road and nearby in the outlying neighbourhoods on the SE edge of Chichester.
Comment on any site development constraints if known	Comprehensive site assembly with adjoining plots may allow the access to be improved.
Market conditions/perception of demand	
Comments on local demand/market segments	Self-evident demand from small firms and suppliers to the building trade. At least 5 firms occupy more than one unit.
Differences short/medium/long term?	Suppliers to the building trade may be vulnerable to the current downturn in the housing market.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	The uptake of open storage appears to be the most recent change of note.
Likely demand and viability without public sector intervention or change of use	The estate lacks prominence which could stifle rental growth and deter redevelopment.
Comment on the 'role' of the area in future	The newer buildings serve a purpose for small businesses in particular. However, Units 1 to 10 are relatively low grade buildings that will require refurbishment or redevelopment in future.
Scope for intensification of use through more efficient use of land over time	Already has high site coverage but site assembly with the open storage land and adjoining plots could yield more space.
Conclusion regarding retention or change of use	Retain existing floorspace and consider mixed use if the site is combined with non-employment sites nearby. Mixed use may help to upgrade both the housing and the business space in this area.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**Chichester Business Park**
Reference(s)	3009 and partly allocation 6 on project map
Market area	A27 Corridor and Chichester
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location, warehouse/distribution park, general/industrial business area and adjacent to a former airfield in horticultural use
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Strong business identity.
Comment on the 'role' of the area now	Out of town business park and distribution centre capable of hosting large buildings.
Prominence	Not especially prominent but well known locally due to its scale.
Base information	
Nature of use and businesses here	The offices of Virgin Vie, Espicom and others are located near to the entrance to the estate (off City Fields Way). Carte Blanche and Philips/Respronics have large storage/distribution operations on Chichester Business Park (en route to the former airfield) and these include separate office blocks that are connected to the warehouses.
Comment on any floorspace for sale/vacant	Land available - development relies on pre-lets.
Potential plots (e.g. cleared sites or derelict buildings) within area	Plots 1 to 4, 5, 7, 10, 11 amount to circa 10.14 acres. Plots 1 and 5 have consent for offices of about 56,500 sq ft ("Hunter Court" and "Meteor Court"). Subject to planning permission there is scope for further expansion to the north (between Philips Respironics and the A27) and southwards depending on future plans for the airfield. Allocation 6 is in the same location as Plots 1 to 4, marketed as 4.03 ac (1.63 ha) for offices or other 'bespoke' development.
Urban, urban edge, outside urban, rural	Outside urban/rural
PDL	Partly developed
Quality of buildings/environment	
Approx age	2000s
Typical quality coding(s) for area - A/B/C/D	A/B
Comment on any significant differences within area	The principal difference is between the built space and the land awaiting development.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional but presentable.
Parking, internal circulation and servicing	Well laid out for all vehicles.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Some housing nearby but not seen as a constraint to further development.
Perception of wider environmental quality	A semi-rural setting but lacking distant views due to the flat landscape.
Local amenities/facilities for workforce	Chichester is nearby but not within walking distance. This property is east of Chichester and is lacking in facilities and amenities for staff in comparison to "town centre offices".
Strategic access or role	
Ease of access to main road network	Easily accessed via the A27.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to the former airfield, now in horticultural use.
Workforce catchment	Close to Tangmere's housing and within driving distance of Chichester's residents.
Comment on any site development constraints if known	Housing nearby (e.g. "Blenheim Park" under construction).
Market conditions/perception of demand	
Comments on local demand/market segments	The current occupiers demonstrate that the sub-region can generate demand from indigenous business growth (e.g. Respironics relocated from Bognor Regis). This site is well suited to large buildings for distribution and has potential as an out-of-town business park with more office content.
Differences short/medium/long term?	The scale of additional demand is hard to predict and the developer is marketing plots on the basis of prelets.
Local or inward investment potential	Both
Large, medium or small units?	Large/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Chichester Business Park is a rarity in this market and represents an important component of supply. However, the extent and timing of development is not easily predicted and relies on companies coming forward to discuss pre-lets.
Comment on the 'role' of the area in future	A strategic site that can offer large plots, ready for development, close to the A27.
Scope for intensification of use through more efficient use of land over time	Vacant plots offer further capacity for development.
Conclusion regarding retention or change of use	Retain and promote for both inward investment and indigenous growth.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**St James's Industrial Estate, Chichester**
Reference(s)	3030
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very much a business location with a strong business identity and clearly defined boundaries.
Comment on the 'role' of the area now	An urban industrial estate, within the built up area of Chichester, focused on small and medium sized businesses.
Prominence	Prominent to Westhampnett Road.
Base information	
Nature of use and businesses here	St James's Industrial Estate has some 40 units accommodating 28 tenants operating a variety of business types including: food, hair & beauty products, electrical, welding, radiators, motor repairs, picture framing.
Comment on any floorspace for sale/vacant	3 units at St James's Industrial Estate appeared to be vacant.
Potential plots (e.g. cleared sites or derelict buildings) within area	No obvious plots although parking appeared to be quite generous. (A separate site nearby with main road frontage is on the market and may be suited to a showroom type use).
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1970s?
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional but no particular landscaping.
Parking, internal circulation and servicing	St James's Industrial Estate is laid out with a one way system and ample parking (about 50 spaces vacant at the time of inspection).
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Some housing in the general vicinity.
Perception of wider environmental quality	Urban
Local amenities/facilities for workforce	Just over 1 km from the town centre.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass. Rush hour traffic can be problematic.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Chichester's north eastern housing areas.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Steady demand for general business units. Expect to see occasional voids as part of routine estate management. Evidence of some companies growing and taking more than one unit (e.g. "More Food" has 5 units).
Differences short/medium/long term?	Units may require refurbishment in the medium term or possibly redevelopment in the long term.
Local or inward investment potential	Mainly local.
Large, medium or small units?	Small/medium.
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Existing income stream is likely to support retention of St James's Industrial Estate in its current form. Further investment in refurbishment or redevelopment may be required longer term.
Comment on the 'role' of the area in future	Ongoing role as a base for small businesses.
Scope for intensification of use through more efficient use of land over time	Redevelopment may produce a slight net gain if the St James's Industrial Estate is rebuilt in future.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	Chichester & Tangmere
Estate/employment area	**Ben Turner Industrial Estate, Oving Road, Chichester**
Reference(s)	3031
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use.
Comment on the 'role' of the area now	Small, urban industrial estate for small firms and trade supplies.
Prominence	Partly visible from A27.
Base information	
Nature of use and businesses here	A mixture of light industrial firms and trade counter type operations. Occupiers include, for example: Autoglass, Elfords (garden sheds), a car parts firm, Brewers decorating materials.
Comment on any floorspace for sale/vacant	Fully occupied.
Potential plots (e.g. cleared sites or derelict buildings) within area	No
Urban, urban edge, outside urban, rural	
PDL	PDL
Quality of buildings/environment	
Approx age	c 1980s
	Elevations of brick and profiled sheet metal cladding.
Typical quality coding(s) for area - A/B/C/D	B/C
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Presents reasonably well.
Parking, internal circulation and servicing	Good to fair.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby
Perception of wider environmental quality	Somewhat harsh due to urban setting and close proximity of A27.
Local amenities/facilities for workforce	About 1.5 km from the town centre.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass. Rush hour traffic can be problematic.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Chichester's eastern housing areas and benefits from close proximity to the A27.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	The estate is well occupied but occupiers here rely to some extent on trade with the public, which may reduce in recession. There may be a turnover of units but the prominence of the estate will help sustain demand.
Differences short/medium/long term?	Unlikely to change measurably. Buildings may require refurbishment in the longer term.
Local or inward investment potential	Mainly local.
Large, medium or small units?	Small/medium.
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Proximity to ring road may reduce pressure for a change of use to housing. Viable in its present form for the foreseeable future.
Comment on the 'role' of the area in future	Maintain as a minor industrial estate for small firms.
Scope for intensification of use through more efficient use of land over time	No significant scope.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**Quarry Lane Industrial Estate, Chichester**
Reference(s)	3020
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Strong business identity.
Comment on the 'role' of the area now	One of Chichester's larger industrial estates. Recent development includes trade counter type units and this has changed the character of the estate.
Prominence	Parts are very prominent to the A27.
Base information	
Nature of use and businesses here	Occupiers include: Magnet, Tile Flair, Screw Fix, HSS, City Electrical Factors, Grahams, Leyland Decorating Centre. West of Bognor Road includes Topps Tiles, Peugeot dealer, Plumbing Trade Supplies and, in older units, Jago (fibreglass), Room Outside Conservatories, Booker, Covers, DHL and others.
Comment on any floorspace for sale/vacant	Chichester Trade Centre has units awaiting first occupation and part of the Tile Flair building is available. Gravel Lane includes 2 starter units to let.
Potential plots (e.g. cleared sites or derelict buildings) within area	The Bookers unit includes a large parking area which may have potential as a development plot, subject to the owner's intentions. Gravel Lane has 3 buildings that may be vacant, potentially creating an opportunity to assemble a site.
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1960s +
	Wide range of ages up to the present day (i.e. the recently built "Chichester Trade Centre").
Typical quality coding(s) for area - A/B/C/D	A/D
Comment on any significant differences within area	Chichester Trade Centre (new) and several terraces of small units in contrast to large units occupied by Covers for example.
Noise/pollutants (no detailed inspections made)	Parts of the estate may experience background noise from the railway or the A27.
State of external areas and public realm	Varies according to the age of units - generally functional and harsh rather than landscaped.
Parking, internal circulation and servicing	Good but varies between individual plots.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	A fairly well defined employment area.
Perception of wider environmental quality	Urban setting between railway and Chichester by-pass (A27).
Local amenities/facilities for workforce	Lacking facilities within the estate but the town centre is within walking or cycling distance.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass. Rush hour traffic can be problematic.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to the railway line.
Workforce catchment	Within walking or cycling distance of housing areas and accessible by car for more distant commuting.
Comment on any site development constraints if known	The Council's ground leases are commonly considered by the market to be a constraint upon development.
Market conditions/perception of demand	
Comments on local demand/market segments	The take-up of the new "trade centre" units are under scrutiny because they are relatively new to the market and demand may suffer in the current downturn. In any event it is probable that they will satisfy latent demand for this type of property in Chichester.
Differences short/medium/long term?	The older parts of the estate will require refurbishment or redevelopment in the medium term.
Local or inward investment potential	Both
Large, medium or small units?	Large, medium and small
Recent activity of note	Construction of "Chichester Trade Centre"
Likely demand and viability without public sector intervention or change of use	Public sector intervention may be required if the council's ground leases continue to be seen as a barrier to investment in the estate.
Comment on the 'role' of the area in future	Ongoing role as a general industrial estate but with an increasing focus upon trade counter type businesses.
Scope for intensification of use through more efficient use of land over time	No immediate opportunities but if large plots become available then there may be scope to re-assess their site coverage.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**St James's Works, Chichester**
Reference(s)	3029
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	Established or potential office location and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Although in active business use and prominent, it also borders residential property.
Comment on the 'role' of the area now	St James's Works provides lower grade office accommodation in a suburban area close to the ring road.
Prominence	Prominent to Westhampnett Road.
Base information	
Nature of use and businesses here	Mainly offices but includes businesses with a semi-retail function too - e.g. Chichester Fancy Dress (adapted workshop) and Scissortec Hairdressing. Other occupiers include Sussex Training Group and Bern's Drums and Percussion. There is also some vacant space.
Comment on any floorspace for sale/vacant	A small ground floor office is available.
Potential plots (e.g. cleared sites or derelict buildings) within area	None
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1960s+?
	The Fancy Dress shop occupies a single storey building that may have been a workshop/store. The offices are built of brick with flat roofs; they may be slightly younger but are still somewhat dated.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional with no room for landscaping.
Parking, internal circulation and servicing	Poor to fair - a slightly tight layout.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Some housing in the general vicinity.
Perception of wider environmental quality	Urban
Local amenities/facilities for workforce	Just over 1 km from the town centre.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass. Rush hour traffic can be problematic.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Chichester's north eastern housing areas.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Clearly has a role as an alternative office location but the buildings are dated which limits their appeal.
Differences short/medium/long term?	If the offices are vacated they will require further investment or redevelopment to sustain their appeal.
Local or inward investment potential	Mainly local.
Large, medium or small units?	Small/medium.
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Lower grade offices tend not to be popular so there may be doubts about the viability of the current buildings in the medium/long term. Refurbishment to sustain the current income may be a better option. Close proximity to the A27 will help make the case for redevelopment as offices but the balance of the market will need to be considered at the time. The progress with marketing of the vacant premises to the east (north of the football ground) will help indicate the nature of demand.
Comment on the 'role' of the area in future	Ongoing role as a base for small businesses but role may have to change to support any redevelopment.
Scope for intensification of use through more efficient use of land over time	Negligible
Conclusion regarding retention or change of use	Retain for employment use but monitor the vacancies here and nearby as redevelopment as offices may be unviable without a pre-let. Prominence may favour a showroom type use.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**City Business Centre, Chichester**
Reference(s)	3023
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	Established or potential office location
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very much in business use and with strong identity.
Comment on the 'role' of the area now	A multi-let building with small suites (mainly offices) for small businesses or branch operations of larger companies.
Prominence	Prominent to Basin Road and bus station.
Base information	
Nature of use and businesses here	A mix of offices for a wide variety of firms (e.g. Autonomous Surface Vehicles, Seaspeed Marine Consulting, Pisces Pacific Sound Productions, Cranes Chartered Surveyors and others), as well as a dental surgery and a health centre. The rear of the property has 3 single storey units with double doors for added flexibility of use; one of these is used by DEFRA (probably in connection with the local food industry).
Comment on any floorspace for sale/vacant	There is no agent's board but the list of tenants suggested that there may be 3 vacancies.
Potential plots (e.g. cleared sites or derelict buildings) within area	
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1980s
	Well presented building of brick construction under a tile roof. An external balcony provides access to the first floor offices.
Typical quality coding(s) for area - A/B/C/D	B
Comment on any significant differences within area	The single storey units at the rear could be used for storage, light assembly or as offices.
Noise/pollutants (no detailed inspections made)	Close to railway line.
State of external areas and public realm	Good but no room for landscaping.
Parking, internal circulation and servicing	Fair, although parking is often tight in multi-let centres of this type.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Urban setting
Local amenities/facilities for workforce	Close to town centre.
Strategic access or role	
Ease of access to main road network	Hampered by level crossing in one direction, otherwise good access to A27 via Stockbridge Road.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to bus and train stations.
Workforce catchment	Helped by its central location in Chichester, close to public transport.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Steady demand for high quality, small office suites close to the town centre.
Differences short/medium/long term?	
Local or inward investment potential	Mainly local.
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Expect there to be steady, ongoing demand for units here.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	None.
Conclusion regarding retention or change of use	Retain for employment.

District sub-area **Estate/employment area**	**Chichester & Tangmere** **Dukes Court, Chichester**
Reference(s)	3015
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	Established or potential office location
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Strong business identity as a small scale office park.
Comment on the 'role' of the area now	Urban offices close to Quarry Lane and the A27.
Prominence	Fairly prominent to Bognor Road but hampered slightly by a level difference with the road which rises to cross the railway line.
Base information	
Nature of use and businesses here	Various office based businesses involved in, for example, market research, radio, signage, accountancy, construction, amongst others.
Comment on any floorspace for sale/vacant	765 sq ft on ground floor of unit 7.
Potential plots (e.g. cleared sites or derelict buildings) within area	Limited by railway line to the north. (Nearby, but north of the railway line is a large warehouse operation south of Chatsworth Road (Bartholomews), which may be a long term redevelopment site).
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1980s +?
Typical quality coding(s) for area - A/B/C/D	B
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	May have some background noise from the railway.
State of external areas and public realm	Functional with no room for landscape features.
Parking, internal circulation and servicing	Slightly cramped site.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Railway line acts as a definite constraint to the north.
Perception of wider environmental quality	Urban setting.
Local amenities/facilities for workforce	Lacking facilities close by but the town centre is within walking or cycling distance.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Within walking or cycling distance of housing areas and accessible by car for more distant commuting.
Comment on any site development constraints if known	Railway line on one boundary.
Market conditions/perception of demand	
Comments on local demand/market segments	Steady demand as the offices are of fair quality and choice is limited.
Differences short/medium/long term?	
Local or inward investment potential	Both
Large, medium or small units?	Medium and small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Already built and operational for the foreseeable future.
Comment on the 'role' of the area in future	Ongoing role as an urban office location but may very well become 'secondary' compared to any new offices that are built in Chichester.
Scope for intensification of use through more efficient use of land over time	No immediate opportunities unless expanding away from the railway onto other employment land.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**Broadbridge Business Centre, Bosham**
Reference(s)	3055
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	In first sight on arrival is a farm shop and Post Office (business units to rear).
Comment on the 'role' of the area now	Rural business units.
Prominence	Lacking prominence due to rural location off the A259.
Base information	
Nature of use and businesses here	Tenants here include cake makers, builders (fitting out), sail makers and others.
Comment on any floorspace for sale/vacant	Not all units were obviously in occupation (but some may simply be used for storage). We would expect vacancies to arise from time to time.
Potential plots (e.g. cleared sites or derelict buildings) within area	Would rely on outward expansion onto undeveloped land.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	
	Former chicken sheds?
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional and benefits from mature trees and some landscaping.
Parking, internal circulation and servicing	Informal parking by units and within courtyard.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Post Office and shop on site.
Strategic access or role	
Ease of access to main road network	Within driving distance of A27 via Fishbourne or Emsworth.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding settlements and Chichester with staff travelling by car.
Comment on any site development constraints if known	Countryside
Market conditions/perception of demand	
Comments on local demand/market segments	Suitable for local firms that want basic specification space without high profile. Although of limited height, these units have been reclad and are quite presentable.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	In active use at present; demand may be limited due to the rural location. Helped by the presence of the Post Office as a local landmark.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Redevelopment could bring slight efficiency gains from the existing site (otherwise dependent upon further extension onto the countryside).
Conclusion regarding retention or change of use	Retain

District sub-area	Chichester & Tangmere
Estate/employment area	**Terminus Road, Chichester**
Reference(s)	3010 and allocations 10 & 11 on project map
Market area	A27 Corridor and Chichester
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location, warehouse/distribution park and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Strong business identity.
Comment on the 'role' of the area now	One of Chichester's principal industrial estates. Also includes car showrooms and, to the east, leisure uses.
Prominence	Parts are prominent to the A27.
Base information	
Nature of use and businesses here	Occupiers include users of industrial space, trade counters, offices, showrooms, warehouses, training and leisure facilities. Notable are the new offices built for Hyde Martlet, John Wiley and Nicola Jane. There are also some very dated office suites available at Mathis House Business Centre in Leigh Road.
Comment on any floorspace for sale/vacant	Several vacant units but these are mainly potential plots (see below).
Potential plots (e.g. cleared sites or derelict buildings) within area	Seward Homes' site alongside Chandler Road (short term lettings or D&B - 5 to 19,000 sq ft); "Cedar Park" site (for 900 to 18,000 sq ft) pending pre-lets; "Southern Gate" site for 15,000 sq ft (between new office buildings already built for Nicola Jane and John Wiley).
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1960s +
	Wide range of ages up to the recently built offices.
Typical quality coding(s) for area - A/B/C/D	A/D
Comment on any significant differences within area	Leisure centre, cinema and snooker club. Operators of car showrooms and builders' merchants appear to have the better quality buildings (presumably because of their customer contact).
Noise/pollutants (no detailed inspections made)	Parts of the estate may experience background noise from the railway or the A27.
State of external areas and public realm	Generally functional and harsh rather than landscaped.
Parking, internal circulation and servicing	Varies between individual plots.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	This is a fairly well defined employment area, constrained by the railway and A27.
Perception of wider environmental quality	Urban setting let down by the dated appearance of many of the buildings.
Local amenities/facilities for workforce	Lacking facilities within the estate but the town centre is within walking or cycling distance.
Strategic access or role	
Ease of access to main road network	Close to the A27 Chichester by-pass. Rush hour traffic can be problematic.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	Close to the railway line.
Workforce catchment	Within walking or cycling distance of housing areas but probably accessed mainly by car.
Comment on any site development constraints if known	The Council's ground leases are commonly considered by the market to be a constraint upon development. The age of the stock reinforces this point.
Market conditions/perception of demand	
Comments on local demand/market segments	Considering the age of the accommodation, the number of voids is fairly low. May see more car dealers over time as they often 'cluster' together. The plots rely upon pre-lets as there are doubts about the viability of speculative development at present.
Differences short/medium/long term?	The older parts of the estate will require refurbishment or redevelopment in the short/medium term. Many units will face this problem simultaneously.
Local or inward investment potential	Both
Large, medium or small units?	Large, medium and small
Recent activity of note	Marketing of plots such as "Chichester House" by Leigh Road is helping to scope out the extent of office demand. It's possible that a high rise office is over ambitious and demand may be for smaller buildings. We understand that there may be interest in this particular site from a hotel operator.
Likely demand and viability without public sector intervention or change of use	Public sector intervention may be required if the council's ground leases continue to be seen as a barrier to investment in the estate.
Comment on the 'role' of the area in future	Ongoing role as a general industrial estate but has potential for more office accommodation, especially at the eastern end of the estate nearer the station and town centre.
Scope for intensification of use through more efficient use of land over time	The larger properties, should they become available for development (e.g. Plot 12 (aka property 26) which also has a large parking area), may yield more space over time. The jobs capacity of the estate will rise if further office development is successful.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	Chichester & Tangmere
Estate/employment area	**Southfield Industrial Park, Bosham**
Reference(s)	3058
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Slightly tucked away but obviously in business use on arrival.
Comment on the 'role' of the area now	Rural business units.
Prominence	Lacking prominence due to rural location off the A259.
Base information	
Nature of use and businesses here	Tenants here include small manufacturers, trade type showrooms, sail makers etc.
Comment on any floorspace for sale/vacant	Unit 4 is advertised as available for renting. We would expect vacancies to arise from time to time.
Potential plots (e.g. cleared sites or derelict buildings) within area	There is a sizeable car park to the south which has obvious development potential.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	
	Appear to be former chicken sheds like Broadbridge Business Centre but have timber rather than sheet metal cladding.
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional and benefits from mature trees.
Parking, internal circulation and servicing	Informal parking to the south.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Post Office and shop nearby.
Strategic access or role	
Ease of access to main road network	Within driving distance of A27 via Fishbourne or Emsworth.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding settlements and Chichester with staff travelling by car.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Suitable for local firms that want basic specification space without high profile.
Differences short/medium/long term?	
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	In active use at present; demand may be limited due to the rural location.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Dependent upon further expansion onto the countryside.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**Chichester & Tangmere**
Estate/employment area	**Clovelly Road, Southbourne**
Reference(s)	3050
Market area	A27 Corridor and Chichester
Multiple classifications	
Type, identity, role and prominence	Includes limited office space and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use but very dated and run down in parts. Within a residential area.
Comment on the 'role' of the area now	Low specification space for local companies doing business in the locality and along the A27 corridor.
Prominence	Tucked away within a suburban area.
Base information	
Nature of use and businesses here	Typical of many industrial estates with, for example, engineering, construction, car trade and haulage firms.
Comment on any floorspace for sale/vacant	Small office suites and a workshop of about 2,000 sq ft are available.
Potential plots (e.g. cleared sites or derelict buildings) within area	Some of the buildings are in poor repair so the assembly of sites may occur in the short/medium term unless they are refurbished.
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1950s/60s+
	Unit 25 may be more recent but it is in the minority.
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	The units on the corner of Manor Road have been refurbished and appear to be quite presentable from outside.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Harsh/functional but tatty in places.
Parking, internal circulation and servicing	Tightly spaced against Clovelly Road.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby in Clovelly Road, Manor Road and Stein Road.
Perception of wider environmental quality	Urban/sub-urban setting
Local amenities/facilities for workforce	There is a Post Office and Co-op within about half a mile of Manor Road/Clovelly Road.
Strategic access or role	
Ease of access to main road network	Close to A259 from Emsworth to Chichester.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	There is a train station nearby, as well as a Post Office and Co-op within about half a mile of Manor Road/Clovelly Road.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Demand is moderate because of the condition and location of the properties, but the estate is well occupied and there is demand for low cost space.
Differences short/medium/long term?	The estate will require further investment to remain viable.
Local or inward investment potential	Local
Large, medium or small units?	Small and medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Requires proactive intervention, such as BID status with business consultation and an estate improvement plan, to kick start further investment. Enhancement of frontages and the public realm would also help. May otherwise depend upon a change of use if the estate fails.
Comment on the 'role' of the area in future	Helpful to have a choice of low specification space for local companies so long as occupiers do not feel it is in terminal decline.
Scope for intensification of use through more efficient use of land over time	Already quite densely developed.
Conclusion regarding retention or change of use	Retain for employment use but may require the intervention stated.

District sub-area	South
Estate/employment area	Vinnetrow Farm, Runcton
Reference(s)	3026
Market area	South West (A286 Wittering corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location, warehouse/distribution park, general/industrial business area and includes a Montessorri School
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Clearly in business use although some buildings are small scale and domestic in character.
Comment on the 'role' of the area now	A base for small businesses including hauliers servicing the peninsula and A27 corridor.
Prominence	Fronts Vinnetrow Road but not especially prominent.
Base information	
Nature of use and businesses here	A mix of small businesses. Examples include a haulage operation, electronics firm, a company specialising in clinical waste disposal, another in materials testing and another in satellite TV system warranty extensions with breakdown cover.
Comment on any floorspace for sale/vacant	Unit 3(b), offering offices of circa 1,000 sq ft, is thought to be available.
Potential plots (e.g. cleared sites or derelict buildings) within area	The landlord is also promoting 800 to 10,000 sq ft of additional office space subject to pre-lets.
Urban, urban edge, outside urban, rural	Rural
PDL	Mix?
Quality of buildings/environment	
Approx age	Up to current decade
	Includes old farm buildings and more modern space recently built.
Typical quality coding(s) for area - A/B/C/D	B/C
Comment on any significant differences within area	Includes a small warehouse used by hauliers and a Montessori School.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Well presented
Parking, internal circulation and servicing	Fair but may not be ideal for HGVs, especially in combination with the nursery school.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	A rural setting; the property is adjacent to or part of a Horticultural Development Area.
Local amenities/facilities for workforce	Remote from amenities/facilities.
Strategic access or role	
Ease of access to main road network	Fair access via Vinnetrow Road and A27.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Not close to housing estates; relies on car borne workers and possibly the local villages.
Comment on any site development constraints if known	Backs onto or is part of a Horticultural Development Area.
Market conditions/perception of demand	
Comments on local demand/market segments	Plays an important role for small businesses, some of which are engaged in high technology work and have distant customers.
Differences short/medium/long term?	Hard to see what would drive significant change to current demand.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	The vacant offices lack prominence and this may explain why pre-lets are sought prior to further development.
Comment on the 'role' of the area in future	Likely to remain attractive to small businesses in the area but monitor current vacancy as a test of demand.
Scope for intensification of use through more efficient use of land over time	Large car park may have capacity for further development but we remain cautious about the scale of demand for more offices in this location.
Conclusion regarding retention or change of use	Retain but monitor vacancy rate.

District sub-area	South
Estate/employment area	North Farm, North Mundham
Reference(s)	3027
Market area	South East (B2145 Selsey corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Farm buildings within village converted to workshops but business identity is not strong.
Comment on the 'role' of the area now	Performs a local role as a base for a mix of firms involved with the building trade, car trade and plant nursery.
Prominence	Lacks prominence.
Base information	
Nature of use and businesses here	Occupiers include a bathroom workshop, a car trading company and a plant nursery.
Comment on any floorspace for sale/vacant	None apparent
Potential plots (e.g. cleared sites or derelict buildings) within area	None apparent
Urban, urban edge, outside urban, rural	Rural, village setting
PDL	PDL
Quality of buildings/environment	
Approx age	Victorian to 1970s?
	Includes traditional farm buildings and somewhat low specification additions.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Basic/functional but with some planting and trees in the vicinity.
Parking, internal circulation and servicing	Based on original farm layout - fair but not generally suited to HGVs.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby
Perception of wider environmental quality	Village within a rural setting
Local amenities/facilities for workforce	Generally lacking
Strategic access or role	
Ease of access to main road network	Poor access via narrow, twisting lanes.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Not close to housing estates; relies on car borne workers and the local villages.
Comment on any site development constraints if known	Already fairly tightly laid out.
Market conditions/perception of demand	
Comments on local demand/market segments	Demand is thought to be very localised because this is a village location with rather poor access for business purposes.
Differences short/medium/long term?	Unlikely to change measurably.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Hard for the market to support redevelopment here. Fresh investment is unlikely although there may be some incremental refurbishment of the buildings according to the users' requirements.
Comment on the 'role' of the area in future	Highly dependent upon current occupiers.
Scope for intensification of use through more efficient use of land over time	Unlikely to see significant change.
Conclusion regarding retention or change of use	Retain so long as demand is sustained. Consider a change of use if employment use is abandoned and market testing brings no parties forward.

District sub-area	South
Estate/employment area	Landberry Industrial Estate, Selsey
Reference(s)	3008
Market area	South East (B2145 Selsey corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Backland site near town centre. Not an obvious location for B-class uses.
Comment on the 'role' of the area now	Somewhat low grade small units plus a builders' merchant with a more prominent property.
Prominence	Lacking prominence (with the above exception).
Base information	
Nature of use and businesses here	Car repairs, marine engineers, builders' merchant and other small units.
Comment on any floorspace for sale/vacant	None apparent, but some units appeared to be used for storage alone?
Potential plots (e.g. cleared sites or derelict buildings) within area	None, although the buildings are somewhat dated and may be suited to redevelopment.
Urban, urban edge, outside urban, rural	Urban
PDL	PDL
Quality of buildings/environment	
Approx age	1960s
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	Comprises a mix of very small, single storey workshops, an older brick/stone barn and a yard for the builders' merchant.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Concrete road, functional
Parking, internal circulation and servicing	Fair for light vehicles only
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby
Perception of wider environmental quality	Urban setting
Local amenities/facilities for workforce	Close to town centre
Strategic access or role	
Ease of access to main road network	Somewhat poor due to the peninsula location.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Local housing estates of Selsey.
Comment on any site development constraints if known	The coastal area is at some risk of flooding and there are concerns about the long term future of Selsey, although we have not researched this point in any detail.
Market conditions/perception of demand	
Comments on local demand/market segments	Low grade units that would suit cost sensitive firms.
Differences short/medium/long term?	Buildings will require further investment in the short to medium term.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Hard to justify redevelopment without higher value uses being permitted.
Comment on the 'role' of the area in future	Likely to be demand for 'cheap' space, even if just used for storage. But a change of use may help support regeneration of the area - requires research into house prices/viability.
Scope for intensification of use through more efficient use of land over time	Already has high site coverage but much is single storey (a change of use might lead to more efficient use of the site).
Conclusion regarding retention or change of use	Consider a change of use to bring investment into this area.

District sub-area	South
Estate/employment area	East Wittering Business Centre, East Wittering
Reference(s)	3005
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Strong business identity upon arrival.
Comment on the 'role' of the area now	A general industrial estate of about 40 units serving East Wittering and the surrounding villages south of Chichester.
Prominence	Not a prominent estate due to its access off a rural road.
Base information	
Nature of use and businesses here	A wide variety of businesses involved in, for example, catering, plastic products for retailers, office furniture, and saddlery, amongst others.
Comment on any floorspace for sale/vacant	Units A3 and A4 were available and 3 others had no signage and may be vacant or simply used for storage.
Potential plots (e.g. cleared sites or derelict buildings) within area	A gas bottle compound is a potential plot but it is in active use at present.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	1970s/1980s
	Possibly built at the time of the Industrial Buildings Allowance tax incentive.
Typical quality coding(s) for area - A/B/C/D	C
Comment on any significant differences within area	The estate also includes open storage (compound for gas bottles); some units have mezzanine offices; there is a BUPA residential care home next door.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional with a few trees and shrubs
Parking, internal circulation and servicing	Good with ample parking available when seen.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	BUPA residential care home next door.
Perception of wider environmental quality	Occupies a rural setting within a flat landscape.
Local amenities/facilities for workforce	No facilities on site for staff; East Wittering is within easy cycling distance.
Strategic access or role	
Ease of access to main road network	Peninsula location with winding roads.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	East Wittering is nearby. It's likely that the estate attracts labour from a wider area too and that most staff drive.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Steady demand for general business units. Expect to see occasional voids. Units A3 and A4 are currently under offer.
Differences short/medium/long term?	Unlikely to change measurably. Buildings may require refurbishment in the longer term.
Local or inward investment potential	Mainly local.
Large, medium or small units?	Small/medium.
Recent activity of note	Two units under offer.
Likely demand and viability without public sector intervention or change of use	Steady demand (market led) although redevelopment may be hard to support if starting afresh.
Comment on the 'role' of the area in future	Likely to remain attractive to small businesses in the area.
Scope for intensification of use through more efficient use of land over time	No significant scope for change unless more office jobs are introduced over time.
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	South
Estate/employment area	**Allmans/Birdham Business Park, Birdham**
Reference(s)	3000
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	Warehouse/distribution park and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously a business location with some long established industrial buildings.
Comment on the 'role' of the area now	Mainly industrial/warehouse space with some limited office space too. One of several small industrial areas along the A286 corridor.
Prominence	Prominent to the A286.
Base information	
Nature of use and businesses here	Businesses include for example: sprayers, printers, office furniture firm, chocolate manufacturers, and waste water treatment consultants.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	No obvious plots (unless expanding onto countryside).
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	1960s +
	Some units have been refurbished with new cladding. WMEC occupies newer workshop/storage space (c. 1990s), including an integral 2 storey office, with elevations of brick and profiled metal cladding.
Typical quality coding(s) for area - A/B/C/D	C/D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Harsh but functional
Parking, internal circulation and servicing	Good
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural to the west
Perception of wider environmental quality	Main road frontage within an otherwise rural setting.
Local amenities/facilities for workforce	Remote from amenities/facilities.
Strategic access or role	
Ease of access to main road network	Situated on the main A286 between Chichester and the Witterings.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Not close to housing estates; relies on workers from Chichester and the local villages.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Steady demand for general business units. Expect to see occasional voids from time to time.
Differences short/medium/long term?	Unlikely to change significantly but some of the buildings are rather dated and will require refurbishment or redevelopment in the longer term.
Local or inward investment potential	Mainly local.
Large, medium or small units?	Medium/small.
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Steady demand (market led) although redevelopment may be hard to support if starting afresh.
Comment on the 'role' of the area in future	Likely to remain attractive by virtue of its main road frontage but very probably must offer a price advantage over the main estates in Chichester.
Scope for intensification of use through more efficient use of land over time	Negligible - already has fairly high site coverage (possibly with the exception of a parking area in the southern corner).
Conclusion regarding retention or change of use	Retain for employment use.

District sub-area	**South**
Estate/employment area	**Enbourne Business Park, nr Sidlesham**
Reference(s)	
Market area	South East (B2145 Selsey corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	General/industrial business area and incubation/SME cluster site
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously a business location (newly built units)
Comment on the 'role' of the area now	Focused on small businesses in the area south of Chichester, near Selsey.
Prominence	Prominent to the main Chichester to Selsey Road.
Base information	
Nature of use and businesses here	Car sales, services and spraying, storage by West Sussex County Council.
Comment on any floorspace for sale/vacant	Both phases (7 plus 8 units) all spoken for within a year or less of construction.
Potential plots (e.g. cleared sites or derelict buildings) within area	Landowner may upgrade his nursery site.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	2008
Typical quality coding(s) for area - A/B/C/D	A
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	New and very presentable with block paving and brick built walls at entrance.
Parking, internal circulation and servicing	Good
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land nearby
Perception of wider environmental quality	Rural setting within a flat landscape
Local amenities/facilities for workforce	Lacking local amenities
Strategic access or role	
Ease of access to main road network	Easy access to the B2145 (Chichester to Selsey Road)
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Not close to housing estates; relies on workers from Selsey, possibly Chichester and the local villages.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	The uptake of units has been very encouraging and in sharp contrast to Selsey Gate - possibly helped by very competitive pricing and flexible terms offered by the private owner/developer.
Differences short/medium/long term?	This is a new development which is set fair for the long term.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	Recently built and let
Likely demand and viability without public sector intervention or change of use	Viability has depended upon the proactive involvement of the owner in the construction process.
Comment on the 'role' of the area in future	Ongoing role in current form - may see some turnover of space over time.
Scope for intensification of use through more efficient use of land over time	May have some scope for extension depending on boundary of the plot compared to agricultural/nursery land.
Conclusion regarding retention or change of use	Retain for employment.

District sub-area	South
Estate/employment area	**Selsey Gate, Selsey**
Reference(s)	3007 and allocation 1 on project map
Market area	South East (B2145 Selsey corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location, warehouse/distribution park, general/industrial business area and includes open storage
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously for business use (although the offices at Sherington Mews have a domestic appearance).
Comment on the 'role' of the area now	Mainly small/medium businesses with a local workforce. Oceanair is a larger company (over 100 staff) that has taken a more substantial industrial unit.
Prominence	The employment area is reasonably prominent upon arrival.
Base information	
Nature of use and businesses here	Mainly small/medium firms. Notably larger is Oceanair, manufacturers of shades, screens and soft furnishings for boats, yachts, superyachts, road vehicles and the home. Their products are exported all over the world.
Comment on any floorspace for sale/vacant	"Selsey Gate" and "Pulsar Business Park" both have surplus industrial units to let (about 11 units available). These are new units awaiting occupation for the first time.
Potential plots (e.g. cleared sites or derelict buildings) within area	There is room for expansion of the employment or residential area according to demand.
Urban, urban edge, outside urban, rural	Urban edge
PDL	N
Quality of buildings/environment	
Approx age	Late 1990s +
	Phased in tandem with housing
Typical quality coding(s) for area - A/B/C/D	A/B
Comment on any significant differences within area	Sherington Mews is a secure courtyard development providing office space but within domestic style buildings.
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional
Parking, internal circulation and servicing	Functional
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Housing nearby
Perception of wider environmental quality	Situated on the northern edge of Selsey within a generally flat landscape.
Local amenities/facilities for workforce	Close to the Selsey Leisure Centre, including "First Steps" nursery, as well as the town centre nearby.
Strategic access or role	
Ease of access to main road network	Somewhat poor due to the peninsula location.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Local housing estates of Selsey.
Comment on any site development constraints if known	The coastal area is at some risk of flooding and there are concerns about the long term future of Selsey, although we have not researched this point in any detail.
Market conditions/perception of demand	
Comments on local demand/market segments	Latent demand appears to have been satisfied and the vacant units need to be taken-up before the market will have any confidence to build more.
Differences short/medium/long term?	The pace of demand is slow with no signs of accelerating.
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Speculative development is unlikely to be viable without cross subsidy of some kind.
Comment on the 'role' of the area in future	It is to be hoped that the vacant units become occupied over time and the area settles into a more productive pattern of use.
Scope for intensification of use through more efficient use of land over time	Unlikely to see any significant change at present.
Conclusion regarding retention or change of use	Retain existing buildings in the hope of fresh demand. Consider a change of use for any undeveloped employment land unless significantly more housing, sufficient to create demand for B-class space, is envisaged.

District sub-area Estate/employment area	South Donnington Park, Stockbridge, Chichester
Reference(s)	3028 and allocation 2 on project map
Market area	South West (A286 Wittering corridor)
Multiple classifications	Multiple uses
Type, identity, role and prominence	Established or potential office location and general/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very much in business use and with strong identity upon arrival.
Comment on the 'role' of the area now	Provides high quality business units south of the A27 but still close to Chichester.
Prominence	Prominent on the A286, Birdham Road
Base information	
Nature of use and businesses here	Businesses here range from professional service providers (Spofforths accountants) to car repairs (Autotechnics) and a chandlery (Force 4). The successful mix of these uses is testament to the high quality of the buildings, including the workshops which are of a similar character when viewed externally.
Comment on any floorspace for sale/vacant	No obvious marketing, although the ground floor of building 12 may be vacant.
Potential plots (e.g. cleared sites or derelict buildings) within area	There is a car park large (seemingly underused) and a plot surrounded by hoardings, both at the rear of the site. Development of Allocation 2 would extend the estate.
Urban, urban edge, outside urban, rural	Rural
PDL	Partly PDL
Quality of buildings/environment	
Approx age	1980s?+
	Likely to have earlier origins (barn conversions).
Typical quality coding(s) for area - A/B/C/D	B
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Very presentable, limited planting, block paving and tarmac surfaces.
Parking, internal circulation and servicing	Satisfactory for present use but would not suit HGVs.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Very limited
Strategic access or role	
Ease of access to main road network	Close to A27 via Birdham Road.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Stockbridge but very probably reliant upon Chichester and other staff travelling by car.
Comment on any site development constraints if known	Countyrside to the west.
Market conditions/perception of demand	
Comments on local demand/market segments	The development has overcome the shortcomings of its rural location by virtue of the character and quality of the buildings, aided by close proximity to the A27 and an absence of such development on the main estate nearby (Terminus Road). Limited choice of town centre offices may be a factor in its favour.
Differences short/medium/long term?	May see competition from Terminus Road or the town centre in the long term but will continue to appeal to firms that want to avoid town centre congestion in favour of a rural setting.
Local or inward investment potential	Mainly local/sub-regional
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Successful scheme that has been market led to date. A change of use would seem incongruous with the established uses.
Comment on the 'role' of the area in future	Ongoing role in current form.
Scope for intensification of use through more efficient use of land over time	No obvious efficiency gain from existing footprint but has potential capacity for one or two more buildings on the plots noted above (otherwise dependent upon further extension onto the countryside as suggested by the mapping of Allocation 2).
Conclusion regarding retention or change of use	Retain for employment.

District sub-area	**South**
Estate/employment area	**Appledram Barns, Birdham Road, Nr Apuldram**
Reference(s)	3024
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	Established or potential office location
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Very much in business use and with strong identity upon arrival, although the buildings also share characteristics of residential barn conversions.
Comment on the 'role' of the area now	High quality, rural offices.
Prominence	Prominent on the A286, Birdham Road
Base information	
Nature of use and businesses here	Various consulting/publishing businesses.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	Countryside to the west.
Urban, urban edge, outside urban, rural	Rural
PDL	Partly PDL
Quality of buildings/environment	
Approx age	Mix
	Mix of old and new barns.
Typical quality coding(s) for area - A/B/C/D	A/B
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	The development is in the style of traditional barn conversions, including gravelled areas and views over countryside.
Parking, internal circulation and servicing	Satisfactory
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Very limited
Strategic access or role	
Ease of access to main road network	Within driving distance of A27 via Birdham Road.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon Chichester and staff travelling by car.
Comment on any site development constraints if known	Countyrside to the west.
Market conditions/perception of demand	
Comments on local demand/market segments	The development has overcome the shortcomings of its rural location by virtue of the character and quality of the buildings, aided by close proximity to the A27 and an absence of such development on the main estate nearby (Terminus Road). Limited choice of town centre offices may be a factor in its favour.
Differences short/medium/long term?	May see competition from Terminus Road or the town centre in the long term but will continue to appeal to firms that want to avoid town centre congestion in favour of a rural setting.
Local or inward investment potential	Mainly local/sub-regional
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Successful scheme that has been market led to date. A change of use would seem incongruous with the established uses.
Comment on the 'role' of the area in future	Ongoing role in current form.
Scope for intensification of use through more efficient use of land over time	No obvious efficiency gain from existing footprint (otherwise dependent upon further extension onto the countryside).
Conclusion regarding retention or change of use	Retain for employment.

District sub-area	**South**
Estate/employment area	**Premier Business Park, Birdham**
Reference(s)	
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area and also in showroom type use
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use.
Comment on the 'role' of the area now	Prominent premises that lend themselves well to their current use (mainly boat and motorhome sales).
Prominence	Prominent on the A286, Birdham Road
Base information	
Nature of use and businesses here	Occupiers include Premier Motorhomes and Lansdale Marine & Leisure.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	
	Modern elevations but origins of buildings not established.
Typical quality coding(s) for area - A/B/C/D	B
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional rather than landscaped.
Parking, internal circulation and servicing	Functional and fairly open to facilitate vehicle storage/sales.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land nearby
Perception of wider environmental quality	Rural setting but prominent to main road.
Local amenities/facilities for workforce	Limited (garage nearby)
Strategic access or role	
Ease of access to main road network	Within driving distance of A27 via Birdham Road.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding villages, such as Birdham, plus Chichester and staff travelling by car.
Comment on any site development constraints if known	Countryside
Market conditions/perception of demand	
Comments on local demand/market segments	Clearly suited to the showroom type use because of the property's prominence to the main road (although the products on sale are fairly specialised so exposure to the general public is probably not critical).
Differences short/medium/long term?	None foreseeable at present.
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	In active use at present; demand may be limited due to the rural location. Prominence to coastal tourist traffic in the summer may help support niche demand.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	Possibly make better use of the large car park if redeveloping the site.
Conclusion regarding retention or change of use	Retain

District sub-area	**South**
Estate/employment area	**Hills Barns, Apuldram**
Reference(s)	3003
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	Established or potential office location
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use upon arrival but also akin to residential barn conversions.
Comment on the 'role' of the area now	Rural business units.
Prominence	Lacking prominence due to rural location.
Base information	
Nature of use and businesses here	Occupiers include firms involved in graphics, corporate entertainment, fostering, construction and others.
Comment on any floorspace for sale/vacant	
Potential plots (e.g. cleared sites or derelict buildings) within area	Would rely on outward expansion onto undeveloped land.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	Mix
	Mix of new and old conversions.
Typical quality coding(s) for area - A/B/C/D	A/C
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Functional courtyard.
Parking, internal circulation and servicing	Informal parking within courtyard.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Very limited (hamlet location).
Strategic access or role	
Ease of access to main road network	Within driving distance of A27 via Fishbourne Road West.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Reliant upon surrounding settlements including Fishbourne and Chichester with staff travelling by car.
Comment on any site development constraints if known	Countryside
Market conditions/perception of demand	
Comments on local demand/market segments	In common with other "barn style" developments in the area, the character of the property, fairly close proximity to the A27 and limited choice of offices in Chichester has helped overcome the rural location.
Differences short/medium/long term?	May see competition from Terminus Road or the town centre in the long term but will continue to appeal to firms that want to avoid town centre congestion in favour of a rural setting.
Local or inward investment potential	Local
Large, medium or small units?	Small/medium
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	In active use at present; demand may be limited due to the rural location.
Comment on the 'role' of the area in future	Ongoing role in its present form.
Scope for intensification of use through more efficient use of land over time	No obvious efficiency gain from existing footprint (otherwise dependent upon further extension onto the countryside).
Conclusion regarding retention or change of use	Retain

District sub-area	South
Estate/employment area	Northleigh Business Park, Birdham
Reference(s)	3002
Market area	South West (A286 Wittering corridor)
Multiple classifications	
Type, identity, role and prominence	General/industrial business area
Character of area in terms of business identity (e.g. obviously for business use or isolated by other uses such as houses)	Obviously in business use
Comment on the 'role' of the area now	Relatively low specification space for car trade and other cost sensitive businesses.
Prominence	Close to Birdham Road although most units are set back from the road.
Base information	
Nature of use and businesses here	Examples of the type of occupier include: motor trade, garden machinery, landscaping, surf shop.
Comment on any floorspace for sale/vacant	No marketing
Potential plots (e.g. cleared sites or derelict buildings) within area	The estate could be extended between the road and the chicken shed used by Birdham Garden Machinery. There are also two informal car parking areas to the south and east which could potentially be developed depending upon car parking requirements.
Urban, urban edge, outside urban, rural	Rural
PDL	PDL
Quality of buildings/environment	
Approx age	1950s/1960s+
	Includes dated space with blockwork walls and corrugated asbestos and metal roofing, as well as adapted chicken sheds.
Typical quality coding(s) for area - A/B/C/D	D
Comment on any significant differences within area	
Noise/pollutants (no detailed inspections made)	
State of external areas and public realm	Rather unkempt and muddy in places
Parking, internal circulation and servicing	Informal parking areas with ample space when seen.
Quality of wider environment	
Adjoining land uses constraining operations or quality of uses on area	Agricultural land
Perception of wider environmental quality	Rural setting
Local amenities/facilities for workforce	Close to Birdham and a local garage and Post Office.
Strategic access or role	
Ease of access to main road network	Situated on the B2179 but close to the A286.
Proximity to any other strategic infrastructure, facility or specialist type of property (e.g. rail freight)	
Workforce catchment	Close to Birdham and the Witterings. Reliant on car borne staff.
Comment on any site development constraints if known	
Market conditions/perception of demand	
Comments on local demand/market segments	Appears well occupied but may benefit from at least superficial investment to improve appearances and surfaces.
Differences short/medium/long term?	Very reliant on the local market so would expect vacancies from time to time.
Local or inward investment potential	Local
Large, medium or small units?	Small
Recent activity of note	
Likely demand and viability without public sector intervention or change of use	Demand depends upon local firms and limited passing trade (e.g. visitors to the beach patronising the surf shop). May come to depend upon non B-class uses in time.
Comment on the 'role' of the area in future	Ongoing role for local firms in this part of the district.
Scope for intensification of use through more efficient use of land over time	The plots mentioned above could be developed to extend the footprint of the estate. However, the informal nature of the development may have to change to attract more demand.
Conclusion regarding retention or change of use	Retain and monitor.

APPENDIX 8

Monitoring and Review

Monitoring and Review

As section 11.2 of 'Creating Local Development Frameworks: A Companion guide to PPS12' (and in particular Checklist 11a) notes, there is a need to regularly review the evidence base for the LDF. In this section we identify the stages when ELRs may need revising and how this should be monitored. In addition, government guidance on monitoring LDFs should help to guide future monitoring processes of employment land in Chichester. For instance, where it is evident that there is unexpectedly slow or rapid progress in delivery of employment sites, a new or revised ELR should be undertaken.

Of particular relevance to Chichester are any relevant changes to the SEP because Chichester Council need to ensure that their adopted and emerging Development Planning Documents (DPDs) are in general conformity with the Plan. Should any part of a DPD relating to employment land fail to be in general conformity, then the DPD is likely to require revision. At this point the authority should consider whether a new or revised ELR is required.

In addition, policy is always based on the best knowledge available at the time. Forecasts of future employment land requirements reflect a snapshot in time and, like all forecasts, are never certain and often wrong. Nevertheless, we must use them because no other tools are available to help you plan for the long term - which you are required to do by national and regional guidance.

There is another, and less obvious, difficulty in planning for the long term: while forecasts and Plan periods have a definite end date, in reality time will not end abruptly at that date. Good planning has to take account of both the near and the far future, in different ways and with different degrees of precision, with no hard and fast dividing lines between distinct periods.

The best way to deal with these difficulties of course is to Plan, Monitor and Manage. In this approach, analysis and forecasting and the resulting policies are periodically reviewed and rolled forward. Policy is always based on the best knowledge available at the time, and the end of the planning period is never reached or even approached closely.

In this spirit, Chichester should undertake the following approaches to monitoring:

- Review employment forecasts and the resulting demand forecasts at 5 year intervals and when there are major step changes in the economy or strategic guidance;
- Review employment forecasts should there be significant revisions to the inputs in forecasting employment. For example, a dramatic upward revision of previous national population estimates might suggest a different out-turn of employment forecasts for the study and therefore implications for planning land supply;
- Continuously monitor key economic data, especially employment change by sector;
- Engage with local stakeholders including property agents, developers and land owner on a regular basis, possibly through group sessions such as breakfast workshops; and
- Continuously monitor demand, supply and market balance, covering:
  - Development completions (land demand) and commitments (land supply), focusing on net floorspace change (both negative and positive);

- Vacancy rates (both for land and floorspace), rentals and land values compared to competing areas, which provide a direct measure of the balance;
- Insofar as possible, business relocations and expansions into and out of the Study Area together with enquiries for business space.