



## BACKGROUND

The Council commissioned consultants to undertake a research study of the Kennet economy. The study followed Government guidance on employment land reviews. Its purpose is to inform the Council on current issues facing the local economy and the prospects and needs for its future. It will form part of the 'evidence base' for developing policies in the local development framework and provide advice on action to be taken to enhance economic prosperity and the quality of employment opportunities.

The study comprised :-a criteria-based assessment of existing and potential employment sites; an analysis of socio-economic conditions, employment trends and the property market; preparation of employment and business floorspace forecasts up to 2016; and a survey of businesses in the district.

The conclusions of the study are highlighted in this paper and full details can be viewed on [www.kennet.gov.uk/planning/forward-planning/economic-study/economic-study1.html](http://www.kennet.gov.uk/planning/forward-planning/economic-study/economic-study1.html)

## ECONOMIC PERFORMANCE

Total employment has fluctuated between 25,000 and 28,000 in Kennet over the last 9 years. Public administration accounts for 30% of jobs and 7.5% are defence related. Distribution and restaurants represent 24% whilst manufacturing has declined to 10%. Financial and other services has grown to 20%.

# Kennet Economic Study

*Employment Change 1995-2004 (source: ABI)*

	1995	2004	Change	%
<b>KENNET</b>	<b>23,000</b>	<b>26,000</b>	<b>3,000</b>	<b>12%</b>
North Wilts	42,000	47,000	5,000	12%
Swindon	99,000	109,000	10,000	10%
S W Region	1,855,000	2,195,000	340,000	18%
S E Region	3,062,000	3,644,000	582,000	19%

## STRUCTURAL CHANGES

Structural change in the economy reflects the national pattern which in turn is influenced by globalization. The future need for land and premises for economic activity will be much less reliant on accommodating manufacturing industries and will need to increase provision for the financial and service sectors.

Employment Sector	Jobs in 2016	% growth per annum	Change in jobs 2004-2016
Banking, finance & insurance	3 246	2.1	919
Construction	925	0.0	0
Distribution & wholesale	1 172	0.3	43
Manufacturing	2 581	-1.0	-293
Other services	1 365	3.2	627
Transport & communications	640	0.2	16
<b>TOTAL</b>	<b>9 929</b>	<b>1.0</b>	<b>-</b>
Jobs created	-	-	1 605
Jobs lost	-	-	-293
Net change in jobs	-	-	1 312

Kennet has seen strong growth in the development of small and medium sized enterprises (SME) and firms have experienced high survival rates. The table above shows the anticipated change in employment in 2016.

## EXISTING LAND SUPPLY

Kennet contains some 156.9 ha of employment land with the majority located in Devizes (see below).

	Employment Land (Ha)	%
Devizes	86.4	55
Marlborough	13.7	9
Pewsey	9.2	6
Tidworth/Ludgershall	27.7	18
Rural Locations	19.9	13
<b>TOTAL</b>	<b>156.9</b>	<b>100</b>

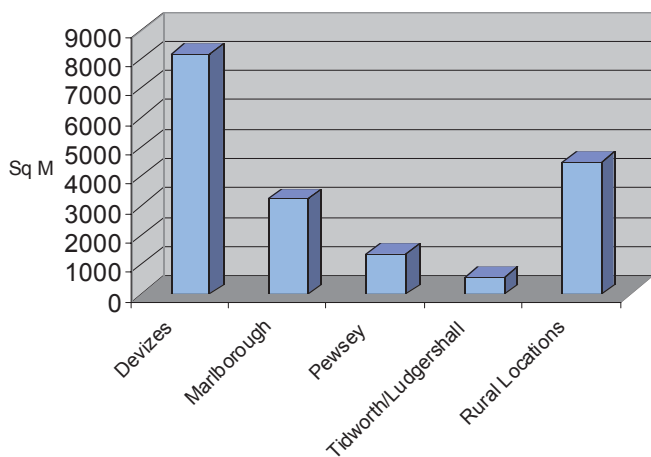
23.26 ha of land was identified as vacant and readily available (79 premises accounting for 17,900 sq m).

11 sites have potential to provide scope to accommodate non B class (employment) uses.

Opportunity areas accounted for some 38.5 ha of land.

The majority of premises comprise less than 500 sq m of floorspace and are classified within the "general industrial" use. Approximately 95% of premises were judged to be in "good" or "fair" condition.

### Vacant Floorspace in Kennet



## FUTURE NEEDS

Structural change suggests the traditional approach of providing considerable areas of land to accommodate large structures housing heavy machinery and process plant is becoming less important. Policies may need to focus on retaining and attracting industrial sectors which can operate competitively in Kennet. Policies in the LDF should respond by providing a sufficient quantity and range

of sites and premises to cater for new and expanding employers.

Highest demand for business units is likely to come from micro and small businesses. Sites and premises should be made available to meet these needs. About 68,900 m<sup>2</sup> (6.9 ha) of land will be required to meet new demand as shown below.

Employment Use	Additional employment land requirement		Vacated employment land	
	Floor space (m <sup>2</sup> )	% of total	Floor space (m <sup>2</sup> )	% of total
Offices	41 316	60	-2 346	11
Factories	18 628	27	-19 940	89
Warehousing	8 938	13	0	0
<b>TOTAL</b>	<b>68 883</b>	<b>100</b>	<b>-22 286</b>	<b>100</b>

The review indicated a slight oversupply of allocated employment land in the local plan compared with the results of trend based forecasting and the survey of local businesses. Therefore it is not thought necessary to provide further employment allocations in the period to 2016.

There is, however, a need to identify land suitable to meet the needs of a diversified economy which existing allocations will not satisfy. Firms expressed a preference to locate in Devizes or Marlborough with Devizes the focus of office demand. Most would prefer to locate in a dedicated industrial area, a town centre or commercial district.

## FACTORS AFFECTING SUPPLY & DEMAND

- More demand for smaller premises & offices
- More pressure to redevelop sites for higher value development
- Quality of stock and likelihood of reoccupation
- Likelihood of undeveloped sites going forward

## PROPOSED AIM FOR THE ECONOMY

Enable the effective management of the existing stock to reduce losses, respond to future demands and enhance the district's employment offer.

## APPROACH TO ALLOCATING EMPLOYMENT DEVELOPMENT SITES

A range of sites and locations will be required to meet the future business needs of Kennet District.

- Sites to meet forecast needs - existing allocations or sites providing the "best" prime opportunities to encourage new industrial and business development
- Sites to meet the requirements of the Structure Plan to 2016 - existing and new potential sites.
- Sites providing scope for expansion, intensification or regeneration of employment operations - sites with potential for incremental redevelopment.
- Sites with potential for development of mixed uses whilst retaining a significant employment function.
- Sites appropriate for non-employment development.

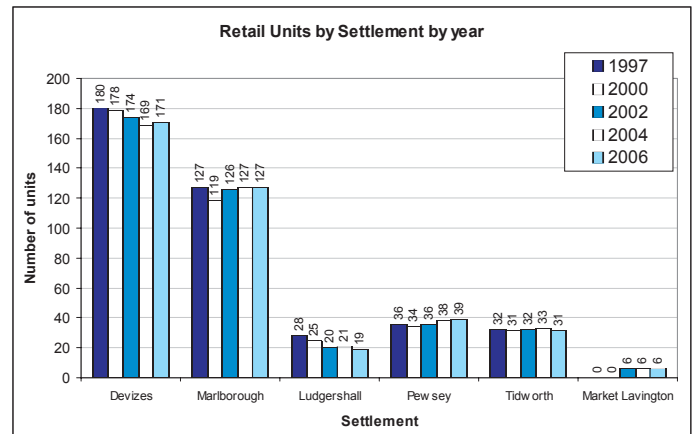
## PROPOSED POLICY FRAMEWORK

- Safeguard most appropriate sites to ensure supply of land to meet future needs.
- Facilitate restructuring of key sites for mixed uses.
- Promote diversity of business needs
- Provide for small businesses including serviced units.
- Provide readily available sites to facilitate inward investment.
- Facilitate a qualitative improvement to the stock through:- intensification; complementary uses; redevelopment; mixed-use development.
- Promote rural enterprise through sustainable economic diversification.

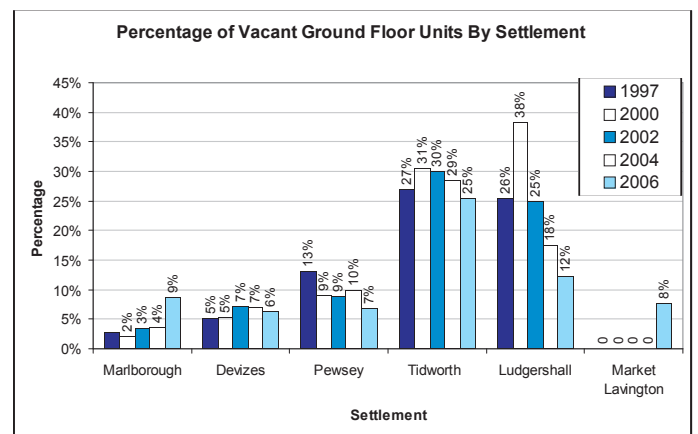
## THE TOWN CENTRE ECONOMIES

The Atkins report identified the importance of commercial activity in the market towns to the local economy. The Council has maintained an on-going survey of town centre uses. Devizes and Marlborough are the major retailing centres for the

district. The retail floor space has been relatively consistent since 2002 with only slight decreases in Devizes and Pewsey and slight increases in Tidworth and Marlborough.



Vacant premises provide a good indication of the health of a centre. A small number of vacant units provide opportunities for change and new retailers to move into an area. The levels of vacancy in both Devizes and Marlborough provide this opportunity. Tidworth and Ludgershall stand out as having very high vacancy rate. The survey does not include the recently permitted Tesco store in Tidworth.



## DEFINING A FUTURE PORTFOLIO OF EMPLOYMENT SITES

Table 1 (overleaf) provides an assessment of the suitability of sites in meeting the future requirements of employment growth. It develops a portfolio of employment sites which will provide appropriate areas of additional land to meet future requirements balanced with a suitable range of existing sites that justify employment policy protection.

Site Details			Existing Local Plan Policy Context					Proposed Employment Allocation Categories				Proposed Employment Protection Categories								
Site ID	Site Name	Location	Employment Allocation (ED1 - ED6)	Strategic Employment Site (para1 ED7)	Town Centre Site (para2 ED7)	Rural Employment Location (ED9)	Other - Urban (para3 ED7)	Other - Rural (non ED9)	Sites Appropriate to Meeting Forecast Needs to 2016	Sites Appropriate to Meeting Structure Plan Requirements to 2011	Sites Providing Scope for Expansion, Intensification or Regeneration of Employment Uses	Mixed Use Development Sites	Non Employment Development	Strategic Employment Sites	Locally Important Employment Location	Rural Enterprise Locations	SME Sites and Premises	Town Centre Enterprise Locations	Sector Specific Locations	No Requirement for Employment Allocation or Protection
001	Hopton Park	Devizes	Y	Y				Y	Y				Y							
002	Hopton Ind. Estate.	Devizes.		Y						Y			Y							
003	Folly Road	Devizes.		Y								Y	Y							
004	Garden Trading Centre	Devizes.		Y								Y	Y							
005	Le Merchant Trading Estate	Devizes	Y	Y				Y	Y				Y							
006	Police HQ	Devizes.		Y						Y									Y	
007	Bureau West	Devizes		Y				Y				Y	Y							
008	Bath Road Business Centre	Devizes.		Y												Y				
009	Southgate House	Devizes		Y															Y	
010	Kennet DC Browfort Offices	Devizes		Y															Y	
011	Nursteed Road Ind. Estate	Devizes		Y										Y						
012	Nursteed Road Allocation	Devizes	Y					Y	Y					Y						
013	Banda Trading Estate	Devizes		Y										Y						
014	Mill Road Ind. Estate	Devizes		Y						Y				Y						
015	Marlborough Business Park	Marlborough	Y						Y					Y						
016	Wagon Yard	Marlborough	Y							Y						Y				
017	Figgins Lane	Marlborough	Y												Y					
018	Elcot Lane/Stonebridge Close	Marlborough		Y											Y					
019	Pelham Court	Marlborough		Y											Y					
020	The Old Yard	Marlborough		Y											Y					
021	Council Depot	Marlborough		Y								Y			Y					
022	Marlborough Tiles	Marlborough		Y															Y	
023	Salisbury Road Ind. Estate	Pewsey		Y					Y					Y						
024	Marlborough Road Allocation	Pewsey	Y						Y											
025	Station Yard	Pewsey				Y				Y	Y			Y						
026	Fordbrook Estate	Pewsey		Y						Y				Y						
027	Old Coal Yard	Pewsey		Y						Y				Y						
028	Swan Corner	Pewsey				Y					Y					Y				
029	British Legion	Tidworth		Y						Y						Y				
030	Castledown Business Park	Ludgershall	Y					Y	Y					Y						
031	MSA Depot	Ludgershall				Y						Y		Y						
032	Andover Road	Ludgershall				Y						Y							Y	
033	Courage Depot.	Ludgershall		Y								Y							Y	
034	Ludgershall Business Park	Ludgershall		Y											Y					
035	Sells Green	Sells Green				Y									Y					
036	Manor Farm	Manningford Bohune				Y										Y				
037	Elm Tree Farm	Manton				Y										Y				
038	Hilldrop Lane	Ramsbury				Y										Y				
039	Broadway	Market Lavington				Y				Y				Y						
040	Brail Farm	Great Bedwyn				Y				Y						Y				
041	Garlands Trading Estate	Collingbourne Ducis						Y							Y					
042	Honey Street Mill	Honey Street						Y				Y			Y					
043	Hirata	Burbage						Y		Y					Y					
044	Mark Wilkinson Furniture	Bromham						Y							Y					
045	Barnes Coaches	Aldbourn						Y				Y			Y					
046	Lottage Road	Aldbourn						Y							Y					
047	OKA/Blanchard Ltd	Froxfield						Y							Y					
048	Bourne Works	Collingbourne Ducis						Y		Y					Y					
049	Devizes Town Centre	Devizes			Y														Y	
050	Ludgershall Town Centre	Ludgershall			Y														Y	
051	Marlborough Town Centre	Marlborough			Y														Y	
052	Pewsey Town Centre	Pewsey			Y														Y	