Boughton and Dunkirk Neighbourhood Development Plan

Business Monitor

Survey Findings Report

For Jeff Tutt, Chairman Boughton and Dunkirk Neighbourhood Plan

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The Boughton and Dunkirk Business Monitor was developed with the involvement of the committee, which has been preparing the Neighbourhood Development Plan. It was managed on a voluntary basis by Jonathan Harris, with oversight and input from Jeff Tutt, Terry Fitchett and all other members of the team.

Previous surveys of households from the local community had been conducted purely on a paper response based format. These had secured good levels of responses, above average compared to the other areas, also developing a Neighbourhood Plan across the country. The group decided that it would be consistent with most businesses means of operation to make the business monitor available in an electronic format, on-line too. An on-line survey, which would enable respondents to click, rather than tick was created. The idea was to make it as quick as possible for company owners and directors to respond, taking no more than ten minutes to complete. This objective was achieved, based upon the responses received on-line. Publishing the survey on the Internet meant that any company that for whatever reason did not receive a paper version or a link to the survey, but heard about it still had the option to go on-line and complete it. Nevertheless, it was also clear that some companies do not use information technology very much, or in some cases even at all and so a traditional paper-based version was also created for distribution by hand.

The survey questions, were based upon the usual format for that which Swale Borough Council uses on a regular basis to consult and engage with business. A quick review of advice and recommendations of good practice for undertaking these surveys on local development from relevant professional and academic organisations was also undertaken. It was adapted slightly to make it shorter and easier for local companies to respond, by omitting certain questions not deemed relevant to the aims of the “Business Monitor” for the Neighbourhood Plan. It was also adjusted slightly to take into account the particular needs of the Neighbourhood Plan; a function which is not performed by Swale Borough Council’s version. A specific question on companies’ aspirations, or suggestions for improvement to be included in the local plan was also added. This is one of the most important parts of the survey, as the local neighbourhood plan addresses a fifteen year time horizon. A timeframe for most improvements to be realised. Since the credit crunch of 2008 and the Great

Recession many businesses have hesitated to look fifteen months into the future, let alone fifteen years.

In order to approach as many local companies as possible to request participation in the survey, a search was made of company list databases. For this the neighbourhood plan team enlisted the help of Kent County Council Arts and Libraries Department, Business Information section. With the use of two databases from Thomson's local directory and ……… it was possible to secure a list of about 150 locally based companies. From these two main lists a number of duplicate entries were identified and sifted out. To these two commercially available lists local knowledge was also combined with members of parish councils and also the parish magazine providing further a further forty company names. A number of the latter had already been identified from the databases, but not all. These efforts to identify all potential respondents and avoid duplication increased the list size to about 170. With changes to the business environment such as the large national increase in self-employment and the closure of some businesses in the aftermath of the Great Recession, it would be impossible to be certain of having identified every single company. However, a substantial, representative list was compiled.

Efforts were made to reach all named companies identified. In particular, each company for whom a telephone number was available were called to explain the purpose of the survey. In about twenty cases, where a company e-mail address was available, an introductory e-mail, an explanatory letter and an electronic link to *The Business Monitor* were sent out. However, there were a substantial number of companies for which no telephone number, or e-mail address was held, or it was impossible to reach them by either of these formats. For about 150 companies a paper version of the survey was printed, with the explanatory letter. These surveys were distributed by hand during September 2015. As the initial circulation of the survey generated insufficient numbers of responses for any meaningful analysis, *The Business Monitor* was re-launched at Christmas 2015 and further follow up was undertaken with companies, by telephone, e-mail and personal visits over the holiday period and throughout January 2016. Further contacts with businesses were conducted during the first week of February, including additional paper copy distribution, when it became apparent that less Dunkirk companies had responded.

Whilst it is impossible to be completely confident that all companies were reached, there is a certain that attempts were made to reach all and least ninety percent of companies were contacted, most on more than one occasion, a good number on substantially more.

One noteworthy fact about the presence of companies in the Boughton and Dunkirk parishes is the comparison with national level densities. In the South East of England there are approximately 1200 businesses per 10,000 head of population or 12 per hundred. (Department of Business Innovation and Skills, ONS) Based upon this research, the Neighbourhood Plan area has about 170 recorded businesses for a population of 3,104 (2011 Census), or 5.5 per hundred head of population. This suggests either a significantly lower level of business presence compared to the rest of the south east or a significant under-recording – CHECK. It could be that companies set up recently have yet to be recorded onto the data records of the information providers or there may be an alternative, as yet unknown explanation.

Industry Sectors of companies in Boughton-under-Blean and Dunkirk

Range of SIC Codes	Division	Total Number	Respondents Number	Percentage Participating
0100-0999	Agriculture, Forestry and Fishing	7		
1000-1499	Mining, Quarrying, Extraction	0		
1500-1799	Construction	3		
1800-1999	not used	0		
2000-3999	Manufacturing	2		
4000-4999	Transportation, Communications, Electric, Gas and Sanitary service	41		
5000-5199	Wholesale Trade	5		
5200-5999	Retail Trade	22		
6000-6799	Finance, Insurance and Real Estate	20		
7000-8999	Services	42		
9100-9729	Public Administration	1		
9900-9999	Non-classifiable* Non-target	10		
Total	Estimated Potential Respondents	153		

In order to explain the

- On-line
- Paper version
- Follow-up
- Response Rate
- Respondents Type and
- Comparisons to local, borough, county and national business structure

Response Rate

There were **seventy** organisations, which responded to the survey in total. This represents about a 44% response rate, which is substantially higher than the level normally expected for such a survey. However, this is increased if certain factors are taken into account. For example, both parishes included a number of; (at least six) residents' association groups. Other public or community functions also appeared on the databases such as the doctors, the library and village halls. Whilst these organisations may have the legal structure of a limited company, they do not trade and sell products or services, but exist merely to serve the needs of their residents or the community. The primary objective of the survey was to consult with commercial or independent charitable organisations, providing products, or services to customers.

According to SurveyGizmo an on-line polling company *"Internal surveys will generally receive a 30-40% response rate (or more) on average, compared to an average 10-15% response rate for external surveys."* Internal surveys are those of employees, external surveys are of customers, or non-affiliated groups. It could be deduced that the response rate achieved by *The Business Monitor* was greater than between twice to three times the average survey response rate for comparable types. The number was also substantially higher than the minimum required to draw inferences from them for the whole neighbourhood plan area.

Key Findings

Location of respondents

More companies responded, with a business premises located in Boughton-under-Blean rather than in Dunkirk Parish. The proportion of responses was approximately 4:3 in favour of the former parish. Based upon an analysis of business location from the database lists of original companies identified, more companies have a Boughton postcode, than Dunkirk. However, the extent of the proportion of difference between the two is not as pronounced, as this Business Monitor survey response breakdown would indicate. The original lists indicate about 54% from Boughton and 46% from Dunkirk.

A combination of factors appear to have led to this outcome. Follow-up work, visiting companies face to face appears to have inadvertently targeted the Boughton based companies more than those in Dunkirk. Secondly, the companies located in Dunkirk were at greater variance with those on the original lists used to identify them, than those in Boughton. More appeared to be operated or just registered at the owner's residence, rather than a specific business premises. A higher tendency to changes in status of these Dunkirk based companies; such as to ceasing trading through retirement or economic circumstances, renaming, or relocation was noted. There may be other explanations too. Further additional efforts to secure more responses from Dunkirk were undertaken and a short extension to the deadline for submission were allowed into the first week of February 2016, with some face to face follow up, which bore some fruit, through additional responses, as the original imbalance had been even greater at 5:2 in favour of Boughton based companies. The balance was thus redressed somewhat.

Companies' function and premises

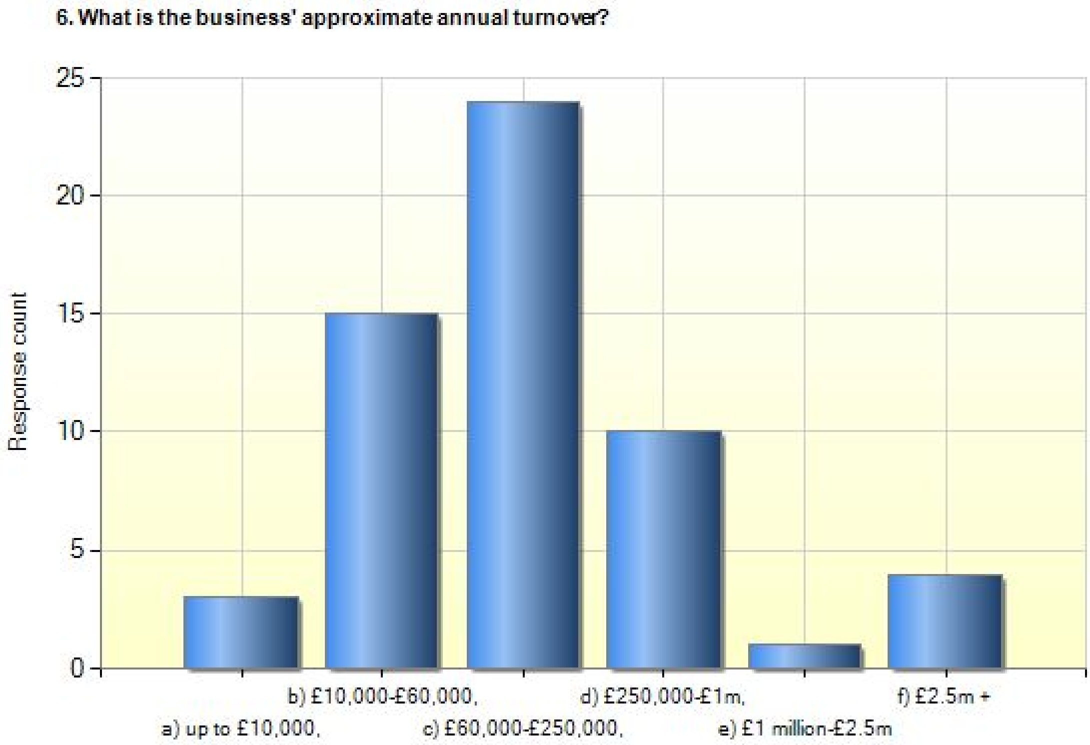
The majority of local companies are independent and do not belong to a larger group. Some sixty enterprises have their only operation in Boughton or Dunkirk, though there are a significant minority of approximately 11% that are members of larger Company Groups. The most common function for over half of companies of the local site was the sole premises. For fifteen it is their headquarters. There are three warehouse depots and nine retail sites and one manufacturing site.

Legal statuses responding

The vast majority and almost exactly evenly split the breakdown of companies divides between limited companies and the self-employed, or sole traders. There were three organisations responding from the charitable or public sector and two partnerships

Annual turnover

The breakdown of companies according to turnover is most succinctly described according to the following graph.



The main observation is that the distribution of companies based on turnover follows a reasonably normal pattern, with the majority falling in the middle three categories between £10,000 to £1m annual turnover. The main exception to this is the apparent low level of companies from the £1-2.5m turnover bracket, compared to what may be expected from an even distribution. This may be explained by a lack of suitable premises to accommodate companies of that size locally, or that those with the potential to reach that financial size bracket are currently situated in the two lower turnover categories, with the potential to move up. It is companies of this size that have the greatest potential to and are the most likely to create new jobs, as they expand and grow. Companies with turnover above £1m have a greater propensity to export. Any constraints on growth for the ten companies in the £250,000-£1m turnover bracket should be identified and if at all possible removed.

Employee numbers of which local people

None of the locally based companies, or branches are larger groups are what could be described as large employers. The highest recorded number of employees for one single company was thirty and the average number of full-time employees across all organisations was 3.55. There were almost as many part-time workers recorded with the average being 3.46. The highest number of part-time employees recorded was thirty, greater than any for full-time employees; where the highest was 14. This would appear to suggest that there is a high prevalence of part-time working at local organisations. There has been a proportionately higher increase in part-time working across the whole UK economy, since the 2008 Great Recession. In this way local trends reflect the national picture. The responses also illustrated that the use of sub-contractors is also quite common, with an average of two people being employed in that manner, per responding firm.

A good number of local employment goes to people living in the two parishes, particularly through the smaller companies. The exact figures on this are subject to more detailed examination and finalisation to ensure that they are fully coherent and that no potential anomalies have entered the calculations, due to differing data collection methods.

Business Support Uptake

There was quite a low level of uptake of business support services. Some companies did make use of networking opportunities through the Chambers of Commerce or Breakfast Clubs. There was also a noticeable use of the more specialist sector specific support. The most common explanation given for not using these services was “not needed” and one respondent indicated a lack of awareness about what support may be available, “don’t know what they offer”.

Add explanation of what these business support services are about:

- Kent Invicta Chamber of Commerce
- Local Chamber of Commerce
- High Kent Growth
- Business Breakfast Club
- Growth Accelerator
- TIGER
- The Angel CoFund
- Seed Enterprise Investment Scheme

- Other

Explanations for Businesses not using Support Services

Total	Reason
20	Not Needed/Required
9	Not Aware
4	Not Applicable
3	Organic/Self-built
2	Too specific a market
1	Non-trading

The two most commonly cited reasons for not using business support services were a lack of need for them or of awareness of the services provided. This when combined with those which have grown organically represents about one third of all companies that have developed almost completely independently, without the perceived need for assistance. With tight budgets, apart from the provision of some financial assistance schemes, the public sector has almost completely withdrawn from any direct support for companies. This has left subscription based membership bodies such as Chambers of Commerce and Industry, trade bodies, or niche sector providers such as in agriculture, or hospitality as the sole post to lean on if and when required. Companies and owners largely fend for themselves and there is nobody to represent their interests collectively locally, assist with exporting, without membership of a chamber of commerce or similar. Membership of these organisations was at a relatively low level.

Exports

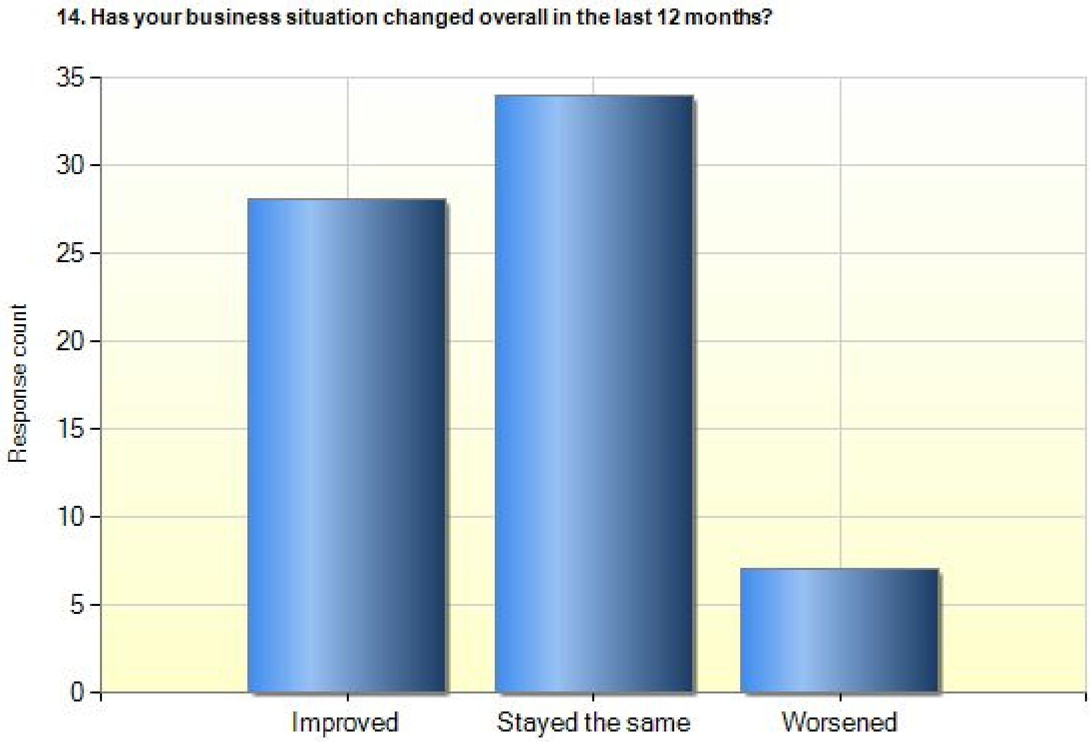
The UK has a generally low level of companies exporting. This has caused an impact on the balance of payments or the country's Gross Domestic Product growth, with imports exceeding exports. The exact levels of this imbalance have fluctuated over recent years. The UK has struggled to make a trade surplus since the war. However, the trend has been for ever increasing and ever extreme fluctuations, based on the vagaries of the exchange rate, making UK exports cheaper, or more expensive for overseas buyers. The last time the UK enjoyed a trade surplus was briefly during the early 1990s. This was helped by a substantial depreciation of about 25% for the £ sterling against particularly former European currencies, following the exit from the European Exchange Rate Mechanism and the boost to exports caused by the creation of the Single European Market. However, this surplus only lasted a couple of years before the UK's adverse trend deterioration in the balance of payments has continued, with ever increasing volatility, despite the UK's self-exclusion from the €uro zone.

The key to exporting is having a product or service that companies overseas wish to buy. A substantial number of local companies do not provide services suitable for sale abroad as they are targeted at a local market of people within easy reach of their premises, such as retail.

Ten percent of locally based companies sell goods or services overseas, of which the average turnover exported for most companies was about 10% with several exporting up to 20%. There is one substantial exception to this norm, as one company exports a maximum of 95% of turnover. This alone is enough to increase the average proportion of goods and services exported locally from 10% to 18%. Whilst those companies that do export are providing valuable overseas income to the economy and boosting national output, one local company significantly outperforms the general export proportion performance in Boughton and Dunkirk. Other companies may sell a smaller percentage of turnover, but this may be of greater value of goods, based on a larger overall company turnover.

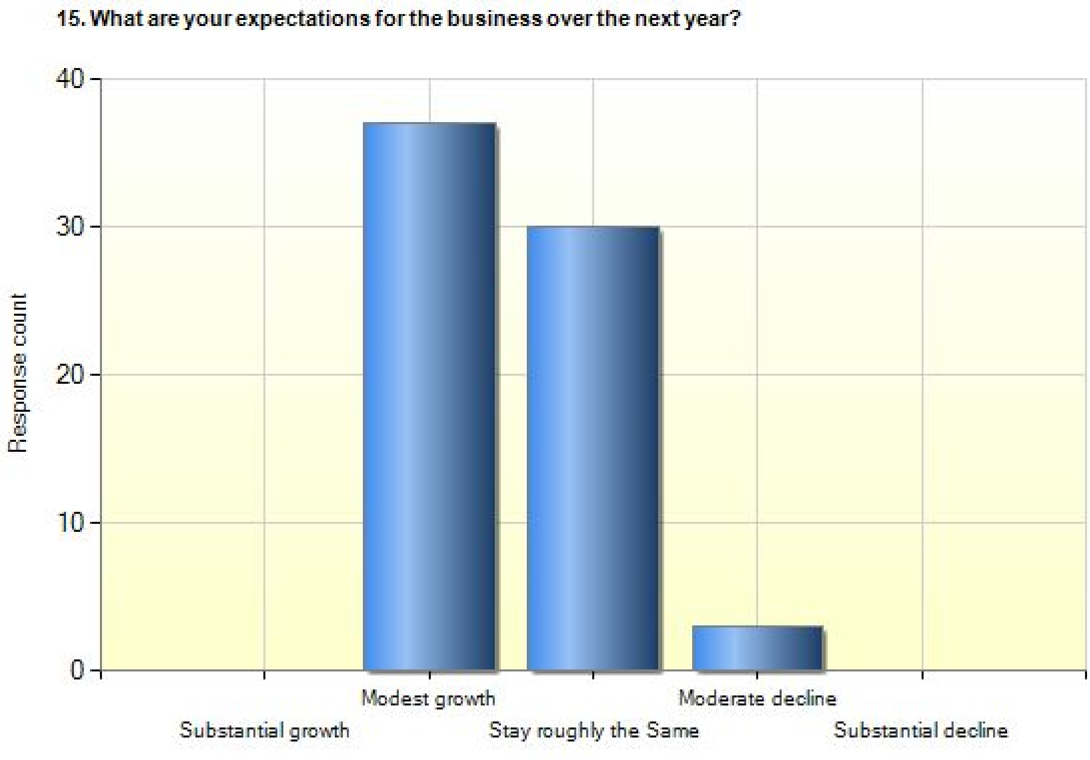
According to the most recent figures available from the Office for National Statistics for 2013, the proportion of UK companies exporting was about 11% of the total of all based across the country. From this it may be deduced that the number of local companies selling abroad is about a tenth lower than the proportion of those nationally. Hence, in order to improve this performance locally, additional sales from existing exporters to increase the proportion of their sales exported is required. Additionally, or alternatively, further locally based companies could where appropriate consider whether they should seek to sell abroad or extend their reach to new markets. Typically the proportion of companies trading internationally increases rapidly, once turnover is greater than £1m per annum up to an average of 40%. (Source: ONS, *Annual Business Survey 2013, Exporters and Importers of Great Britain*). Providing the right conditions and or facilities for local companies to enable growth beyond the £1m annual turnover threshold could make a vital contribution to increasing exports locally. There are anywhere up to ten local companies of those responding that potentially fit into this category. The Internet, which not only provides a global shop window, now makes selling abroad more accessible and potentially feasible to a wider range of businesses on-line. The broadband provision needs to meet the requirements for this.

Business Climate – over the Last 12 months,



For just under half of companies the business climate has stayed the same over the last twelve months. However, there are a substantial number (40%) for whom the market has improved. These are positive signs for the local economy. There is a minority of about 10% of companies for which the situation has deteriorated in the last year. There appeared to be no common factor, which had caused this, though the survey did not seek detailed explanations. On the whole, business seemed to be held up by or grow with the rising general economic tide, which saw UK growth of 2.1% in the year to December 2015. This tide has ebbed a little since July 2014, when GDP growth reached its most recent peak of 3% in the last eight years. Slowing growth in developing market economies such as Brazil, Russia, India and China, alongside a slow, patchy European market recovery have taken the edge off the highs of 2014.

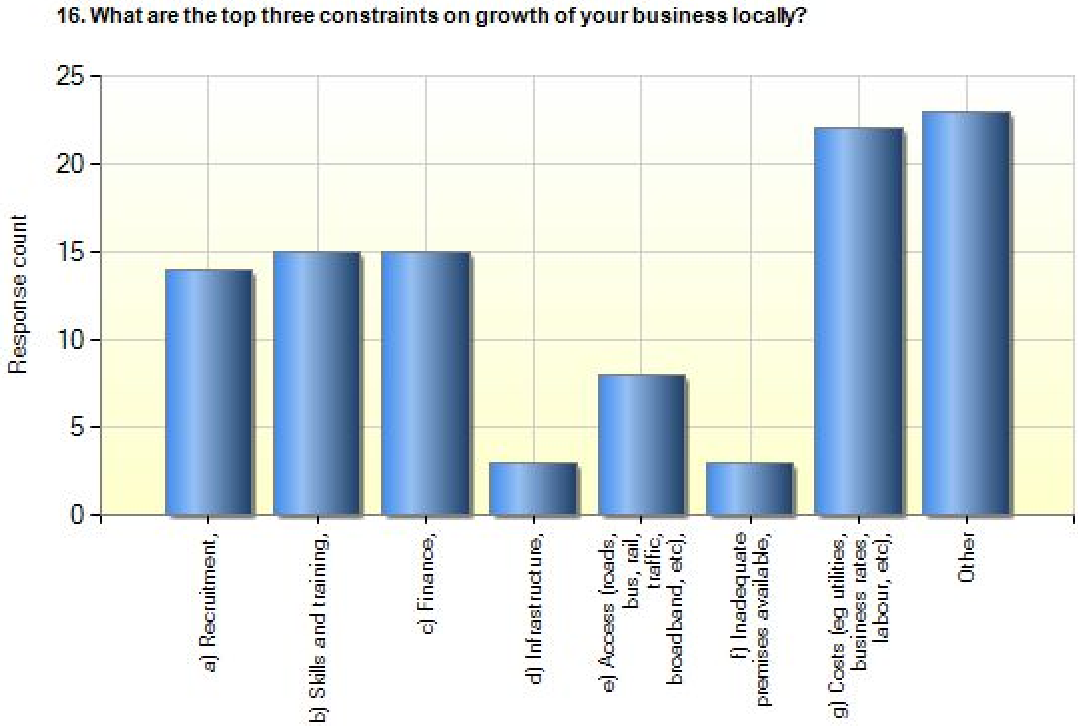
Level of Optimism next year



The responses about companies' expectations for future growth in 2016 are on the whole very positive. There were no companies that foresaw either growth or decline of a substantial nature. The majority, 53% expected modest growth. The second largest category, 43% expected that their turnover would stay about the same as the previous year. Only 4 of companies felt that their prospects were less positive and that a moderate decline was expected over the next year. These expectations are encouraging and suggest that some firms will be planning for expansion of some sort. Indeed responses regarding property requirements indicate that this may be underway already. Expansion by local firms may well require provision within the neighbourhood plan.

Constraints on Growth

The graph below illustrates the responses to companies' restraints on growth. A broad range of the different options offered were suggested as restricting growth, but the most commonly cited reason was "other" with a yet further range of different of additional or alternative reasons apparently holding firms back. These reasons are also summarised below in the table. Beyond the list of diverse other restraints, the biggest single factor holding companies back was costs, though within that the concerns of individual firms varied. 20% of firms felt recruitment was the biggest constraint, whereas 21% cited either training, or finance. 11% believed that inadequate access was adversely affecting their company and 4% were impeded by inadequate premises. A further 4% added that infrastructure was holding up growth. The latter three of these reasons may be addressed by the neighbourhood development plan, as appropriate and required. The survey did not seek full details, so further clarification would be necessary with these companies.



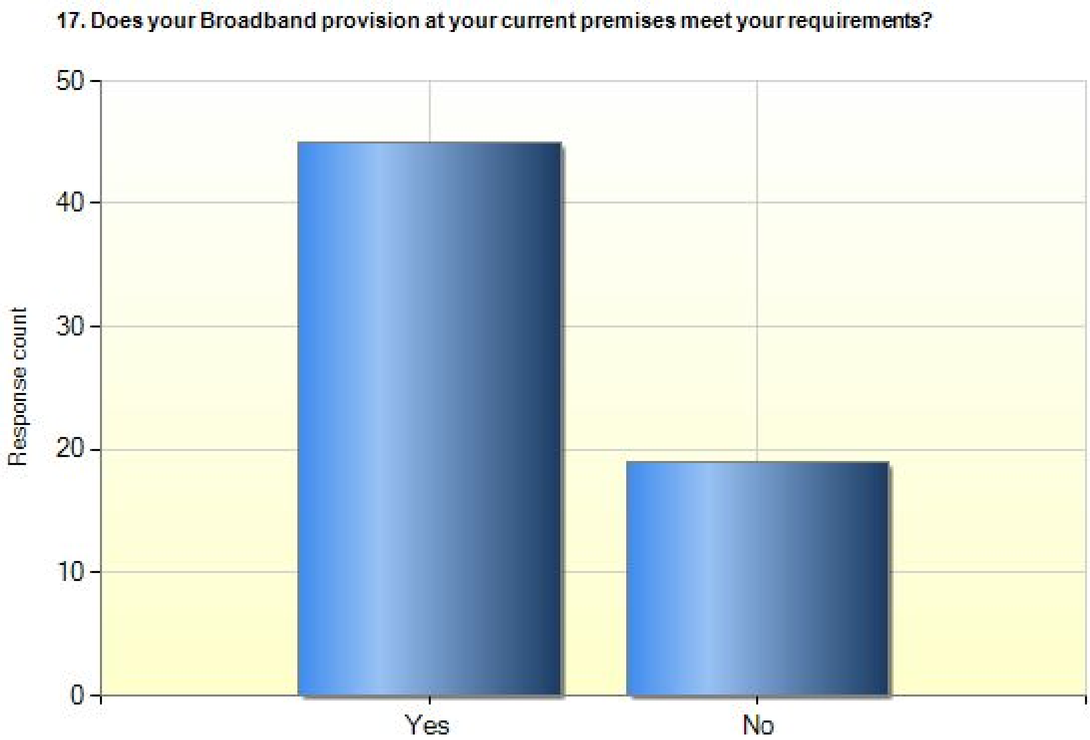
The range of other constraints on growth is summarised on the table overleaf. The most common answer is "none" or "not applicable," with three further companies stating that they did not seek to grow further. These answers may be largely discounted. The most relevant to the purposes of this survey and the neighbourhood plan concern a "slow internet connection", "insufficient space on current site and building." Other factors such as competition and global prices are beyond the scope of the plan's objectives.

"Other" quoted constraints on company growth

Total	Constraint on growth
8	None or Not Applicable
3	No wish to grow
2	Time
2	Competition
2	Prices in global markets
1	Slow Internet connection
1	Other projects
1	Supply and demand in market
1	Suitable Staff
1	On-line business
1	Size of current site and building
1	Competing uses for land

Source: Question 16 Responses, Boughton and Dunkirk Business Monitor

Broadband - speed and adequacy of provision

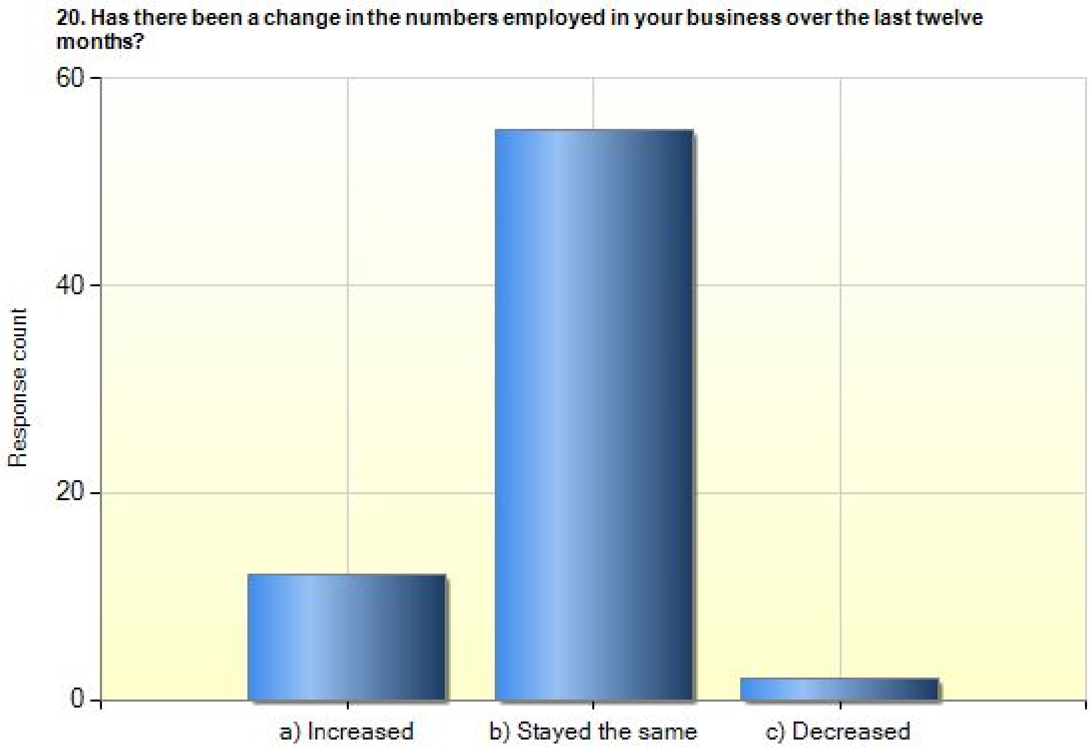


The balance of companies satisfied with their broadband provision over not satisfied was 70% to 30% in favour of adequacy. It should be noted that a relatively small number of companies answered the follow-up question about their actual broadband download speed compared to most other questions in the survey. A little over half tested their connection to provide information on their download and in some cases upload speed as well. The average (mean) broadband speed of those responding was 15.18 Mbps. The fastest of the range recorded for this research was 53Mbps and this single reading brought the mean up substantially. As is demonstrated above the majority of businesses felt that their current broadband provision was adequate for their purposes. However, a significant minority did not. In view of the absence of a majority of companies reporting their data download speed measurement, it is not possible to be confident that broadband speeds are at average levels for the UK overall. Indeed, the average download speed across the UK in November 2014 was 22.8Mbps. appendix ….. This implies that the local download speeds are one third below national averages eighteen months after the most recent nationally quoted speeds were measured and published. To assess these responses more fully, it is worth considering more generally the subject of Internet access speed. The Telecommunications regulator OFCOM produces an annual review of Internet access speeds, which is made available on-line. Further details about average Internet access speeds for consumers across the UK are included in appendix ….. The consumer download speeds have been included, rather than corporate service, as most of the companies responding to this survey did so from principally residential areas. Provision of Internet broadband access for companies tends to be more expensive, but may be generally faster. Due to their size and location, the assumption has been made that the majority of local firms are therefore relying on their domestic broadband provision service to double up for their business use.

The key points to note on national average access speeds and local comparisons are as follows: a large variation in average broadband download speed. This depends mostly on the different package purchased from the different major suppliers. The suppliers include BT, Plusnet, KC, EE, Sky and Virgin Media. The most basic packages offer speeds operating at an average download of 9-13 Mbps. The most widely available broadband packages average between 53-65 Mbps download speed. The fastest broadband supply service currently on the market in the UK is not provided in Boughton and Dunkirk. Virgin Media's top package offers download speeds of 115-159 Mbps. In fact, none of the company's range of broadband products are supplied to the area. This lack of provision and the absence of a full range of competitors in the local broadband market restricts consumer and business choice and arguably keeps costs higher, as well as the pressure on suppliers to improve standards, increase accessability and quality. ….add notes from appendix here.

The conclusion is that many local companies are putting up with relatively slow service for their broadband compared to what could be available either theoretically or in practice. The majority it would appear without necessarily being aware. This may be partly due to choice affected by the cost of provision. However, that is not the full picture, as the suggestions for inclusion in the local plan section includes a number of requests for improved broadband access, particularly in the more rural locations. It may also be explained by an analogy. A motorcyclist that has always driven a 50cc moped, restricted to a maximum of 30mph may never have ridden, nor be aware, or perhaps be able to afford the time saving that a more powerful 125cc machine may bring, using dual carriageways, etc. Thus local businesses may not be aware of the time saving and increased productivity that could result from utilising faster broadband access up to "superfast" on the "information superhighway". As is highlighted above, there is also a lack of adequate competition amongst providers, as one of the major national telecommunications companies providing broadband access does not supply locally, through the available network.

Employment – Changes over the last twelve months



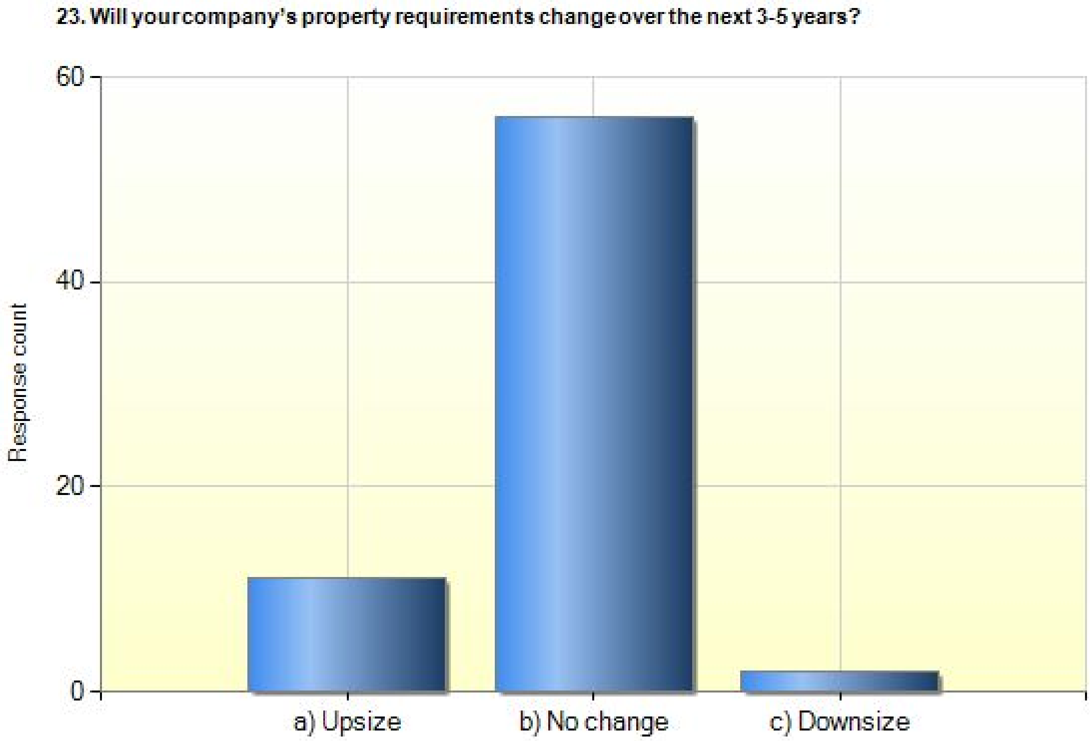
A healthy 17% of companies had recruited additional new employees during 2015, increasing the number of people working for them and within the community. Four fifths of local companies had remained with constant numbers of employees. There is a steady, consistent base of constant trade for over half of local companies, whilst an important minority of nearly twenty percent are growing and expanding. It is this growing section of the business population that the Neighbourhood Plan should make provision to accommodate.

19% of companies expected their employee numbers to further increase over the coming year in 2016. This is a very positive result for the local economy and anyone seeking work locally. However, there are indications from other aspects of this survey, that some employers are experiencing difficulties with recruitment. Recruitment or skills and training were cited as an impediment to growth by almost half of the companies responding to the survey. This proportion of companies far exceeds those that stated that they expected to be recruiting over the short to medium term. Below is a summary of the responses.

Employment Changes over the coming year

Without further details from specific employers, it is impossible to give a further reasoned assessment of the extent or severity of the exact difficulties experienced in recruitment, or suggest any specific measures to alleviate them, be they relevant to the neighbourhood plan, or as is more likely outside its direct scope.

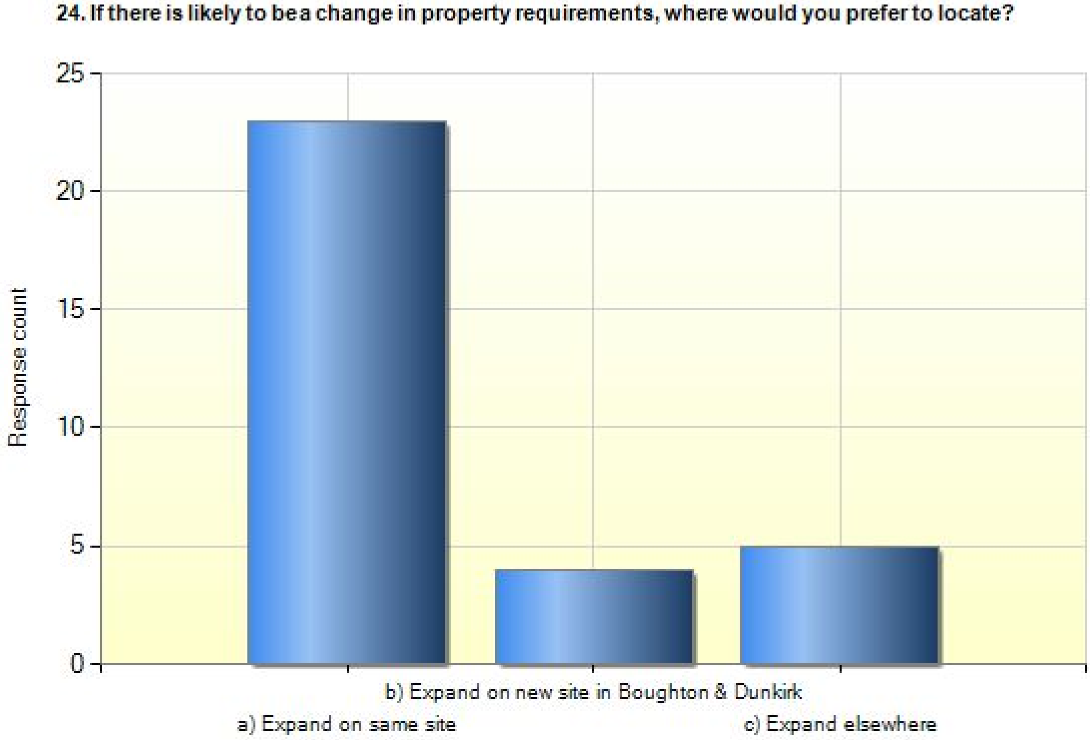
Property requirements in the next three to five years

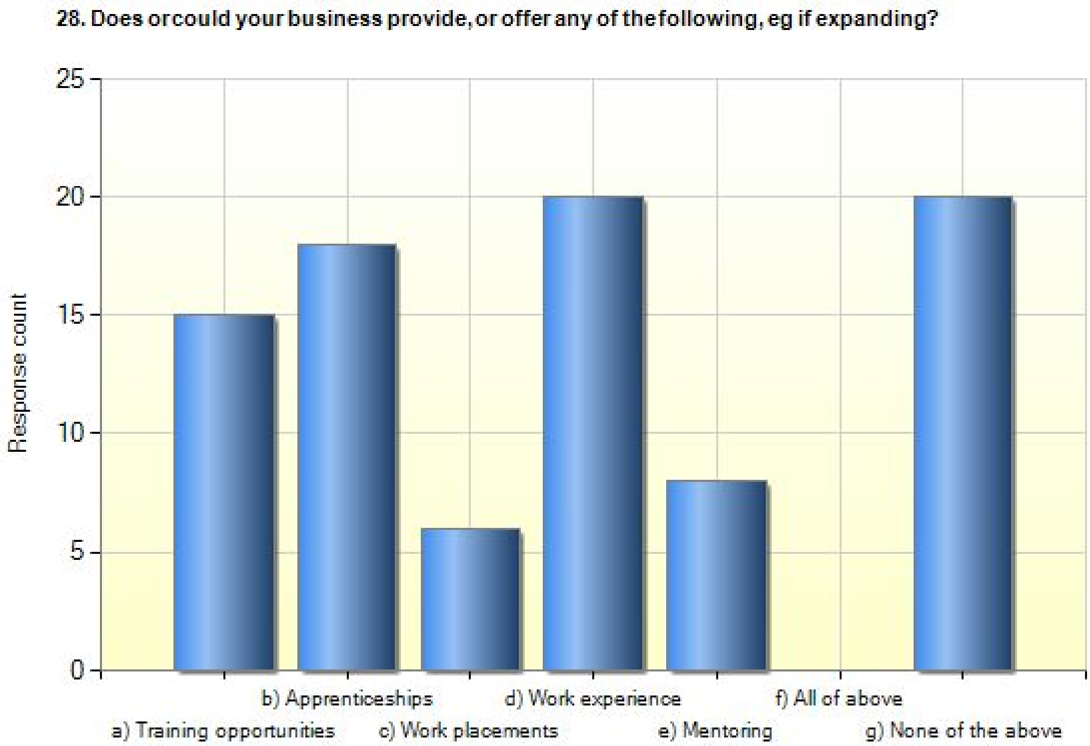


The majority of companies do not expect any change in their business premises over the next three to five years. However, there are about 16% that do plan to have a requirement for an increase in size to their premises. The specific needs of these eleven companies should also be accommodated by the neighbourhood plan, especially since this time frame only covers the early part, up to a maximum of one third of the plan's fifteen year time horizon. Other companies may subsequently enjoy growth and formulate plans during the plan period and hence consequently require changes in their offices, workshops, or shops.

Of the companies expecting to expand over the period, ten would expect to do so on their current premises. This may be feasible. However, it may be that if in a principally residential area, this may not be as straightforward as perceived. It would be helpful if the local neighbourhood plan could take any of these potential developments into consideration to avoid the planning system placing a subsequent constraint on expansion. However, this implies a current consideration of such plans. It may be that even with the best of intentions and planning certain envisaged developments could either fall outside scope of the plan or conflict with intentions of other policies likely to be included. Early consideration of such business expansion plans would assist in reaching the best accommodation for all parties, within the plan's timeframe.

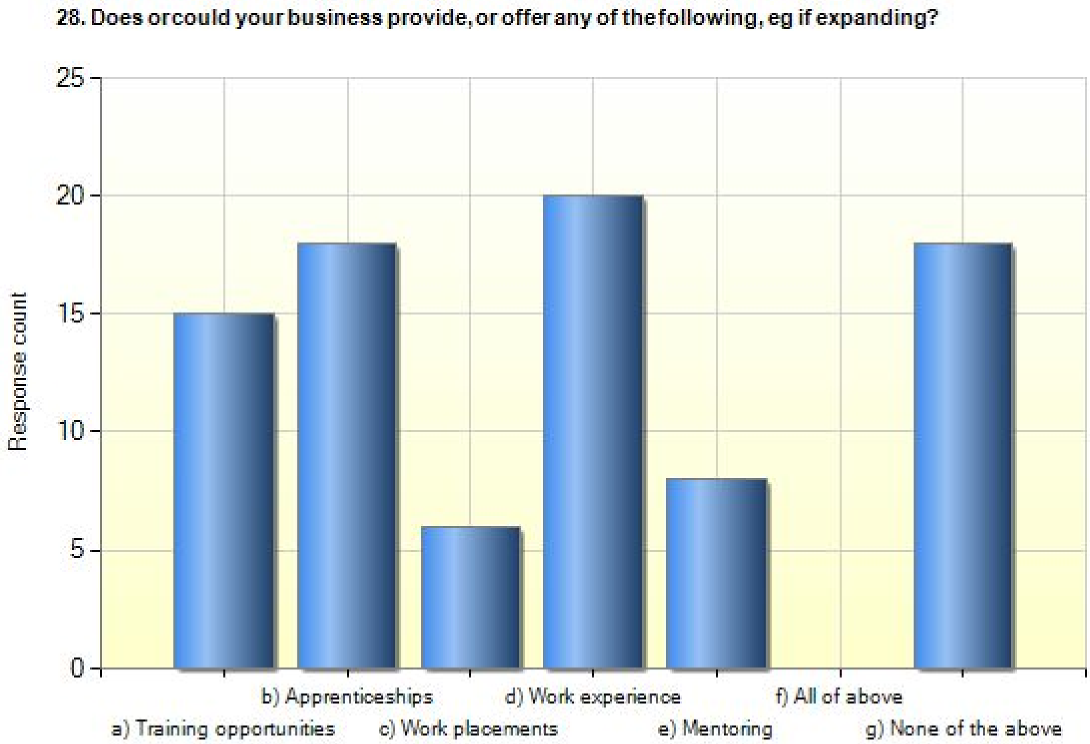
There are four companies that wish to expand onto new sites within the plan's designated area and a further five that currently plan to expand outside the area. Whilst it would be impossible to contravene the expressed wishes of any company seeking to move away, if their growth could reasonably accommodated locally and the neighbourhood plan could help achieve this. This would be a positive outcome for both company and the local area. The summary of companies' intended property requirements is summarised overleaf. It is of note that a higher number of companies than the ones expressing a desire to increase employment over the next year stated a desire to increase their premises size.





For the companies looking to expand in the future there appear to be a range of potential locations and types of move that are being considered. This answer did not apply to the majority which are not envisaging an expansion involving a change of premises. These responses may be discounted. A small majority of companies wished to expand on or adjacent to their existing site. Of those others expressing a preference, the second highest total was for companies wishing a refurbishment of current premises. Four companies envisage an entirely new build on a different site and two seek to renovate or reuse existing alternative premises. After those wishing to expand on the same site the next most frequently expressed view was for no preference as to the type and style or location of any change to their business property. This demonstrates a high level of flexibility in location amongst seven of the expansionary minded enterprises. Four companies appear to see their future outside the area. Of the companies expressing a wish to make changes to their premises, six or approximately 10% of the total, responding to The Business Monitor may require assistance with their plans for the move. This could make it easier to accommodate these business objectives within the Neighbourhood Plan.

Of the companies seeking to expand, the creation of further employment will be part of these developments. A range of different new positions will be created from single additional posts to the highest which could be as many as twenty new jobs. The average new employment positions created by the expansion projects would be two full time equivalents per company.



There was a positive response to the question about the types of training and development opportunities either currently or potentially on offer at local companies. As many as twenty different companies were willing to offer work experience placements. About seventeen can offer apprenticeships and fifteen training opportunities. This is particularly encouraging as

people responding to the survey have already highlighted in response to the questions of constraints on their growth that skills and training are barriers to selecting new staff currently in a significant minority of cases. Offering the types of training and development opportunities highlighted able will help potential recruits to bridge this gap between supply and demand in the employment market.
Three suggestions for business to include in the plan

In their consideration of the future of the area each company was asked to put forward ideas, suggestions or proposals that should be included in the neighbourhood plan to assist with the future prospects for their company. To provide some level of priority and focus for thought three most important proposals were requested. In theory, this could have yielded a maximum of 210 suggestions. In practice, just over ninety ideas were put forward, though a handful of these were either indicating that respondents had not given the prospect of improving the area any thought at all. A few others (less than 5%) perhaps feel that the two parishes are so idyllic that not the slightest improvement is required.

Fortunately for the purposes of creating a substantive neighbourhood plan a number of members of the business community clearly have given it both some thought. The result is some clear ideas about what issues and challenges needed to be addressed by the plan and what improvements they would like to see implemented. Some ideas are more specific or detailed than others and a few are not strictly within the scope of a neighbourhood plan and will require some follow up, particularly by the Parish Councils and or other relevant parties. The appendix … includes the full list as originally provided.

To summarise and prioritise and illustrate the common policy areas of these suggestions, each has been grouped together, according to specific topics or themes and when a specific point has been raised by a number of different respondents, this is illustrated. These ten policy areas provide the basis of a *"business manifesto"* for the Boughton and Dunkirk Neighbourhood Plan. With the number of mentions in total from the suggestions in brackets afterwards, the ten policy areas in alphabetical order are as follows:

- Broadband (12)
- Business Support, Promotion & Engagement (17)
- Crime (1)
- Environment (1)
- Highways and Public Transport (19)
- Housing and Commercial Site Development (8)
- Parking and Traffic (13)
- Planning (2)
- Training and Development (3)
- Waste Disposal (3)

The five most mentioned areas therefore are:

- Highways and Public Transport;
- Business Support, Promotion and Engagement;
- Parking and Traffic;
- Broadband
- Housing and Commercial Development.

To gain a more detailed understanding of the areas that business felt should be addressed by the neighbourhood plan or were mentioned for improvement the responses for these five areas are summarised in tabular form below. Each policy area is shown separately.

Highways and Public Transport

Comment or Suggestion	**Mentions Reference**	**Common theme**	**Total**
Roads Upkeep	HPTRU1	Roads Upkeep	5
Condition of roads	HPTRU2		
Repair the chasms on the North side of Staplestreet Road and the running water.	HPTRU3		
The road needs improving, particularly in The Ridgeway	HPTRU4		
Better roadworks	HPTRU5		
Improve public transport	HPTPT1	Improve Public Transport	4
Public Transportation	HPTPT2		
bus service in the countryside	HPTPT3		
increase number of trains that stop at selling station	HPTPT4		
Clear Road Signage	HPTRS1	Improved road signage	2
Better signage on public highway.			
Footpath on access road to village hall.	HPTFP1	Footpaths	1
Nine Ash Lane to be put back on the gritting route.	HPTG1	Gritting	1
More street lighting next to site.	HPTL1	Street Lighting	1
Being able to pull over in a lay by on A2	HPTLB1	A2 Layby	1
Lorry Park	HPTLP1	Lorry Park	1
Slip road off A2 Dover bound at top of hill	HPTSL1	New A2 sliproad	1
Dunkirk speeding	HPTSP1	Speeding	1

The above table illustrates local business concerns and suggestions for the area of Highways and Public Transport. The most often cited item to be addressed was the upkeep of local roads, followed by improving public transport. The final point which was suggested by more than one company was improved road signage. Some companies were very specific about the road or area, which they felt required improvement. Other answers were indicative of a more general answer. It is clear that with eighteen separate suggestions, the area of improving highways and public transport is one which business feels strongly should be addressed in the Neighbourhood plan. A more detailed and specific exploration of the different aspects of these suggestions, especially where generic to provide a schedule of the full list of requested improvements would assist in formulating the response within the neighbourhood plan and secondly in requesting the assistance of the statutory bodies in seeking practical solutions and where necessary funding.

Business Support, Promotion and Engagement

Comment or Suggestion	Mentions	Common theme	Total
Networking events	SPENEB1	Networking events for business	5
Monthly network of businesses in the area	SPENEB2		
Business Networking	SPENEB3		
Business Networking	SPENEB4		
Presence of major collaborators	SPENEB5		
Continue to promote local business via community magazine	SPEP1	Promote business locally,(including via magazine)	5
More awareness of service providers in the area.	SPEP2		
Greater awareness of businesses operating in this area	SPEP3		
A place for local business to advertise.	SPEP4		
local awareness of us	SPEP5		
include us in community events	SPECOM1	Include business in community activities	2
community	SPECOM2		
More shops	SPER1	Increase shops	2
Local retail services	SPER2		
Invitation to Council meetings - businesses	SPECO1	Councils to engage with business	1
More business	SPEGR1	Generate more business	1
Links with financiers	SPENFIN1	Networking with financiers	1

The second most common area for suggestions has been grouped together under the broad heading Business Support, Promotion and Engagement. The two most commonly made suggestion for businesses were for increased business networking locally and measures to support, promote and raise awareness about local firms within the community. There was also an undercurrent of willingness to become more involved by engaging further with the business of local council decision making. It was not fully clear whether this was just at parish council level, or at borough and county level too. The type of concerns raised by the emerging agenda for business in Boughton and Dunkirk imply further engagement with all and that suggest that a way of marshalling collective input may be required. The completion of this survey by many local companies has begun the process of opening up the channels of increased communication and dialogue.

Parking and Traffic

Comment or Suggestion	Mentions	Common theme	Total
It would be great if the road could be widened in Boughton - or parking not allowed on street	PTODYL1	Forbid or significantly reduce parking on The Street	7
On-road parking is causing a real problem in certain areas - particularly in The Street.	PTODYL2		
Parking on the street	PTODYL3		
Parking of vehicles needs to be addressed in The Street.	PTODYL4		
Parking in Boughton The Street	PTODYL5		
Reduction in parking on The Street	PTODYL6		
Traffic and parking in Boughton	PTODYL7		
Brenley Lane Car Parkk!!	PTBLCP1	Brenley Lane Car Park	2
Proper parking facility - Brenley Lane Car Park!	PTBLCP2		
Lower number of articulated lorries	PTAL1	Reduce HGV traffic	1
This is only likely to get worse, so adequate parking provisions needs to be ensured when new properties are built.	PTNDCP1	Provide adequate parking for any new developments	1
Resident to access their off Road parking for public transport access.	PTOFPDYL 1	Forbid or reduce parking on The Street & Provide an off The Street car park for public transport	1
Need for more parking arrangements in The Street for local shops/Businesses to expand.	PTOSP1	Provide additional off The Street parking for local shops	1

The singularly most clear and repeated suggestion that the neighbourhood plan should address from the business community was parking on The Street. There are a range of suggestions from widening The Street, to forbidding parking there altogether, or reducing it to various degrees. Concerns were expressed about Public Service Vehicle's being unable to transit the village, as well as vehicles seeking to emerge safely onto The Street from side roads. On the positive side one business felt that additional off - The Street parking provision would increase trade at local shops and businesses. The neighbourhood plan should take action and adopt policies to reduce the current problems caused by parking on The Street and make provision for additional parking to allow traders to expand. Compromises may be need to be sought out with local residents to meet these differing aspirations.

Beyond The Street, it was also felt that action should be taken to improve the parking provision on Brenley Lane, just off the large junction at Brenley Corner. The condition of the parking provision there, used by commuters to car share to West Kent and beyond is also consistent with the poor state of the roads in the area, highlighted elsewhere in this report, particularly under the Highways and Public Transport section above. This is as true on Brenley Lane as across substantial parts of the rural fringes of the two parishes beyond the main village housing settlements. Local businesses and residents are being compelled to use these roads more frequently in attempts to avoid gridlock caused by operation stack, or increased congestion as a result of sheer increased traffic volumes, accidents or other incidents on main roads. A comprehensive schedule of the local roads requiring attention may have some merit, as a basis to influence the relevant council departments to take appropriate action.

Broadband

Comment or Suggestion	**Mentions**	**Common theme**	**Total**
Improved Broadband	BBIM1	Improved Broadband	4
Better Broadband	BBIM2		
improve broadband	BBIM3		
Improve Wifi/broadband	BBIM4		
Cable (fibre optics) infrastructure	BBIN1	Installation of Broadband	4
Installation of fibre optic cable	BBIN2		
broadband!!	BBIN3		
Ideally fibre optic broadband, tho' wireless fine	BBIN4		
Broadband speed to rural areas.	BBF1	Faster Broadband	3
Faster broadband for rural areas	BBF2		
Better B Band Speeds	BBF3		
Virgin Media to be brought into village	BBVM1	Virgin Media Broadband	1

Whilst a number of companies expressed their satisfaction with their current speed of broadband provision, the comparison with average national broadband download speeds suggests that provision locally is not adequate, particularly in the more rural areas, away from the main areas of habitation. Too many local companies did not supply their download speeds to be confident that they are at least consistent with national averages. Businesses were fairly clear in their suggestions in respect of broadband. To misquote a Kanye West song, they want it, ”broader, better, further, faster”. There is a need for a broader range of broadband Internet service providers, better service, further reach to rural areas and faster upload and download speeds.

Housing and Commercial Land Development

Comment or Suggestion	**Mentions**	**Common theme**	**Total**
More land to build on and rent.	HCSDL1	Land for homes	5
More starter homes	HCSDL2		
The provision of retirement homes for agricultural workers to enable younger employees to be recruited.	HCSDL3		
More accommodation	HCSDL4		
Major construction projects locally	HCSDL5		
More opportunities for expansion - eg land	HCSDLC6	Land for commercial development	1

Get rid of village envelope.	HCSDENV 1	Village Envelope	1

The allocation of land for development is one of the main purposes of the neighbourhood development plan, alongside setting policies for the area from conservation, to design and safeguarding and improving the environment. A fair amount of information was obtained from companies with plans for growth that could include either extension to existing or moving to new premises under the earlier sections, which covered the responses from companies on that. Having dealt with those requirements elsewhere these matters were not apart from one case not repeated en masse in the suggestions section. There were six companies that acknowledged the need for the allocation of land for housing development, within the neighbourhood plan. The main two priorities stated appeared to be starter homes, as well as those for retiring workers.

Environment

Comment or Suggestion	**Mentions**	**Common theme**	**Total**
Road and covert leading down to our business on Hickman's Green need to be improved to prevent flooding each time it rains.	EHPTDR1	Flooding & Drainage	1

This point is one of importance to the companies located at these business units. The question of flooding and drainage is one which applies more widely in the Hickman's Green area as well as in parts of Dunkirk. As it affects the businesses concerned it is a matter for clarification as to establish the nature, cause and extent of the impact as well as potential solutions to these questions. A more detailed understanding will enable any appropriate provisions to be made within the neighbourhood plan as well as, if required outside its brief by other agencies, such as the councils and The Environment Agency.

Local Planning

Comment or Suggestion	**Mentions**	**Common theme**	**Total**
be more flexible on planning applications	PPR1	Improve Planning Regime	2
planning restrictions	PPR2		

Improving the local planning regime is at the core of the objectives of the local neighbourhood plan. It is difficult to establish whether these suggestions can be met, without more specific details of the type of increased flexibility that is required. The plan aims to facilitate appropriate, demand-led development, both commercial and housing, whilst protecting valuable environmental and conservation areas.

Crime

Comment or Suggestion	Mentions	Common theme	Total
Increased Police presence, too many attempted attacks on house/burglary	CPC1	Reduce crime through increased Police presence	1

Whilst these matters are of concern, particularly to the company raising them. They are matters to be pursued by the parish councils and the relevant agencies outside the provisions of the neighbourhood plan and crucially subject to budgetary constraints of Kent Police. Establishing voluntary, neighbourhood, or if necessary “shop/business watch” approaches may be an alternative solution.

Waste Disposal

Comment or Suggestion	Mentions	Common theme	Total
The area of South Street/Brickfield Lane/Brenley Lane suffers from litter and fly tipping, which is a concern.	WD1	Fly tipping and litter	3
Litter on rural roads	WD2		
Litter on rural roads	WD3		

The neighbourhood plan team will have to consider the suggestions and assess what may realistically be included about this within the plan. It is possible that more could be done outside the confines of the plan to address this matter.

Training

Comment or Suggestion	Mentions	Common theme	Total
e) Mentoring	TMEN1	Increase Mentoring	1
b) Apprenticeships	TAPP1	Increase Apprenticeships	1
c) Work Placements	TWP1	Increase Work Placements	1

The positive approach to many local companies taken towards the development of current and future potential employees with regard to their skills and training has already been noted above. It will likely be another topic that the neighbourhood plan team will have to consider, in conjunction with the company proposing these measures as to what is appropriate to include on these subjects within a neighbourhood plan and what alternative mechanisms may be required for those that cannot.

"Your success in life isn't based on your ability to simply change. It is based on your ability to change faster than your competition, customers and business."

— Mark Sanborn

"The rate of change is not going to slow down anytime soon. If anything, competition in most industries will probably speed up even more in the next few decades."

— John P. Kotter
Leading Change

"Change has a bad reputation in our society. But it isn't all bad — not by any means. In fact, change is necessary in life — to keep us moving ... to keep us growing ... to keep us interested . ... Imagine life without change. It would be static ... boring ... dull."

— Dr. Dennis O'Grady
in *Bottom Line - Personal*

"Everybody has accepted by now that change is unavoidable. But that still implies that change is like death and taxes — it should be postponed as long as possible and no change would be vastly preferable. But in a period of upheaval, such as the one we are living in, change is the norm."

— Peter Drucker
Management Challenges for the 21st Century (1999

"Change is the law of life and those who look only to the past or present are certain to miss the future."

—John F. Kennedy

"The greatest danger in times of turbulence is not the turbulence; it is to act with yesterday's logic."

— Peter Drucker

"Neither a wise man nor a brave man lies down on the tracks of history to wait for the train of the future to run over him."

— Dwight D. Eisenhower

"The most successful businessman is the man who holds onto the old just as long as it is good, and grabs the new just as soon as it is better."

— Robert P. Vanderpoel

"It is a bad plan that admits of no modification."

— Publilius Syrus
First Century BC

"Never doubt that a small group of thoughtful, concerned citizens can change the world. Indeed it is the only thing that ever has."

— Margaret Mead

"To be a successful entrepreneur one needs a vision of greatness for one's work. If we dream extravagantly we will be inspired to forge a reality beyond the straight jacket of practicalities. There is a profound connection between art and enterprise which allows businesses to overcome the limitations of their existing visions."

— Sir Ernest Hall

"No one is less ready for tomorrow than the person who holds the most rigid beliefs about what tomorrow will contain."

— Watts Wacker, Jim Taylor and Howard Means
The Visionary's Handbook: Ten Paradoxes That Will Shape the Future of Your Business (1999)

"The measure of success is not whether you have a tough problem to deal with, but whether it is the same problem you had last year."

— John Foster Dulles
Former Secretary of State

"The significant problems we face cannot be solved at the same level of thinking we were at when we created them."

— Albert Einstein

Conclusions

Recommendations

Appendices

Responses to Q29. What 3 things should the local neighbourhood plan address to support your business?		
1	2	3
not thought about it	not thought about it	not thought about it
Networking events	Parking on the street	Local retail services
not really relevant as our business comes from TV networks		Business Networking
dont know		
It would be great if the road could be widened in Boughton - or parking not allowed on street		
Clear Road Signage	Parking of vehicles needs to be addressed in The Street.	Road and covert leading down to our business on Hickman's Green need to be improved to prevent flooding each time it rains.
Roads Upkeep	Parking in Boughton The Street	
More land to build on and rent.		
Get rid of village envelope.	Slip road off A2 Dover bound at top of hill	
Improved Broadband		
Happy way things are at current.		
More starter homes		
Continue to promote local business via community magazine		
include us in community events	The road needs improving, particularly in The Ridgeway	A place for local business to advertise.
e) Mentoring	b) Apprenticeships	c) Work Placements
Stay the same.		
Better signage on public highway.	More street lighting next to site.	More opportunities for expansion - eg land
Improve public transport	Improve Wifi/broadband	
More shops		
None in respect of our business	The area of South Street/Brickfield Lane/Brenley Lane suffers from litter and fly tipping, which is a concern.	
The provision of retirement homes for agricultural workers to enable younger employees to be recruited.		

Being able to pull over in a lay by on A2	Lorry Park	Nine Ash Lane to be put back on the gritting route.
N/A		
On-road parking is causing a real problem in certain areas - particularly in The Street.	This is only likely to get worse, so adequate parking provisions needs to be ensured when new properties are built.	
More business	More accommodation	Business Networking
Cable (fibre optics) infrastructure	Major construction projects locally	Presence of major collaborators
Installation of fibre optic cable		
Broadband speed to rural areas.	Brenley Lane Car Parkk!!	Litter on rural roads
Faster broadband for rural areas	Proper parking facility - Brenley Lane Car Park!	Litter on rural roads
Condition of roads	Ideally fibre optic broadband, tho' wireless fine	
More awareness of service providers in the area.	Monthly network of businesses in the area	Invitation to Council meetings - businesses
broadband!!	community	local awareness of us
Need for more parking arrangements in The Street for local shops/Businesses to expand.	Resident to access their off Road parking for public transport access.	Footpath on access road to village hall.
Better Broadband	Lower number of articulated lorries	Links with financiers
be more flexible on planning applications		
Virgin Media to be brought into village	Reduction in parking on The Street	Increased Police presence, too many attempted attacks on house/burglary
Public Transportation	Better roadworks	
planning restrictions		
improve broadband	bus service in the countryside	increase number of trains that stop at selling station
X?		
Greater awareness of businesses operating in this area		
Repair the chasms on the North side of Staplestreet Road and the running water.		
Dunkirk speeding	Traffic and parking in Boughton	

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Summary of average download speed by ISP package: November 2014

	Average download speed during period		
Package	**Maximum**	**24 hours**	**8-10pm weekdays**
BT ADSL2+	9.6Mbit/s to 12.6Mbit/s	8.9Mbit/s to 11.8Mbit/s	8.9Mbit/s to 11.7Mbit/s
KC ADSL2+	9Mbit/s to 11.3Mbit/s	8.6Mbit/s to 10.8Mbit/s	8.5Mbit/s to 10.8Mbit/s
Plusnet ADSL2+*	9.9Mbit/s to 12.8Mbit/s	9.3Mbit/s to 12.1Mbit/s	9.2Mbit/s to 12Mbit/s
Sky ADSL2+	9.3Mbit/s to 11.4Mbit/s	8.6Mbit/s to 10.6Mbit/s	8.5Mbit/s to 10.5Mbit/s
TalkTalk ADSL2+	8.1Mbit/s to 10.2Mbit/s	7.5Mbit/s to 9.5Mbit/s	7.5Mbit/s to 9.5Mbit/s
BT 'up to' 38Mbit/s	33.1Mbit/s to 35.4Mbit/s	32.1Mbit/s to 34.4Mbit/s	31.9Mbit/s to 34.2Mbit/s
EE 'up to' 38Mbit/s	34.3Mbit/s to 36.3Mbit/s	29.5Mbit/s to 31.5Mbit/s	29Mbit/s to 30.9Mbit/s
Plusnet 'up to' 38Mbit/s*	32.2Mbit/s to 36.5Mbit/s	30.1Mbit/s to 34.2Mbit/s	30Mbit/s to 34.1Mbit/s
Sky 'up to' 38Mbit/s	35.3Mbit/s to 37.1Mbit/s	34.3Mbit/s to 36.4Mbit/s	34.2Mbit/s to 36.3Mbit/s
Virgin Media 'up to' 50Mbit/s	53.9Mbit/s to 54.2Mbit/s	52.5Mbit/s to 53.3Mbit/s	51.5Mbit/s to 52.8Mbit/s
BT 'up to' 76Mbit/s	62Mbit/s to 65.1Mbit/s	59.9Mbit/s to 63.1Mbit/s	59.3Mbit/s to 62.6Mbit/s
Plusnet 'up to' 76Mbit/s	61.3Mbit/s to 64Mbit/s	57.7Mbit/s to 60.5Mbit/s	57.1Mbit/s to 59.7Mbit/s
Virgin Media 'up to' 100Mbit/s	104.4Mbit/s to 106.5Mbit/s	94.3Mbit/s to 99.5Mbit/s	86.5Mbit/s to 95Mbit/s
Virgin Media 'up to' 152Mbit/s	159.1Mbit/s to 159.5Mbit/s	129.5Mbit/s to 135.8Mbit/s	115Mbit/s to 124.5Mbit/s

Source: SamKnows measurement data for all panel members with a connection in November 2014. Panel Base: 1,711
Note: Ranges show the 95% confidence interval of the average speeds measured on the ISP packages.

1. **Average download speed for residential fixed broadband connections**

"Small increase in proportion of registered businesses in GB trading internationally between 2012 and 2013, Exporters and Importers in Great Britain, 2013," Office for National Statistics, Released: 13 November 2014.
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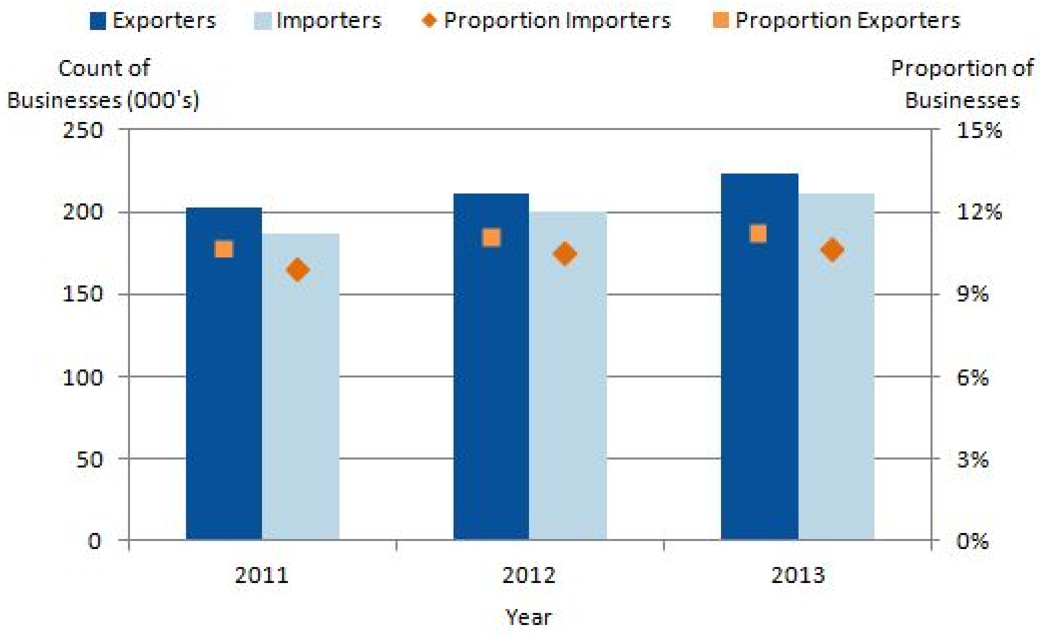

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