Medway Local Development Framework



Medway Annual Monitoring Report 2010

Volume 1 - Main Report

December 2010

Medway

Serving You

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Executive summary

Main findings 2009/10

- The housing completion rate of 972 units in 2009/10 was the highest annual completion level since 1990. This was quite exceptional given the downturn in housebuilding elsewhere caused by the economic downturn.

- The proportion of residential development taking place on previously developed land (PDL) at 64% has recovered to former levels (as forecast), exceeding the national PDL target of 60% once again.

- Affordable housing units completed were again above target at 32% of all housing completions.

- The first ‘Building for Life Assessment’ undertaken on the J5 and J6 development at Chatham Maritime, received a ‘good’ assessment.

- The amount of employment land available for development in 2009/10 at 460 hectares was the highest level since the beginning of the plan monitoring period in 2006.

- The proportion of employment development on previously developed land was again high at 99%.

- There were five renewable energy applications in 2009/10, the highest number recorded to date.

- Average earnings (workplace-based) in Medway in 2009 stood at just above the national level.

- House prices dipped significantly between 2008 and 2009, however in 2010 prices picked up again, increasing marginally over the year.

- The number of residents in Medway qualified to NVQ level 1,2,3 and 4 has increased steadily since 2006.

- While life expectancy locally is below the national level, the trend in Medway shows a gradual improvement.

Introduction

Section 35 of the Planning and Compulsory Purchase Act 2004[1] requires every local planning authority to make an annual report to the Secretary of State containing information on the implementation of the local development scheme (LDS) and the extent to which the policies set out in local development documents are being achieved.

The report needs to look at statistical survey periods for monitoring and which are tied to the financial year. This report therefore covers the period **1 April 2009 to 31 March 2010**.

This is Medway's sixth Annual Monitoring Report (AMR) under the new development plans system. Its role is to report on the implementation of the Development Plan for Medway, including the Medway Local Plan 2003 (MLP) and to inform future policymaking.

It is a key component in the development of a comprehensive system for monitoring the current and emerging development plans in Medway as the Medway Local Plan is successively replaced by Local Development Documents (LDDs) within the portfolio known as the Local Development Framework (LDF).

A companion volume to this report is also available. This contains detailed land availability tables, summaries of which are reported below.

[1] Further details of this requirement are set out in Regulation 48 of the Town and Country Planning (Local Development) (England) Regulations 2004.

Local Development Scheme (LDS)

Government legislation requires the Council to produce an Annual Monitoring Report (AMR) including progress of the Local Development Scheme for every financial year. The LDS sets out the timetable for the production of the Local Development Framework (LDF). The AMR needs to outline whether the implementation of the LDS is on target and whether milestones have been achieved.

The LDS in force at April 2009 was dated from November 2008 but was replaced by an updated document in December 2009. Progress reported in this AMR is against the December 2009 revision.

No key milestones occurred during the monitoring year.

Supplementary planning documents no longer have to be listed in the LDS and so progress on their preparation is not reported in this AMR.

Development Plan

At the beginning of the year covered by this report the development plan for Medway comprised:

- RPG9 Regional Guidance for the South East (2001 with subsequent amendments)
- RPG9a The Thames Gateway Planning Framework (1995)
- The Kent & Medway Structure Plan (2006)
- Kent Minerals Plan (various dates)
- Kent Waste Local Plan (1998)
- The Medway Local Plan (2003).

The Regional Assembly (SEERA) was responsible for monitoring RPG9 and RPG9a. Medway was jointly responsible with Kent County Council for monitoring the structure plan, waste and minerals plans and solely responsible for the Medway Local Plan. However on 31st March 2009 the Regional Assembly dissolved itself and the South East England Partnership Board (SEEPB) replaced it.

In May 2009 the South East Plan was adopted, fundamentally changing the structure of the development plan to the following:

- South East Plan (2009)
- Kent Minerals Plan – 'saved' policies (various dates)
- Kent Waste Local Plan – 'saved' policies (1998)
- Medway Local Plan – 'saved' policies (2003).

Indicators

This Annual Monitoring Report considers three types of indicators – Core Output Indicators defined by central government, Contextual Indicators and additional Local Output Indicators defined by the Council.

1. Local Development Framework Core Output Indicators. These cover a broad range of land use and environmental subjects.

- Business Development (BD1, BD2, BD3, BD4)
- Housing (H1, H2a, H2b, H2c, H2d, H3, H4, H5, H6)
- Environmental Quality (E1, E2, E3)
- Minerals (M1, M2)
- Waste (W1, W2)

2. Contextual Indicators. These help explain how factors happening on a broader scale are affecting the Borough, particularly wider economic changes.

3. Local Development Framework Local Output Indicators. These help collect evidence that is locally important which is not covered by the above. The identification of these will be part of the ongoing LDF process. These are included in a separate appendix.

Performance against Core Output Indicators 2009/10 and progress since start of Plan period - 2006

Business Development

BD1 Amount and type of completed employment floor space – 2009/10					
	B1	B2	B8	Mixed B	Total
Gross	957	1435	1331	2268	5991
Net	-401	-24701	184	2268	-22650

There was a significant loss of employment floor space in 2009/10 due to a large loss of B2 floor space.

The majority of this loss of B2 (-24,442 sq.m) relates to the demolition of the Alloy Wheels site, Strood, however this net loss is compensated by considerable floor space coming forward with 125,655 sq.m of B2 floor space now committed, along with a further 589,734 sq.m of B8 floor space. The bulk of these commitments are from applications approved for Kingsnorth Industrial Estate and a new business park on the National Grid land at Grain. It is expected that a substantial portion, if not all, of the Alloy Wheels site will be redeveloped for employment purposes in due course.

Looking back over the plan period, the large net loss this year is quite exceptional and can be attributed to sites being cleared prior to redevelopment.

See floor space completion charts in appendix.
For use class definitions see back of appendix.

Amount of completed employment floor space 2007- 2010				
	2006/07	2007/08	2008/09	2009/10
Gross	27966	20965	22523	5991
Net	-2849	-6805	3017	-22650

BD2 Amount and type of completed floor space (gross) coming forward on previously developed land (PDL) – 2009/10				
B1	B2	B8	Mixed B	Total
899 sq.m (94%)	1435 sq.m (100%)	1331 sq.m (100%)	2268 sq.m (100%)	5933 sq.m (99 %)

Completed floor space on previously developed land in 2009/10, at 99% of all completed floor space, is in line with the previous year. It was considerably higher than in 2008 (93%), though the scale of development on PDL in 2009/10 was significantly lower than previous years at 5,933 sq.m.

Completed floor space on PDL (total) 2007-2010			
2006/07	2007/08	2008/09	2009/10
25,182 sq.m	19524 sq.m	22,478 sq.m	5933 sq.m
90.1%	93.1%	98.8%	99.0%

BD3 Amount and type of employment land available (hectares gross) – 2009/10				
B1	B2	B8	Mixed B	Total
71.9 ha	58.4 ha	222.8 ha	106.8 ha	**460 ha**

The amount of employment land available for development is up in 2009/10 on previous years, at 460 hectares. Almost half (48%) of the land available is likely to be occupied by B8 uses.

Amount of employment land available 2007-2010			
2006/07	2007/08	2008/09	2009/10
97.8ha	186.7ha	224.8ha	460ha

BD4 Total amount of floor space for town centre uses (A1/A2/B1a/D2) –2009/10										
	A1 (m^2)		A2 (m^2)		B1 (m^2)		D2 (m^2)		Total	
	Gross	Net	Gross	Net	Gross	Net	Gross	Net	Gross	Net
Town Centre	**2394**	**1572**	**291**	**-20**	**65**	**-274**	**0**	**0**	**2750**	**1278**
Rest of Medway	11707	11539	55	-215	892	-127	5574	5313	18228	16510
TOTAL	14101	13111	346	-235	957	-401	5574	5313	20978	17788

Total floor space (net) for town centre uses is up in 2009/10 at 17,788 sq.m from 7,210 sq.m in 2009.

Total floorspace for town centre use 2007-2010								
	2006/07		2007/08		2008/09		2009/10	
	Gross	Net	Gross	Net	Gross	Net	Gross	Net
Town Centres	1035	-1128	1073	-1145	5832	2791	2750	1278
Rest of Medway	32359	17279	15178	3139	15339	4419	18228	16510
Floor space Total	33394	16151	16251	1994	21171	7210	20978	17788

Housing

H1 Plan period and housing targets	
South East Plan target 2006-2026	16,300

Medway is continuing to use the housing target that was set in the regional spatial strategy (SE Plan), which equates to an annual average completion requirement of 815 units.

H2a Net additional dwellings in previous years	
2007	591
2008	761
2009	914
2007-2009	**2,266**

H2a Net additional dwellings in previous years

	Completions	Requirement	Surplus/deficit
2007	591	815	-224
2008	761	815	-54
2009	914	815	+99
2007-2009	**2,266**	**2445**	**-179**

H2b Net additional dwellings for the reporting year

	Completions	Requirement	Surplus/deficit
2010	**972**	815	+157
2007-2010	3238	3260	-22

Medway had a housing completion rate well above target for the second year running, however it remains just below target since the beginning of the plan period, with 3,238 completions to date against a cumulative requirement of 3260 residential units.

Expected delivery over the next 15 years (commitments on large and small sites + allocations)			
Years	0-5 years (2010/11-2014/15)	5-10 years (2015/16-2019/20)	10-15 years (2020/21-2024/25)
No of dwellings	**3491**	**2873**	**1407**

With a net total of 585 dwellings currently under construction, the trajectory for the next few years indicates a dramatic slowdown in house building. Although there is a very healthy supply of sites with planning permission in Medway the economic downturn is expected to affect build rates unless there is a dramatic improvement in mortgage lending and the availability of development finance.

Over the next 5 years a further 4075 units will be required, adding this to the shortfall results in a total requirement of 4097 dwellings. Planned delivery is predicted to fall short of the required completion level but recover strongly over the medium term.

H2d Managed delivery target

Housing trajectory

Provision will be made to ensure approximately 18,745 new homes can be delivered between 2006 and 2028 - an average of 815 per year. This will include:

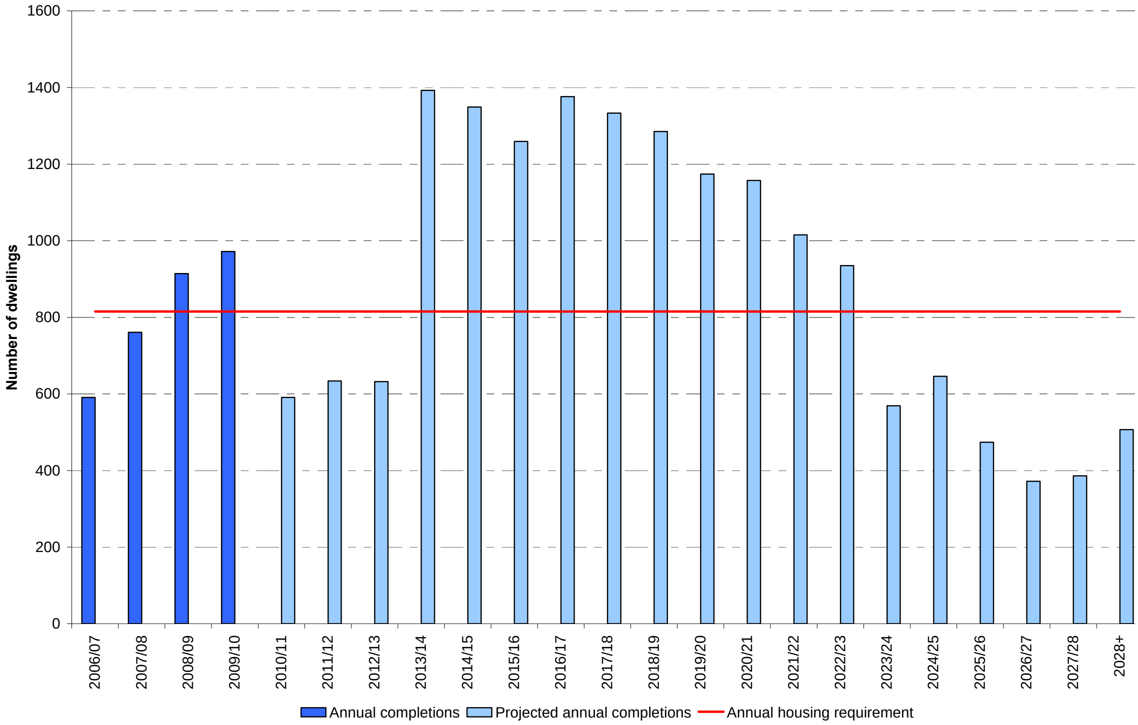
- All sites which are the subject of adopted development briefs or master plans including Strood, Chatham and Gillingham town centres
- Sites allocated in the Medway Local Plan 2003 not already having the benefit of a planning permission
- A contribution of 5,000 dwellings (of which approximately 4,600 dwellings will be delivered during the plan period) arising from the Strategic Allocation of land at Lodge Hill;
- Other sites identified in the Medway Strategic Land Availability Assessment, 2010.

Further sites will be allocated in the forthcoming Land Allocations and Development Management development plan document, depending on the outstanding requirement at the time it is prepared.

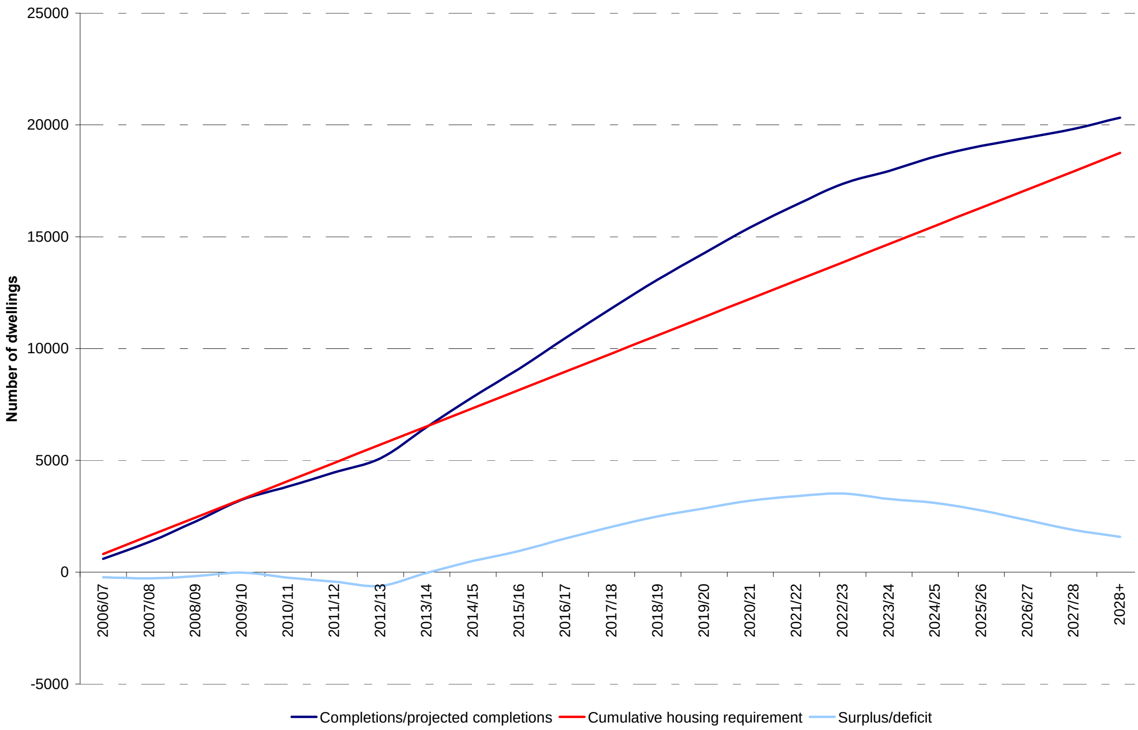
	Completions to date				**Future Phasing**																			
	Yr1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23+	
	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26	26/27	27/28	2028+	Total
Completions/phasing	591	761	914	972	591	634	632	1392	1349	1259	1376	1333	1285	1174	1157	1015	935	569	646	474	372	386	507	**20324**
Annual housing requirement	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	815	**18745**

	Completions to date				**Future Phasing**																		
	Yr1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23+
	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26	26/27	27/28	2028+
Completions/projected completions	591	1352	2266	3238	3829	4463	5095	6487	7836	9095	10471	11804	13089	14263	15420	16435	17370	17939	18585	19059	19431	19817	**20324**
Cumulative housing requirement	815	1630	2445	3260	4075	4890	5705	6520	7335	8150	8965	9780	10595	11410	12225	13040	13855	14670	15485	16300	17115	17930	**18745**
Surplus/deficit	-224	-278	-179	-22	-246	-427	-610	-33	501	945	1506	2024	2494	2853	3195	3395	3515	3269	3100	2759	2316	1887	**1579**

Medway housing trajectory 2006-2028



Medway housing trajectory 2006-2028 (cumulative series)



H3 Number of new and converted dwellings on previously developed land (net)		
	Percent units on PDL	Units on PDL
2009/10	**63%**	**622**
20008/9	51%	524
20007/8	37%	408
2006/07	91%	538

The Government has set a national target for at least 60% of housing completions to be on ‘previously developed land’ (PDL).

Between 2001 and 2007 Medway performed well above this target.

However a number of old greenfield local plan allocations are being developed, resulting in only 51% of total completions (net) last year and 37% the year before being on previously developed land.

This year, 2009/10 was better, with the figure up to 64%. With the greenfield sites gradually being built out and a number of regeneration sites such as Rochester Riverside becoming available, it is expected that the figure will be well over the 60% target in future years.

H4 Net Additional pitches (gypsy and traveller)

None

H5 Gross affordable completions		
	Number of affordable units	As % of all completions
2009/10	**309**	**31.8**
20008/9	408	44.6
20007/8	230	30.2
2006/07	163	27.6

There were 309 affordable housing completions in 2009/10, representing just under 32% of net completions. While this is a drop on the previous year, it remains well above the target of 25%.

This is based on the SEERA/SEEPB definition of an affordable unit, which is a narrower definition than that used by the Homes and Communities Agency (previously the Housing Corporation). An additional 49 units fell within the definition of open market Home Buy.

H6 – Housing quality – Building for life assessment
J5 and J6 residential & mixed use blocks at Chatham Maritime – **Good** assessment
For the purpose of the 2009-10 reporting, the scheme with the largest number of completed units was selected as a test case. This has been assessed and received a Building for Life score of **15** out of 20 (where Very good = 16/20 or more, Good = 14-15.5/20, Average = 10-13.5/20, Poor = 9.5/20 or less). One building for life post assessment has been undertaken by a accredited assessor. Due to limited staff resources it is not possible to undertake assessments of all completed schemes but in future years it is intended that post completion assessments will be undertaken for all schemes with 20+ completions and where the number of completed units within a given year represents a significant proportion of the development.

Environmental Quality

E1 Number of planning permissions granted contrary to Environment Agency advice on flooding and water quality grounds
None

E2 Changes in areas of biodiversity importance			
Measured via NI197 – Improved local biodiversity - proportion of local sites where positive conservation management has been or is being implemented			
Fifteen Local Wildlife Sites, covered by this definition, fall partly or wholly within the Medway Council area. Of these ten are in positive management. Eight Local Wildlife Sites can be considered to be in positive management. This number has fallen by 1 since last year due to changes to NI197qualification criteria from at least 1% of the site being in a recognised management scheme during the last five years to a significant amount being under management.			
2006/07	2007/08	2008/09	2009/10
N/A	*N/A*	80%	67%

E3 Renewable energy generation			
In 2009/10 there were five renewable energy applications (1 part wind/ part solar, 4 solar)			
Application Number	**Renewable energy type**	**Summary**	**Decision**
MC2009/1090	Solar		Permitted 1/10/09
M2009/25456	Solar/wind	Install solar panels, sun pipes and wind catchers	Permitted 23/121/10
MC20092303	Solar	Solar panels onto roof	Permitted 21/1/10
MC2010/0528	Solar	Install solar panel on roof slope	Permitted 10/3/10
MC2010/0062	Solar	Install photovoltaic panels	Permitted 10/3/10
2006/07	2007/08	2008/09	2009/10
2	0	2	**5**

Minerals

Production of primary land won minerals			
Production of primary land won minerals has fallen each year since 2006/07, standing at approximately 9,900 tonnes in 2009/10.			
2006/07	2007/08	2008/09	2009/10
37,671	23,897	19,903	**9,900**

Primary aggregates imports (marine dredged and land won and crushed rock from outside Medway)			
The quantity of primary aggregates imported fluctuates annually, however the annual average between 2007 and 2010 is approximately 2,375,500 tonnes.			
2006/07	2007/08	2008/09	2009/10
2,963,606	1,911,368	2,758,243	**1,868,866**

Production of secondary/recycled aggregates	
2009/10	136,500 tonnes (estimate)

Waste

W1 Capacity of new waste management facilities	
2009/10	125,000 tpa in vessel aerobic composting at Kingsnorth Industrial Park

W2 Amount of municipal waste arising and managed by type – 2009/10		
Type	**Tonnes**	**As % of waste**
All waste	**120,999**	100%
Recycled	25,756	22.1%
Composted	13,943	12.0%
Used to recover heat	4,520	2.5%
Land filled	76,780	63.4%

Amount of municipal waste arising 2007-2010

The amount of municipal waste produced by Medway has decreased over the past three years, with the proportion of waste going to landfall falling as recycling has increased.

	2006/07	2007/08	2008/09	2009/10
All waste	130,022	131,406	123,407	**120,999**
Recycled/composted	32.6%	31.7%	33.6%	34.1%
Land filled	67.4%	67.4%	65.0%	63.4%

Contextual indicators

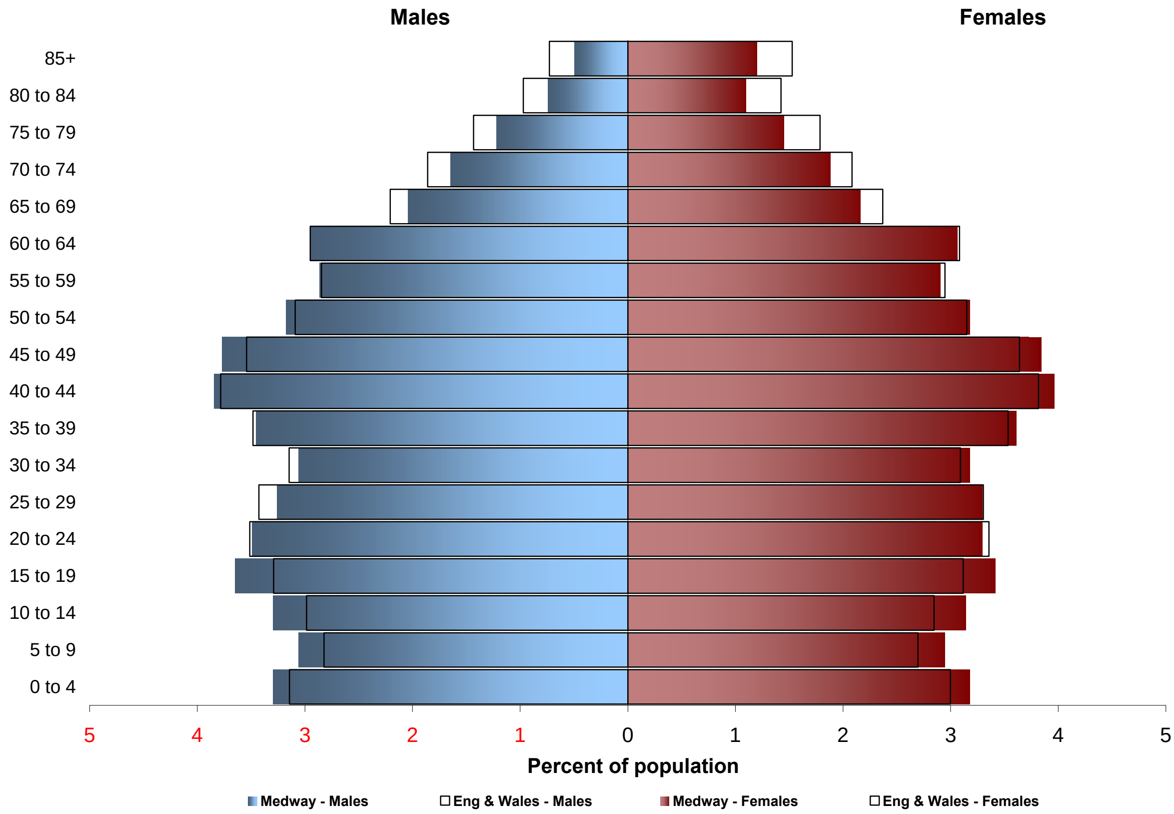
Demography

Population

In 2009 Medway's population increased naturally – births exceeding deaths - by 1,300 people since 2008. This continues the trend since 2007 of relatively large annual increases. In the period 2004 to 2006, outward migration was relatively high with around a thousand residents leaving Medway annually. More recently migration has stabilised resulting in a higher level of population growth overall.

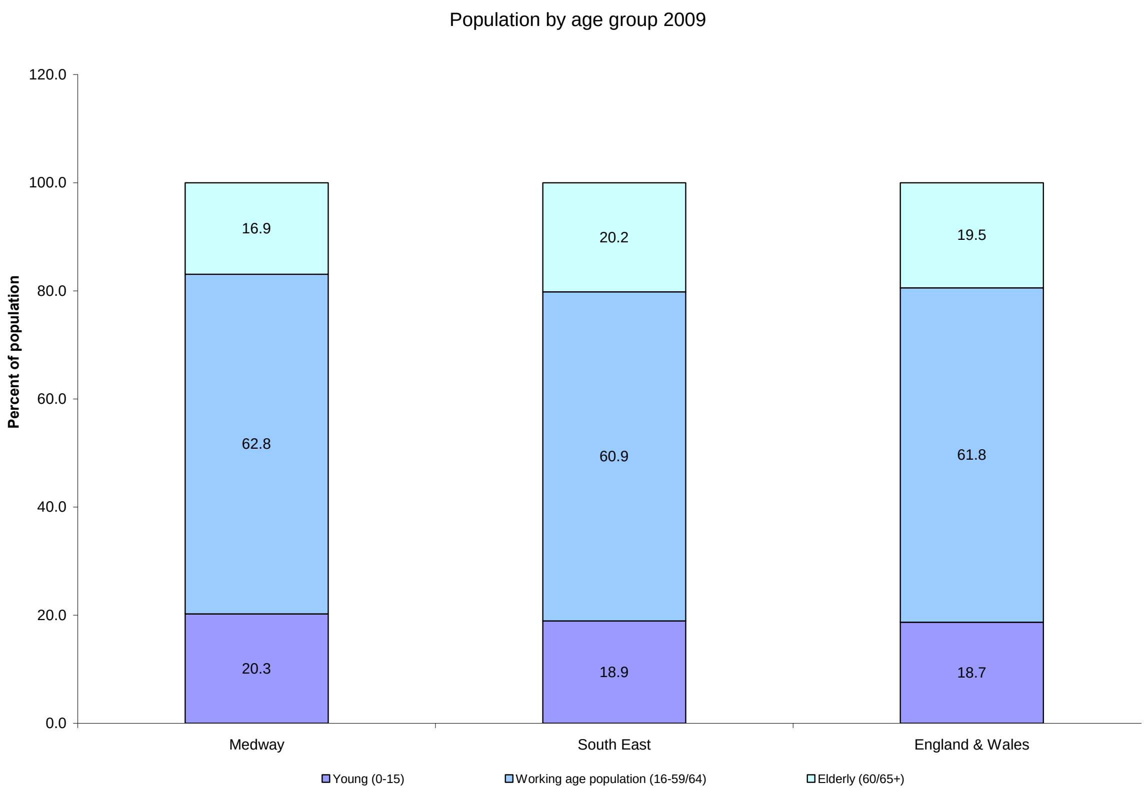
With a population in excess of a quarter of a million in 2009, Medway is the largest urban area in Kent and is one of the largest conurbations in the southeast outside London.

Medway has a relatively young population with an average age of 38.8 years in 2008 against 39.3 in England & Wales.



Population by broad age group

The comparatively younger population is evident by broad age group, with Medway having a larger proportional working age population and younger people and smaller elderly population than the regional and national averages.



Population change

Medway's population has increased naturally every year since 2001, however net out migration reduced overall population growth to +2.0% over this period.

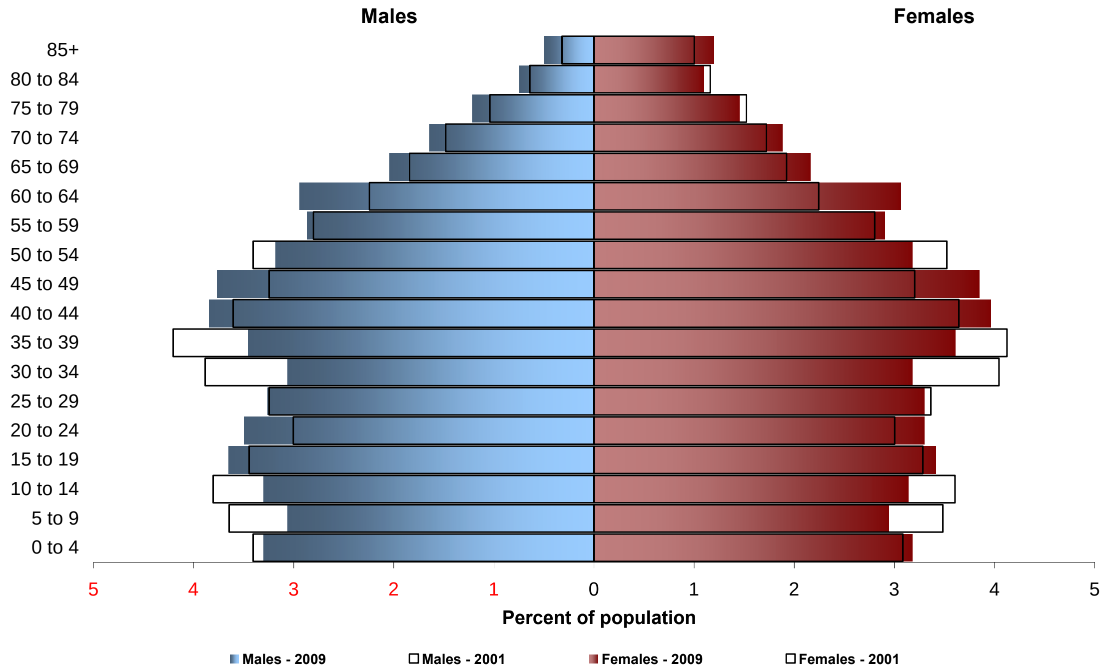
Medway has a higher proportion of under 20 year olds than the South East and England & Wales and a lower proportion of over 60 year olds.

Younger age categories appear to have decreased in size since 2001 in Medway, with a -5% drop in the number of under 40 year olds, while the over 40's have increased by +12%.

More specifically, those aged in their 30's have decreased by -17%, under 15 year olds have decreased by -8%, while residents aged over 60 have increased by +18% and those aged in their 40's are up by +15%.

Population growth - 2001 to 2009

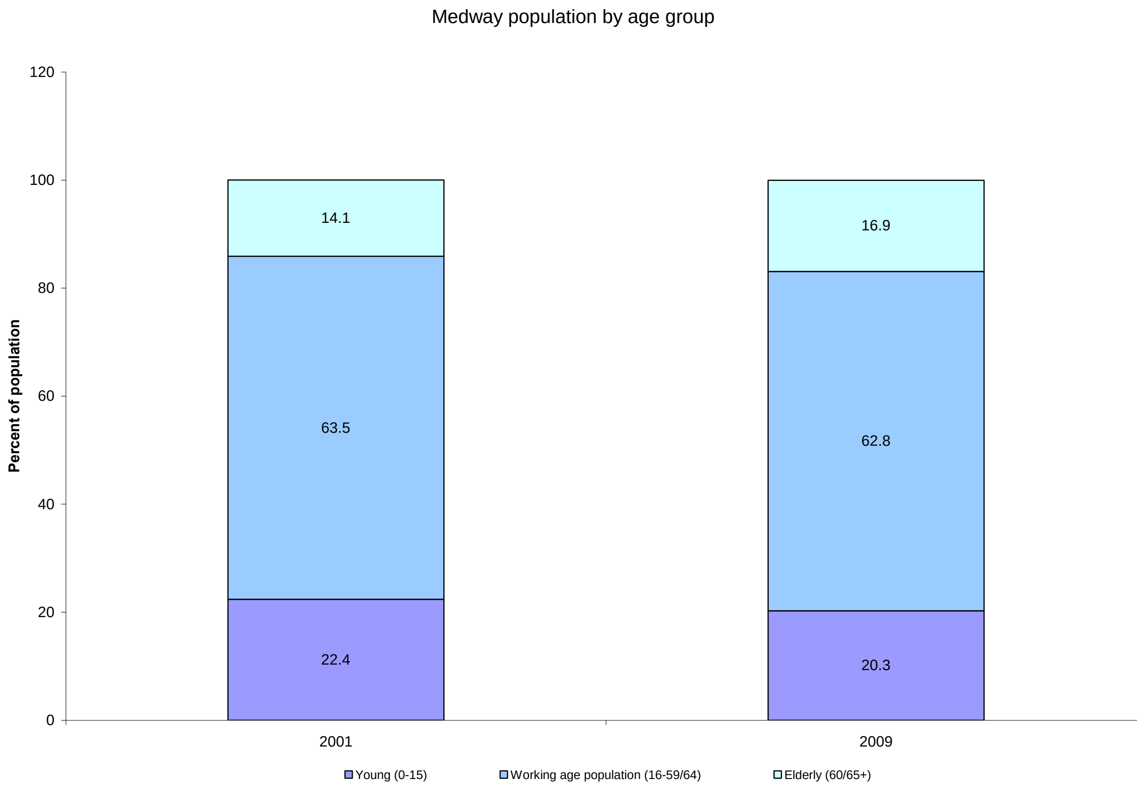
	2001	2009	Population growth	Rate of growth (%)
Medway	249,700	254,800	5,100	2.0
South East	8,023,400	8,435,700	412,300	5.1
England & Wales	52,360,000	54,809,100	2,449,100	4.7



Change in population by broad age group

The working age population in Medway dropped between 2001 and 2009 - from 63.5% to 62.8% - but remained above the national and regional level in 2009.

There has been a general ageing of the population since 2001 with a notable proportional increase in elderly residents and a proportional decrease in younger residents.

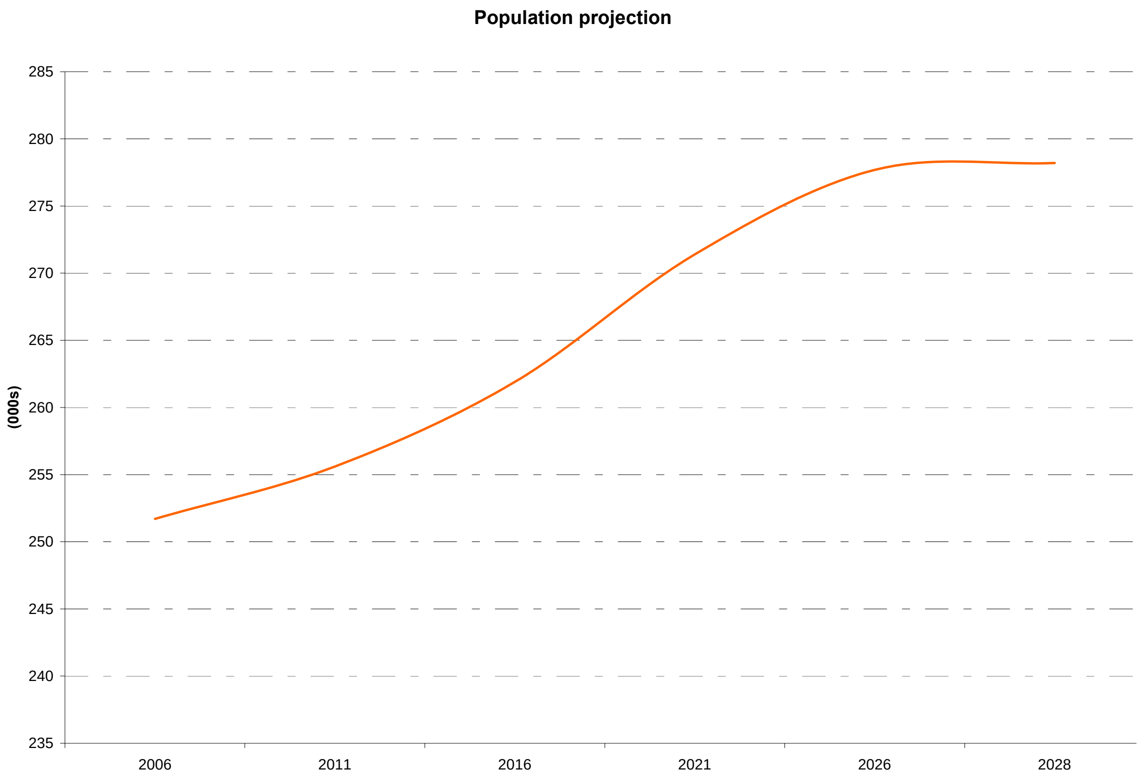


Population projection

Medway's population is forecast to grow to 278,200 by 2028. This projection is based on the completion of 19,812 houses between 2006 and 2028.

This represents a 9.2% increase in the population from the 2009 population of 254,800.

Housing strategy based population projection (000's)						
	2006	2011	2016	2021	2026	2028
Medway	251.7	255.6	261.9	271.4	277.7	278.2



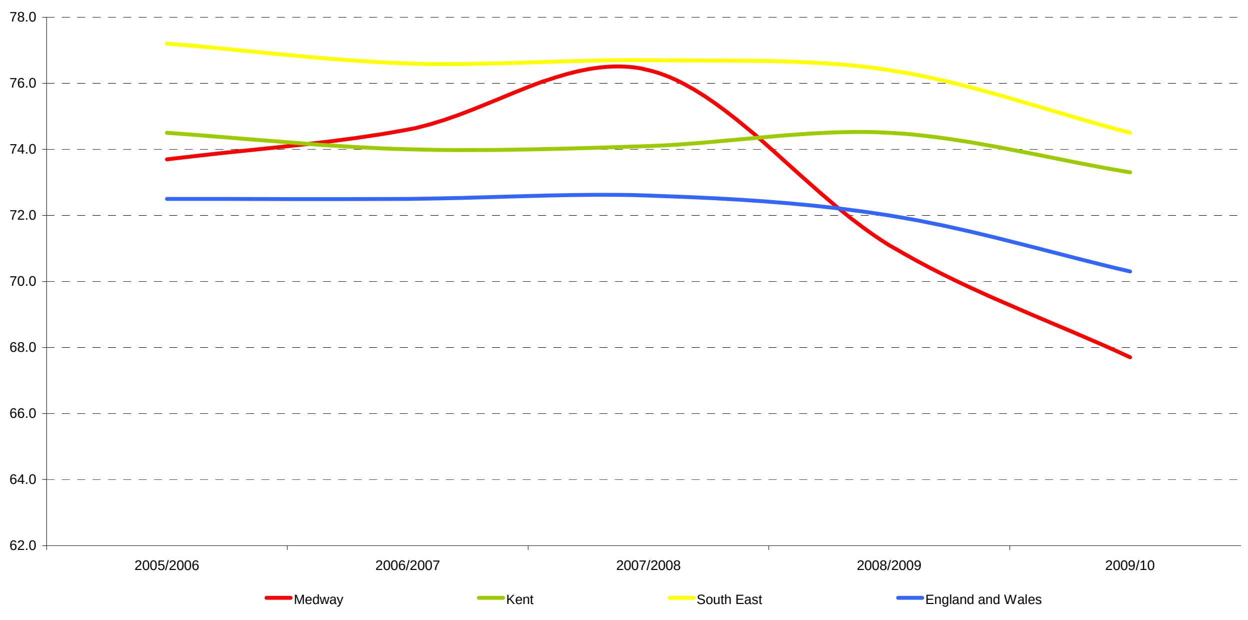
Economy

Employment rate

For the second year running Medway saw a fall in the employment rate, which is a trend reflected across all areas.

Medway's employment rate has shown the greater variation since 2006, peaking at 2007/2008, followed by a rapid decline up to 2010.

Employment rate (16-64)						
		2005/06	2006/07	2007/08	2008/09	2009/10
Medway	Number	122,000	122,400	125,900	118,600	112,700
	Rate	73.7	74.6	76.4	71.1	67.7
Kent	Rate	74.5	74.0	74.1	74.5	73.3
South East		77.2	76.6	76.7	76.4	74.5
Eng & Wales		72.5	72.5	72.6	72.0	70.3



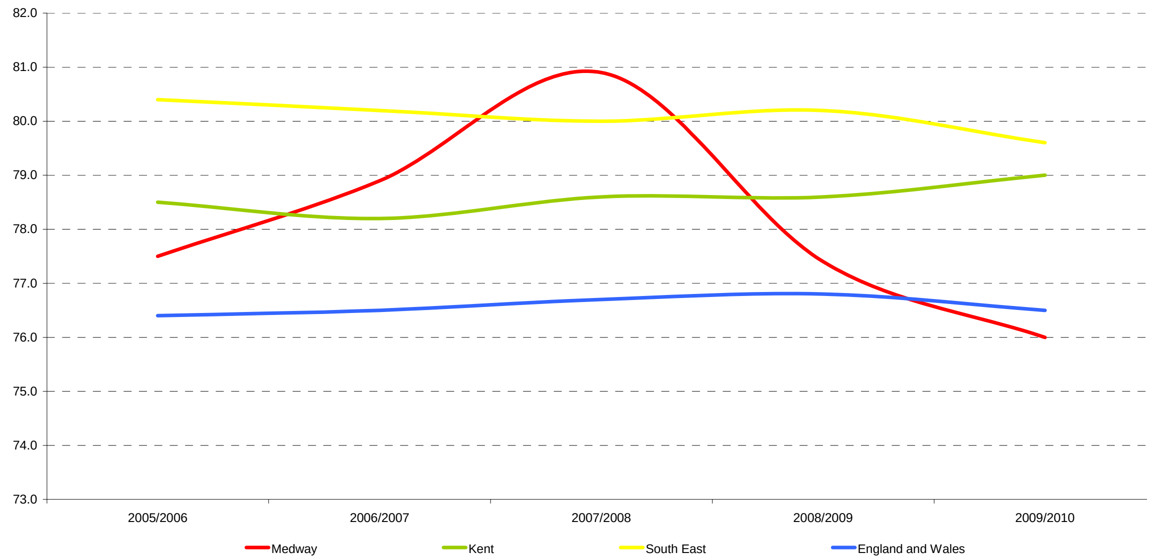
Economic activity rate

The economic activity rate in Medway has fallen for the second year to a greater extent than across the South East and England & Wales.

76% of the working –age population in Medway are economically active, standing just below the national figure of 76.5%.

The economic activity rate in Medway peaked at 80.9% in 2007/08.

Economic activity rate (16-64 year olds)					
	2005/06	2006/07	2007/08	2008/09	2009/10
Medway	77.5	78.9	80.9	77.4	76.0
Kent	78.5	78.2	78.6	78.6	79.0
South East	80.4	80.2	80.0	80.2	79.6
England & Wales	76.4	76.5	76.7	76.8	76.5

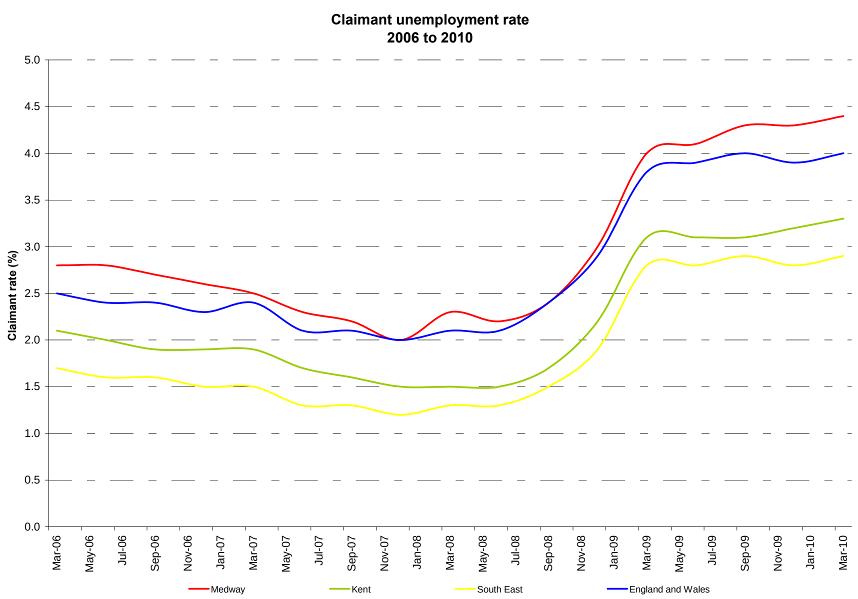


Job seekers Allowance claimant rate

The JSA claimant rate in Medway has been rising steadily since 2006 peaking at 4.4% in March 2010. This is a trend that is mirrored nationally.

Job Seekers Allowance claimant rate – 2006 to 2010

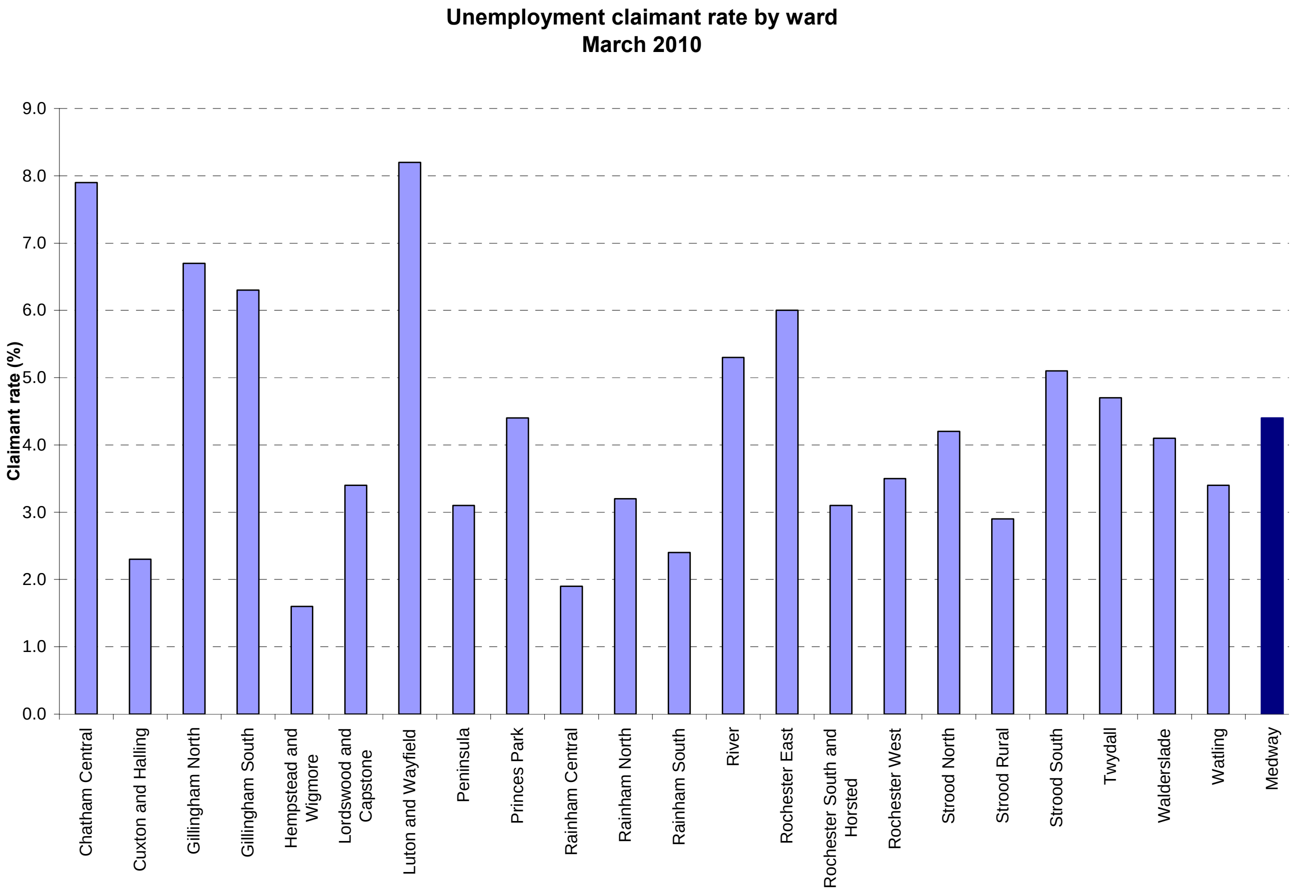
	Medway		Kent	South East	Eng & Wales
	Count	Rate	Rate		
Mar 2006	4,643	2.8	2.1	1.7	2.5
Jun 2006	4,553	2.8	2.0	1.6	2.4
Sep 2006	4,493	2.7	1.9	1.6	2.4
Dec 2006	4,239	2.6	1.9	1.5	2.3
Mar 2007	4,237	2.5	1.9	1.5	2.4
Jun 2007	3,761	2.3	1.7	1.3	2.1
Sep 2007	3,612	2.2	1.6	1.3	2.1
Dec 2007	3,316	2.0	1.5	1.2	2.0
Mar 2008	3,830	2.3	1.5	1.3	2.1
Jun 2008	3,602	2.2	1.5	1.3	2.1
Sep 2008	3,987	2.4	1.7	1.5	2.4
Dec 2008	4,950	3.0	2.2	1.9	2.9
Mar 2009	6,635	4.0	3.1	2.8	3.8
Jun 2009	6,891	4.1	3.1	2.8	3.9
Sep 2009	7,194	4.3	3.1	2.9	4.0
Dec 2009	7,303	4.3	3.2	2.8	3.9
Mar 2010	7,446	4.4	3.3	2.9	4.0



Job Seekers Allowance claimant rate – ward level

There is great variation in the JSA claim rate by ward within Medway - from a high of 8.2% in Luton & Wayfield, 7.9% in Chatham Central down to 1.6% in Hempstead & Wigmore.

Medways four 'worst' wards Luton and Wayfield, Chatham Central, Gillingham North and Gillingham South account for 38% of job seekers allowance claimants in Medway.



Proportion of resident population aged 16-64 claiming Job Seekers Allowance		
Ward	Rate	Count
Chatham Central	7.9	797
Cuxton and Halling	2.3	83
Gillingham North	6.7	671
Gillingham South	6.3	680
Hempstead and Wigmore	1.6	87
Lordswood and Capstone	3.4	212
Luton and Wayfield	8.2	718
Peninsula	3.1	259
Princes Park	4.4	307
Rainham Central	1.9	153
Rainham North	3.2	174
Rainham South	2.4	217
River	5.3	311
Rochester East	6.0	384
Rochester South and Horsted	3.1	240
Rochester West	3.5	242
Strood North	4.2	365
Strood Rural	2.9	254
Strood South	5.1	465
Twydall	4.7	380
Walderslade	4.1	244
Watling	3.4	203
Medway	**4.4**	**7,446**

Long-term unemployment

The long-term unemployment rate in Medway increased significantly during 2009/10 standing at 43% in March 2010. This is a trend which has occurred across all comparative areas but which is particularly pronounced in Medway.

Medway has a long-term unemployment rate that is above that in Kent, the South East and England & Wales.

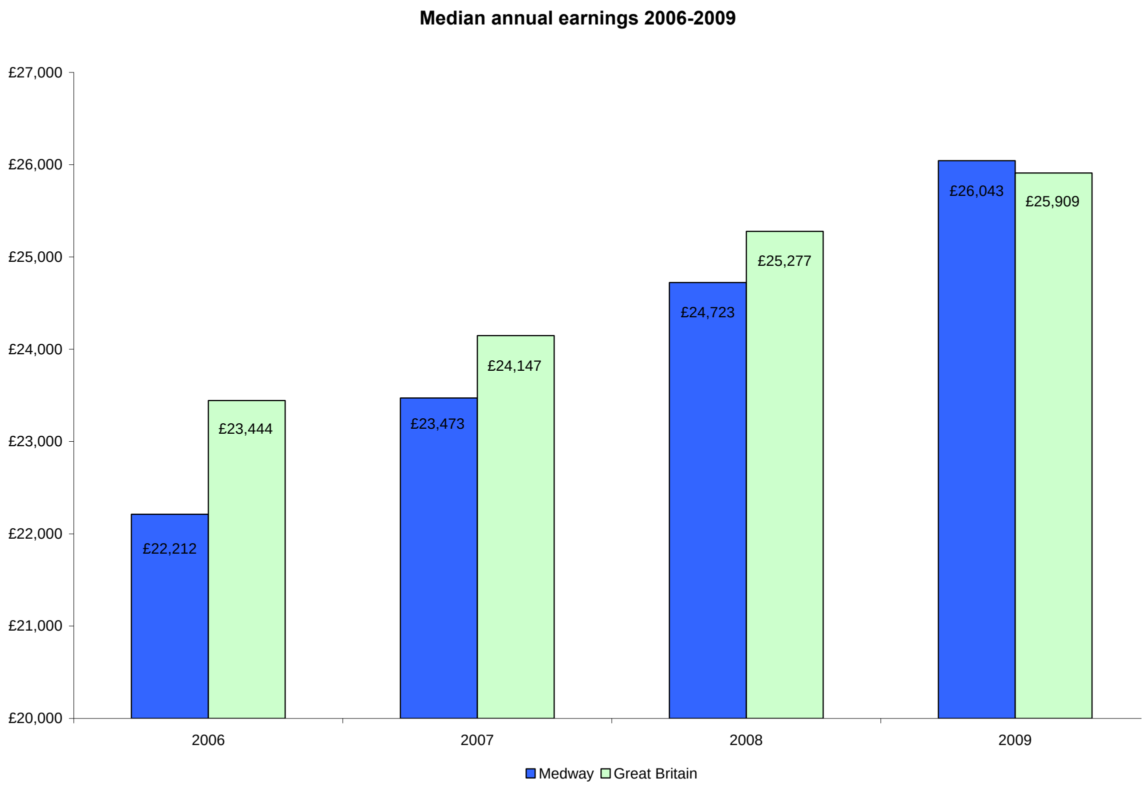
Job Seekers Allowance claims over 12 months in duration

	Medway		Kent	South East	England and Wales
	No	Rate	Rate		
Mar 06	1,465	31.6	28.5	29.7	32.0
Jun 06	1,730	38.0	34.1	34.7	36.7
Sep 06	1,740	38.7	36.1	34.9	36.4
Dec 06	1,555	36.7	33.3	32.2	34.3
Mar 07	1,605	37.9	30.7	31.2	33.6
Jun 07	1,470	39.1	32.8	33.0	35.6
Sep 07	1,235	34.2	30.5	30.2	33.1
Dec 07	975	29.4	26.5	26.8	30.2
Mar 08	1,010	26.4	23.3	24.6	28.6
Jun 08	970	26.9	23.6	25.1	29.0
Sep 08	1,105	27.7	21.5	22.5	26.0
Dec 08	1,170	23.6	17.6	19.1	22.5
Mar 09	1,490	22.5	17.8	18.3	22.3
Jun 09	1,920	27.9	25.0	25.5	29.1
Sep 09	2,530	35.2	30.7	30.8	33.2
Dec 09	2,830	38.8	31.7	32.4	34.5
Mar 10	3,200	43.0	34.3	34.8	36.7

Earnings

Median annual earnings in Medway at £26,000 stand just above the national level in 2009, having increased by a higher proportion since 2006, when Medway's earnings were considerably below the national level.

Median annual earnings (£'s) - work-place based				
	Medway	Kent	South East	Great Britain
2006	22,200	22,600	24,800	23,400
2007	23,500	23,300	25,600	24,100
2008	24,700	25,000	26,800	25,300
2009	26,000	25,400	27,500	25,900
2006-2009 % increase	+17.2	+12.0	+10.9	+10.5



Businesses by sector

In 2008 there were 8,200 business units in Medway, accounting for 84,000 jobs.

'Banking, finance and insurance' is Medway's largest business sector, accounting for just over 28% of businesses in Medway, compared to 38% in the South East and 33% nationally.

Medway has a lower proportion of businesses in the service sector at 45%, compared to the regional (54%) and national level (51%).

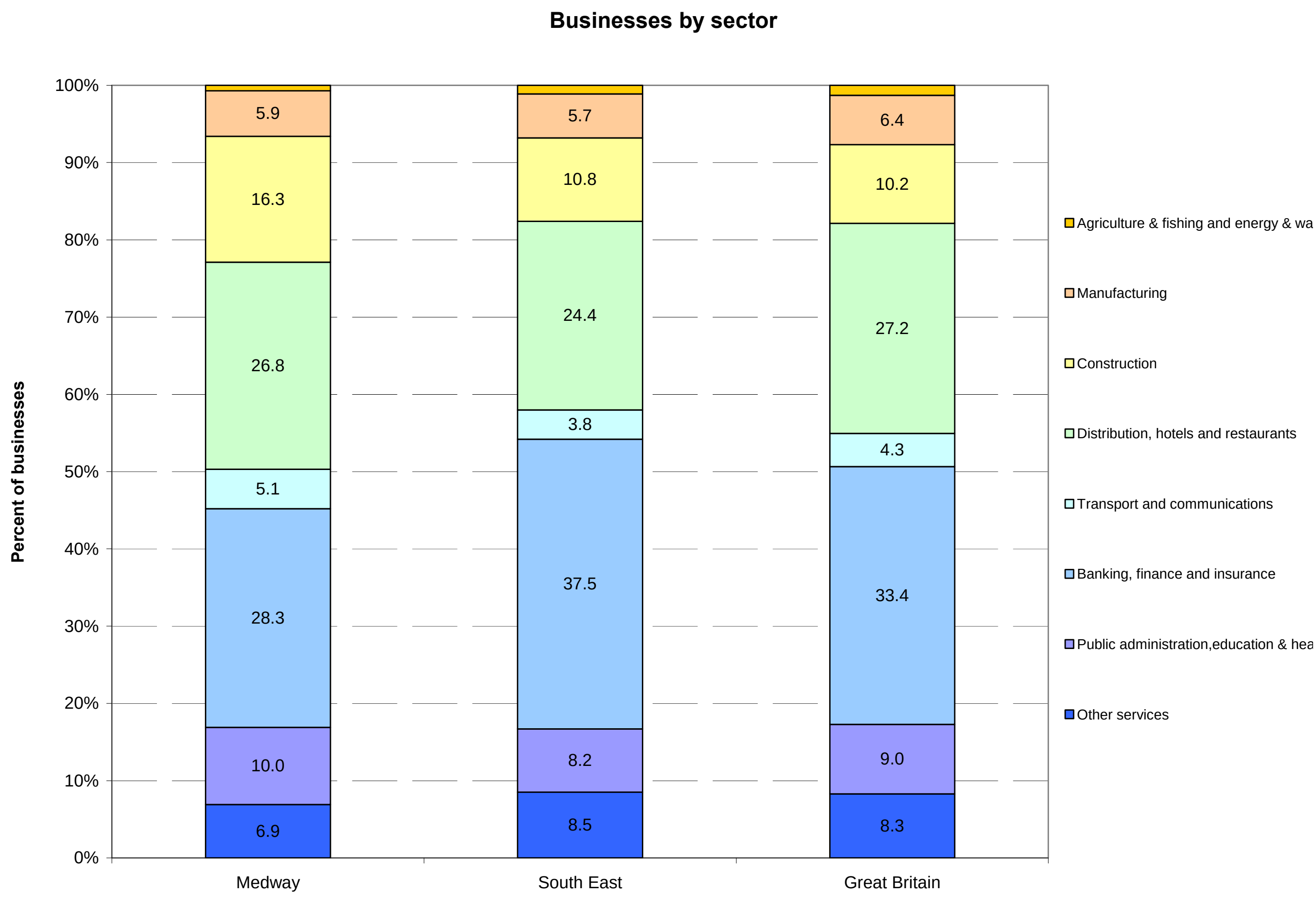
The size of the construction sector in Medway is notable, accounting for just over 16% of business units, compared to 11% in the South East and 10% nationally.

Manufacturing decreased by 8% between 2006 and 2008, while construction increased by 6%.

At just over 10 employees per business, Medway has an average business size just below the national level (10.8) and just above the South East (9.4).

Business units by sector – 2008

	Medway		South East		Great Britain	
	Number	Percent	Number	Percent	Number	Percent
Agriculture & fishing and energy & water	100	0.7	4,400	1.1	30,800	1.3
Manufacturing	500	5.9	22,500	5.7	155,800	6.4
Construction	1,300	16.3	42,800	10.8	249,500	10.2
Distribution, hotels and restaurants	2,200	26.8	96,600	24.4	664,700	27.2
Transport & communications	400	5.1	15,200	3.8	104,200	4.3
Banking, finance & insurance	2,300	28.3	148,400	37.5	817,800	33.4
Public administration, education & health	800	10.0	32,400	8.2	221,100	9.0
Other services	600	6.9	33,500	8.5	202,100	8.3
Total business units	8,200		395,600		2,446,000	


Businesses by sector
Percent of businesses
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Medway
South East
Great Britain
5.9
16.3
26.8
5.1
28.3
10.0
6.9
5.7
10.8
24.4
3.8
37.5
8.2
8.5
6.4
10.2
27.2
4.3
33.4
9.0
8.3
Agriculture & fishing and energy & wa
Manufacturing
Construction
Distribution, hotels and restaurants
Transport and communications
Banking, finance and insurance
Public administration,education & hea
Other services

Gross value added

GVA continued to increase in Medway up to 2007, however when compared to the national picture Medway's level of growth is lower resulting in another drop in the indices measure to 67.7 in 2007, from a high of 68.8 in 2005.

Headline Gross Value Added (GVA) per head at current basic prices (£ per head)

	2001	2002	2003	2004	2005	2006	2007
UK (less extra regio)	15 006	15 797	16 709	17 545	18 122	19 011	19 951
South East	16 276	17 103	18 057	18 925	19 475	20 360	21 248
Kent	12 182	12 817	13 619	14 387	14 876	15 486	16 102
Medway	10 226	10 716	11 353	11 996	12 462	13 000	13 501

Headline Gross Value Added (GVA) per head indices at current basic prices

	2001	2002	2003	2004	2005	2006	2007
UK *	100.0	100.0	100.0	100.0	100.0	100.0	100.0
South East	108.5	108.3	108.1	107.9	107.5	107.1	106.5
Kent	81.2	81.1	81.5	82.0	82.1	81.5	80.7
Medway	68.1	67.8	67.9	68.4	68.8	68.4	67.7

*UK less extra region =100

Deprivation

Five additional super output areas (SOAs) were in the most deprived 20% nationally in 2007 over the 2004 figure, taking the total number of SOAs in the most deprived 20% nationally in 2007 to sixteen.

Just over 37,000 residents in Medway are income deprived, up by 6,000 since 2004. Just over 13,000 residents are employment deprived, up by 1,100.

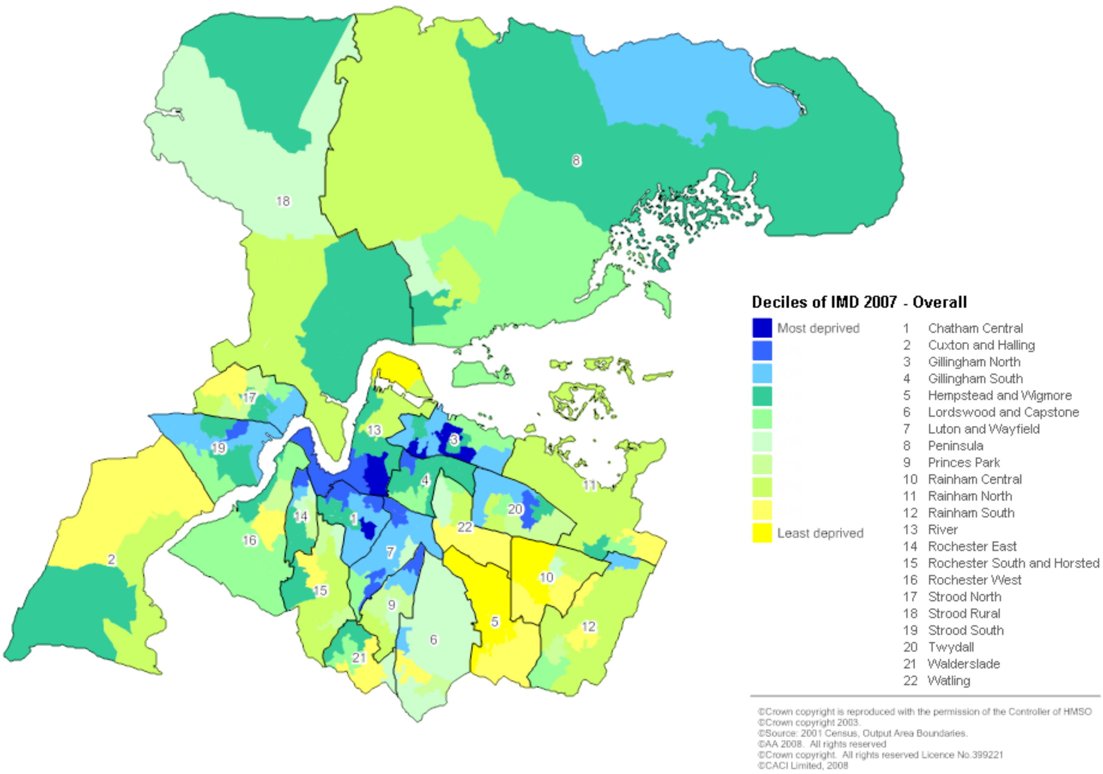
In 2007 3% of Medway residents lived in SOAs ranked in the worst 10% nationally, in 2004 less than 1% of residents lived in the 10% most deprived SOAs.

Nine percent of Medway residents live in SOAs ranked in the worst 20% nationally, in 2004, 7% of residents lived in the 20% most deprived SOAs nationally.

Education training and skills had the highest proportion of SOAs in the most deprived 20% of SOAs nationally at 24%.

Index of Deprivation 2007 - Percentage (cumulative) of Super Output Areas by national decile ranking

	Multiple Deprivation	Income	Employment	Health & Disability	Education skills & training	Barriers to housing & services	Crime	Living Environment	Child poverty	Elderly poverty
Most deprived 10%	3.0	3.7	1.8	0.6	6.1	3.7	6.1	8.5	2.4	3.7
20%	9.8	13.4	9.8	3.7	24.4	11.6	16.5	23.2	16.5	11.6
30%	25.0	33.5	22.0	12.8	42.7	18.9	28.0	31.7	32.9	23.2
40%	44.5	46.3	32.3	22.0	62.2	26.8	39.0	39.6	48.8	34.1
50%	54.3	56.1	48.8	40.2	72.6	41.5	56.7	50.6	58.5	49.4
50%	45.7	43.9	51.2	59.8	27.4	58.5	43.3	49.4	41.5	50.6
40%	37.8	34.1	42.1	46.3	13.4	40.9	31.7	36.0	29.9	40.2
30%	29.9	26.2	31.1	34.1	5.5	26.2	18.3	28.0	17.7	31.7
20%	14.0	14.0	17.7	16.5	1.8	11.6	8.5	15.9	8.5	21.3
Least deprived 10%	3.7	6.1	4.9	2.4	0.6	0.0	1.8	1.2	1.8	8.5



Index of Deprivation 2004 - Percentage (cumulative) of Super Output Areas by national decile ranking

	Multiple Deprivation	Income	Employment	Health & Disability	Education skills & training	Barriers to housing & services	Crime	Living Environment	Child poverty	Elderly poverty
Most deprived 10%	0.6	1.8	0.6	1.8	6.7	0.6	1.2	8.5	2.4	3.0
20%	6.7	12.8	6.1	1.8	21.3	3.0	9.1	23.2	14.0	12.8
30%	18.9	28.7	14.6	9.1	44.5	11.0	18.9	29.9	28.7	24.4
40%	38.4	45.1	29.3	17.1	59.8	18.3	37.8	40.9	46.3	34.1
50%	51.2	54.9	43.9	35.4	73.8	26.2	52.4	54.3	56.1	48.2
50%	48.8	45.1	56.1	64.6	26.2	73.8	47.6	45.7	43.9	51.8
40%	38.4	36.0	43.3	50.6	11.0	61.0	29.3	34.8	32.9	36.6
30%	33.5	26.2	34.1	34.1	4.3	48.8	18.3	20.1	22.0	29.3
20%	18.3	18.9	21.3	19.5	1.2	30.5	6.7	12.2	13.4	19.5
Least deprived 10%	6.1	6.7	7.3	2.4	0.6	11.0	1.2	2.4	6.1	7.9

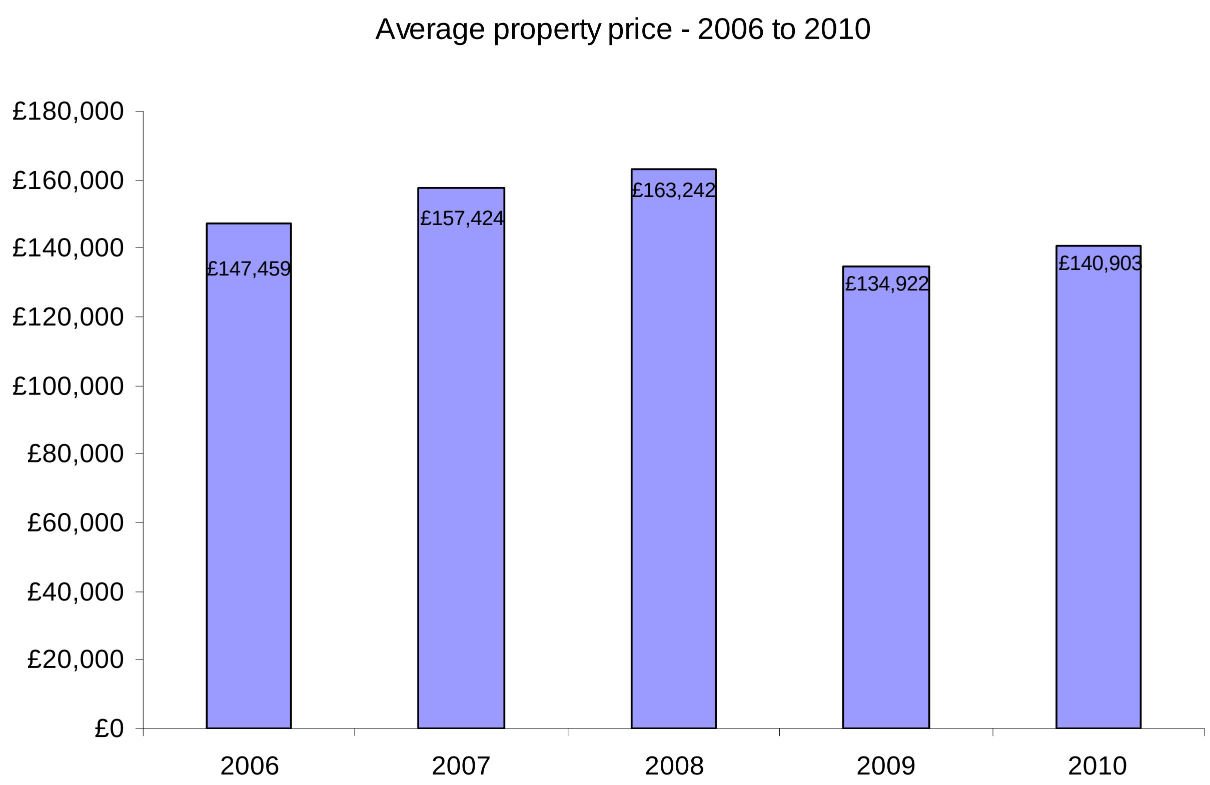
Property prices

Property prices in Medway are considerably lower than the national, regional and Kent level. While prices have either shown a small increase or remained constant since 2006, Medway has seen a small decrease in prices (-4.5%) standing at around £141,000 for all property types.

While property prices dropped significantly between in 2009 (-17%), prices picked up again in 2010 with a 4% increase.

Average property price in Medway 2006-2010

	Mar-06	Mar-07	Mar-08	Mar-09	Mar-10	2006-10 % change	2009-10 % change
Medway	£147,500	£157,400	£163,200	£134,900	£140,900	-4.5	+4.4
Kent	£182,900	£196,700	£207,500	£172,300	£183,700	+0.4	+6.6
South East	£200,800	£219,200	£227,900	£186,900	£208,700	+4.0	+11.6
England & Wales	£164,500	£178,900	£184,000	£153,100	£165,300	+0.5	+7.9

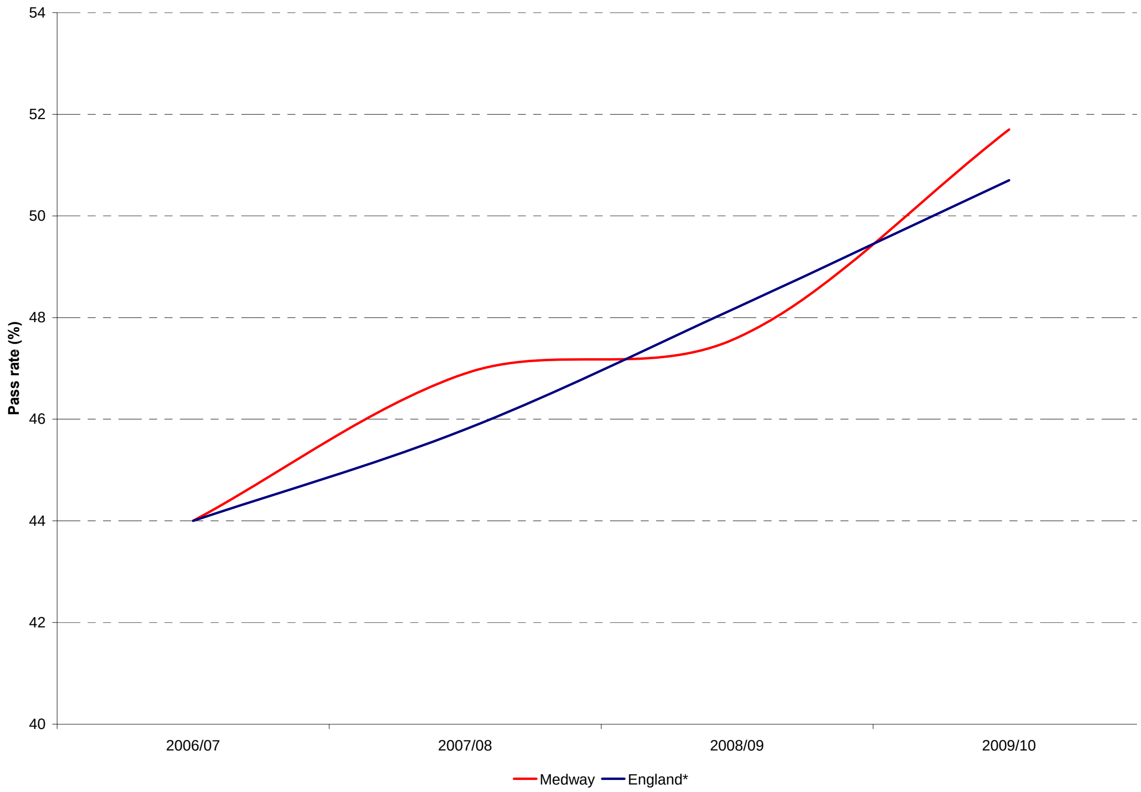


GCSE attainment

The GCSE attainment rate (A-C) in Medway rose significantly in 2009/10, exceeding the national level, having dipped below the national level in the previous year.

% of pupils at the end of Key Stage 4 achieving 5+A*-C (and equivalent) including English and maths GCSEs				
	2006/07	2007/08	2008/09	2009/10
Medway	44.0	46.9	47.6	51.7
England*	44.0	45.8	48.2	50.7

* maintained schools only



NVQ attainment –working age population

The number of residents in Medway qualified to NVQ 1,2,3 and 4 in Medway has increased since 2006, with the number of people having a degree level qualification (NVQ4) having increased by 15%.

The number of residents with no qualifications has increased since 2006 resulting in a rate above the national level in 2009.

Recent changes to the definition of the working-age population result in a lowering of the NVQ rates which can be misleading, masking improvements to qualification levels.

2006	**Medway**			**Kent**		**South East**		**Great Britain**	
Working age population with:	Number	Percent	Working age population	Number	Percent	Number	Percent	Number	Percent
NVQ4 and above	29,200	18.3	159,400	212,600	25.4	1,544,700	30.3	10,094,500	27.4
NVQ3 and above	66,900	42.0	159,400	383,800	45.9	2,619,700	51.4	17,629,300	47.9
NVQ2 and above	96,700	60.6	159,400	531,700	63.6	3,445,200	67.6	23,423,200	63.6
NVQ1 and above	128,100	80.4	159,400	668,800	80.0	4,197,100	82.4	28,550,600	77.6
Trade Apprenticeships	8,300	5.2	159,400	43,100	5.2	235,800	4.6	1,946,200	5.3
Other qualifications	11,800	7.4	159,400	62,300	7.4	396,000	7.8	3,154,600	8.6
No qualifications	19,500	12.2	159,400	105,400	12.6	501,600	9.8	5,100,600	13.9

2009	**Medway**			**Kent**		**South East**		**Great Britain**	
Working age population with:	Number	Percent	Working age population	Number	Percent	Number	Percent	Number	Percent
NVQ4 and above	33,600	20.1	167,600	252,000	28.6	1,744,700	32.6	11,546,600	29.9
NVQ3 and above	68,200	40.7	167,600	433,100	49.2	2,813,500	52.6	19,062,300	49.3
NVQ2 and above	98,800	59.0	167,600	589,000	66.9	3,692,700	69.0	25,266,400	65.4
NVQ1 and above	132,600	79.1	167,600	719,500	81.7	4,441,800	83.0	30,480,200	78.9
Trade Apprenticeships	6,600	3.9	167,600	28,900	3.3	204,400	3.8	1,542,200	4.0
Other qualifications	12,500	7.5	167,600	58,000	6.6	419,500	7.8	3,396,100	8.8
No qualifications	22,500	13.4	167,600	102,700	11.7	488,100	9.1	4,757,900	12.3

Standardised mortality ratio

The mortality rate in Medway has been falling every year up to 2008, which is a trend that is reflected nationally.

Medway mortality ratio							
2001	2002	2003	2004	2005	2006	2007	2008
723.2	707.2	710.0	658.3	658.5	671.1	620.6	621.7

England & Wales mortality ratio							
2001	2002	2003	2004	2005	2006	2007	2008
670.2	665.4	664.3	628.8	615.3	593.3	582.4	577.2

Directly age standarised mortality ratio - a comparison of the number of the observed deaths in a population with the number of expected deaths if the age-specific death rates were the same as a standard population
Compendium of Clinical and Health Indicators / Clinical and Health Outcomes Knowledge Base (www.nchod.nhs.uk) The NHS Information Centre for health and social care. © Crown Copyright.

Average life expectancy

Life expectancy is below the national level, however the trend shows an improvement up to 2007.

Medway life expectancy			
	2004-2006	2005-2007	2006-2008
Male	76.4	76.6	76.8
Female	80.8	81.0	81.2

England authority average – life expectancy			
	2004-2006	2005-2007	2006-2008
Male	77.3	77.7	77.9
Female	81.6	81.8	82.0

Early deaths

Deaths in Medway from 'heart disease and stroke' and cancer are above the national level, however 2007 shows a decrease on the previous year.

Medway early deaths			
	2004-2006	2005-2007	2006-2008
Heart disease and stroke	97.8	91.9	86.1
Cancer	123.1	125.8	124.7

England authority average – early deaths			
	2004-2006	2005-2007	2006-2008
Heart disease and stroke	84.2	79.1	74.8
Cancer	117.1	115.5	114.0

Directly age standardised rate per 100,000 population under 75

Teenage pregnancy

Medway has a teenage pregnancy rate above the national level, with the rate increasing in Medway up to 2007, at a time when the teenage pregnancy rate was falling nationally.

Medway – teenage pregnancy rate		
2004-2006	2005-2007	2006-2008*
43.8	46.4	46.3

England authority average – teenage pregnancy rate		
2004-2006	2005-2007	2006-2008*
41.1	41.2	40.9

Under-18 conception rate per 1000 females aged 15-17 (crude rate)
* provisional

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Appendix

Local indicators

Refused applications received in the year ending 31st March 2010

Almost three quarters of all planning refusals in 2009/10 are residential applications failing due to 'design & layout and development policy' issues.

Table 5, section 1 in volume 2, lists all the refusals that were monitored during the year.

Application Type	**Number of refused applications**	**Percentage of refusals**	**Main category for refusal**
B1-B8 (Industrial)	3	3%	Design & Layout, Development Policy and Amenity & Environment
Residential	77	72%	Design & layout and Development Policy
Mixed Use	4	4%	Transport and Infrastructure, Amenity & environment and Development Policy
Commercial Leisure & Other Commercial	15	14%	Design & layout and Development Policy
A1 (retail)	8	7%	Design & Layout and Development policy
Total	107	100	

Refused applications – 2007-2010			
2006/07	2007/08	2008/09	2009/10
-	182	164	107

Business Development

Progress on major sites during the year

- Chatham Maritime - The Chatham Quays development was completed. As well as the two iconic residential towers, the wharf buildings will provide retail and leisure uses.
- The Sherlock Homes movie was shown locally. Much of this blockbuster film was shot in the Chatham Dockyard.

- Historic Dockyard - The new national museum at Chatham Dockyard was completed in the summer 2010. The Chatham Historic Dockyard Trust, the National Maritime Museum, the Imperial War Museum and the Science Museum are jointly involved in the new complex.
- A specialist centre for creative industries in the Joiners Shop in the Dockyard celebrated a successful first year. It is home to 38 businesses, with only 6 units remaining unoccupied.

- Gillingham - The £86 million new home of Mid Kent College in Prince Arthur Road in Gillingham opened its doors to students in September 2009.
- The £7 million community park at the lower lines was opened to the public.
- Conversion of the former Council Offices at the Municipal Buildings in Gillingham began to create a large care home for 148 residents.
- Transformation of the old Black Lion sports centre to Medway Park was completed. £11.1 million was spent to create an eight-lane athletics track, new judo centre, changing rooms, gymnastics centre and new 12-court sports hall, plus refurbishment of the existing swimming pool and redecoration of the reception area and restaurant. There is also a state of the art sport science and therapy centre used by students from the University of Kent at Medway.

- Chatham – The redevelopment of the old Churchlands care home began. The new buildings when completed will accommodate112 bedrooms for people with dementia.
- Fort Amherst is set to receive a £50,000 grant from the Heritage Lottery Fund to carry out major improvements to the historic tunnels – to be completed in 2012.

- Strood – Work started on the new extension to the Frindsbury House care home. The £2 million project will create 13 bedrooms, all with en suite facilities. It was due to open in spring 2010.
- The Aveling and Porter building in Strood was demolished.
- Construction began on the 121 bed hotel at Medway Valley Park.

- Peninsula - Proposals by EON for a new coal fired power station at Kingsnorth led to Greenpeace joining protesters on the 4th July.
- EON began to formulate plans for a pipeline, which could form part of a carbon capture storage facility associated with the proposed replacement power station at Kingsnorth.
- The Council raised no objection no objection to Scottish Power's proposal for a gas fired power station to be built at Damhead Creek, Kingsnorth. A final decision rests with the Government.

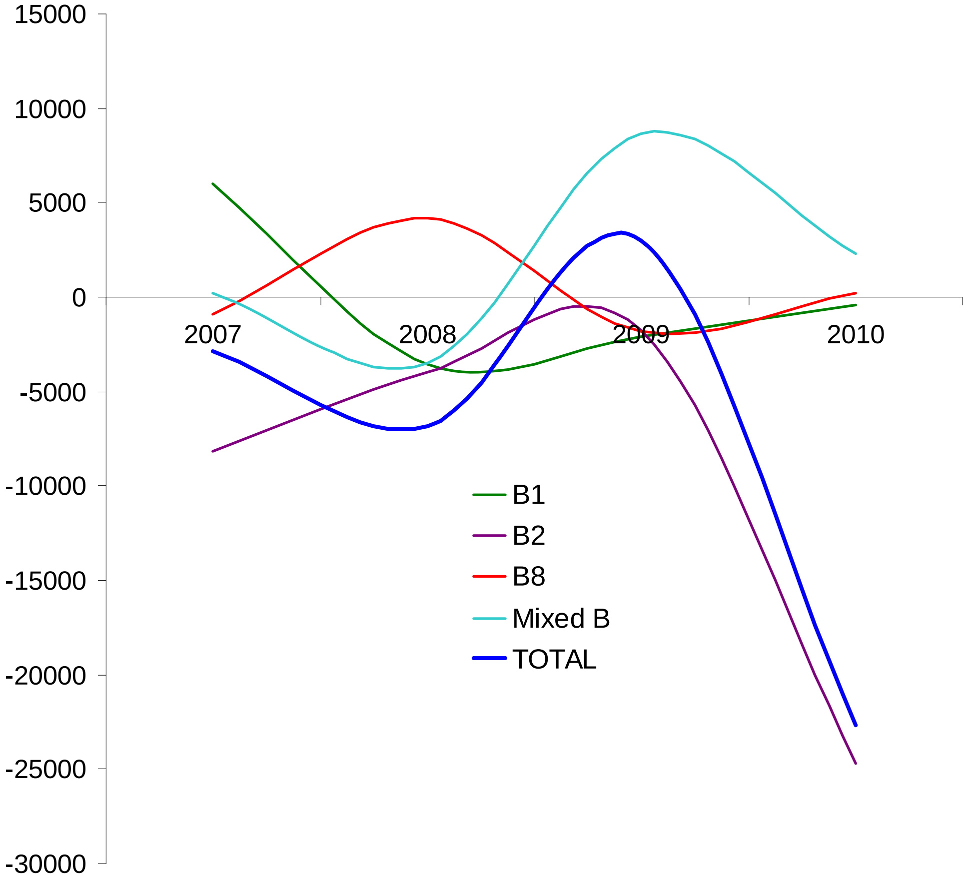
- £15 million was to be spent on improvements to the A228, including a new roundabout at Fenn Corner and a bridge to replace the level crossing at Stoke.
- A new Business Park for Grain was given outline approval for over 464,500m² of port related industrial warehousing and storage, with potential for an estimated 6,000 jobs.

- Rochester - Phase 2 of the Medway Innovation Centre at Rochester Airport opened.
- Mid Kent College opened a site in Gas House Road, Rochester to provide skills training for jobseekers.
- Tourism continued to flourish in Medway with 2009 seeing record numbers of visitors at its 2 leading attractions, Rochester Cathedral and the Historic Dockyard Chatham.
- Halling – Hydrocks Remediation Contracting arm won a major contract with CEMEX to decommission and demolish the former_cement Works at Halling This began in March 2010.

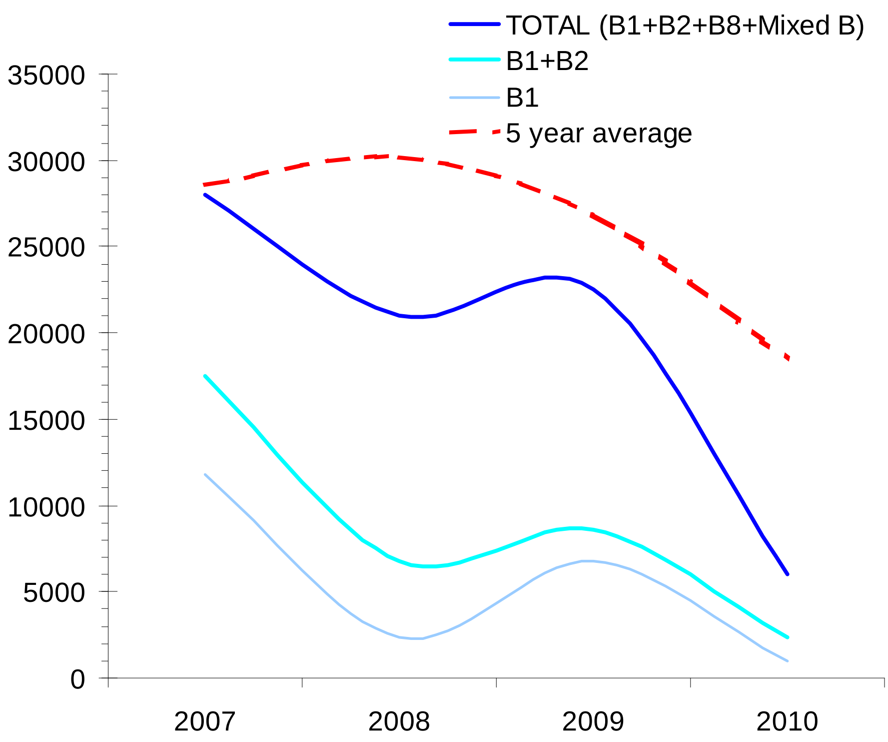
Employment summary statistics; planning consents valid 1 April 2009 to 31 March 2010 (sq.m.)

	B1 (sq.m.)	B2 (sq.m.)	B8 (sq.m.)	Mixed B (sq.m.)
Completions				
Development completed in survey year period	957	1435	1331	2268
Lost due to redevelopment/reconstruction	-1358	-26136	-1147	0
	-401	-24701	184	2268
Commitments				
Not started	54878	130619	589838	22488
Under construction	7748	6140	5418	14477
	(62626)	(136759)	(595256)	(36965)
Potential losses	-17660	-11104	-5522	0
	44966	125655	589734	36965

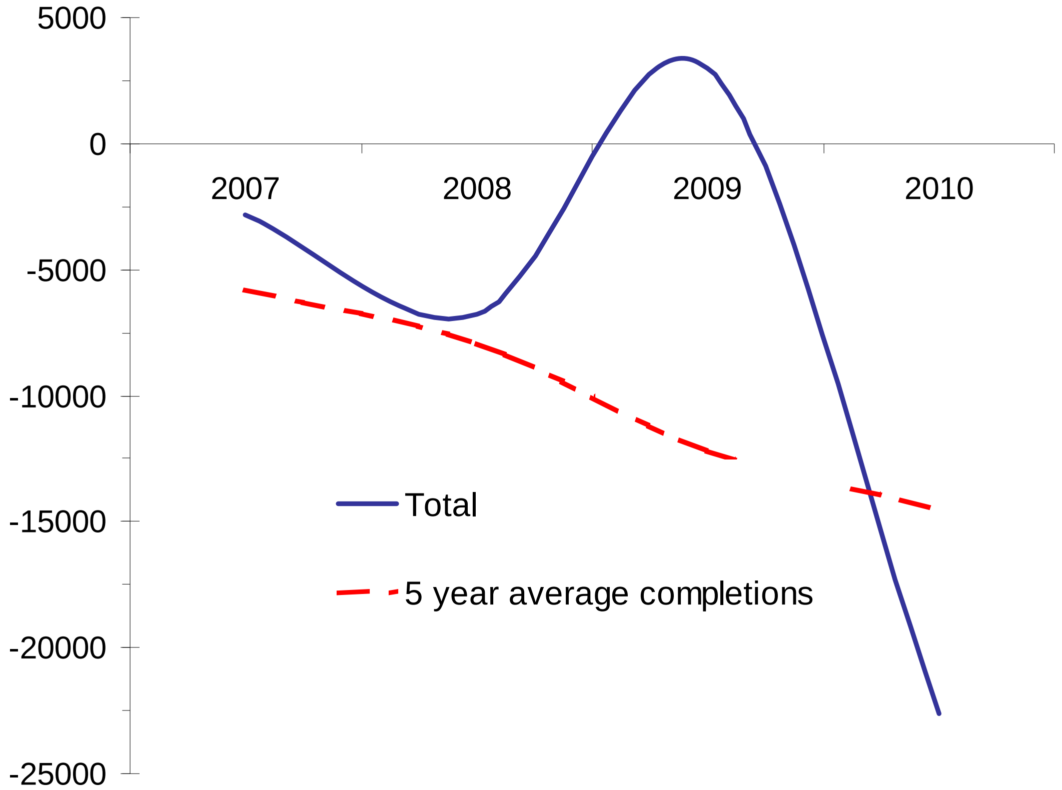
Net Completions, 2006/07 – 2009/10 (sq.m)



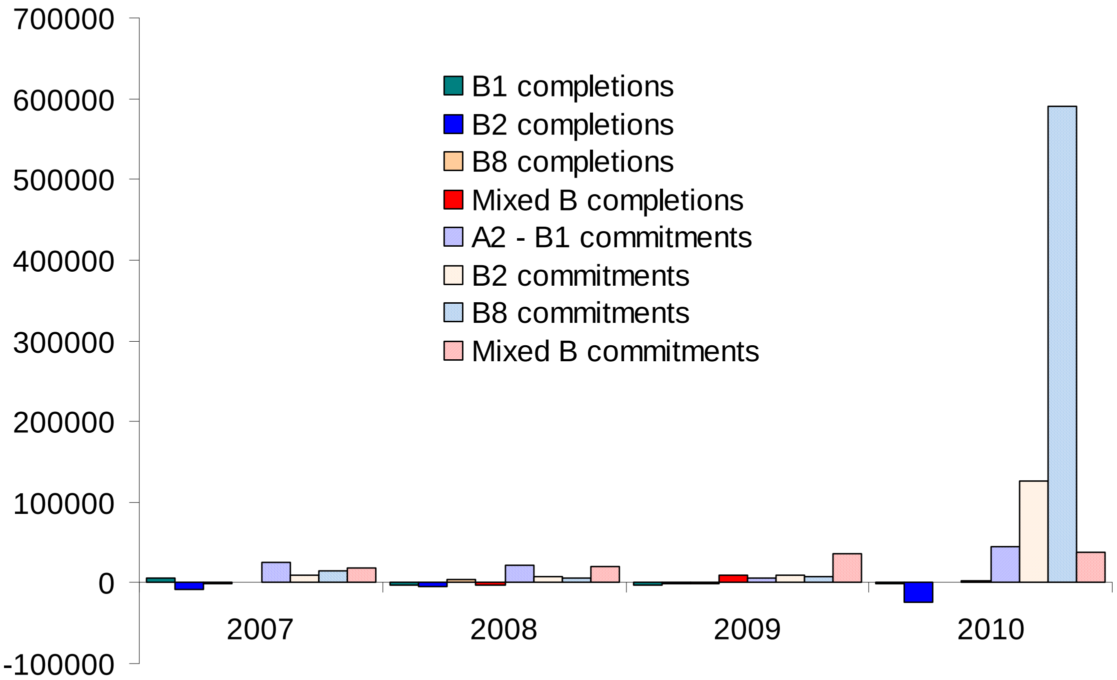
Gross Completions, 2006/07 – 2009/10 (sq.m)



Net Completions (B1, B2, B8 and Mixed B) 2006/07 –2009/10 with 5 year average (sq.m)



Net commitments and completions 2006/07 – 2009/10 (sq.m)



Industrial Estates and Business Parks

Within Medway most industrial activities/businesses are to be found within the following estates. Further employment and retail uses are planned within various development briefs and areas where there are policy commitments (these are detailed in volume 2).

Site Name	Ward	Extent of site in hectares	Local Plan Designation
2-10 Cuxton Road, Strood	Strood South	0.32 ha	White land, ED3, T15
Ballard Business Park, Strood	Strood South	1.67 ha	Employment land ED1
Beechings Way Industrial Estate	Twydall	9.22 ha	Employment land ED1 (B1/B2/B8 uses; loss to other uses will not be permitted – excluding mixed use areas).
Bridgewood Business Park, Rochester	Rochester	3.74 ha	Employment land ED1 (B1/B2/B8 uses)
Castle View, Rochester	River	0.71 ha	Part of Action Area – mixed use: ED2 (B1/B2 uses) S7, ED12, D13, R9, CF6, L13, H1, H3
Chatham Maritime, Chatham	River	58.02 ha	Mixed use zone ED2 (B1(a)), S8, ED12, ED13, BNE12, CF3, CF6, CF7, L11, L13, H1
Historic Dockyard, Chatham	River	26.37 ha	ED12 (Tourist attractions & facilities), S9, BNE12, BNE20, CF7, L11
Chatham Port, Chatham/Gillingham	River	55.36 ha	Employment land ED1 (B1/B2 uses), ED9, T7
Commercial Road, Strood	Strood South	1.12 ha	Part of Action Area ED2 (B1/B2/B8) S10, H1, H3, T15
Courteney Road, Gillingham	Rainham Central	22.09 ha	Employment land ED1 (B1/B2 uses)
Cuxton Industrial Estate, Cuxton	Cuxton & Halling	0.9 ha	White land within tidal flood plain ED3, CF13, BNE31
Elm Court Industrial Estate, Gillingham	Lordswood & Capstone	3.53 ha	Employment Land ED3 (B1 uses), ED4
Fenn Street Industrial Estate, Hoo		1.78 ha	Employment land ED3 (B1 uses).
Formby Road, Halling	Cuxton & Halling	28.7 ha	Employment land, part of the site within the tidal flood plain. ED1 (B1/B2/B8 uses), CF13, T10, BNE36
Fort Horsted	Rochester South & Horsted	5.43 ha	Scheduled Ancient Monument ED3 (B1 uses), BNE20
Gads Hill, Gillingham	Gillingham North	3.8 ha	Employment land ED1 (B1/B2/B8 uses)
Gillingham Business Park, Gillingham	Watling	56.18 ha	Employment land ED1 (B1/B2/B8 uses), ED5 (B1 uses) for undeveloped Health Authority Land.

Hoo Industrial Estate, Hoo	Peninsula	7.5 ha	Employment land within the tidal flood plain. ED1 (B1 use), CF13, BNE46
Hopewell Drive, Chatham	Princes Park	3.83 ha	Employment land ED1 (B1/B2/B8 uses) however reasoned justification states, to safeguard residential amenity only B1 uses will be permitted.
Isle of Grain	Peninsula	595.52 ha	Employment land, most of the site within the tidal flood plain. ED1 (B1/B2/B8 uses - B1 development restricted to B1 (c)), S13, ED5 (B1/B2/B8 uses - B1 development restricted to B1(c)), ED7, ED8, CF13, T10, BNE2, BNE3, BNE23, BNE24, BNE46, L3
Kingsnorth Industrial Estate, Hoo	Peninsula	243.7 ha	Employment land within the tidal flood plain and Strategy Area. ED1 (B1/B2/B8 uses - B1 development restricted to B1 (c) except where the development makes provision for increased accessibility by means other than the private car), S12 (as ED1), ED5 (as ED1), ED7, ED8, CF13, T10, BNE2, BNE3, BNE23, BNE24, BNE46
Lordswood Industrial Estate, Chatham	Lordswood & Capstone	8.76 ha	Employment land ED1 (B1/B2/B8 uses)
Lower Twydall Lane, Gillingham	Twydall	0.48 ha	Employment land ED1 (B1 use)
Medway City Estate, Frindsbury	Strood Rural	99.02 ha	Employment land ED1 (B1/B2/B8 uses), T10, R10
Otterham Quay Lane, Rainham	Rainham North	4.46 ha	White land within tidal flood plain ED3, CF13, BNE45
Otterham Quay Lane, Canterbury Lane, Rainham	Rainham North	1.68 ha	Employment land ED1 (B1/B2 uses), ED5
Pier Road, Gillingham	Gillingham North	12.67 ha	Employment land ED1 (B1/B2/B8 uses), ED9, T7
Railway Street Industrial Estate, Gillingham	Gillingham North	1.46 ha	Employment land ED1 (B1/B2/B8 uses), however the reasoned justification only refers to B1.
Rochester Airfield Estate, Rochester	Rochester South & Horsted	18.61 ha	Employment land but part also of Action Area ED1 (B1/B2/B8 uses), S11 (high quality business, science technology development B1/B2/B8
Second Avenue, Chatham	Luton & Wayfield	5.31 ha	Employment land ED1 (B1 use)
Temple Industrial Estate, Strood	Strood South	37.18 ha	Part of an Action Area ED2 (B1/B2/B8 uses), S10 (appropriate B1/B2/B8 uses), H1, H3, BNE20.
Jenkins Dale, Chatham	Chatham Central	1.09 ha	White land ED3

Medway Valley Park Industrial Estate, Strood	Strood South	5.72 ha	Part of an Action Area ED2 (B1/B2/B8 uses), S10 (appropriate B1/B2/B8 uses), H1, H3, BNE20.
Thameside Industrial Estate, Cliffe	Strood Rural	9.8 ha	ALLI within the tidal flood plain BNE34, CF13

Employment land completed by previously developed land (sq.m)						
	B1 gross	**B2 gross**	**B8 gross**	**Mixed B**	**Total**	**Total %**
Non PDL	58	0	**0**	0	**58**	**1.0**
PDL	899	1435	1331	2268	**5933**	**99.0**
Total	**957**	**1435**	**1331**	**2268**	**5991**	**-**

Floor space supply

While there has been an overall loss of floor space since 2006 there is considerable floor space coming forward, with 125,655 sq.m of B2 floor space now committed, along with a further 589,734 sq.m of B8 floor space. The bulk of these commitments come from applications approved for Kingsnorth Industrial Estate and a new business park on the National Grid land at Grain resulting in the largest amount of floor space with planning permission since the beginning of the plan period.

Total Floor space supply 2007-2010					
	B1	**B2**	**B8**	Mixed B	**Total**
Completed floor space 2007 - 2010	-1139	-45395	-33594	7594	-72534
Floor space with planning permission as at 31/3/2010	44966	125655	589734	36965	797320
Floor space with planning permission as at 31/3/2010 (percentage)	5.6%	15.8%	74.0%	4.6%	-
Total supply (sq.m)	**43827**	**80260**	**556140**	**44559**	**724786**

Floor space (sq.m) with planning permission 2007-2010			
2006/07	**2007/08**	**2008/09**	**2009/10**
68,703	55,050	58,792	797,320

Land lost to residential development by use class (hectares)

The amount of employment land used for residential use has been dropping since 2007, just 0.16 hectares of land was transferred to residential use in 2009/10.

Use class lost 2009-2010	District Total on PDL
B1	0.06
B2	0.10
B8	0
Mixed B	0
Total	**0.16**

Total land lost to residential development (hectares) 2007 to 2010			
2006/07	2007/08	2008/09	2009/10
0.58	0.50	0.38	0.16

Housing

Progress on major sites at 31st March 2010

- Medway Gate Strood - Progress on this site was good, with phase 2 ialmost completed.

- Grange Farm Gillingham – Construction of the remaining 6 units was well under way, the site should be fully developed by summer 2010.

- Chattenden Land Securities, the delivery partner for the MOD land at Lodge Hill is having regular meetings with the Council, to ensure that the best scheme can be drawn up for the area. Approximately 5,000 new homes will be provided at this site.

- Hoo - George Wimpey and Bellway Homes continued to deliver on this site with over half of the dwellings completed.

- Chatham Maritime - At St Mary's Island there were no completions or sites under construction at the time of survey, however, Kickstart money was earmarked for part of the development and a first phase was expected to be completed at the end of the year.
- At Chatham Quays the development of the two towers was completed.

- Wainscott - Crest Nicholson, the developers of Liberty Park were on course to complete phase 1 by the end of 2010.

- Pier Road Gillingham - Student accommodation at the front of this site was completed, along with a few shops. Work began on a first phase of the associated residential development.
- The exclusive development of 24, three and four bedroom apartments (The Hamptons) being built on the adjoining site at Gillingham Marina should be finished August/September 2010.

- Rochester Riverside - A planning application was expected for the first phase of dwellings on this strategic site.

- Formby Road Halling – Site clearance began on this large site.

- Howlands Nursery Site, Gillingham – A longstanding Local Plan Allocation, was granted consent in 2008 for 60 dwellings and work commenced at the end of the monitoring year.

Small site completions

The 5-year average of housing completions on small sites was 118 per annum.

Small site completions 2007-2010				
	2006/7	2007/8	2008/9	2009/10
Completions	144	122	111	88
Proportion of all completions	24.4%	16.0%	12.1%	9.1%

Windfall completions

The average completion rate on previously developed land windfall sites fluctuates between years, however the five-year average was 193 per annum.

Windfall completions 2007-2010				
	2006/7	**2007/8**	**2008/9**	**2009/10**
Greenfield	8	124	216	145
PDL	232	113	183	200
Percent windfall on PDL	96.6	47.6	45.9	57.9
Total windfall completions	**240**	**237**	**399**	**345**
Percent of total completions	**40.6%**	**31.1%**	**43.7%**	**35.4%**

Residential land availability summary at 31st March 2010												
	Gains				Losses				Net			
	N/S	**U/C**	**C/P**	**Total**	**N/S**	**U/C**	**C/P**	**Total**	**N/S**	**U/C**	**C/P**	**Total**
Large sites												
Permissions	6711	515	3058	**10284**	30	22	21	**73**	6681	493	3037	**10211**
Allocations	422	0	0	**422**	0	0	0	**0**	422	0	0	**422**
TOTAL	7133	515	3058	**10706**	30	22	21	**73**	7103	493	3037	**10633**
Small sites												
Permissions	276	107	146	**529**	43	15	50	**108**	233	92	96	**421**
TOTAL	**7409**	**622**	**3204**	**11235**	**73**	**37**	**71**	**181**	**7336**	**585**	**3133**	**11054**

Medway Council's 5 year Land Supply Assessment 2010 and Housing Trajectory to 2026

The table below includes a pipeline projection, which is derived from sites in the Strategic Land Availability Assessment.

To avoid double counting all sites with permission either not stared or under construction appear separately, these are further split into large and small applications. The existing Local Plan Allocations are also shown on a separate line.

Year	**06/ 07**	**07/ 08**	**08/ 09**	**09/ 10**	**10/ 11**	**11/ 12**	**12/ 13**	**13/ 14**	**14/ 15**	**1-5 yrs**	**5-10 yrs**	**10-15 yrs**	**15-20+ yrs**
Actual comps (all)	**591**	**761**	**914**	**972**	-	-	-	-	-	-	-	-	-
Large site apps	-	-	-	-	449	576	505	748	830	**3108**	**2713**	**1274**	**80**
Small site apps	-	-	-	-	96	29	71	77	56	**329**	**-**	**-**	**-**
MLP Allocation	-	-	-	-	0	0	0	54	0	**54**	**160**	**133**	**75**
SLAA pipeline sites*	-	-	-		46	29	56	513	463	**1107**	**3554**	**2915**	**1584**
TOTAL					**591**	**634**	**632**	**1392**	**1349**	**4598**	**6427**	**4322**	**1739**

Phasing over the next 15 years (commitments on allocations, large and small sites)*			
5 year period	**0-5 years**	**5-10 years**	**10-15 years**
No of dwellings	3491	2873	1407

*figures in this table are lower than those in the SHLAA which includes all sites irrespective of planning permissions.

Dwellings (%) with planning permission under construction and not started on previously developed land and greenfield sites 2007- 2010								
	2006/7		2007/8		2008/9		**2009/10**	
	PDL	Greenfield	PDL	Greenfield	PDL	Greenfield	**PDL**	**Greenfield**
Under construction	-	-	65%	35%	77%	23%	**71%**	**29%**
Not Started	-	-	83%	17%	94%	6%	**89%**	**11%**
All new dwellings	91%	9%	80%	20%	92%	8%	**87%**	**13%**

Dwellings completed by density

The table below illustrates that 98% of completed developments in 2009/10 exceeded the national minimum requirement of 30 units per hectare.

This can be attributed to the many urban sites suited to higher densities.

The proportion of developments exceeding 30 units per hectare has increased ever year since 2007.

The average net density of full permissions by ward is shown in appendix 2, section 2.

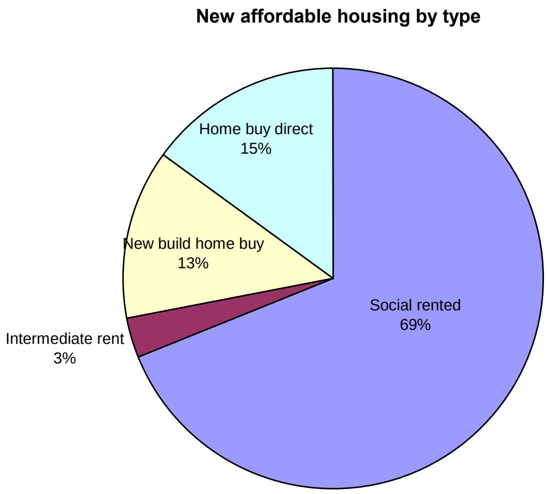
Dwellings completed by density – 2007 to 2010				
Dwellings per hectare (dph)	**2006/7**	**2007/8**	**2008/9**	**2009/10**
<30	9%	4%	4%	2%
30 - 50	21%	34%	24%	22%
>50	69%	62%	72%	76%
% >30	***90%***	***96%***	***96%***	***98%***

Affordable new housing splits by type and number of bedrooms

A more thorough picture of affordable housing is obtained by using data supplied by the Councils Housing Strategy Team rather than relying on the information supplied with planning applications.

The tenure can be split into 213 (69%) social rented, 9 (3%) intermediate rent, 41 (13%) New Build Home Buy and 46 (15%) Home Buy Direct.

Affordable new housing split by type and number of bedrooms						
	Not Specified	1 bed	2 bed	3 bed	4 bed	Total
Houses	0	4	52	70	18	**144**
Flats/Maisonettes	7	82	69	7	0	**165**
Total	**7**	**86**	**121**	**77**	**18**	**309**



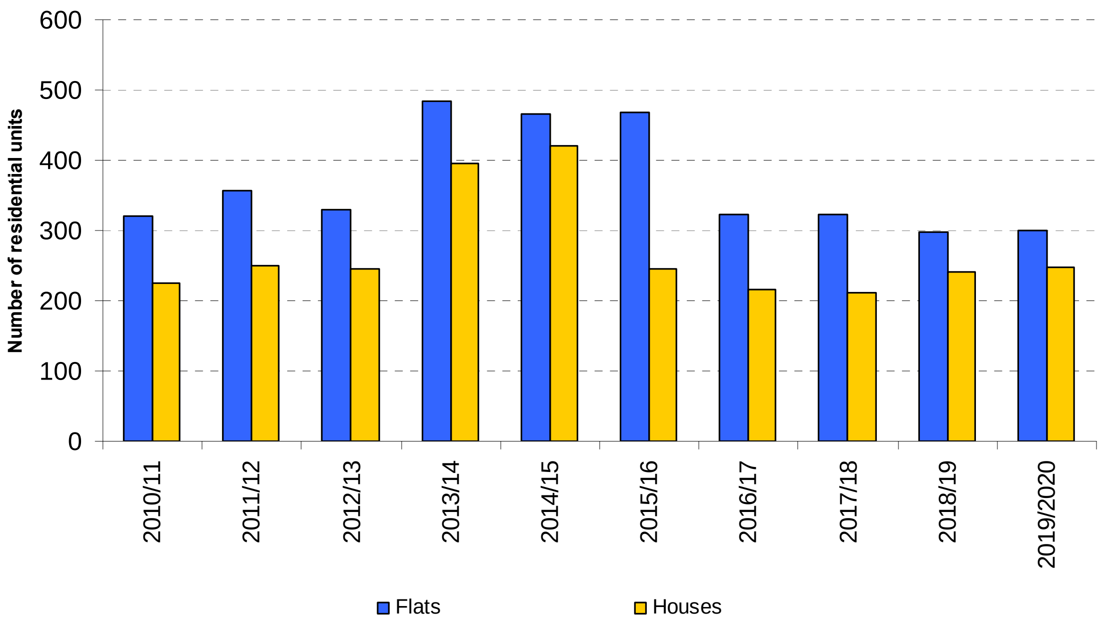
Projected build rates by property type

The projection shows a relatively high proportion of development in Medway will be flats but the current stock is lower than both the national and regional averages.

Projected build rates by type to 2018/19

Dwelling	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Flats with planning permission	321	356	330	456	465	451	321	322	268	268
Estimated allocated flats	0	0	0	27	0	17	2	0	29	32
Total flats	**321**	**356**	**330**	**483**	**465**	**468**	**323**	**322**	**297**	**300**
Houses with planning permission	224	249	246	369	421	229	214	212	212	216
Estimated allocated houses	0	0	0	27	0	17	3	0	28	32
Total houses	**224**	**249**	**246**	**396**	**421**	**246**	**217**	**212**	**240**	**248**
TOTAL	**545**	**605**	**576**	**879**	**886**	**714**	**540**	**534**	**537**	**548**

Projected build rates by property type



The table below shows the amount of building activity in each ward (expressed as a percentage). River shows the most significant amount of development during the last year, while Hempstead & Wigmore and Rainham South have had consistently fewest new dwellings over the last 4 years.

Ward	2006/7	2007/8	2008/9	2009/10
Chatham Central	4.9	2.0	2.7	2.3
Cuxton and Halling	0.8	1.3	1.8	0.3
Gillingham North	6.3	23.8	19.6	7.3
Gillingham South	24	2.2	3.3	0.8
Hempstead and Wigmore	0.2	1.7	0.2	0.2
Lordswood and Capstone	-0.3	0.3	0.4	2.2
Luton and Wayfield	2.5	2.5	1.2	0.7
Peninsula	2.2	17.3	11.9	16
Princes Park	2.7	0.5	0	0.5
Rainham Central	7.3	1.3	0.5	0.4
Rainham North	4.7	1.1	0.2	0.3
Rainham South	0.2	0	0.1	0.1
River	15.1	0.9*	24.2	38
Rochester East	-1.0	8.0	15.4	1.3
Rochester South and Horsted	0.5	0.9	1.2	2.5
Rochester West	2.7	2.9	0.4	0.2
Strood North	11.5	2.0	0.4	6.1
Strood Rural	5.2	12.5	5.5	6.6
Strood South	0.2	13.7	10.3	11.1
Twydall	0.2	0.9	0	2.5
Walderslade	2.9	3.9	0.3	0
Watling	7.3	0.3	0.2	0.6

Completions (gross) on large sites by property type and number of bedrooms

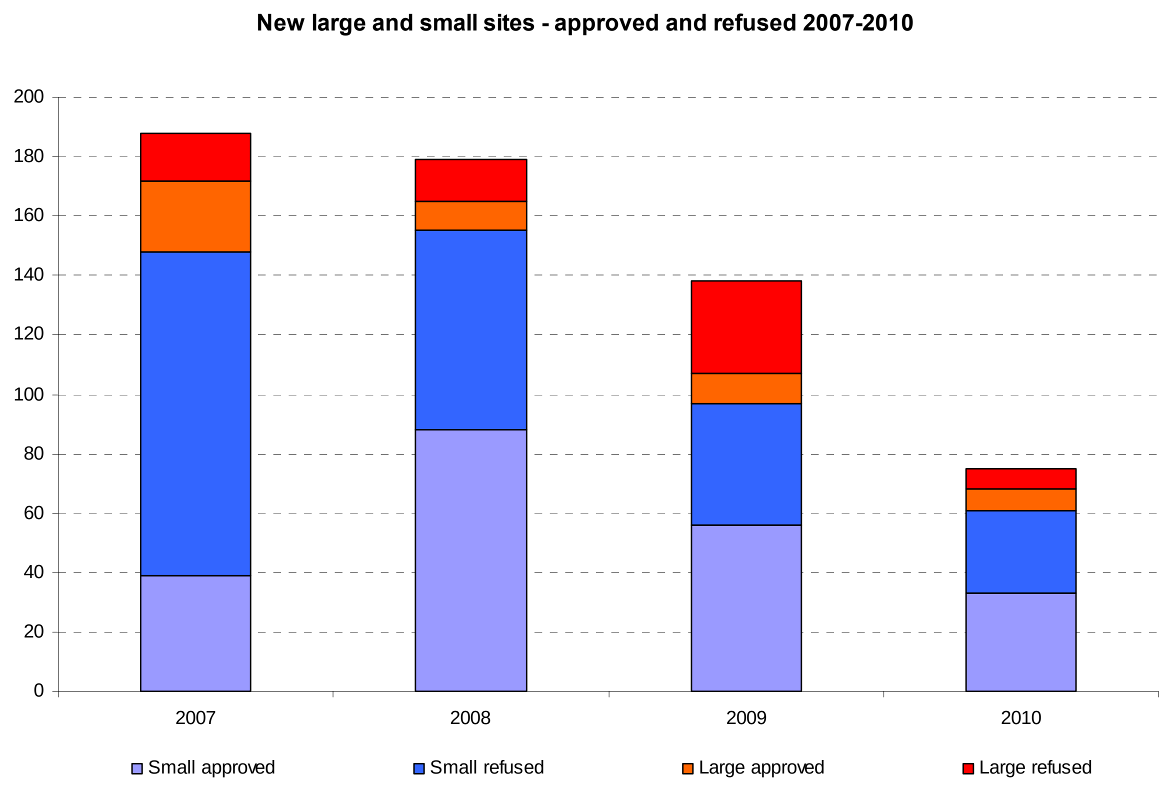
For large sites built out in the year 2009/10 the breakdown of houses and flats by number of bedrooms is shown in the table below. As can be seen, the majority of completed dwellings were one and two bedroom flats, although over half of these (334) are on just one development.

Completions (gross) on large sites by property type and number of bedrooms 2009/10		
Number of bedrooms	**Houses**	**Flats**
One	4	290
Two	8	275
Three	51	3
Four or more	29	0
Total	**92**	**568**
Total % split	**14%**	**86%**

New large and small sites proposed 2007 – 2010, split by approval/refusals

The number of new applications received during the year was significantly down on previous years, due to the current economic climate. Just over 50% of all new applications were approved.

	Total new sites	**Small sites**			**Large sites**		
		No of sites	**Approved (%)**	**Refused (%)**	**No of sites**	**Approved (%)**	**Refused (%)**
2006/07	188	148	26%	74%	40	60%	40%
2007/08	179	155	57%	43%	24	42%	58%
2008/09	138	97	58%	42%	41	24%	76%
2009/10	75	61	54%	46%	14	50%	50%


New large and small sites - approved and refused 2007-2010
200
180
160
140
120
100
80
60
40
20
0
2007
2008
2009
2010
Small approved
Small refused
Large approved
Large refused

Retail

Progress on major sites during the year and other significant developments:

- Christmas trade exceeded expectations in Medway.
- A former Trinity House lightship was to be transformed into a floating cultural venue, it will include exhibition facilities and purpose built workspace for local artists and be moored at Gillingham Pier.

Chatham

- The demolition of the Sir John Hawkins flyover began.
- A £6 million new bus station was given planning consent, it will be located at the junction of Globe Lane and Dock Road
- Primark extended into the former Woolworth store in Chatham High Street.
- Specs Factory opened a new shop in Military Road
- 35 and 49 High Street Chatham were given a £1.6 million facelift.
- Jobs at Ethel Austin fashion retailer in Chatham were at risk after the firm went into administration.

Chatham Maritime

- A number of new shops opened at the Dockside Outlet including The Range, Denby, Home Curtains and Bedding, Books to Go, Brand Fusion, Honda, Trespass and RS Bathrooms, Slinders and Rectella.

Strood

- Iceland supermarket moved into the old Woolworths store in Strood High Street, creating 31 jobs.

Rainham

- The Old Cherry Orchard public house in Parkwood was transformed into an Indian Restaurant – Spice Fusion.

Gillingham

- The Berkeley Group let 3 shops at Victory Pier, Gillingham to Tesco, Subway and Dominos Pizza. The first phase of this development, which includes student accommodation was completed
- The former Woolworth stores have new occupiers. The branch in Twydall Green is now Twydall Discount Store. The Gillingham site now a 99p Store.

Rochester

- Fagins café in Rochester was converted into a Pizza Express, which opened at the end of the March 2010.

Retail summary statistics A1 - A5 summary statistics; planning consents valid 1 April 2009 to 31 March 2010

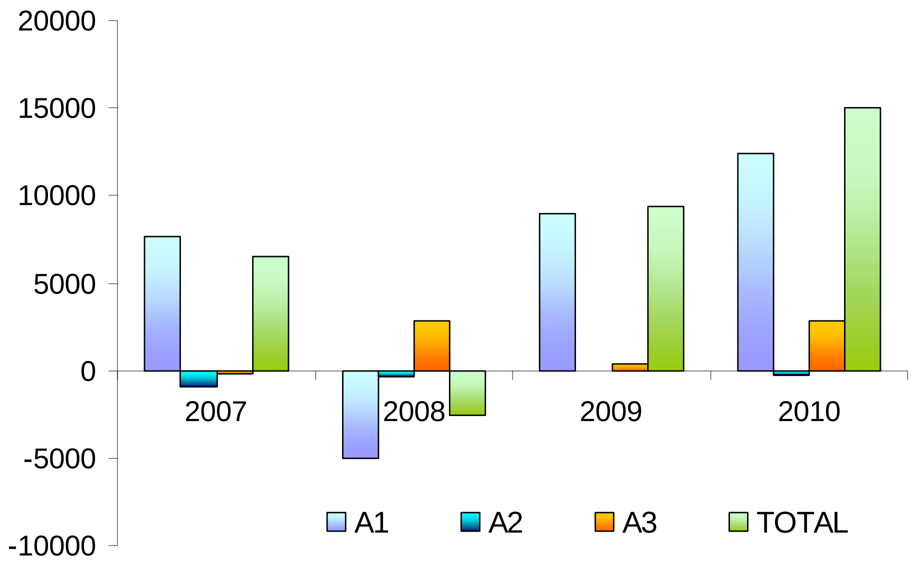
Net completions of A1 continued to rise in 2009/2010. Much of this was due to completions of various units at the Dockside Outlet Centre including the new 2 floor store 'The Range', JJB Sports in the Pentagon and unit conversions at Gillingham Business Park.

2009/2010 was another productive year for A3, including a new restaurant unit at J5/J6.

Retail summary statistics 2009/10

	A1 (sq.m.)	*A2 (sq.m.)*	*A3 (sq.m.)*	*A4 (sq.m.)*	*A5 (sq.m.)*
Completions					
Development completed in survey period	14101	346	3148	0	118
Lost due to redevelopment/reconstruction	-1682	-581	-353	-1255	-56
Net Completions	**12419**	**-235**	**2795**	**-1255**	**62**
Commitments					
Not started	29227	2254	3605	2072	2657
Under construction	1566	0	2093	0	158
	(30793)	**(2254)**	**(5698)**	**(2072)**	**(2815)**
Potential losses	-6061	-1504	-121	-941	0
Net Commitments	**24732**	**750**	**5577**	**1131**	**2815**

Net completions A1 to A3 2006/07 – 2009/10 (sq.m)



Other commercial and leisure summary statistics: planning consents valid 1 April 2009 to 31 March 2010					
	C1 (beds)	C2 (beds)	D1 (sq.m.)	D2 (sq.m.)	SG (sq.m.)
Completions					
Development completed in survey period	0	30	33018	5574	17520
Lost due to redevelopment/reconstruction	0	0	-14576	-261	-594
Net Completions	**0**	**30**	**18442**	**5313**	**16926**
Commitments					
Not started	757	258	30380	1596	4069
Under construction	138	260	9337	119	470
	(895)	**(518)**	**(39717)**	**(1715)**	**(4539)**
Potential losses	-15	-38	-25034	-1505	-1071
Net Commitments	**880**	**480**	**14683**	**210**	**3468**

Proportion of gross completions in town centres 1 April 2009 to 31 March 2010 by use class	
A1	17%
A2	84%
A3	9%
A4	N/A*
A5	0%
D1	1%
D2	0%

** No A4 was completed either in or outside the town centres*

Town centre activity

The biggest gain was in the A1 category. A new store was formed resulting from redevelopment within the Pentagon Centre. The losses shown are not of any great concern as the majority are just switching to other acceptable town centre uses. There is however the loss of a public house to residential accommodation. The D1 loss is a clinic, which is currently being replaced by a larger healthy living centre, this should be completed next year.

Town centre development – 2009/10

Use	Losses (sq.m)	Gains (sq.m)	Net change (sq.m)
A1	822	2394	1572
A2	311	291	-20
A3	95	287	192
A4	370	0	-370
A5	56	0	-56
D1	568	453	-115
D2	0	0	0
Total	**2222**	**3425**	**1203**

Use Classes
Classes of land and building use as categorised by the Town and Country Planning (Use Classes) Order 1987 as amended. The various classes and categories appropriate to that class are as follows:

A1 Shops for the sale, display or provision of goods and services (except hot food) to visiting members of the public - includes hairdresser, funeral director, post office, dress or DIY hire shop, ticket and travel agency, internet cafe, sandwich bar, dry cleaner and pet shop.

A2 Financial or professional services (other than health or medical services) - includes betting shop, building society office, estate agent and bank.

A3 Restaurant and cafe.

A4 Drinking establishment – includes public house and wine bar.

A5 Hot food takeaway

B1 Business - includes office (a), research and development premise (b) and light industry which can be carried out in a residential area (c).

B2 General industry - any industrial use not covered by B1.

B8 Storage and distribution – includes wholesale warehouse (but not retail warehousing), distribution centre and repository.

C1 Hotel – includes boarding house and guesthouse.

C2 Residential institution – includes residential school and college and training centre, hospital and convalescent/nursing home.

C2a Secure residential accommodation – includes prison, young offenders institution, detention centre, custody centre, secure hospital and military barracks

C3 Dwelling house, communal housing of the elderly and handicapped.

D1 Non-residential institution - includes place of worship, law court, church hall, clinic, health centre, crèche, day nursery, consulting room, museum, public hall, library, art gallery, exhibition hall, non-residential education and training centre.

D2 Assembly and leisure –includes cinema, music and concert hall, dance hall, bingo hall, sports hall, swimming bath, skating rink, gymnasium and other indoor and outdoor sport or recreation.

Sui Generis (SG) Uses not falling within any of the above classes - includes theatre, night club, casino, sale of motor vehicles, sale of motor fuel, taxi service, launderette, hostel, live/work unit and motor sport or firearm activities.