

Industrial Estates Audit
Brighton & Hove



SHW

Brighton & Hove City Council

Date: December 2017

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1.00 EXECUTIVE SUMMARY

- 1.01 SHW were appointed to carry out an audit of the Industrial Estates in Brighton & Hove. The last audit was carried out in 2007. The aim of the audit is to establish a full understanding of the business strengths and needs in the City and to provide information that will help us to determine how best to support and grow the business base.
- 1.02 In total 146 occupiers were invited to take part. 75 occupiers responded; 48 occupiers answered the questionnaire and 27 occupiers gave a reason as to why they did not want to participate. 68 occupiers did not respond at all.
- 1.03 Brighton & Hove continues to prove an attractive location for a number of businesses although there is very limited scope for growth for existing companies, or sites for new development. In the first 6 months of 2017, Brighton & Hove has seen a take-up of 4,924 sq m mostly in the Hove/Portslade area with the majority of transactions being smaller units. There remains a lack of good quality modern units in the 1,000 sq m plus range, which continues to frustrate occupiers looking to expand or to move into the City. Limited land for new development is having a detrimental impact with almost no industrial development likely to take place in 2018. Demand remains strong despite the lack of stock, with increasing numbers of enquiries for freehold buildings of all sizes and leasehold units particularly in the 350 – 1,000 sq m range.
- 1.04 Occupiers were generally reluctant to engage with the research however of those that did respond they provided useful and specific feedback.
- 1.05 No BME led industrial businesses were discovered. From SHW knowledge this would be very different if looking at retail businesses.
- 1.06 4 female led business were highlighted. Of these none expressed any issue in running the business due to gender. The only issue highlighted was where one businesses work force was predominantly female they struggled to cope with maternity pay. This is not a problem specific to industrial use but a wider employment hurdle.
- 1.07 The majority of occupiers are not located in a cluster, nor do they consider being in a cluster important.
- 1.08 72% of occupiers are serving the local or UK market, with the remaining 28% serving EU and International markets.
- 1.09 94% of occupiers are male dominated and 94% have 100% white staff.
- 1.10 58% of occupiers were in a space of 140– 465 sq m. This implies that if there were new development this would be the optimum size of units to be built. However, a problem highlighted was a lack of premises to grow into so perhaps larger developments are required. There are also fewer (9% with premises ranging between 929 sq m – 1,858sq m) large occupiers but they still need to be catered for to attract further larger businesses to the area.

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- 1.11 65% are not engaging with business advice services, colleges or universities. It may be an idea to provide further information on the benefits of engaging and or employing an apprentice.
- 1.12 Improvements occupiers want to see include improved access to estates (i.e. less cars blocking the entrance / less cars using it is a cut through to other locations) better appearance, better parking allocation, improved security and better internet connection.
- 1.13 76% of occupiers had no plans to relocate however almost 20% would be looking to relocate in the next 5 years.
- 1.14 The main barriers faced was a lack of premises to grow into and high costs (including rent, rates and utilities).
- 1.15 The most important locational factors were identified as access. Being within a cluster was selected as being of least importance.
- 1.16 Almost 1 in 4 occupiers that completed the questionnaire sited high energy bills as a barrier they experienced. There was interest from approximately 29% in exploring reduced energy bills. Almost a third of those that completed a questionnaire stated they had invested in energy efficiency improvements in the last 5 years. While this is positive, it indicates there is significant scope for further energy efficiency improvement across the estates.
- 1.17 Some occupiers located on sites which are earmarked for redevelopment answered saying their location was not earmarked for redevelopment. This could result in some occupiers having to look for alternative space fairly urgently.
- 1.18 Brexit was not a major concern; 58% of occupiers said their companies were not currently facing problems due to Brexit. However for those where it was a concern, 47% of occupiers, it was due to higher costs of materials, employment and loss of contracts due to nervousness in the market.
- 1.19 Conway Street, Sackville Trading Estate, Peacock Trading Estate and Longley Trading Estate are all proposed for redevelopment and are locations where SHW considered it highly likely redevelopment will happen.
- 1.20 There is currently approximately 11,000 sq m vacant space, some of this is only available on short term lets, and some is strategically being left vacant in preparation for future development.
- 1.21 It is concluded that alternative sites need to be designated solely for industrial use, so developers are not competing with developers of residential or office use where the values are much higher leading to the ability to pay a higher land value.
- 1.22 Releasing Greenfield sites is probably the only way of doing this. The alternative option is to accept that Brighton & Hove will not be able to accommodate further Industrial growth and rather look to work with surrounding Greater Brighton area.
- 1.23 Sites for potential development are highlighted under section **9.00 Alternative Sites**.

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2.00 RECOMMENDATIONS

- 2.01 There is limited space available for the current businesses and very low levels of new build forecast for immediate development. This means current businesses will struggle to expand here and new business will not be attracted to the area. An assessment exploring the age and obsolescence of existing stock is required to be able to plan for the future. If large amounts are nearing the end of their economic life, and limited new development is taking place, this will impact greatly on industrial businesses and it would highlight which estates perhaps need more assistance in order to keep them in a useable condition.
- 2.02 It was found that some occupiers located on estates earmarked for redevelopment were not aware that their premises could be redeveloped in the near future. It is normally the land owner/developer that would engage with the occupiers, mainly because they want to work with them to avoid objections to any planning application. However, if this isn't happening it may be in the interest of the Council to ensure occupiers are aware of potential redevelopment to give the occupier ample time to find alternative premise.
- 2.03 Brownfield sites do not allow companies to grow due to constraints of surrounding housing or industry. They are notoriously complicated and time consuming as they are normally close to other occupiers (often residential) and an enormous collection of objections are often raised in planning applications. Existing businesses would like the possibility of Greenfield sites to allow expansion, similar to Rolls Royce in Bognor, who initially had 30,600 sq m contracted with an option for a further 9,300 sq m which is now under construction, 2 years later. By continuing to champion brownfield sites it becomes believed that this is a solution and as such not necessary to allocate further land that really could make a difference. To maximise employment in the City there needs to be both city centre and out of town offerings. However the out of town sites need to be of a sufficient size to make a difference.
- 2.04 Greenfield sites adjacent to the A27 are a more logical solution because, they are often in straight forward and simple ownership, the location will be of more interest to occupiers, the sites would be large enough to have a meaningful impact on the economy and development could happen in a reasonable timescale.
- 2.05 The Council needs to identify where future opportunities might be for industrial space development - say up to 4,600 sq m as there are developers who want to build in Brighton. Through City Plan Part 2 the Council needs to consider sites to allocate specifically for Industrial/Warehouse use. This is necessary to accommodate the next phase for occupants in business centres and innovation centres.
- 2.06 To improve quality of business the Council needs to consider providing something along the lines of a science park (i.e. Cambridge or Guildford Science Parks). Toads Hole Valley would be an attractive location for this. By creating a science park it would provide new facilities for existing businesses as well as attracting larger, established businesses to the area and creating new employment. If this were

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- already in existence it would have been a natural place for businesses such as Rayner and Custom Pharmaceuticals to relocate to. This would in turn have freed up existing industrial units in the centre of Brighton which are more suitable for smaller expanding businesses.
- 2.07 If Greenfield sites cannot be allocated, working in conjunction with the surrounding authorities to help enable development in other locations, and engaging with occupiers on this also, is vital to keep the businesses in the greater area.
- 2.08 It is recommended that there is a follow up with occupiers interested in reducing energy bills, by the council and partner organisations offering business support on energy efficiency advice. Under the Minimum Energy Efficiency Legislation (MEES), from April 2018 all commercial property must have an EPC rating of E or better in order for a new letting/sale to take place. This will impact on tenants if they want to sub-let space. The Government is exploring the possibility of raised energy efficiency standards for commercial buildings (2019), a package of measures for business energy efficiency, and a carbon reporting framework for businesses (Clean Growth Strategy 2017). There may be packages of support or other incentives to make improvements in the Industrial Estates in future years
- 2.09 Whilst a wider strategy for development for new space is put together, further communication with existing businesses, especially those that are on sites earmarked for redevelopment is recommended.
- 2.10 Further consultation on specific areas such as engaging businesses with Business Advice, Colleges and Universities, impact of Brexit on Businesses and reducing energy bills may be worthwhile if the Council would like more information on this.
- 2.11 Engage regularly with larger occupiers to help accommodate their future expansion and to prevent them having to relocate. Regular conversation, even if a solution to their barriers cannot easily be found, would be welcomed especially by the larger businesses.



3.00 INTRODUCTION

- 3.01 SHW were appointed to carry out an audit of the Industrial Estates in Brighton & Hove.
- 3.02 The last audit was carried out in 2007.
- 3.03 The aim is to establish a full understanding of the business needs enabling the companies to grow and prosper in Brighton & Hove.
- 3.04 Brighton & Hove Council would like to establish if there any problems facing women led and BME led businesses.
- 3.05 Estates which are made up of motor trade, national trade counters, or being used as B1 office rather than industrial, were excluded from the audit. This includes Freshfield Trading Estate, Newton Road trade counters, English Business Centre and Sussex House.

4.00 METHODOLOGY

- 4.01 SHW met with Brighton & Hove Council to discuss the objectives of the audit.
- 4.02 Using both the SHW database of information on Industrial Estates and the council's database, a spreadsheet showing the Industrial Estates, the occupiers and contact details was put together. **See Appendix A.**
- 4.03 SHW put together a questionnaire which was then discussed with the council's Steering Group. Once finalised the questionnaire was sent to all occupiers on the Industrial estates. **See Appendix B.** An interactive version was also available.
- 4.04 A map of the Estates can be seen at **Appendix C.**
- 4.05 Initial response to the questionnaire was limited. All occupiers were then phoned and asked if they would be willing to fill the questionnaire in, either over the phone or we could resend the questionnaire electronically.
- 4.06 Following this, site visits to each estate were carried out, most units being visited three times if a response had not yet been received.

5.00 MARKET OVERVIEW

- 5.01 **Brighton & Hove Market Overview**
 - 5.01..1 Brighton & Hove continues to prove an attractive location for a number of businesses although there is very limited scope for growth for existing companies, or sites for new development.

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- 5.01..2 In the first 6 months of 2017, Brighton & Hove has seen a take-up of 4,924 sq m mostly in the Hove/Portslade area with the majority of transactions being smaller units.
- 5.01..3 There remains a lack of good quality modern units in the 1,000 sq m plus range, which continues to frustrate occupiers looking to expand or to move into the City.
- 5.01..4 Limited land for new development is having a detrimental impact with almost no industrial development likely to take place in 2018.
- 5.01..5 The proposed redevelopment of Sackville Trading Estate, Conway Street, Peacock Industrial Estate and Longley will represent a loss of circa 25,000 sq m of industrial space further hindering the supply of good quality stock.
- 5.01..6 Current availability stands at 10,300 sq m although 3,500 sq m of this is in one property, the former Argus building in Hollingbury which is available short term whilst the owner works up a new scheme for the site.
- 5.01..7 The most recent new business parks in Brighton have been constructed on brownfield sites i.e:
- Portland Business Park, Hove, 3 acres where the former Co-op Dairy was located, now 446 sq m of new units.
 - St Joseph's Business Park – Former Waste transfer site. Now 17 units totalling approximately 428 sq m.
 - Woodland Business Park – the former Jaycee furniture building and Sunblest Bakery.
- 5.02 **Wider Market Overview**
- 5.02..1 **Worthing** – Take up for the first half of 2017 amounted to 2,800 sq m which is an increase in the take-up compared with the last half of 2016. Demand from occupiers remains strong although the current supply is still low. The speculative development of 5,700 sq m of business units at Rock Business Park is likely to help satisfy some of the growing demand for accommodation in the area.
- 5.02..2 **Eastbourne, Polegate and Hailsham** – Take up in the first half of 2017 amounted to 7,700 sq m, with the available stock reaching 14,000 sq m. Demand from occupiers remains steady and there is healthy development activity in the area. The most significant speculative development is Swallows Business Park, in Hailsham where 3,350 sq m has now completed and over 9,300 sq m is likely to be speculatively constructed.
- 5.02..3 **Newhaven** – Take up for the first half of 2017 was very low despite the available accommodation reaching 4,400 sq m (up from 3,100 sq m in Q4 2016). The lack of demand is likely due to the age/condition of the stock available. There are opportunities for further business space with the new Newhaven Enterprise Zone and the speculative development of Eastside Business Park will provide a further 2,250

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sq m of new stock towards the end of 2017. This space is already attracting interest from Brighton based occupiers who are looking for good quality modern units.

5.02..4 **Crawley** – The first half of 2017 has seen a moderate level of take-up of 11,500 sq m. Take up would have been significantly higher if further stock was immediately available. 2016 saw a reasonably healthy take-up at 23,700 sq m let or sold. (5 year average take-up is 25,600 sq m.) Demand remains very high with over 74,300 sq m of active requirements for the area with limited development likely to take place in 2018.

5.02..5 **Horsham** – The Science Park being developed on the former Novartis site aims to attract health and life style companies that will focus within life-saving research work and the development of innovative technology. The 18.6 acre brownfield site will unlock approximately 50,000 sq m of office and industrial space with the remainder being residential.

5.03 Rents

5.03..1 **Brighton** - The market continues to be two tiered for either trade units in specific trade locations or straightforward industrial units, with trade rents now generally in **the £11.00 to £15.00 psf** (£118 - £161 psm) range but rising to **£18.00 psf** (£193 psm) on the much sought after Freshfield Industrial Estate in Kempdown, where there is a waiting list of potential occupiers. Generally, Industrial rents are in the **£7.00 - £10.00 psf** (£75 - £107 psm) range, although this rises to **£15.00 psf** (£161 psm) for small units up to 232 sq m. The shortage of available space with the constraints of the South Downs and the sea is likely to lead to a continued increase in rents during 2017.

5.03..2 **Worthing** – Rents have considerably improved with the highest rental increases being seen within the sub 500 sq m category with rents reaching over **£8 psf** (£86 psm) and predicted to rise further within 2017. Sub 950 sq m units are now achieving in excess of **£11 psf** (£118 psm).

5.03..3 **Eastbourne** – Rents have improved slightly with **£9.50 psf** (£102 psm) being achieved on new small units or trade units in Eastbourne and Polegate. Rents on good quality 1980s units are up to circa **£8 psf** (£86 psm) with older or less favourably located units at around **£6 psf** (£64 psm). In Hailsham, prime rents have reached a market high of **£8 psf** (£86 psm).

5.03..4 **Newhaven** – Transactions have been limited in 2017, quoting rents for the older stock range between **£5.00 and £6.30 psf** (£53 and £68 psm). The new development Eastside Business Park is likely to achieve rents of circa **£7.50 psf** (£80 psm).

5.03..5 **Crawley** - Rents have reached **£14.50 psf** (£156 psm) on trade counter units at Oakwood Trade Park, Gatwick Road and Denvale Trade Park in the town centre, both of which are considered to be the best Trade schemes in the Town. Rents for larger, non-trade counter warehouses have now reached **£13.00 psf** (£140 psm) Quoting rents on new build larger schemes have now topped **£14.50 psf** (£156 psm) Rents for good quality 1980s units are circa. **£8.50-£10 psf** (£91 - £107 psm) with older or less favourably located units at slightly less.

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5.03.6 Rents in Brighton & Hove are high in comparison to neighbouring locations and similar to those of Crawley / Gatwick. Businesses could relocate to areas such as Newhaven where rents are lower and there is more availability. It is often the case however that it is easier to attract staff by being based in Brighton. Rent in Brighton is still comparably low compared to staffing costs of a business. Generally speaking, if a business wants to be located in Brighton they will not be deterred by rent.

6.00 THE ESTATES

6.01 A summary of each estate including the below information is attached as **Appendix D**.

- Location
- Current Situation
- Future Plans
- Tenant
- Response to the Questionnaire
- Key issues and recommendations

7.00 RESPONSE RATE

7.01 In total 146 occupiers were invited to take part.

7.02 We received a response from 75 occupiers.

7.03 48 occupiers answered the questionnaire.

7.04 27 occupiers gave a reason as to why they did not want to participate.

7.05 68 occupiers did not respond at all.

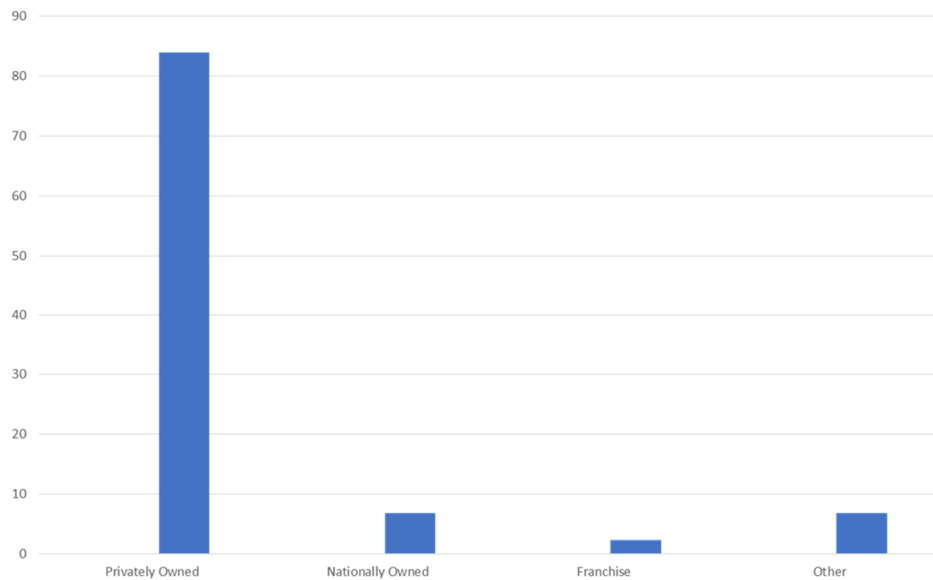


8.00 RESULTS

8.01 Taking each question in turn, starting from question 6 on the questionnaire (as question 1-5 relates to contact details) we show the breakdown on answers received.

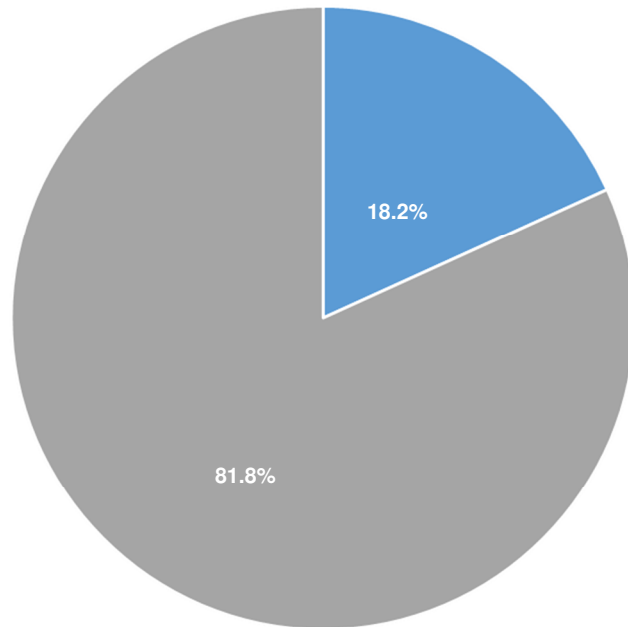
8.02 A written representation for each question can be seen in **Appendix E**.

8.03 Question 6: Which term best describes your business?



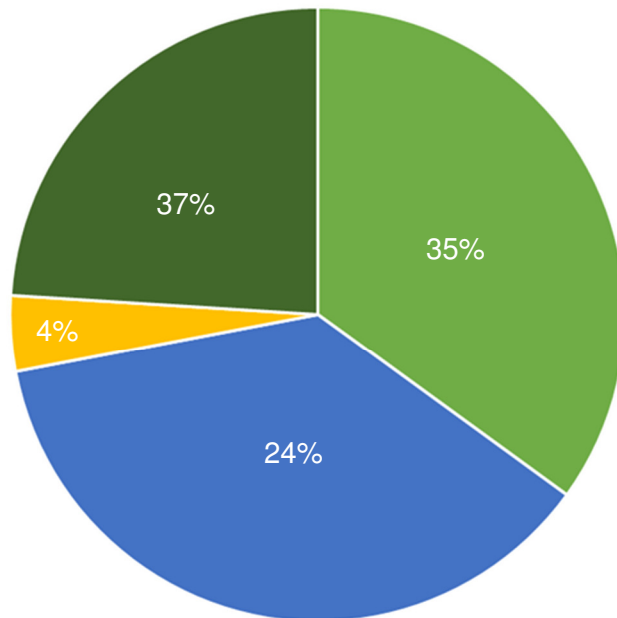


8.04 **Question 7: Is Your Business Part of a Cluster?**



■ Yes ■ No

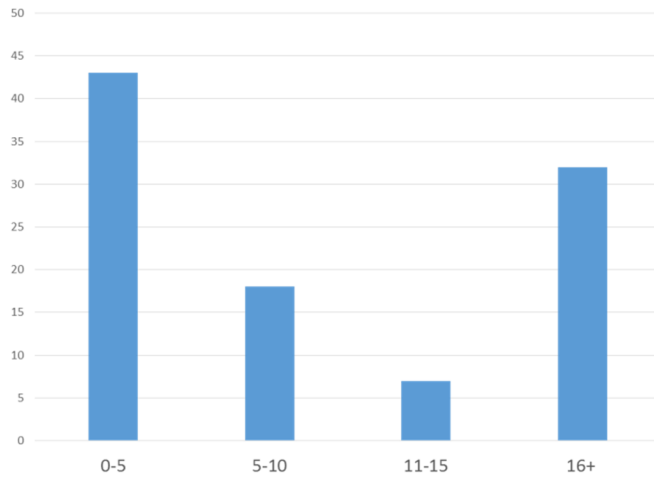
8.05 **Question 8: What market does your business serve?**



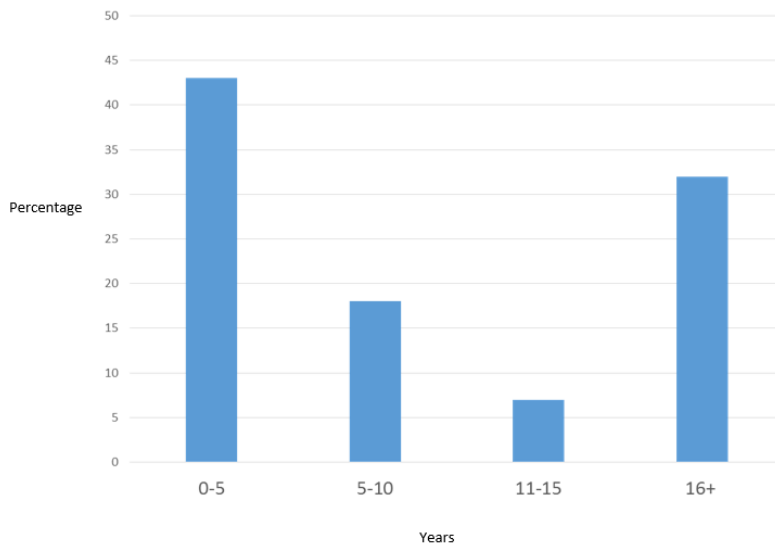
■ Local ■ UK ■ UK+EU ■ International



8.06 **Question 9: How long has your business been location at your location?**

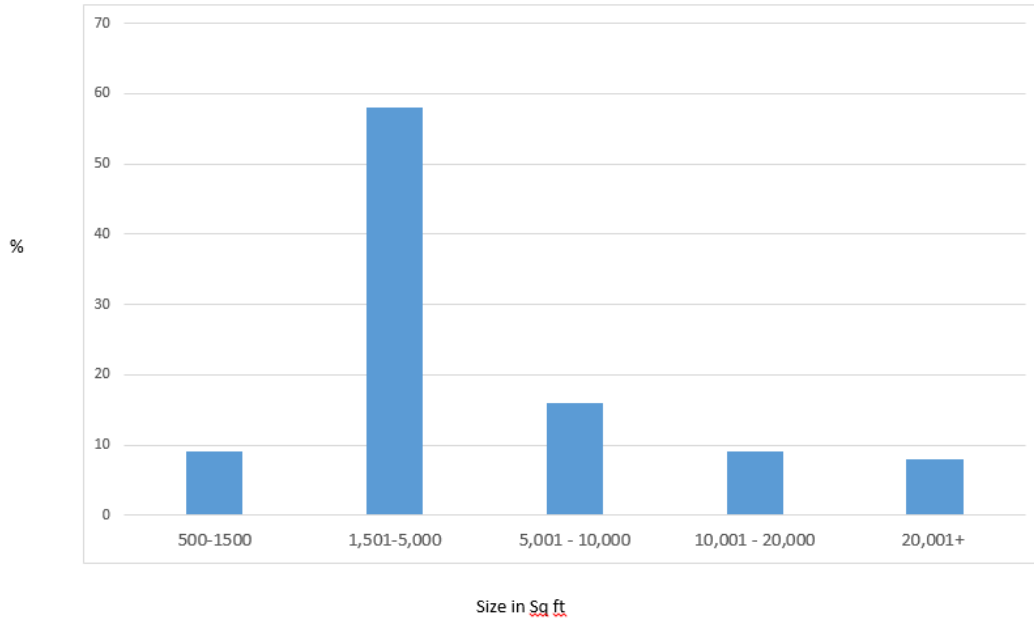


8.05 **Question 10: What type of accommodation is your business located in?**

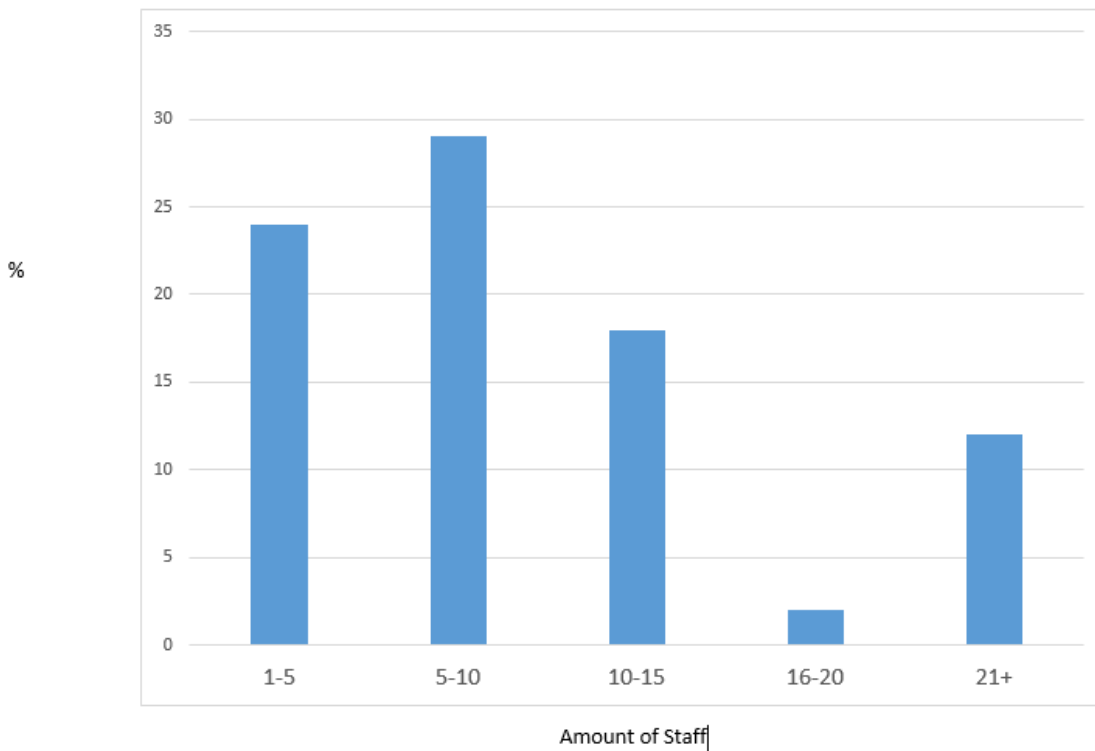




8.06 **Question 11: Approximately how big is your premises?**

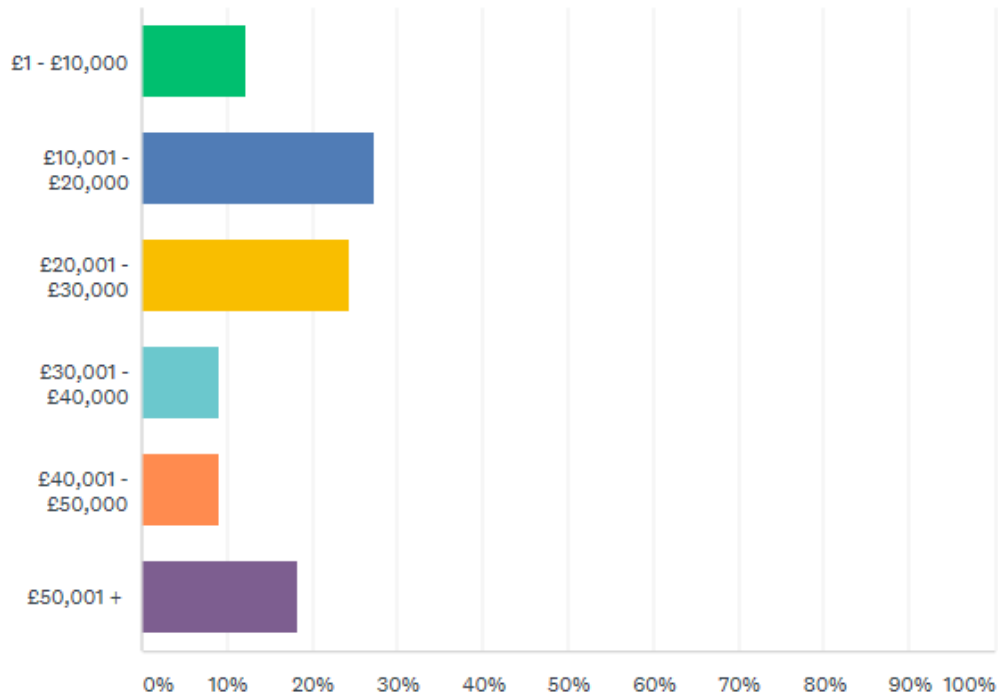


8.07 **Questions 12: How many staff do you employ?**

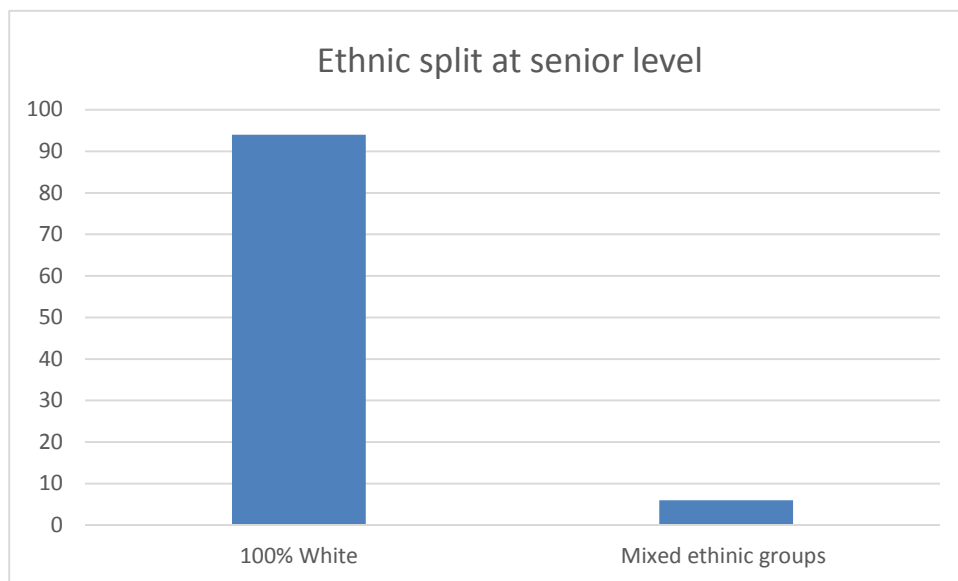




8.08 Question 13: How much is your annual rent?

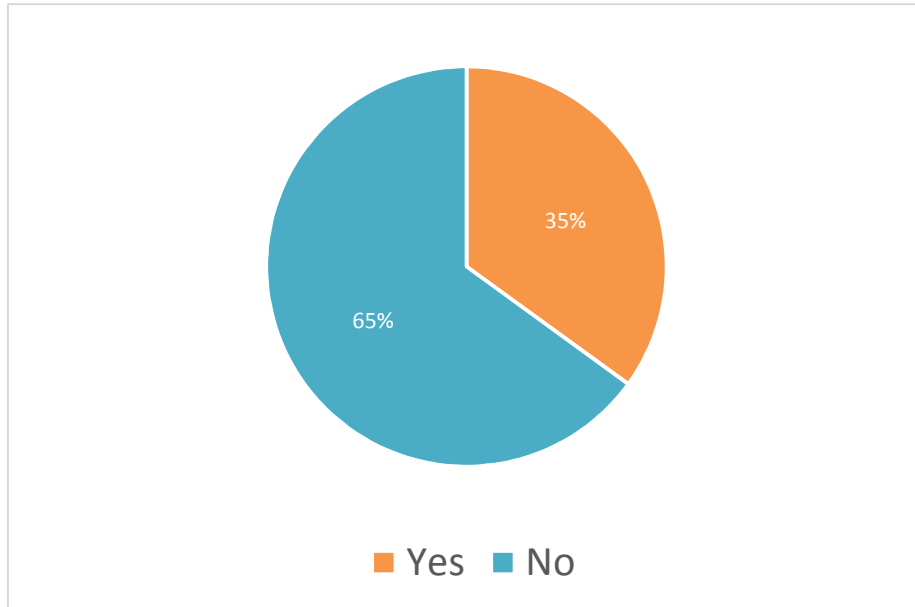


8.09 Question 14: Female / Male and Ethnic Split:

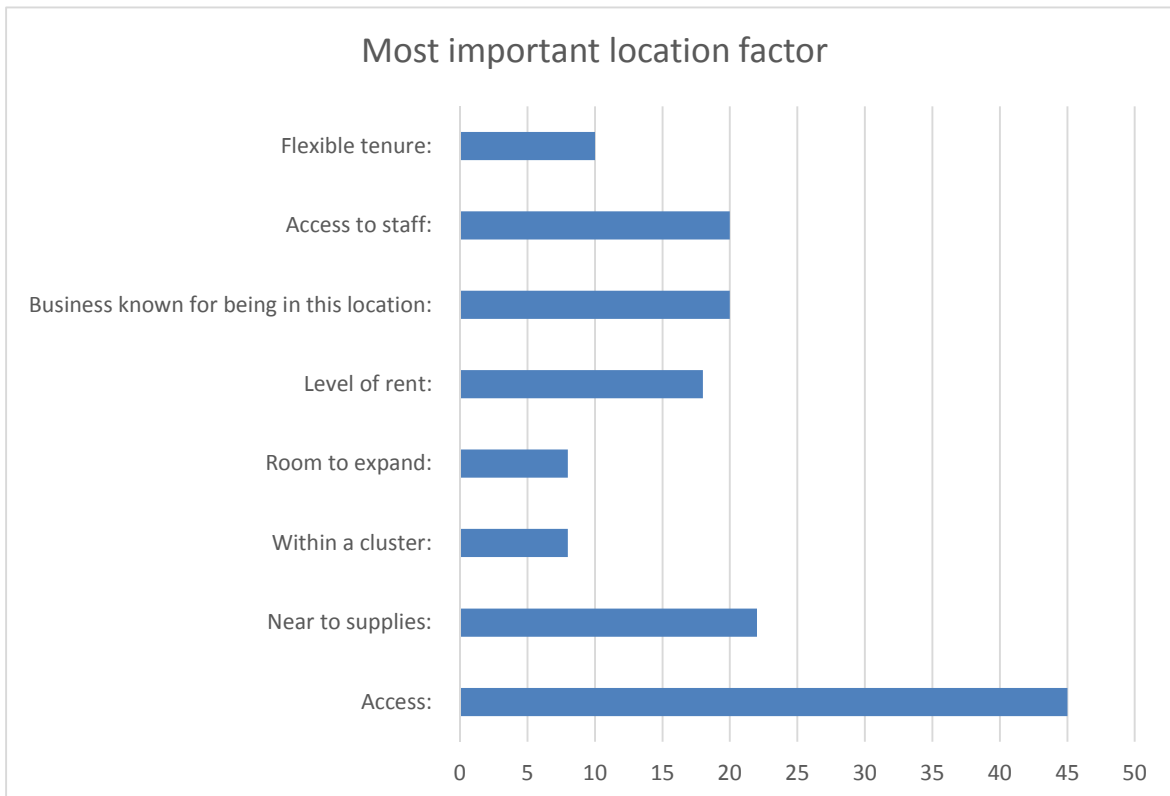




8.10 **Question 15: Do you engage with Business advice services / colleges / universities?**

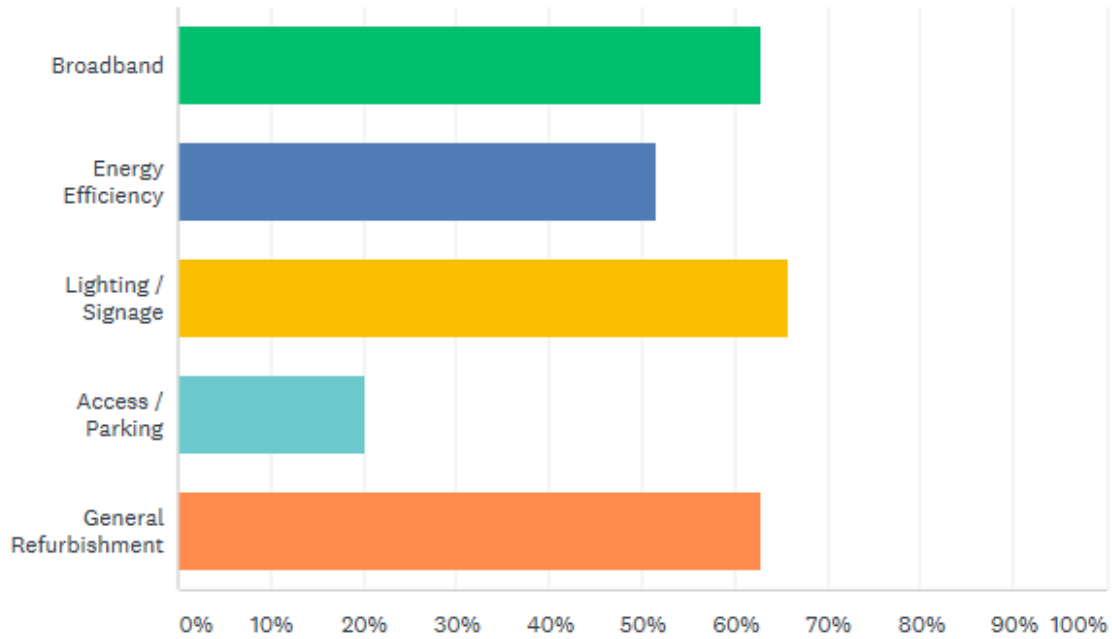


8.11 **Question 16: List Important Location Factors 1-8.**

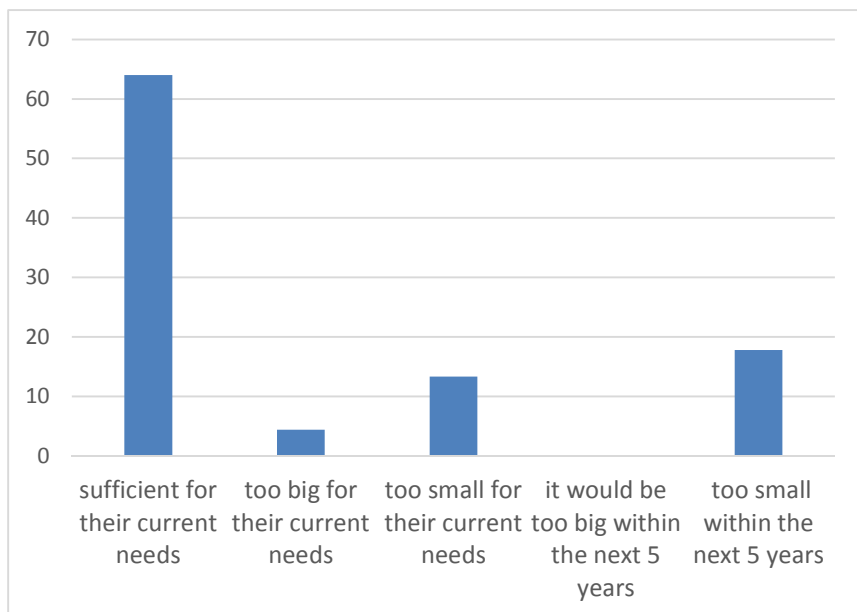




8.12 Question 17: Has there been any of the following investment in the property in the last 5 years?

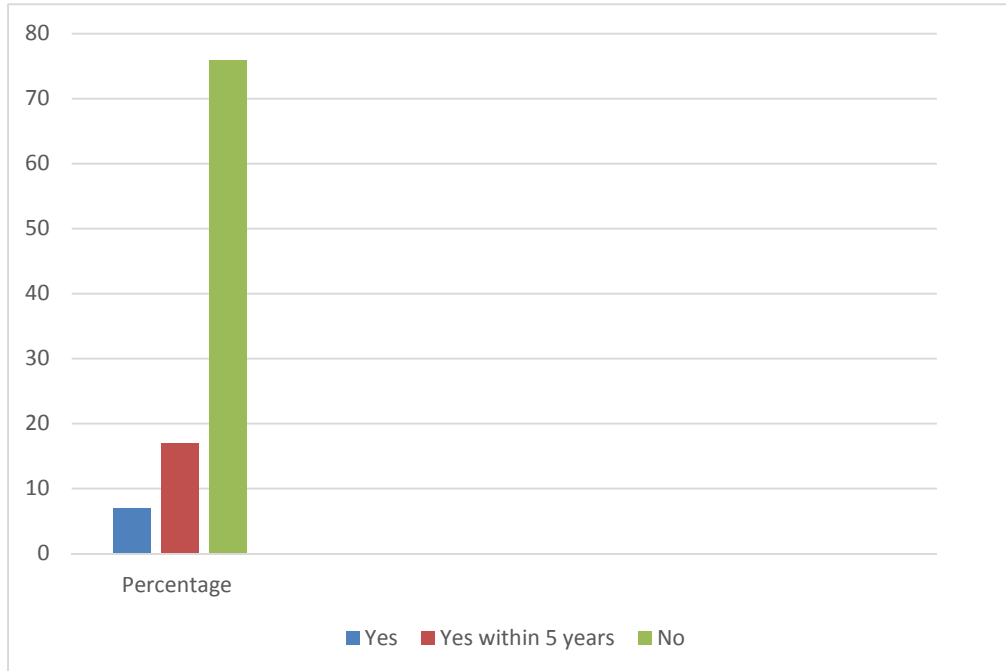


8.13 Question 18: In terms of the size of the unit for their operation:

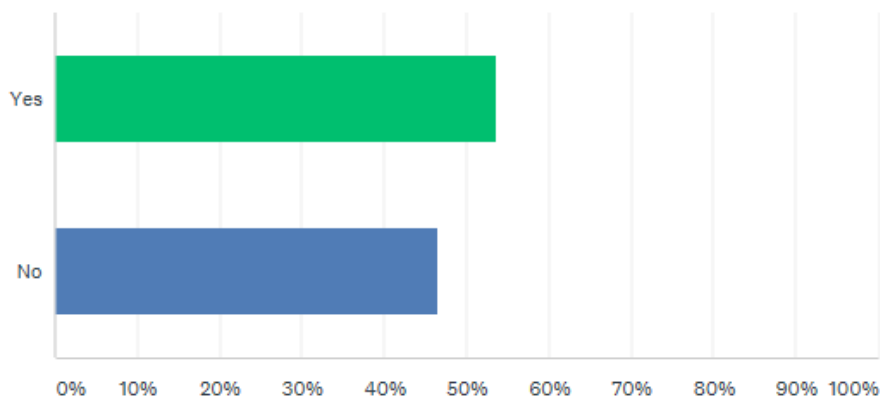




8.14 **Question 19: Do you have immediate plans to relocate?**

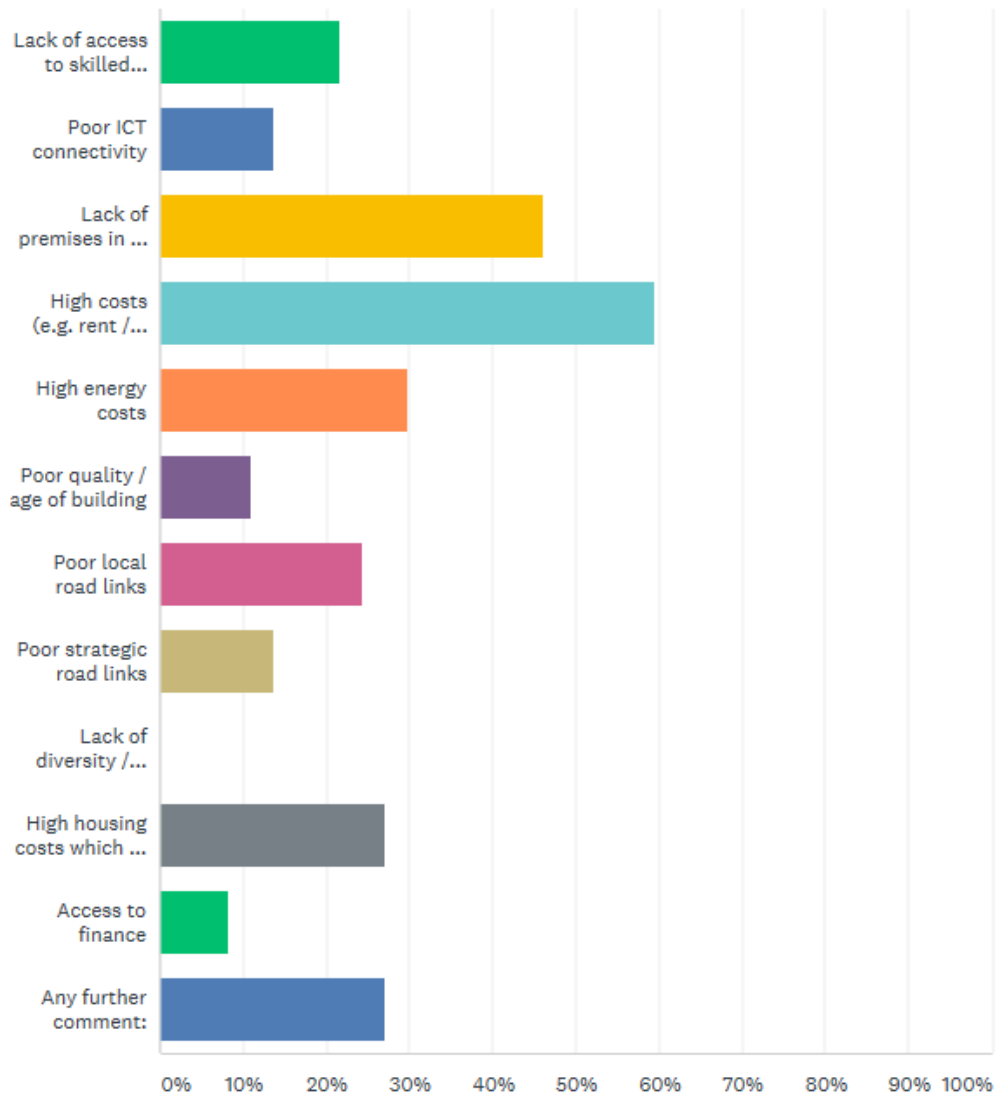


8.15 **Question 20: Are there improvements you would like to see on the industrial estate your business is located on?**



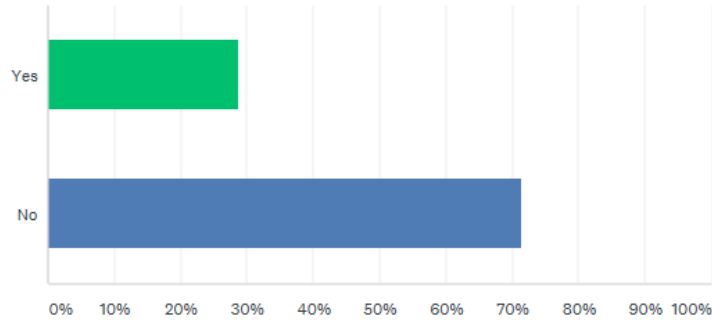


8.16 **Question 21: Do you feel your business faces any of the following barriers?**





8.17 Question 22: Would you be interested in exploring options to reduce your energy bills and would you be happy to be contacted to discuss further?

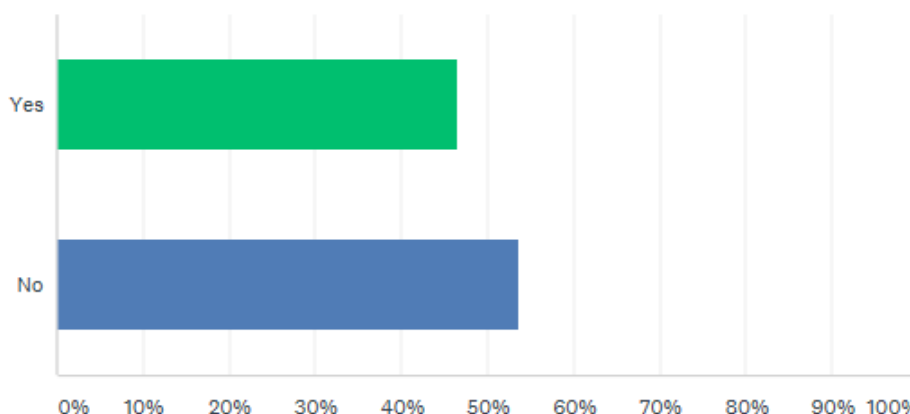


8.18 Questions 23: Is your Estate earmarked for redevelopment?





8.19 **Question 24: Is your company currently facing problems due to Brexit or do you envisage it will after Britain leaves the EU?**



8.20 **Question 25: Occupiers were then invited to make any further comments. Responses included:**

- Access to estates needs improving
- Parking throughout the city needs improving and the cost of parking reduced
- Less student accommodation at the expense of employment space
- Concern over local business being pushed out
- Estates need to be tidied up and presented better
- The council need to be more flexible and commercial in the approach to planning
- It is difficult to find space that will allow heavy machinery
- Need to get rid of cycle lanes which no one uses and which congest the already busy roads
- Council needs to be more transparent
- Business rates are far too high.



9.00 INTERPRETATION OF RESULTS

9.01 BME / Women led businesses

9.01..1 No BME led business were highlighted.

9.01..2 We had a response from 4 companies which had female leadership:

- Ellie Ellie who are currently based in hove but relocating out of the area.
- B Creative at Westergate
- Amplicon at Centenary and formerly of Woodingdean
- Alternative Route Finance of South Portslade who are really an office occupier in an industrial unit.

9.01..1 None of these companies highlighted facing an issue due to their gender. Ellie Ellie commented that the majority of her work force are female and this makes it hard on her business as she often has to deal with maternity pay. This can really damage a small business and she would like to see support for this.

9.02 Clusters

9.02..1 Aside from Trade Counters and Car Trade there is no evidence of any other clusters.

9.02..2 Victoria Road, Portslade has become a cluster of car trade, this is usual as when looking at cars customers tend to consider multiple brands and compare prices so car trade tends to cluster together to take advantage of this.

9.02..3 Equally Trade Counter tends to cluster because it makes it easier for customers and therefore increases sales. Further, trade use tends to be able to pay a higher rent, and as such tend to locate in certain industrial estates which are better quality. This has been seen at Freshfield Industrial Estate where rents are at £18 psf.

9.02..4 Due to lack of availability of space occupiers in the current market will consider all options that offer the correct sized unit. So whilst they may prefer to be located near to other similar businesses the lack of availability makes this unrealistic.

9.03 Unit size and employment figures

9.03..1 The majority of occupiers are located in units between 140 and 465 sq m. This suggests the biggest demand is for units of this size, however 13.3 % said that their unit was too small for them and 17.8% said it would be too small within the next 5 years. This suggests there is, or soon will be, demand for units in excess of 465 sq m.

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9.03..2 58% of the business are in units of 140– 465 sq m, and 53% are employing between 1-10 members of staff. This does show some correlation however some industrial users will require a large space for machinery or storage but require few staff.

9.03..3 Only 2 businesses said their current premise was too big, these were Uniclean in Hollingbury and Foodhaven formally of Home Farm. Foodhaven have already relocated and Uniclean are in small unit already (46-140 sq m) and therefore not occupying a large unit which could be better suited to an expanding company.

9.04 **Markets being served / Brexit**

9.04..1 The majority of businesses (72%) are serving the local / UK Market. Only 4% serve the EU and 24% internationally.

9.04..2 The businesses trading in the EU / internationally include Red Cross, Covaris, Amplicon, Custom Pharmaceuticals, CEF, Baines and Ficker, Ellie Ellie, OOOssh Tours, Unique Apparel, Switch Signs, Richardsons and Art Republic. These businesses represent a variety of sectors such as fashions, electronics, signage and life sciences. There are business in similar sectors which only trade locally or within the UK.

- Ellie Ellie create jewellery and decorative items, they trade on Etsy and Not on the High Street as well as their own website so serve private individuals worldwide.
- Amplicon create computer based measurement and automation systems. They trade internationally with offices in the UK, USA, Europe, Thailand, India, Middle East and Israel.
- Covaris provides tools and technologies to improve pre-analytical sample preparation, enable novel drug formulations, and manage compounds in the drug discovery process. The HQ is in Massachusetts with Covaris Europe HQ in Brighton. From these sites they service worldwide.
- Custom Pharmaceuticals is a resource for contract development, contract manufacturing and packaging companies in the United Kingdom. They make tablets and capsules used for medicines. They trade mainly in the UK and Europe but do also export to Australia and New Zealand.
- CEF are electrical wholesalers and developers. They trade in the UK, Spain, Australia, USA and Canada.
- Baines and Ficker design create bespoke interiors both for commercial and residential. They trade internationally as required.
- Ooosh Tours! provide vehicles and equipment for music events and trade internationally depending on the specific project in hand.

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- Unique Apparel is an independent clothing line. They trade internationally via their website.
 - Art Republic are a high end art supplier. They were founded in the UK but have now opened in the USA. They ship worldwide.
 - Switch Signs manufacture signage. They are UK based but have clients who trade internationally and as such they will create products for wherever their clients trade.
- 9.04..3 There does not appear to be any evidence of a specific sector where all trade internationally.
- 9.04..4 There was a fairly even split over whether business would be impacted by Brexit (46.5 % answered Yes and 53.5 % answered No). Only one company who said they felt business would be impacted said the impact would be positive.
- 9.04..5 Companies which provided commentary on how their business would be impacted by Brexit were:
- Panama Cleaning: Brexit created uncertainty
 - Denmay Steel: Brexit will impact business but in a positive way
 - Wood Store: 50% of staff are European
 - Switch Signs: importing costs from the EU will increase which will impact profit.
 - Strictly Designs: materials costs have gone up by 30%, at the same time they now have smaller orders so this increase in material costs has a big impact.
 - Threesixty: have lost contracts due to nervousness
 - Art Republic: have concerns over the potential VAT and export cost increases.
 - RJ Meaker: Already feeling the impact. We import timber and the pound is not as strong as it was.
 - Custom Pharmaceutical: When outside of EU we will face regulatory barriers to sell to the EU. Currently these don't exist. We will be treated the same as a third world non EU country like India or China.
 - Foodhaven: Cost in purchasing has increased and it is difficult to pass this on to a customer.



9.05 **Barriers facing businesses**

9.05.1 High costs was the biggest barrier faced by occupiers, with 59% of occupiers identifying it as a barrier. High costs was described as rent and raw materials.

9.05.2 Lack of premises to grow into was identified by 45% of occupiers as a barrier to business. This correlates with our own market knowledge of limited availability and few development opportunities.

9.05.3 Poor quality / age of building was only identified by 10% as a barrier to business. A number of estates are nearing the end of their natural life so this suggests that occupiers are not concerned by the quality of the building and would perhaps put location above quality as a priority.

9.05.4 Other comments on barriers to businesses included

- **Parking:** This is both a lack of parking for staff/customers on estates and people parking on the roads within an estate or close to access routes making access / deliveries difficult.
- **Business Rates:** Occupiers stated Business Rates as being too high, this is a usual complaint. It is possible that some occupiers are entitled to Business Rates relief but are unaware of this.
- **Loss of industrial space to residential use:** This links to the barrier of a lack of properties to grow into. Occupiers highlighted the loss of industrial space for redevelopment which usually means residential use as this is a higher end value. This is difficult for the Council to deal with if they are not the landowners. The solution would be to consider whether any of the sites identified as having potential for development in the Urban Fringe which are owned by the council would be suitable for consideration for industrial use.
- **Recruitment:** occupiers highlight the lack of access to skilled staff as a barrier. They also suggested school leavers do not have a good work ethic. This links to Question 15 asking whether the occupier engages with business advice services, schools, colleges or universities. 65% answered 'no' to this question. If improved communication between schools/colleges/universities could be established, the businesses may be able to identify and attract the most enthusiastic new staff.

9.06 **Most important location factors**

9.06.1 Access was identified as the most important location factor. This is access for staff, customers, deliveries/distribution and access to strategic road links. This is likely to be the most important because it impacts both the day to day running of the business and both staff and customers/clients.

9.06.2 The level of rent for example, whilst still important to a business, is minimal in comparison to the cost of staff and does not impact staff or customers/clients. It will be of importance at a managerial level.



- 9.06..3 22% identified being near to suppliers as important. For businesses which rely on a high number of deliveries from their suppliers or have to pay more the further from suppliers they are this will be a big factor. The lower amount of occupiers that selected this as the most important will be a reflection of the fact that not all businesses will rely on suppliers.
- 9.06..4 Being known for the location was selected as most important by 20%. This was by occupiers that are reliant on a local customer base or have been in the location for a considerable amount of time, such as Richardsons, BCreative, Art Republic, NSL, Unique Apparel, MS Roofing.
- 9.06..5 22% said being located within a cluster was least important. This was the factor with the highest percentage of selection for being least important. This is likely to be the case because trade counter and motor trade were excluded from the questionnaire, for them, being in a cluster would be a much higher up priority.

9.07 **Business Support**

- 9.07..1 65% answered 'no' when asked if they engaged with Business Advice Services, Colleges or Universities, and/or employing an apprentice. As mentioned above at point 8.05.04, recruitment was identified as barrier, especially of younger staff with a good work ethic. It is our opinion that the reason for this is likely to be that businesses simply don't know much about this and the benefits of engaging. Furthermore, often employing an apprentice or engaging with universities / colleges is considered a distraction from their core business and therefore resisted. Communication of the benefits of doing so would be a good start either via a general mail out (which we expect would have limited success) or by liaising in the first instance with the colleges and universities to see what sectors / business they would like engagement with and then targeting specific businesses. It may be that further consultation is required in this area in order find out the specific reasons as to why businesses are not engaging on this matter. East Sussex County Council provide grants and loans for expanding businesses, in some cases they only provide a grant/loan if the business agrees to take on an apprentice; this is just one example of how this can be encouraged.

9.08 **Vacant Space**

- 9.08..1 As of October 2017 there is approximately 11,000 sq m of vacant space. This does not relate to the same amount being considered available for occupation.
- 9.08..2 There is one unit vacant at Woodingdean, it provides 98 sq m.
- 9.08..3 There is 480 sq m available at Longley available on a short term basis.
- 9.08..4 At Crowhurst Road there is 3,500 sq m still available (out of a total of 5,500 sq m) at the former Argus building. This is available on short term lets.
- 9.08..5 Sussex House, former police site in Hollingbury is available on short term lets, there is currently 1,600 sq m available.
- 9.08..6 At School Road there is approximately 750 sq m vacant – this is in preparation for redevelopment.

Cont'd/...



9.08..7 At Sackville Trading Estate there is approximately 4,650 sq m vacant – this is in preparation for redevelopment.

10.00 ALTERNATIVE SITES

- 10.01 Conway Street and Longley have been identified in City Plan part 1 for mixed use re development. This represents a loss of circa 23,000 sq m of industrial space.
- 10.02 Both Conway Street and Longley Industrial Estate are strategic locations in the City Plan Part 1. They have both been allocated as sites to bring forward new office space and housing.
- 10.03 There is no replacement space identified / planned and only 7,400 sq m identified as potential developed space by 2030 (according to the Nathaniel Linchfield & Partners Brighton & Hove Employment Land Study).
- 10.04 In order to provide space for Industrial occupiers further sites need to be identified and allocated solely for Industrial use.
- 10.05 This should include freeing up Greenfield sites and not allowing a higher value use (such as residential) on all or part of the site depending on the overall size. It is recognised that 40% of land around the city falls within the National Park, and that much of the city's urban fringe (land between the built up area and national park) meets the National Planning Policy Framework's definition of open space and represents a significant proportion of the city's open space and green infrastructure. The urban fringe was recently assessed for potential for housing during the examination of the City Plan Part 1 and this highlighted that of a total of 66 urban fringe sites that were assessed, 39 were assessed as having potential for housing, mostly these were small parts of a site identified; a total of 7.5% of the urban fringe as a whole reflecting ecological, landscape and heritage and open space issues.
- 10.06 We are aware of developers who would speculatively build industrial space if the land were available and if they did not have to compete with developers of higher value uses.
- 10.07 At the former Argus building in Hollingbury and at Sussex House, there is potential for speculative industrial schemes to be put together to price units of circa 185 sq m; both would be a very welcome addition to the Brighton & Hove industrial market.
- 10.08 If further land in Brighton & Hove is not highlighted, industrial uses are going to be forced out of the city. In this scenario the Council need to look at working in conjunction with neighbouring authorities to see if new industrial development can be accommodated elsewhere such as Shoreham, Worthing, Burgess Hill and Crawley. Neighbouring Councils will have their own targets, however by working in conjunction with other Councils there may be a way to mutually benefit from one another.

Cont'd/...



-
- 10.09 The following suggestions for sites for Industrial development are suggested because they would work from an industrial occupier's point of view, and therefore an industrial developer. The Council may have other ideas for the sites under the City Plan which they may have to take into consideration.
- 10.10 Areas we have identified for potential future development are:
- **Decoy Farm, Worthing, owned by Worthing Borough Council**
- 10.10..1 7.7 ha site. The site needs decontaminating and funds are now in place. The site adjoins East Worthing Industrial Estate. Decoy Farm represents one of only two sites with the potential to create new employment floor space across the whole of Worthing. Within the Worthing plan Decoy Farm is earmarked as a site that provides the opportunity to create new small industrial units and support other employment sectors and presents the opportunity to delivery 50,000 sq m of new employment floor space and could create around 988 new jobs as well as promoting industrial uses, waste recycling, open storage facilities and the accommodation of relocated businesses in support of wider Growth outcomes.
- **Brighton City Airport, Shoreham**
- 10.10..1 The owners will or have submitted an application for 25,000 sq m of new industrial / warehouse space in 2017. Though this is a site for employment in the Local Plan there are concerns over increased traffic and the feasibility of a roundabout in place of the traffic light on the A27.
- **Victoria Road Trading Estate, Portslade**
- 10.10..1 The owners, Endeavour, are working up a plan for 800 sq m industrial unit at the rear of the estate.
- **Land at Hangleton Bottom, Hove**
- 10.10..1 The site is adjacent to the A27. It is 8.1 acres currently allocated for Waste Management site but would make an excellent gateway site for a new Industrial/Warehouse park.
- **Malling Brooks, Lewes**
- 10.10..1 Site for 7,000 sq m of purpose built space. 1,900 sq m taken by Gosnell. The site is owned by Santon Group.
- **Eastside Business Park, Newhaven**
- 10.10..1 First phase of 2,500 sq m under construction and due to complete in November 2017. There is further land to accommodate 6,000 sq m of new build units.
- **Shoreham Cement Works, Shoreham**



10.10..1 The site totals 120 acres. It is owned by Dudman Group. Part of the site could be ideal for existing Brighton based companies with expansion plans. This could then help to free up existing buildings in Brighton & Hove for occupation.

- **South Portslade**

10.10..1 This area is very run down. There are a variety of freeholders and uses. This would be an excellent location to regenerate however relocating the tenants to facilitate this would be difficult.

11.00 CONCLUSION

11.01 To conclude, there is limited space available for the current businesses and very low levels of new build forecast for immediate development. This means current businesses will struggle to expand here and new business will not be attracted to the area.

11.02 If Greenfield sites cannot be allocated, working in conjunction with the surrounding authorities to help enable development in other locations, and engaging with occupiers on this also, is vital to keep the businesses in the greater area.

11.03 Whilst a wider strategy for development for new space is put together, further communication with existing businesses, especially those that are on sites earmarked for redevelopment is recommended.

11.04 Further consultation on specific areas such as engaging businesses with Business Advice, Colleges and Universities, impact of Brexit on Businesses and reducing energy bills may be worthwhile if the Council would like more information on this.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'E. Hards'.

Emma Hards MRICS
Director
for and on behalf of
Stiles Harold Williams Partnership LLP

Appendix A

Database

Database of Industrial Occupiers listed by Industrial Estate

Industrial Estate	Unit	Company	Contact Name	Contact details		Questionnaire
1. Longley Industrial Estate, New England Street, Brighton						
	Unit 1	Sun Harvest		01273 777768	info@sunharvestltd.com	Y
	Unit 2	Wood Store	Ed	01273 570600	info@woodrecycling.org.uk	Y
	Unit 3 + 5	Mastertiles	Terry - manager	01273 695208		Y
	Unit 4	VACANT	N/A	N/A	N/A	N/A
	Unit 6	VACANT	N/A	N/A	N/A	N/A
2. New England Quarter , Brighton						
	3-9 Blackman Street	GB Liners	Mike Crysell	01273 574014	mrcrysell@gb liners.com	Y
	53 New England Street	GE Richardsons	Mark Richardson	07093066054	none	Y
	Albany House, New England St	Brewers	Stuart Matthews	01273 677030	brighton.nes@brewers.co.uk	Y
	1-2 Trafalgar Street	Travis Perkins	Andy Nicholson	01273 620760	brightraf@travisperkins.co.uk	Y
3. Home Farm, Home Farm Road, Brighton						
	Unit 1	Covers		01273 607044	enquiries@covers.biz	N
	Unit 2	MBM		01273 810500		N
	Unit 3 + 4	Paxton Access	Vinny Parekh	01273 810636	vinny.parekh@paxton.co.uk	Y
	Unit 5	Gatwick Technologies		01273 616908	sales@gatwick.eu	N
	Former tenant unit 4	Foodhaven	Abbey Eastwell	07872165811	abbie@foodhaven.co.uk	Y
4. Hollingdean Industrial Estate, Upper Hollingdean Road, Brighton						
	Hollingdean Depot	City Clean Brighton and Hove Council		01273 292929		
	Wholesale Meat Market 1-8	Blakes Meat		01273 552109	blakesmeats@live.co.uk	
	13 Upper Hollingdean Road	G Saunders and Sons		01273 555449		
5. Hollingbury Industrial Estate, Crowhurst Road, Brighton						
	Unit A1 + B5	Gap Solutions	Greg Bradely	07974515261	greg@gapsolutions.co.uk	Y
	Unit A5	Amplicon	Gina C	01273 570220	gina.c@amplicon.com	
	Unit B1	In The Pipeline		01273 90212	sales@inthepipelineltd.co.uk	DID NOT FEEL RELEVANT
	Unit B2 & B3	Bells Garage		01273 552032		DID NOT HAVE TIME
	Unit B4	Hollingbury Joinery		01273 558259	info@hollingburyjoinery.co.uk	
	Unit B6	The Window Store		01273 500820	sgreenslade@windowstoreplastics.com	
	Unit B7	UnciClean Property Management	James Ingram	01273 465458	james.ingram@upml.co.uk	Y
	Unit B8 & B11	ARJ Engineering		01273 726529	rje.hove@gmail.com	
	Unit B10	Beacon Drinks		01273 506545	accounts@nicholsplc.co.uk	
	Unit 12 -14	Phase Electrical		01273 552032	brighton@phaseelectrical.co.uk	SOME COMMENTS
	1-3 Crowhurst Corner	TG Fruits	Andy	01273 503390	andy@tgfruits.com	
	5 Crowhurst Corner	Ch Mears and Sons		01273 556888	michelle@chmears.co.uk	
	6 Crowhurst Corner	Mills and Bloom		01273 549325	millsnblooms@btconnect.com	
	7 Crowhurst Corner	Premier Fruits	Richard Hickson	01273 559970	richard.hickson@premierfruits.com	
	10 Crowhurst Corner	Capital Hair and Beauty	Hamish Vans Agnew	01273 90111	hva@capitalhb.co.uk	Y
	Grip Works	Talbot Tools		01273 508881		
6. Centenary Industrial Estate, Hughes Road, Brighton						
	Unit 1	Brighton and Hove Council				
	Unit 2	Rio Trading	Colin Tricker	01273 570987	colin@riohealth.co.uk	does not want to
	Unit 2a&2b	R&B Automobiles		01273 671188		does not want to

	Unit 3a&3b	VACANT	n/a	n/a	n/a	n/a
	Unit 4	SIG Interiors	Martin Lyth	01273 878700	Martin.lyth@franklinltd.co.uk	Y
	Unit 5	Brighton Sunblinds		01273 602743	sales@brightonsunblinds.co.uk	Too busy to take part
	Unit 6&7	Brighton Tools and Fixings	Matt Hyde	01273 620456	matt@brightontools.co.uk	no response
	Unit 8&9	Shaws of Brighton	Mark Mitchell	0800 975 5790	mark.m@shawsofbrighton.co.uk	no response
	Unit 10	Autoglass				Not relevant to them
	Unit 11	Amplicon	Gina Citroni	01273 570220	gina.c@amplicon.com	Y
7. Bell Tower Industrial Estate, Roedean Road, Brighton						
	Unit 1	Bikes of Brighton		01273 677736	bikesofbrighton@hotmail.co.uk	N
	Unit 2	Julian Plumart			julie@julienplumart.com	N
	Unit 3	Baines & Fricker Ltd.	Eliza Fricker	07846220441	fricker@bainesandfricker.net	Y
	Unit 4	Grow Works Ltd.		01273 624327		N
	Unit 5	Loud Shirt Brewing Co Ltd	Martyn Batchelor			N
	Unit 6	Mid Sussex Roofing Supplies Limited.	Tony Siriano	07989676522	tony.siriano@msroofingsupplies.co.uk	Y
	Unit 7	Just Motorcare Ltd (In Administration)			brighton@justmots.eu	no longer in occupation
	Unit 8	EBC Motor Factors Ltd.	Samantha Rzepa	01273 693239	samantha@ebsfactors.co.uk	Y
	Unit 9	Zelgrain Ltd.		01273 550000		N
	Unit 10	Brighton Bier		07515 956976	ollie@brightonbier.com	N
	Unit 11	Anti-Graffiti Systems Ltd.		01273 690059	lisa.charrington@agsone.co.uk	part
8. Fairway and Westergate, Moulsecoomb, Brighton						
	Unit 1 Fairway	Southern Heating Group	Tony Catt	01273 588123		Y
	Unit 2 Fairway	JFDI Pheonix			joel.jeffrey@jfdiphoenix.co.uk	Office User
	Unit 3,4&8 Fairway	Fareshare	Rachel Careless	01273 671111 (option2	rachel@faresharesussex.org.uk	Y
	Unit 5 Fairway	George Rose Office Products		01273 697231	admin@georgeroseofficeproducts.co.uk	Y
	Unit 7 Fairway	DR (UK)Ltd				N
	Unit 1 Westergate	Bcreative	Niki Faires	01273682831	niki@economyofbrighton.co.uk	Y
	Unit 2 Westergate	A1 Glass and Glazing		01273 676750	a1glassandglazing@btconnect.com	Too busy to take part
	Unit 3 Westergate	Lee Sullivan Contract Flooring Ltd	Lee Sullivan	01273 709099	leesullivan@btconnect.com	Too busy to take part
	Unit 4 Westergate	Shineway Foods Ltd	Guo	01273 696541	info@shinewayfoods.co.uk	N
	Unit 5 Westergate	East Brighton Trust		01273 818999	info@eastbrightontrust.org.uk	N/A as Office Use
	Unit 6 Westergate	Senator Cleaning Ltd	Peter Coles	01273 686970	info@cleanwipes.co.uk	Y
	Unit 7 Westergate	H2 Organisation		01273 670068	contact@h2productions.co.uk	N
	Unit 8&9 Westergate	Firetoys	Morgan Robertson	01273 607088	morgan@firetoys.com	Not relevant to them
	Unit 10 Westergate	Gladrags Community Costume Trust	Vania Mills	01273 609184	vania@gladragscostumes.org.uk	Y
9. Woodingdean Business Park, Sea View Way, Brighton						
	Unit 1	PJW Associates	Jo Wheeler	07983342692	jowheeler1@googlemail.com	Y
	Unit 2	West Pier Telecoms		08442645522	info@westpiertele.com	Y
	Unit 3	Proporta		01273 808445	hello@proporta.com	Y
	Unit 4	Temco Ltd		01273 304354	info@temcouk.com	N
	Unit 5	Brighton Trade Windows / Conservatory Innovations		01273 304060	sales@brightontradewindows.co.uk	N
	Unit 6	Buxtons Flooring		01273 300074	info@buxtons.co.uk	N
	Unit 7	One Digital Ltd		01273 887575		Y
	Unit 8	Salon Supplies		01273 391860	info@salonsupplies.co.uk	Y
	Unit 9&10	Covaris		+44 (0)845 872 0100	EUcustomerservice@covarisinc.com	Y
	Unit 11	VACANT	N/A	N/A	N/A	N/A
	Unit 12	Phlorum		01273 307167	info@phlorum.com	N
	Unit 13	Reflex Nutrition Ltd		01273 303817	info@reflexnutrition.com	N

	Unit 14	Jayar Car Parts				Y
10. Hyde Business Park, Bevenden						
	Unit 1+2	Brighton Sheet Metal	Jane Young	01273 602216	jane@brightonsheetmetal.co.uk	Y
	Unit 7	Bigbox Storage		01273 625700		N
	Unit 4	Harman Hire		01273 603021	info@harmanhire.co.uk	N
	Prospect House Unit D & E	Anti Graffiti Solutions		01273 690059	info@agsone.co.uk	Y
	Unit 2b Front	Funplex		01273 690888		N/A as Soft play
	Unit 5	West Control Solutions		01273 606271	Enquiries@West-CS.com	N
	Prospect House	Tersus Consultancy		01273 621200	joanne.hodgkiss@tersusgroup.co.uk	B1 Office user
11. Conway Street Industrial Area, Hove						
	Unit 1 Industrial House	Dare Studio Limited				Studio/retail
	Unit 3 Industrial House	Maria Allen Jewellery	Maria Allen	07759188185	mariaallenjewellery@gmail.com	
	Unit 5 Industrial House	FW Marsh		01983 615035		B1 Office User
	Unit 6 Industrial House	Creative Process Digital		01273 232272	jack@jackhiett.com	B1 Office user
	2nd Floor West Wing Industrial House	United Global Training	Ian Mitchell	01273 737650	unitedglobal@virginmedia.com	
	2nd Floor East Wing Industrial House	Larsson and Jennings			accounts@larssonandjennings.com	
	Unit 3 Ellen Street	Central Hygiene Supplies		01273 724124		Relocating
	Conway Street	Jewson	shane barber	01273 778778		Trade
	Conway Street	Decon Laboratories		01273 739241	mail@decon.co.uk	
	Ground Floor West Wing Industrial House	Unique Apparel	Peter Small	01273 321209	sales@logosports.co.uk	
12. St Josephs Business Park, Hove						
	Unit 1&7	British Red Cross	C Blair	01273 220448	cblair@redcross.org.uk	Y
	Unit 2	4 Print & Design		01273 712520		N
	Unit 3	In Rock		01273 735500		Y
	Unit 4	Mobile Windscreens				Would not like to take p
	Unit 5	panama Janitorial Supplies	John Harrop	01273 889988	johnharrop@panama-uk.co.uk	Y
	Unit 6	Morrells Wood Finishes	S Evans	01614065324	s.evans@morrells.co.uk	Would not like to take p
	Unit 8	Heating Plumbing Supplies	Simon Emery	01273 716190	brighton@hpsmerchant.co.uk	N
	Unit 9	NSL	Denise Payne	07826951800	denise.payne@nsl.com	Y
	Unit 10	Just Motor Care		07711922127		Would not comment at
	Unit 11&14	CCC		08450060606		N
	Unit 12	Art Republic Online	neil Constantine	01273 766360	neil.c@artrepublic.com	Y
	Unit 13	VACANT	n/a	n/a	n/a	n/a
	Unit 15	Fields Garage		01273 570707		Would not like to take p
	Unit 16&17	LC Switchgear		01273 770540	sales@lcswitchgear.com	N
	Unit 14 + 16 HTC	Bluebird tea	vicky	07752415994	vicky@bluebirdtea.co.uk	N
	Unit 11 HTC	Audreys			info@audreyschocolates.co.uk	N
	HTC	Harcross		01273 771902	info@harcross.com	N
		smart lines	graham parsons	07770507797	graham.parsons@slgroup.co.uk	n
	Hove Business Centre	Ellie Ellie	Danielle Plowman	01273 725055	danielle@ellieellie.co.uk	Y
13. Sackville						
	Unit 9 Sackville	CEF	Jason	01273 647675	brightonwest@CEF.co.uk	y
	uni 1-2 Sackville	Rayner		01273 205451		N
17. South Portslade						
	92-98 North Street	Sussex Fireplace Gallery		01273 416679	info@gratefireplaces.co.uk	Y
	100-106 North Street	The London and Brighton Plating Company	keith button	01273 418122	info@lbplating.com	Y
	18 North Street	Metway Electrical			talk@metway.co.uk	N
	59 North Street	Security Event Solutions	Gareth Smith		gareth@securityandeventssolutions.co.uk	N
	19 North Street	Mears Home Improvements		01273 427690		N

	Display House	Striking Displays	Alan Turner	01273 423623	sales@strikingdisplays.com	Y
	Compass House	Ooosh Tours	Jon Wood	01273 911382	jon@oooshtours.co.uk	Y
	South Side Ellen Street	Meadows Passmore			sales@m-p.co.uk	N
	Freeman House	DW Electrical		01273 46670	info@dwgroupuk.com	Y
	57 North Street	Denmay Steel	Jack May	01273 597733	info@prefabsteel.co.uk	Y
	Unit 3 Quayside	Sash Windows Restoration				no time
	11-13 Middle Street	RJ Meakers	Daniel Halowell	01273 430073		Y
	North Street	TP Servicing	MJ Patterson	01273 429885	tpservicing@gmail.com	Y
	Regent House	Price and Co (no in administration)		01273 421999		N
	57 North Street unit 2	Brighton coaches	Robin Flint	776446850	brightoncoaches@aol.com	N
	bason road north	chandlers building supplies	david weston		davis.weston@chandlersbs.co.uk	N
	1-3 william st	Grover Windows		01273 413333	deborah@lansdownebuilding.co.uk	
	unit 7 hove enterprise	tide studios			tidestudiosltd@gmail.com	
	unit 15 hove enterprise	bmerch		01273 613100	dom@bmerch.com	
	Unit 9 hove enterprise	shelf direct		01273 757179	info@shelf-direct.co.uk	
	77a north street	Rapid autocentre		01273 413030	contact@rapid-auto-centre.co.uk	N

CEF gave info for both sackville and freshfield

Amplicon: Centenary, Woodingdean + Hollingbury

Anti Graffiti: Bell Tower + Hyde

Choccywoccydoodah - waterloo road, did not respond

Appendix B

Questionnaire



One Jubilee Street, Brighton, BN1 1GE

Emma Hards, Director

T: 01273 876203

M: 07947373565

E: ehards@shw.co.uk



The following questionnaire has been prepared to give us a general understanding of your business, your employees and how your property works for you. This questionnaire is being sent to all businesses on Industrial Estates based in Brighton & Hove to see if there are any particular hurdles facing Industrial businesses that the council may be able to assist with.

It should take a maximum of 30 minutes and the more detail you can provide, the better understanding we will have of your specific circumstance.

We thank you for your participation.

1) Name of Company

.....

2) Your Name and Job Title

.....

3) Address:

.....

4) Most appropriate contact name and number for any further contact:

NAME

TEL

EMAIL

5) What Business sector is your business part of (i.e. construction, manufacturing etc) and what is your main product/service?

.....



One Jubilee Street, Brighton, BN1 1GE

Emma Hards, Director

T: 01273 876203

M: 07947373565

E: ehards@shw.co.uk



6) Which term best describes your business type? **(Please tick one box)**

Privately owned

Franchise

National chain

Other

7) Is your business part of a cluster (i.e. geographical concentration of similar businesses, services, suppliers etc)?

YES

NO

8) What markets does your business serve? **(Please tick one box)**

Local only

UK and EU

UK

UK and International

If you do serve the EU / Internationally please state which countries:

.....
.....
.....

9) How long have you been located at your current address **(Please tick one box)**

0 – 5 years

11 – 15 years

6 – 10 years

16 years +



One Jubilee Street, Brighton, BN1 1GE

Emma Hards, Director

T: 01273 876203

M: 07947373565

E: ehards@shw.co.uk



10) What type/size of accommodation is your business located in? **(Please tick all that apply)**

- | | | | |
|------------------------|--------------------------|---------------|--------------------------|
| Office/serviced office | <input type="checkbox"/> | High-tech lab | <input type="checkbox"/> |
| Industrial/warehouse | <input type="checkbox"/> | Mixed/other | <input type="checkbox"/> |
| Freehold | <input type="checkbox"/> | Leasehold | <input type="checkbox"/> |

11) Approximately how big is your premises?

- | | | | |
|----------------------|--------------------------|-----------------------|--------------------------|
| 500 – 1,500 sq ft | <input type="checkbox"/> | 10,001 – 20,000 sq ft | <input type="checkbox"/> |
| 1,501 – 5000 sq ft | <input type="checkbox"/> | 20,001 sq ft + | <input type="checkbox"/> |
| 5,001 – 10,000 sq ft | <input type="checkbox"/> | | |

12) How many staff do you currently employ within Brighton & Hove? **(Please tick one box)**

- | | | | |
|---------|--------------------------|---------|--------------------------|
| 1 - 5 | <input type="checkbox"/> | 16 - 21 | <input type="checkbox"/> |
| 6 - 10 | <input type="checkbox"/> | 21 + | <input type="checkbox"/> |
| 11 - 15 | <input type="checkbox"/> | | |

13) How much is your current annual rent (excluding VAT, service charge, business rates and any other costs)?

- | | | | |
|-------------------|--------------------------|-------------------|--------------------------|
| £0 – £10,000 | <input type="checkbox"/> | £30,001 - £40,000 | <input type="checkbox"/> |
| £10,001 - £20,000 | <input type="checkbox"/> | £40,001 - £50,000 | <input type="checkbox"/> |
| £20,001 - £30,000 | <input type="checkbox"/> | £50,001 + | <input type="checkbox"/> |



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14) What is the gender split and ethnic make-up at senior leadership/ board level (please note this does not have to be exact, an estimate will suffice.)

	Male %	Female %
White		
Mixed/multiple ethnic groups		
Asian		
Black		
Other		

15) Does your business engage with Business Advice Services, Colleges or Universities, and/or do you employ an apprentice?

YES

NO

If answered 'Yes' please provide further information.....

.....

16) What do you consider to be important location factors for your business? Please list in order of importance from 1-8 with 1 being the most important.

- | | | | |
|-----------------------------|--------------------------|---|--------------------------|
| Access | <input type="checkbox"/> | Level of rent | <input type="checkbox"/> |
| Near to suppliers/customers | <input type="checkbox"/> | Your business is known for being in this location | <input type="checkbox"/> |
| Within a cluster | <input type="checkbox"/> | Access to staff | <input type="checkbox"/> |
| Room to expand | <input type="checkbox"/> | Flexible tenure | <input type="checkbox"/> |



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17) Has there been any of the following investment in the property/site in the last 5 years?

(Please tick as many as are applicable)

Broadband

Access/Parking

Energy Efficiency

General Refurbishment

Lighting/Signage

Leasehold

18) Do you consider your property/site to be **(tick any that apply)**:

Sufficient for your current operational needs

Too big for your needs within the next 5 years

Too big for your current needs

Too small for your needs within the next 5 years

Too small for your current needs

19) Do you have immediate or future plans to relocate?

Yes, within the next year

Yes, within the next five years

No

20) Are there any improvements you would like to see on the industrial estate your business is located on?

YES

NO



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If 'Yes' please expand provide further information:

.....
.....
.....

21) Do you feel your business faces any of the following barriers? **(Please tick as many as are applicable)**

- | | | | |
|--|--------------------------|---|--------------------------|
| Lack of access to skilled staff | <input type="checkbox"/> | Poor quality / age of building | <input type="checkbox"/> |
| Poor ICT connectivity | <input type="checkbox"/> | Poor local road links | <input type="checkbox"/> |
| Lack of premises in the area that allow your business grow | <input type="checkbox"/> | Poor strategic road links | <input type="checkbox"/> |
| High costs (e.g. rent/rates/raw materials etc) | <input type="checkbox"/> | Lack of diversity / equality in your sector | <input type="checkbox"/> |
| High energy costs | <input type="checkbox"/> | High housing costs which may impact retaining staff | <input type="checkbox"/> |
| Access to finance | <input type="checkbox"/> | | |

Any Further comment:

.....
.....
.....



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22) Would you be interested in exploring options to reduce your energy bills and would you be happy to be contacted to discuss further?

YES

NO

23) If your business is located on an industrial estate that has been earmarked for redevelopment, are you being supported with relocation either from the Council or other bodies? **(Please tick one box).**

My location is not earmarked for redevelopment

My location is earmarked for redevelopment and I am receiving advice/support

My location is earmarked for redevelopment and I am not receiving advice/support

What advice, if any, would you like?

.....
.....

24) Is your business currently facing problems due to Brexit or do you envisage it will after Britain leaves the EU in April 2019?

YES

NO



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If you answered 'Yes' please provide further information.....
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25) Please use the space below for any further comments you may wish to make including any suggestions on what you feel the council or other agencies could be doing to support Industrial businesses. Please continue on another sheet if necessary or call/email on contact details at the top of the questionnaire to discuss further.

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26) Please state if you are happy to be contacted by us to arrange a meeting to discuss further.

YES

NO

THANK YOU

Appendix C

Map

Map Showing Industrial Estates in Brighton & Hove

KEY:

1. Longley
2. New England Quarter
3. Home Farm
4. Hollingdean
5. Hollingbury
6. Centenary
7. Bell Tower
8. Westergate & Fairway
9. Woodingdean Business Park
10. Hyde
11. Conway Street
12. St Josephs
13. Sackville Trading Estate
14. Portland Road (business park + trading estate)
15. School Road
16. Victoria Road
17. South Portslade
18. Clarks Trading Estate



Appendix D

Summary of Estates:

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Longley	1
New England Quarter	3
Home Farm	5
Hollingdean	7
Hollingbury	8
Centenary	10
Bell Tower	12
Westergate and Fairway	14
Woodingdean Business Park	16
Hyde	18
Conway Street	20
St Josephs	22
Sackville Trading Estate	24
Portland Road Business Park	26
Portland Trading Estate	27
School Road	29
Victoria Road	31
South Portslade	33
Clarks Trading Estate	35

Longley Industrial Estate, New England Street, Brighton MAP 1



<p>Location</p>	<p>Longley Industrial Estate is within the New England Quarter to the North of Brighton Station.</p> <p>The site is 5km from A27/A23 junction – accessed via Preston Road. Though this is not far for strategic access, there is often congestion especially at peak times.</p> <p>Local accessibility is good with a number of bus stops nearby and it is within close proximity to Brighton railway station.</p>
<p>Current Situation</p>	<p>The use is currently B8 / trade. It is 0.28 ha</p> <p>The freeholder is Brighton & Hove City Council</p> <p>The long leasehold interest is owned by Maplebright Ltd.</p>
<p>Future Plans</p>	<p>The City Plan strategic allocations for the New England Quarter and London Road Area is 20,000 sq m B1 office space and 165 residential units.</p> <p>Planning application BH2015/04474 for change of use to B1 offices was refused. The main reason for refusal was the fact that the proposed scheme was not mixed use and did not provide any housing.</p> <p>Planning consent has just been granted on appeal.</p> <p>It is considered likely that this site will be redeveloped in the near future.</p>
<p>Tenants</p>	<p>Unit 1: Sun Harvest Unit 2: Wood Store Unit 3 + 5: Mastertiles Unit 4: Vacant Unit 5a: Vacant Unit 6: Vacant</p>

Response to the Questionnaire	Sun Harvest, Wood Store and Mastertiles all completed the questionnaire.
Key Issues and Recommendations	<p>The tenants did not seem aware that there was a likely chance of redevelopment in the not too distant future. Although the Council do not have a responsibility to inform the tenants of any redevelopment, it is surprising that the developer/landlord has not engaged with them as part of their consultation. It is recommended that consideration is given to the fact that these tenants may soon need assistance in finding new premises.</p> <p>The tenants liked the location and had few complaints.</p> <p>For Wood Store the main concern was that if they could not remain in this location and were pushed out to the outskirts of Brighton, they would struggle to get their volunteers to the location.</p>

New England Quarter, Brighton MAP 2



Location	<p>The New England Quarter has been developed on the former Railway Goods Yard to the east and north of the station. It includes a large amount of office space and residential with some Industrial users still in occupation. Longley Industrial Estate is within this area but we have classed this as a separate site.</p>
Current Situation	<p>A number of Industrial occupiers are dispersed amongst new development, primarily of office and residential use.</p> <p>BHCC own the GB Liners building. Brewers own their freehold. BHCC own Richardsons, there is a long leasehold to Richardsons with circa 40 years remaining.</p>
Future Plans	<p>All the units are earmarked for redevelopment but the current tenants require alternative premises close to the city centre. To date nothing suitable has been found.</p> <p>The vacant site on Station Street adjacent to the CMSA office and currently being used as a car park has planning consent for 60,000 sq ft of B1 offices. The developer would have included the GB Liners building as well if GB Liners could relocate.</p> <p>A number of these sites are identified as part of The City Plan strategic allocations for the New England Quarter and London Road Area; 20,000 sq m B1 office space and 165 residential units are allocated.</p>
Tenants	<p>3 – 9 Blackman Street: GB Liners 53 New England Street: GE Richardsons Albany House, New England Street: Brewers 1-2 Trafalgar Lane: Travis Perkins</p>
Response to the Questionnaire	<p>GB Liners and GE Richardson completed the questionnaire. Brewers and Travis Perkins provided some comments.</p>
Key Issues and Recommendations	<p>GB Liners and GE Richardsons would be happy to relocate if a suitable alternative site could be found, to date this has not been possible. Both tenants recognises their use should not be in a city</p>

	<p>centre location. Further consultation may be required in order to identify alternative sites.</p> <p>GE Richardson were unhappy with the neighbouring Cobblers Thumb shipping container scheme where part is being used as residential accommodation via Brighton Housing Trust. They have experienced some antisocial behaviour from the tenants but are in direct contact with BHT about this. They also have trouble with parking with the lay-by sometimes being blocked and the parking restrictions not enforced making it difficult to access their unit.</p> <p>GB Liners have been in this location in some form since the 1930s. They would like a unit double the size within the next 5 years but so far it has not been possible to find this.</p>
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Home Farm Business Centre, Home Farm Road, Brighton MAP 3



<p>Location</p>	<p>Home Farm Business Centre is located to the north east of central Brighton. It is accessed from Lewes Road/A270, which is one of the main thoroughfares to the city centre. The A270 links a short distance to the north with the A27 Brighton bypass, which in turn provides easy access to the M23 and the national motorway network beyond.</p> <p>Local access is considered to be reasonably good, with Moulsecomb train station located nearby and a number of regular bus routes servicing the area. It is possible via Auckland Road, however Lewes Road becomes congested at times as it acts as one of the main routes to and from the City, University campuses and the football stadium.</p>
<p>Current Situation</p>	<p>The freeholder is Brighton and Hove City Council with 125 long leaseholds sold.</p> <p>The site area is approximately 2.5 ha.</p> <p>There is B1a/B1c/B2 and B8 uses.</p> <p>The estate provides large, good quality units.</p> <p>Paxton have expanded into unit 4.</p>
<p>Future Plans</p>	<p>The Estate is well occupied and we are not aware of any current plans to redevelop. There is no further space available for additional development.</p> <p>The City Plan designates the Home Farm Industrial Area as protected employment land B1, B2 and B8 uses.</p>
<p>Tenants</p>	<p>Unit 1: Covers (building merchants) Unit 2: MBM Unit 3: Paxton House: Paxton Access Ltd</p>

	<p>Unit 4: Foodhaven (recently relocated, had been at Home Farm for 16+ years and have the long leasehold of Unit 4)</p> <p>Unit 5: Gatwick Technologies</p>
Response to the Questionnaire	<p>Foodhaven and Paxton Access have responded filling in the questionnaire.</p> <p>We are waiting for MBM and Covers to come back to us.</p>
Key Issues and Recommendations	<p>Problems faced included high costs, included rent and rates, and lack of access to skilled staff. Companies on this estate maybe well placed to engage with universities/colleges and have potential to employ apprentices. It may be worth the Council targeting these companies.</p> <p>There were no negative comments about the estate itself in terms of access and appearance.</p>

Hollingdean Industrial Estate, Upper Hollingdean Road, Brighton MAP 4



Location	<p>Hollingdean Industrial Estate is approximately 4km from the A27. The A270 is within 200m providing a dual carriageway to the main strategic roads.</p> <p>The site is access via Upper Hollingdean Road. There are a number of bus stops nearby.</p>
Current Situation	<p>The freeholder is Brighton and Hove City Council.</p> <p>The site is approximately 3.92 ha.</p> <p>The site consists of 2 private occupiers and the council depot.</p>
Future Plans	<p>The City Plan protects the site for employment use only protecting it for B1, B2 and B8 uses.</p> <p>The council were considering relocating the depot perhaps via a land swap. More recently investment has been put into the location. The leases at the adjoining meat market ended in 2016 and a new 10 year agreement has been signed.</p> <p>Unless an alternative site for the depot can be found, or this can be incorporated, a new development is unlikely to happen.</p>
Tenants	<p>Hollingdean Depot: City Clean, Brighton & Hove Council Wholesale Meat Market, Depots 1- 8: Blakes Meats 13 Upper Hollingdean Road: G Saunders and Sons</p>
Response to the Questionnaire	<p>There was no response for this estate.</p>
Key Issues and Recommendations	

Hollingbury Industrial Estate, Crowhurst Road, Brighton Map 5



Location	<p>Hollingbury Industrial Estate is located adjacent to the A27 meaning there is excellent strategic access.</p> <p>Local access is via Crowhurst Road which is shared with the Asda superstore. There are a number of bus stops nearby and most of the units have their own parking.</p>
Current Situation	<p>The freeholder is Brighton and Hove City Council.</p> <p>The site is approximately 9.92 ha.</p> <p>Asda, Matalan, Next, Argus, Renault and Marks & Spencer are all adjacent to this estate.</p> <p>The former Newsquest site has consent for demolition of existing building and reconfiguration for a new Jaguar / Land Rover car dealership. (BH2017 / 01351)</p> <p>Within the estate is :</p> <ul style="list-style-type: none"> • The Former police station at Sussex House of which the long leasehold has recently been sold to Matsim who are marketing this for B1 office use. • Exion 27 office building is located within this estate. There are two tenants; University of Brighton and Imagexp. • Bestway Cash and Carry • Brake Bros Cash and Carry • Storage Mart
Future Plans	<p>The City Plan protects the site for employment use only protecting it for B1, B2 and B8 uses.</p> <p>Long term it is likely that the Sussex House building may be redeveloped to provide a higher intensity of employment space.</p>

	An application has just been submitted for a change of use to allow an Escape Rooms.
Tenants	<p>Unit A1 Enterprise Estates: Gap Solutions Unit A2 Enterprise Estate: Master tiles Unit B1 Enterprise Estate: In The Pipeline Unit B2 & B3 Enterprise Estate: Bells Garage Unit B4 Enterprise Estate: Hollingbury Joinery Unit B5 Enterprise Estate: Gap Solutions Unit B6 Enterprise Estate: The Window Store Unit B7 Enterprise Estate: UniClean Property Maintenance Unit B8 + 11 Enterprise Estate: ARJ Engineering Unit B10 Enterprise Estate: Beacon Drinks Units 12 – 14 Enterprise Estate: Phase Electrical 1-3 Crowhurst Corner: TG Fruits 5 Crowhurst Corner: CH Mears and Son 6 Crowhurst Corner: Flower City 7 Crowhurst Corner: Premier Fruits 10 Crowhurst Corner: Capital Hair and Beauty Grip Works, Crowhurst Road: Talbot Tools</p>
Response to the Questionnaire	<p>Uni Clean, Capital Hair and Beauty and Gap Solutions responded filling in the questionnaire.</p> <p>In the Pipeline responded saying they did not feel it was relevant for them and so they did not want to take part.</p> <p>Bells Garage responded saying they did not have time to take part.</p> <p>Phase Electrical responded with some comments but did not want to fill in the whole questionnaire.</p>
Key Issues and Recommendations	<p>There had been some investment including lighting and signage.</p> <p>Poor IT and high costs were highlighted as problems. The council could explore the possibility of installing increased connectivity in this area.</p> <p>Parking permits were specifically mentioned as a high cost.</p> <p>Uni Clean mentioned that when tender opportunities come up with the local council and universities, they struggle to compete with the large nationals. They feel more support should be given to local companies. It is recommend that the council engage with this business, even if the Council cannot provide tender opportunities just for local firms, a conversation to show support may be welcome.</p>

Centenary Industrial Estate, Hughes Road, Brighton MAP 6



<p>Location</p>	<p>Centenary Industrial Estate is located just to the north of Brighton City Centre.</p> <p>It is approximately 4km from the A27 and within 200m of the A270.</p> <p>There are a number of bus stops nearby offering approximately 20 services. There is a dedicated access road share with Sainsbury's supermarket.</p>
<p>Current Situation</p>	<p>The units are individually owned.</p> <p>There is a mixture of B1a/B1c and B8 uses.</p> <p>These are good quality units which are well occupied.</p> <p>Unit 3 recently applied for a change of use for use as a gym and this was rejected. (application BH2017/01562).</p>
<p>Future Plans</p>	<p>The City Plan protects the site for employment use only protecting it for B1, B2 and B8 uses.</p> <p>There is no further land available for immediate development. We consider it unlikely that Centenary will be redeveloped in the near future.</p>
<p>Tenants</p>	<p>Unit 1: Brighton and Hove Council Unit 2: Rio Trading Unit 2a&2b: R&B Automobiles Unit 3a&3b: Allenwest Brighton Unit 4: SIG Trading Unit 5: Brighton Sunblinds Unit 6&7: Brighton Tools and Fixings Unit 8&9: Shaws of Brighton Unit 10: Autoglass Unit 11: Amplicon</p>

Response to the Questionnaire	<p>Brighton Sunblinds responded saying they were too busy to take part and did not feel it was of relevance to them.</p> <p>Amplicon and SIG Interiors have responded filling in the questionnaire.</p>
Key issues and recommendations	<p>The main issues highlighted were high costs including energy, poor strategic road links and lack of access to skilled staff.</p> <p>It was commented that there is a lot of redevelopment including that of student housing at the expense of industrial stock. This is a general observation and something that was noted throughout Brighton & Hove and is not site specific.</p>

Bell Tower Industrial Estate, Roedean Road, Brighton

MAP 7



Location	<p>The Bell Tower Industrial Estate is located just off the A259 and is over 5km from the A27.</p> <p>Local access is considered to be reasonably good via Roedean Road however this can become congested at times.</p>
Current Situation	<p>The freeholder is H&T Properties Ltd (Vijay Thamman)</p> <p>The site currently provides 0.37ha of industrial/warehouse space.</p> <p>It is adjacent to the Gas Works site.</p>
Future Plans	<p>The Estate is well occupied and we are not aware of any current plans to redevelop.</p> <p>The City Plan designates Bell Tower Industrial Estate as protected employment land.</p> <p>The neighbouring Gas Works is earmarked for redevelopment and in the past developers looking at this have wanted to incorporate the Bell Tower site too.</p> <p>The gas works site adjacent is identified in the City Plan as a strategic location for housing but also 2,000 sq m of employment space (B1a, B1c). Development should provide an appropriate mix of employment floor space of varying sizes that cater for business uses ranging from office to light industrial, including small starter units or managed units (Use Classes B1).</p>
Tenants	<p>Unit 1 Bikes of Brighton</p> <p>Unit 2 Julian Plumart</p> <p>Unit 3 Baines & Fricker Ltd.</p> <p>Unit 4 Grow Works Ltd.</p>

	<p>Unit 5 Loud Shirt Brewing Co Ltd</p> <p>Unit 6 Mid Sussex Roofing Supplies Limited.</p> <p>Unit 7 Just Motorcare Ltd (In Administration)</p> <p>Unit 8 EBC Motor Factors Ltd.</p> <p>Unit 9 Zelgrain Ltd.</p> <p>Unit 10 Brighton Bier</p> <p>Unit 11 Anti-Graffiti Systems Ltd.</p>
Response to the Questionnaire	<p>EBC Motors, Baines and Fricker and Mid Sussex Roofing all fully completed the questionnaire.</p> <p>Brighton Bier, Anti-Graffiti Systems and Bikes of Brighton all said they would when they have time but despite chasing would not fill in the questionnaire. Albeit Anti Graffiti Systems did give some feedback on access.</p> <p>Julien Plumart, Grow Works, Loud Shirt and Zelgrain did not respond.</p>
Key Issues and recommendations	<p>There had been some recent investment in the estate including signage and lighting.</p> <p>Access to the estate is often blocked by vans and they would like double yellow lines at the entrance to avoid this. It is recommended that the Council explore the viability of this.</p> <p>They identified a lack of properties to grow into as a problem along with high costs. This is highlighted as an issue throughout Brighton & Hove and is not site specific. Recommendations on this including alternative sites for development are highlighted in the main report.</p>

Fairway and Westergate Business Park, Moulsecomb, Brighton MAP 8



<p>Location</p>	<p>Fairway and Westergate are located outside of the city centre, approximately 1.5km from the A27.</p> <p>There are a number of bus stops nearby. There is some on street parking and access can sometimes be congested.</p>
<p>Current Situation</p>	<p>The freeholder is Aviva.</p> <p>The site is approximately 1.10 ha and is split into 2 plots.</p> <p>Bookers Cash and Carry are within this location.</p>
<p>Future Plans</p>	<p>The City Plan protects this site for Employment use only, including B1, B2 and B8 uses.</p> <p>We consider it unlikely this site will be redeveloped.</p> <p>There is the potential for 1 more unit to be developed which would provide circa 10,000 sq ft of additional industrial space. The site is currently included within the letting to Reeves and is used as a car park.</p>
<p>Tenants</p>	<p>Fairway Business Park: Unit 1: Southern Heating Group Unit 2: JFDI Phoenix Unit 3, 4, & 8: Fareshare Unit 5 & 6: George Rose Office Products Unit 7: DR (UK) Ltd</p> <p>Fairway Trading Estate: Unit 1: Brighton & Hove City Council Unit 2: Custom Pharmaceutical Unit 3: T Reeves</p> <p>Westergate: Unit 1: Bcreative Unit 2: Ai Glass and Glazing Unit 3: Lee Sullivan Contract Flooring Ltd</p>

	<p>Unit 4: Shineway Foods Ltd Unit 5: B1 Office Use Unit 6: Senator Cleaning Ltd (Clean Wipes) Unit 7: H2 Organisation Unit 8&9: Firetoys Unit 10: Gladrags Community Costume Trust</p>
<p>Response to the Questionnaire</p>	<p>BCreative, Southern Heating Group, Custom Pharmaceutical and Farshare responded filling in the questionnaire.</p> <p>Glass and Glazing responded saying they did not want to fill in the questionnaire saying they were too busy.</p> <p>Lee Sullivan Contract Flooring responded saying they did not want to take part as they were too busy. They passed a copy on to the manager who despite chasing did not respond.</p> <p>Firetoys responded saying they did not want to take part as did not feel it was relevant to them.</p> <p>There was no response from Shineways, Clean Wipes, T Reeves, H2 Organisation and Gladrags.</p>
<p>Key Issues and Recommendations</p>	<p>Business Rates were identified as an issue.</p> <p>Fareshare have a higher than average amount of women employees compared to other businesses identified in Brighton & Hove.</p>

Woodingdean Business Park, Sea View Way, Brighton



<p>Location</p>	<p>Woodingdean Business Park is located to the east of Brighton City Centre, close to the Falmer junction of the A27, which provides links to London, Gatwick Airport and the M25. The site is located directly off the B2123.</p> <p>Local accessibility is reasonably poor. Whilst there are bus services to and from Woodingdean and Falmer train station, those travelling to Woodingdean Business Park by public transport will have to walk some distance to get to the Park. In addition to this, parking is often deemed to be inadequate considering the insufficient public transport links.</p> <p>Falmer Road (which connects the Park to the A27) can become very congested at peak times.</p> <p>The site is on the edge of a large residential area.</p>
<p>Current Situation</p>	<p>The total site is approximately 3.89 ha.</p> <p>The freeholder is Brighton and Hove City Council. St Modwen hold a long leasehold interest.</p> <p>The site currently provides approximately 1,200m² of industrial/warehouse space. The units are modern and provide good quality industrial space.</p>
<p>Future Plans</p>	<p>The City Plan designates Woodingdean Business Park as protected employment land.</p> <p>The South Downs National Park is just to the north of the site.</p> <p>We are not aware of any current plans for development of this site.</p>

Tenants	<p>Unit 1: BJW Associates (Office user) Unit 2: West Pier Telecom (Office user) Unit 3: Proporta (Office user) Unit 4: Temco Ltd Unit 5: Brighton Trade Windows Ltd Unit 6: Conservatory Innovations Ltd Unit 7: One Digital Ltd Unit 8: Salon Supplies Unit 9 & 10: Covaris Unit 11: VACANT Unit 12: Phlorum Unit 13: Reflex Nutrition Ltd Unit 14: Jayar Car Parts</p>
Response to the Questionnaire	<p>BJW, West Pier Telecom and Proporta responded saying they did not want to fill out the questionnaire as they did not feel it was relevant to them as office occupiers.</p> <p>Brighton Trade Windows, Conservatory Innovations and Buxton Floorings did not respond.</p> <p>One Digital would not fill in the full questionnaire but did give some comments.</p> <p>Salon Supplies, Covaris and Jayar Car Parts completed the full questionnaire.</p>
Key Issues and Recommendations	<p>The local roads were considered poor making it difficult to access the estate especially if in a van.</p> <p>The variety of different businesses on the estate can present access problems due to ongoing deliveries via HGVs.</p> <p>The quality of the buildings was mentioned as a positive.</p>

Hyde Business Park, Bevendean

MAP 10



Location	<p>Hyde Business Park is located to the north east of Brighton City Centre, approximately 1 mile to the east of Lewes Road/A270.</p> <p>Local access is considered to be reasonably good, with Moulsecomb train station located nearby and a number of regular bus routes servicing the area. It is possible via Auckland Road, however Lewes Road becomes congested at times as it acts as one of the main routes to and from the City, University campuses and the football stadium.</p> <p>The surrounding area is residential.</p>
Current Situation	<p>The freeholder is Brighton & Hove City Council with some long leases in place.</p> <p>The units are dated and there are a mixture of occupiers including D1 users (childrens play).</p>
Future Plans	<p>The Estate is well occupied and we are not aware of any current plans to redevelop.</p> <p>The City Plan designates Hyde Business Park as protected employment land.</p> <p>In the past student housing developers have looked at this site but to date have discounted.</p>
Tenants	<p>Unit 1+2: Brighton Sheet Metal</p> <p>Unit 7: Bigbox Storage</p> <p>Unit 4: Harman Hire</p> <p>Prospect</p> <p>House Unit</p> <p>D & E: Anti Graffiti Solutions</p>

	<p>Unit 2b Front: Funplex Unit 5: West Control Solutions Prospect House : Tersus Consultancy</p>
<p>Response to the Questionnaire</p>	<p>Brighton Sheet Metal provided an extensive response.</p> <p>Bigbox have said they will respond and we continue to chase them.</p> <p>Anti Graffiti solutions have responded saying they will complete the questionnaire when they have time but have provided some comment.</p>
<p>Key Issues and Recommendations</p>	<p>Broadband is reasonable but there is poor BT infrastructure which limits digital systems.</p> <p>Access continues to be an unsolvable issue with residential roads not being ideal for the size of vehicle using the estate and speed bumps cause long term damage to vehicles and products.</p> <p>Although public transport (and free parking at present) is good, the Council fail to grit the estate as the bus route stops at Norwich Drive</p> <p>The Funplex play area is not an ideal site for such use and on occasion causes serious congestions – requests to the Council to improve this have been made.</p> <p>Dealing with fly tipping is increasingly difficult, with enforcement officers and direct contact with the Council having been replaced by voicemail/email reporting – in any event we always have to pay.</p> <p>There are often abandoned vehicles.</p> <p>The Council planting of 1997 has now outgrown the site but this is our responsibility; they do not however maintain the areas which are their responsibility other than the verges in front of residential properties.</p> <p>From 2018 the property will have to provide a level of energy efficiency equating to at least E – although this will not be an issue unless we wish to dispose of it.</p> <p>Vandalism is at a low level but unaccompanied children playing in the road and on the site is difficult to control/police.</p> <p>It is recommended that the Council engage with Brighton Sheet Metal as an established and large employer in the city. They have provided significant feedback and have some concerns highlighted above.</p>

Conway Street Industrial Area, Hove

MAP 11



Location	<p>Conway Street is located to the south west of Hove Railway Station.</p> <p>It is within 0.5 km of the A270.</p> <p>There is good public transport links with the railway station adjacent and a number of bus stops nearby.</p>
Current Situation	<p>There is various freehold ownership including BHCC, Brighton & Hove Bus company and Matsim Properties.</p> <p>The total site is approximately 3.4 ha.</p> <p>There is a mixture of B1 / B8 / Sui Generis uses.</p> <p>The Agora office building is within this location.</p> <p>Stockwell Lodge is within this location, this is a block of various small units being used as a mixture of office and retail on short term lets.</p> <p>Industrial House is a mixed use building including Light Industrial and storage.</p> <p>Brighton & Hove bus company have an application under consideration to increase office floor space on part of their site.</p>
Future Plans	<p>The City Plan highlights this as a major Brownfield development site. It is designated for a mixed used development including employment space and residential.</p> <p>Brighton & Hove Bus Company would relocate if the site were developed but have struggled to find a suitable location.</p>

	<p>Matsim have submitted planning applications for redevelopment to create 'Hove Square'. Their latest application (BH2016/02663) was to demolish the existing B8 buildings and to develop 4-17 storey buildings to accommodate 186 C3 residential dwellings, 1,988 sq m of B1 office space, 226 sq m of A1 retail and a basement car park.</p> <p>This was refused in July 2017 on the basis that not enough affordable housing had been included. The City plan required for at least 25% affordable housing however the application only allowed for 18.8%.</p> <p>Planning consent has been approved to demolish Stockwell lodge and replace with 3 B1 office units (BH2016/06562).</p>
Tenants	<p>Industrial House: Unit 1: Office use Unit 2: Office use Unit 3: Maria Allen Jewellery Unit 5: Office use Unit 6a: Lau and Home (storage) 2nd Floor West Wing: United Global Trading 2nd Floor East Wing: Larsson and Jennings Unit 3 Ellen Street: Central Hygiene Supplies</p>
Response to the Questionnaire	<p>Central Hygiene responded just to say they are relocating elsewhere but would not confirm where.</p> <p>Custom Pharmaceutical are relocating to Fairway and have responded. Their move was highly covered in the local press as they had a long search for a new location.</p>
Key Issues and Recommendations	<p>Custom Pharmaceutical commented that as a large employer (180 full time staff) in the city they need more support to deliver future growth and employment across a wide range of jobs. It is recommend that the Council engage with this employer on a regular basis in order to keep them in the area.</p> <p>High costs across the board were highlighted as a problem.</p>

St Josephs Business Park, Hove

MAP 12



<p>Location</p>	<p>St Josephs Business Park is located approximately 100 yards from the A270 Old Shoreham Road.</p> <p>It is within 2 miles of the A27, Brighton by-pass which in turn links to the A23 and the national motorway network. Central Hove and its retail outlets are within 1 mile and Hove mainline Railway Station is within ½ mile which provides a frequent service to London Victoria.</p> <p>Local access is considered good however can be congested at peak times.</p>
<p>Current Situation</p>	<p>The freeholder is Smartlines Ltd</p> <p>Brighton & Hove City Council own St Josephs Technology Centre.</p> <p>P&C own the Stamco building.</p>
<p>Future Plans</p>	<p>The Estate is well occupied and we are not aware of any current plans to redevelop.</p> <p>The City Plan designates St Josephs as a protected employment site. There are no current plans to redevelop and we consider it unlikely that this will change in the near future.</p>
<p>Tenants</p>	<p>Unit 1: British Red Cross Unit 2: 4 Print & Design Unit 3: In Rock Unit 4: Mobile Windscreens Unit 5: Panama Janitorial Supplies Unit 6: Morrells Woodfinishes Unit 7: British Red Cross</p>

	<p>Unit 8: Heating Plumbing Supplies Unit 9: NSL Unit 10: Just Motor Care Unit 11: CCC Unit 12: Art Republic Online Unit 13: VACANT Unit 14: CCC Unit 15: Fields Garage Unit 16&17: LC Switchgear</p>
Response to the Questionnaire	<p>1 unit is currently vacant.</p> <p>British Red Cross, InRock, Panama, NSL and Art Republic all responded by completing the questionnaire.</p> <p>Mobile Windscreens, Morrells and Field Tyres all responded saying they would not like to take part.</p> <p>Just Motor Care responded saying they are part of a larger firm and so would not comment on a local level.</p> <p>LC Switchgear have not yet responded, they are a relatively new occupier to the estate and we continue to chase them.</p>
Key Issues and Recommendations	<p>High level of Business Rates were a cause for concern and considered high in comparison to Adur and surrounding areas.</p> <p>Access, conditions of the roads and limited parking were all highlighted as problem areas. The council may want to look into the access of this estate and see if any improvements could be made.</p>

Sackville Trading Estate, Sackville Road, Hove

MAP 13



<p>Location</p>	<p>Sackville Trading Estate is located to the south of Old Shoreham Road / A270, off Sackville Road.</p> <p>Local accessibility is good with a number of bus stops nearby and it is within close proximity to Hove railway station.</p> <p>Though this is not far for strategic access, there is often congestion especially at peak times and the busy Old Shoreham Road combined with the train station is considered to create a north-south severance.</p>
<p>Current Situation</p>	<p>The Estate has a low level of occupation as there are plans for an extensive redevelopment. Formerly, the Estate was occupied by trade counter operators.</p> <p>The freeholder is Mountpark Ltd.</p> <p>The site currently provides 5,080m² B uses and 5,080m² restricted A1 retail.</p>
<p>Future Plans</p>	<p>The City Plan strategic allocations for the Hove Station Area is to enable its development as a mixed-use area focussed on employment. This specific area is to provide an addition 1,000m² of employment space.</p> <p>The developer, Mountpark, presented their initial proposals for the development scheme at a public consultation on 18th March 2017. The proposed scheme is to incorporate Sackville Trading Estate, the Old Coal Yard north of Hove Station, spanning to Newtown Road and Goldstone Lane. It will provide 6,500m² of office and cultural space as well as 600 new homes.</p>
<p>Tenants</p>	<p>Halfords, Capital Hair & Beauty, an ex services charity, CEF and Raynor still have a presenc on the site. The rest is vacant.</p>

	<p>Raynor have found a new location in Worthing and are in the process of moving. CEF are relocating to Newton Road. Capital Hair & Beauty have a new HQ at Crowhurst road.</p>
Response to the Questionnaire	<p>Raynor were invited to complete the questionnaire and share their experience of trying to find a new unit in the area but failing to do so. They have not responded.</p> <p>CEF and Capital Hair & Beauty completed the questionnaire.</p>
Key Issues and Recommendations	<p>The site is earmarked for redevelopment but the tenants said they had not received support or advice.</p> <p>A lack of space to move to was identified.</p> <p>From our experience of Raynor they were keen to remain in Brighton & Hove but simply could not find a suitable location.</p> <p>High costs, both rent/rates and materials was highlighted.</p>

Portland Road Business Park, Hove

MAP 14



Location	<p>Portland Road Business Park is situated in Portland Road at its junction with Olive Road, to the west of Hove Town Centre. The business park is accessible from the A27 Brighton by-pass via the Hangleton link road, Old Shoreham Road and Olive Road.</p> <p>Access is considered good but can be congested at peak times.</p>
Current Situation	<p>The freeholder is Store Property Investment.</p> <p>There is currently B8 Trade Users located at Portland Business Park. This is a well presented trade location.</p>
Future Plans	<p>The estate was developed in the early to mid 90s and it is considered unlikely that this site will be redeveloped further. There is no space available for further development.</p>
Tenants	<p>Trade occupiers include: Screwfix, Euro Car Parts, C.Brewers & Son, Johnstone's, Yesss Electrical, Omnico Plastics, BRT Bearings and Benchmarx.</p>
Response to the Questionnaire	<p>All national Trade occupiers so excluded from the questionnaire.</p>
Key Issues and Recommendations	<p>N/A</p>

Portland Trading Estate, Hove

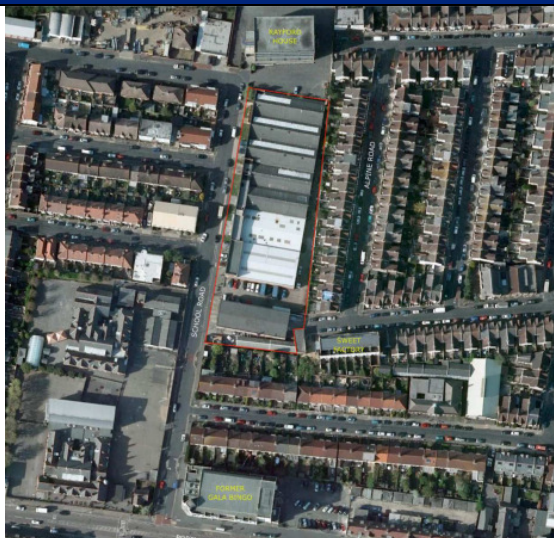
MAP 14



<p>Location</p>	<p>Portland Trading Estate is situated in Portland Road at its junction with Olive Road, to the west of Hove Town Centre. The business park is accessible from the A27 Brighton by-pass via the Hangleton link road, Old Shoreham Road and Olive Road.</p> <p>Portland Trading Estate is to the west of Portland Business Park.</p> <p>Access is considered good but can be congested at peak times.</p>
<p>Current Situation</p>	<p>The freeholder is London & Cambridge Properties.</p> <p>At the entrance to the estate is Martello House a former office building redeveloped to residential under PDR.</p> <p>There is currently B8 Trade Users and a D2 gym.</p> <p>This estate is not as modern as the neighbouring Portland Business Park.</p> <p>Amongst this are units on Olive Road which are privately owned. Deliveroo have recently taken a lease here.</p>
<p>Future Plans</p>	<p>The estate is marked in the City Plan for employment use.</p> <p>The conversion of Martello House to the south to residential use has made this estate of interest to developers.</p> <p>We are not aware of any current plans to redevelop at this time. The site is safeguarded under CP3.4 for employment led mixed use redevelopment which would also incorporate the EDF site but excludes the Olive Road site which is considered a secondary employment site.</p>
<p>Tenants</p>	<p>Trade occupiers include: Plumbase, Howdens, Edmundson Electrical.</p>

	<p>There is a gym – Fit For All on this estate as well.</p> <p>Olive Road: Deliveroo Dickies Suit Hire Motor Repairs.</p>
Response to the Questionnaire	<p>All Trade occupiers so excluded from the questionnaire.</p> <p>Deliveroo Responded filling the questionnaire.</p> <p>Dickies did not respond.</p>
Key Issues and Recommendations	<p>Deliveroo have been looking for a site in the surrounding Brighton area for some time. They have taken this site albeit would like additional space.</p> <p>They have only recently opened this location and were happy with it so far.</p>

School Road, Portslade MAP 16



Location	<p>School Road is located out of the City centre in Hove, just off Portland Road. It is approximately 3km from the A27.</p> <p>The surrounding area is a mix of residential and educational. There are regular bus services on Portland Road.</p>
Current Situation	<p>The freeholder is Cross Stone Securities Ltd.</p> <p>There is currently B1a / B1c and D2 uses.</p> <p>The total site area is 0.64 ha.</p> <p>The majority of the site is made up of older industrial buildings most of which are now vacant. There is a large soft play/indoor football facility located here. To the north of the site is Rayford House Office building and to the south is the former Gala Bingo Building which has already been redeveloped.</p>
Future Plans	<p>The City Plan designates this site for Employment led (residential and employment) mixed development. This includes the site to the north (Rayford House) which is currently a B1 office building. Rayford House is in the process of being sold with consent for residential development.</p> <p>School Road Industrial has a planning application under consideration (BH2016 / 02535). This includes demolition of the existing buildings and development of 104 C3 Residential dwellings and 572 sq m B1 Office. The target decision date was 11/11/2016.</p> <p>It is considered highly likely that redevelop of this site will happen in the near future.</p>

Tenants	<p>The majority of the units are now vacant in preparation for redevelopment.</p> <p>Westows soft play/football centre is still in occupation however not relevant to this. They have a lease until April 2018.</p> <p>There is a motor trade business and Dh Tyres still in occupation on flexible terms.</p> <p>There are some artists in occupation on a short term / flexible basis.</p>
Response to the Questionnaire	The majority of the space is vacant or occupied by non-industrial users.
Key Issues and Recommendations	N/A

Victoria Road Trading Estate, Portslade



<p>Location</p>	<p>Victoria Road Trading Estate is located in Portslade. It is less than 2km from the A27.</p> <p>Victoria Road is a busy local road and as such the junction to the industrial estate can be congested at times.</p> <p>There are a number of bus stops nearby and Portslade Railway Station is within very close proximity.</p> <p>Victoria Road has become a Car Showroom location.</p>
<p>Current Situation</p>	<p>The freeholder is Endeavour Holdings Ltd / Rivervale.</p> <p>The total site area is 2.17 ha. There is a mixture of B1c / B8 / D2 and Sui Generis on this site.</p>
<p>Future Plans</p>	<p>The Local Plan protects the site as Employment Use.</p> <p>One plot is available for redevelopment and Endeavour Holdings are in the process of putting a planning application together to develop this site. It is estimated a further 8,000 sq ft of Industrial space could be developed here. Endeavour are speaking to potential occupiers including some who would be new to the area.</p>
<p>Tenants</p>	<p>Rivervale House, 50 Victoria Road: Rivervale Cars Unit 3 : Threesixty Unit 4: BSS Group Unit 6: Travis Perkins Unit 7a: Hire Station Unit 7b-c: Boulder Brighton (D2 use) Unit 8a: TSS Facilities Unit 8b – Rivervale Cars Units 10&11: Rivervale Cars 51 Victoria Road – Victoria Road Service and MOT</p>

Response to the Questionnaire	<p>Boulder Brighton are not relevant to this given they are a climbing centre rather than an industrial user.</p> <p>Threesixty, Rivervale and Endeavour have all completed the questionnaire.</p> <p>Rivervale are owner occupiers and occupy a large percentage of the estate.</p>
Key Issues and Recommendations	<p>Endeavour would like support from the planners on the development of the vacant plot. They stated lack of flexibility is a barrier to economic growth. It is recommended that the Council engage with this land owner.</p> <p>Parking was highlighted as an issue.</p> <p>As there is a big car trade presence in this location a concern related to Brexit is the increase in cost to import vehicles.</p>

South Portslade Industrial Estate

MAP 18



<p>Location</p>	<p>Portslade is approximately 4 miles from Brighton City Centre. South Portslade Industrial Estate is located on the north side of the A259.</p> <p>The A259 provides a reasonable main road access however in peak times it is often congested. The A27 dual carriageway is approximately 3.5km away.</p> <p>Portslade railway station is a short walk away and a number of bus routes from the west and east stop nearby. On street parking is available.</p>
<p>Current Situation</p>	<p>The site is 5.39 ha.</p> <p>Mix of ownerships.</p> <p>There are a variety of uses including Sui Generis / B1a/ B1c / B8 / D2.</p>
<p>Future Plans</p>	<p>The Local Plan allocates this site for employment use (industry and business).</p> <p>Under the City Plan this industrial estate forms part of the Shoreham Harbour Regeneration area and is allocated for a mixture of employment, residential and community uses with a green corridor and upgraded access. The Shoreham Harbour Joint Area Action Plan identifies areas of the industrial estate to be protected for B uses and areas suitable for mixed use redevelopment.</p>
<p>Tenants</p>	<p>There are a variety of uses on this estate, we did not include the D2 or B1 office users or national trade occupiers. Regency House was owner occupied by Price&Co who have gone into administration and the property is currently vacant.</p>

	<p>92-98 North Street: Sussex Fireplace Gallery 100-106 North Street: The London and Brighton Plating Company 18 North Street: Metway Electrical 59 North Street: Security and event Solutions 19 North Street: Mears Home Improvement 19 Middle Street: RJ Meaker Fencing Ltd Display House, North Street: Striking Displays Display House, North Street: Compass House: Oooosh! Tours South Side Ellen Street: Meadows and Passmore Freeman House: D W Electrical 57 North Street: Denmay Steel Unit 3 Quayside: Sash Windows Restoration</p>
Response to the Questionnaire	<p>RJ Meaker, Ooosh! Tours, Striking Displays, DW Electical, Denmay Steel all completed the questionnaire.</p> <p>Sash Windows Restoration responded to say they do not have time to complete the questionnaire.</p> <p>Price & Co were asked for their feedback even though they are no longer in occupation however they did not respond in any form.</p>
Key Issues and Recommendations	<p>The recurring theme here was the lack of parking, congested access and poor appearance of the estate as a whole.</p> <p>This is an area where the properties are in poor condition and further research into this specific area and what it could be in the future may be worthwhile. Any redevelopment will not be straight forward as there are multiple ownerships.</p>

Clarks Trading Estate, Newton Road, Hove

MAP 18



Location	<p>The Clarks Trading Estate is situated at the southern end of Newtown Road in Hove close to its junction with Fonthill Road.</p> <p>Hove Railway Station is within walking distance of the estate</p>
Current Situation	<p>The freeholder is La Salle Investment Management obo Coal Pension Trust.</p> <p>The estate is close to Goldstone Retail Park with other occupiers in Newtown Road including Plumb Center, HSS Tool Hire and Speedy Hire Centre with DFS, Toys R Us and Burger King on Goldstone Retail Park.</p>
Future Plans	<p>Clarks Trading Estate was reduced through the City Plan Part 1 allocation at CP3.4 of Land north of Newtown Road for employment-led mixed use development (the Hyde housing development behind the Toys R Us site). The industrial units south of Newtown Road as shown on the City Plan policies map are still protected.</p>
Tenants	<p>Unit 1 NRS</p> <p>Unit 2 Plumb Centre</p> <p>Unit 3 Vacant</p> <p>Unit 4 Mattress Mart</p> <p>Unit 5 TLC</p> <p>Unit 6 TLC</p>
Response to the Questionnaire	<p>Trade Counter occupiers were excluded from the questionnaire.</p>
Key Issues and recommendations	

Appendix E

Written results

Question 6: Which term best describes your business?

- 2 skipped this question
- 84% Privately Owned
- 6.8% National
- 2.3% Franchise
- 6.8% Other

Question 7: Is Your Business Part of a Cluster?

- 2 skipped this question
- Yes: 18.2%
- No: 81.8 %

Question 8: What market does your business serve?

- Local: 35%
- UK: 37%
- UK + EU: 4%
- UK + International: 24%

Question 9: How long has your business been location at your location?

- 0-5 years: 43%
- 6-10 years: 18%
- 11-15 years: 7%
- 16+ years: 32%

Question 10: What type of accommodation is your business located in?

- Office: 29%
- Industrial / Warehouse: 89%

- High Tec: 0%
- Mixed / other: 4%
- Freehold: 8%
- Leasehold: 15%

Question 11: Approximately how big is your premises?

- 500 -1,500 sq ft: 9%
- 1,501 – 5,000 sq ft: 58%
- 5,001 – 10,000 sq ft: 16%
- 10,001 – 20,000 sq ft: 9%
- 20,001 sq ft+: 8%

Questions 12: How many staff do you employ?

- 1 skipped this question.
- 1-5: 24%
- 5-10: 29%
- 11-15: 18%
- 16-21: 2%
- 21+: 12%

Question 13: How much is your annual rent?

- 13 skipped this question
- £0 - £10,000:11%
- £10,001 - £20,000: 27%
- £20,001 - £30,000: 24%
- £30,001 - £40,000: 11%
- 40,001 - £50,000: 9%
- £50,001+: 18%

Question 14: Female / Male and Ethnic Split:

- 28% did not answer this question
- 91% had more male than female staff
- 94% had 100% white staff

Question 15: Do you engage with Business advice services / colleges / universities?

- 3 did not answer this questions
- 35% answered Yes
- 65% answered No

Question 16: List Important Location Factors 1-8.

- This question was not fully answered by all and 4 skipped the question entirely. Those that did answer either picked one factor, their most important and least important factor or a selection of important factors. However they did not list them all in order of importance as requested. This makes it difficult to analyse this answer.
- What we have established from the answers given is that the majority listed access as the most important factor and being within a cluster as the least important.
- Below shows the percentage of occupiers that selected each factor as the most important, bearing in mind some occupiers selected more than one factor as most important.
- Access: 45%
- Near to supplies: 22%
- Within a cluster: 8%
- Room to expand: 8%
- Level of rent: 18%
- Business known for being in this location: 20%
- Access to staff: 20%
- Flexible tenure: 10%

Question 17: Has there been any of the following investment in the property in the last 5 years?

- All estates had some investment in them.
- Access and parking had the lowest level of responses and this was an area that many tenants from various estates highlighted as an issue.
- Lighting and Signage had the highest level of response.

Question 18: In terms of the size of the unit for their operation:

- 64% said it was sufficient for their current needs
- 4.4% said it was too big for their current needs
- 13.3% said it was too small for their current needs
- 0% said it would be too big within the next 5 years
- 17.8% said it would be too small within the next 5 years

Question 19: Do you have immediate plans to relocate?

- 5 skipped this question
- 7% said yes within the next years
- 17% said yes within the next 5 years
- 76% have no plans to relocate.

Question 20: Are there improvements you would like to see on the industrial estate your business is located on?

- Yes: 53.5%
- No: 46.5%
- Further comments were received with parking being the main concern. Occupiers on St Josephs, Centeneary, New England Quarter, Portland Street and Crowhurst Road.
- Improvement of the appearance of the estate was identified on Conway Street and South Portslade.
- Improvement to access was identified at Newton road and Westergate.
- Improvement on security was identified at Conway Street.

Question 21: Do you feel your business faces any of the following barriers?

- Lack of access to skilled staff: 21.6%
- Poor ICT connectivity: 13.5%
- Lack of premises to grow into: 46%
- High Costs: 59%
- Poor quality/age of building: 11%
- Poor local road links: 13.5%
- Poor strategic road links: 13.5%
- Lack of diversity / equality in your sector: 0%
- High housing costs which may impact retaining staff: 27%
- Access to finance: 8%

Question 22: Would you be interested in exploring options to reduce your energy bills and would you be happy to be contacted to discuss further?

- Yes: 29%
- No: 71%

Questions 23: Is your Estate earmarked for redevelopment?

- 3 skipped this question
- 81% said their estate is not earmarked for redevelopment
- 16% said their estate is earmarked for redevelopment and they are not receiving support
- 3% said their estate is earmarked for redevelopment and they are receiving support

Question 24: Is your company currently facing problems due to Brexit or do you envisage it will after Britain leaves the EU?

- 3 skipped this question
- 47% said Yes
- 53% said No

Question 25: Occupiers were then invited to make any further comments. Responses included:

- Access to estates needs improving
- Parking throughout the city needs improving and the cost of parking reduced
- Less student accommodation at the expense of employment space
- Concern over local business being pushed out
- Estates need to be tidied up and presented better
- The council need to be more flexible and commercial in the approach to planning
- It is difficult to find space that will allow heavy machinery
- Need to get rid of cycle lanes which no one uses and which congest the already busy roads
- Council needs to be more transparent
- Business rates are far too high.