

Christchurch and East Dorset Employment Land Review Stage 1 Report

1.0 Introduction

- 1.1 Major changes have been made to the planning system with the introduction of the Planning & Compulsory Purchase Act 2004. As part of this process the Christchurch and East Dorset Local Plans will be replaced by Local Development Frameworks (LDFs). In preparing the LDF local planning authorities are required to conduct employment land reviews which assess the supply and quality of employment land in the plan area¹. The assessment will ascertain the necessary quantity, location of employment land and type of premises to be provided in order to meet business requirements over the plan period and beyond². This assessment will look toward providing a diversity of sites to meet the needs of a range of employment sectors.
- 1.2 This employment land review has been conducted jointly to provide a cohesive evidence base to inform the preparation of the Christchurch and East Dorset Core Strategy. The review is also a fundamental element of the evidence base to inform the preparation of the Bournemouth Airport Area Action Plan. This Stage 1 report is also consistent with the shared approach adopted by Dorset authorities.

Government Guidance on Employment Land Reviews

- 1.3 The Government produced guidance for undertaking employment land reviews in December 2004 and this guidance sets the framework for the Christchurch and East Dorset review.
- 1.4 The core stages of the employment land review process are as follows:

Stage 1: This stage provides a stock take of the existing situation, including an initial assessment of the 'fitness for purpose' of existing allocated employment sites.

Stage 2: Stage 2 assesses the scale and nature of likely demand for employment land and the available supply in quantitative terms.

Stage 3: The third and final stage involves a more detailed review of site supply and quality. It also identifies and designates new employment sites in order to create a balanced employment land portfolio.

(2.37 Employment Land Reviews, ODPM, 2004)

¹ For the purposes of this review the 'Plan Area' refers to the Christchurch and East Dorset local planning authority areas

² The Plan period refers to the time horizon of the Core Strategy and the emerging South West Regional Spatial Strategy (RSS) which is a 20 year period 2006 - 2026

Stage 1 Detailed Aim

- 1.5 The primary aim of stage 1 is to assess the suitability of the current portfolio of employment sites in Christchurch and East Dorset for employment development³. This process will determine sites to be maintained in employment use and sites that can be considered for non employment uses. This report also contains some analysis of the contribution to employment generation and productivity for business sectors represented in the plan area.

Links to the Local Development Framework

- 1.6 The employment land review will form part of the evidence base for the Christchurch and East Dorset Core Strategy and the Bournemouth Airport Area Action Plan (AAP). Stage 1 and 2 of the review will feed into the Issues and Options stage of the Core Strategy and Airport AAP in November / December 2007. The completed ELR inclusive of Stage 3 will feed into the Preferred Options stage of these documents.

Policy Background

- 1.7 The purpose behind the preparation of employment land reviews is expressed in national guidance, regional and sub regional planning / economic strategies. Relevant policy is set out below:

Planning Policy Statement 3: Housing

- 1.8 The context and requirement for undertaking an employment land review is expressed within PPS3. This guidance places emphasis on the review of non housing allocations which is a primary requirement for Stage 1 of the review process.
- 1.9 *'In developing their previously – developed land strategies, Local Planning Authorities should consider a range of incentives or interventions that could help to ensure that previously developed land is developed in line with the trajectory/ies. This should include:*
- *Considering whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development.'*
- (Para 44)*

³ Sites considered within the Stage 1 assessment include sites allocated in the Local Plan, Sites Benefiting from planning permission, Sites vacant (for over a year) and / or potentially under-utilised sites and isolated employment sites.

Planning Policy Guidance 4: Industrial, Commercial Development and Small Firms

- 1.10 PPG4 places an emphasis on meeting the needs of commerce and industry. A sound evidence base collated as part of the employment land review will assist in determining the land requirements across a range of business sectors. This will consider meeting the needs of business sectors currently represented in the plan area and those that are desirable to attract.
- 1.11 PPG4 identifies the requirement to provide a variety of sites well served by appropriate infrastructure to meet diverse business requirements. In this context the locational requirements of businesses are highly significant in the preparation of the employment land review. Guidance states that the locational requirements of businesses are determined by; the demand of customers, access to raw materials and suppliers; links with other businesses; the workforce catchment area and access to the highway network. Assessment of locational requirements must be made in the context of sustainable development with due consideration to environmental impacts. Therefore, consideration should be given to minimising the number of journeys by locating businesses nearer more energy efficient modes of transport.
- 1.12 In preparing development plans planning authorities are encouraged, where appropriate, to channel particular types of business development into specific locations. Decisions made in this respect must be accompanied by the appropriate evidence that justifies this level of prescription. This provides scope for the ELR process and LDF policy to influence the types of businesses and premises located on specific employment sites.

The Draft Regional Spatial Strategy for the South West 2006 - 2026

- 1.13 The emerging RSS is not prescriptive in terms of the quantity of employment land to be provided at a local level in South East Dorset. However, reference is made to the employment land projections put forward to the Regional Assembly by the Dorset Strategic Authorities. The ELR process will review these projections in quantifying employment land requirements for Christchurch and East Dorset in Stage 2 of the review.
- 1.14 The RSS makes broad statements concerning the supply and type of sites required to raise the economic performance of the sub region / South West region. Reference is made toward meeting the objectives of sub regional economic strategies⁴ and for the review process to take account of the needs of individual business sectors. This includes meeting the needs of key business sectors that make a significant contribution to employment generation and productivity. This also

⁴ 'Raising the Game' forms the economic strategy for the South East Dorset sub region.

translates into a requirement to determine complementary clusters of related business activity. The LDF process and the employment land review needs to be consistent with the Regional Economic Strategy (RES) and the South East Dorset sub regional economic strategy 'Raising the Game'. The Submission RSS identifies the need to provide;

- 1.15 *'A ready supply of high quality sites and buildings at the right time and in suitable locations is fundamental to the continued economic performance of the region' (8.3.1 RSS Submission Draft)*
- 1.16 *'A sufficient supply is fundamental in promoting successful business, in helping to secure successful delivery of economic development and regeneration, sub regional employment space strategies and development of key established emerging business sectors, including clusters of related activity' (8.3.1 RSS Submission Draft)*
- 1.17 The RSS reiterates the requirements of Government guidance on employment land reviews in terms of meeting the needs of individual business sectors. Assessment of these requirements must also be made in reference to a robust understanding of supply and demand. The Submission RSS identifies:
- 1.18 *the need to take into account 'specialised employment land' requirements which should also be addressed when considering the preparation of LDFs and RSSs. These sectors include any specific employers in sectors that are important to the local economy whose potential expansion needs to be safeguarded' (8.3.3 RSS Submission Draft)*
- 1.19 *Local authorities should ensure that they maintain an up to date robust evidence base of supply and likely demand for employment land and size and types of unit for their area. This will ensure that the right types of provision are brought forward in response to identified requirements' (8.3.4 RSS Submission Draft)*

The Regional Economic Strategy (RES)

- 1.20 The RES is prepared by the South West Regional Development Agency and sets out the strategy and strategic economic objectives for the South West Region for the period 2006 - 2015. Within the strategy the role of the public sector is set out in creating the conditions to support private enterprise and reduce economic disparities. The RES identifies 5 key issues facing the region over the next 10 years:
- Population growth, ageing and distribution
 - Business creation and retention
 - Rapidly changing industrial and employment mix
 - Technological and other knowledge dissemination

- Energy, use of resources and climate change

1.21 From these issues a number of strategic objectives have been developed in the RES which have an impact on work undertaken in the preparation of the Local Development Framework. Two core issues for the sub region identified by the RES are illustrated below:

Raising Productivity / Skill Levels

1.22 Dorset performs below the national average in respect of GVA⁵ output per head. The County faces significant challenges in raising the quality of employment opportunities and the quality of life for local communities. In the context of regional growth there is a requirement for improvements in productivity and the availability of a flexible and highly skilled workforce. There are opportunities here for increasing the number of higher quality employment positions, raising basic skills levels and improving access to knowledge i.e. further / higher education opportunities.

Changing Industrial and Employment Mix

1.23 With a decline in traditional industries such as manufacturing it is necessary to take account of the needs of emerging sectors that assist long term economic growth in the plan area. This involves supporting sectors with high knowledge content that include aerospace and health.

Sustainable Development

1.24 The drive for employment generation and raising business productivity is consistent with sustainable development principles stated in the RES.

1.25 *The region is committed to reducing its environmental 'footprint' by adopting a low carbon approach to economic development; by improving resource productivity; by promoting renewable energy and by encouraging better environmental efficiency in private and public sectors.*

1.26 In this context economic growth is decoupled from negative environmental impacts and pursued in accordance with the principles of sustainable development.

'Raising the Game' Economic Development Strategy 2005-2016

1.27 Raising the Game has been produced by the Bournemouth, Dorset and Poole Economic Partnership in association with the Local Strategic Partnerships. It forms the economic strategy for the South East Dorset

⁵ **Gross Value Added** (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK by estimating the value of its outputs (goods and services), less purchases and less net spending taxes.

Sub Region for the period 2005 – 2016. Christchurch signed up to the strategy at Full Council in January 2006.

- 1.28 The strategy sets out the current and projected role of the sub region in respect of its contribution to the regional and national economy. It also provides a co-ordinating function to align planning and economic policies to deliver shared long term economic objectives. The long term vision is also consistent with the Regional Economic Strategy and Regional Spatial Strategy.

Raising the Game

- 1.29 The economic strategy for the South East Dorset sub region identifies the requirement;

‘To develop a thriving, competitive business environment that delivers better quality employment opportunities and a better quality of life for people in Bournemouth, Dorset and Poole’.

- 1.30 Significant issues have been raised by the strategy to be addressed over the plan period which include:

- *Significant room for improvement in productivity*
- *A relatively low wage economy*
- *Skills gaps and shortages that may be made worse by a rapidly ageing population and out migration of young people*
- *Poor affordability in terms of the ratio of house prices to incomes*
- *Infrastructure deficiencies limiting inward investment*

- 1.31 The strategy refers to a ‘quest for quality’ in terms of the business environment that will deliver improved economic performance and a better quality of life. It examines the opportunities for the sub region to become a very significant knowledge based economy in relation to the South East and Europe. There are significant opportunities for business sector growth in the plan area which benefit from a growing regional airport, high technology manufacturing, high value tourism, leisure, and health sectors. In particular the strategy states the long term strategy for a sustainable economy:

A sustainable competitive economy needs diversity and depth without being over-reliant on a single sector and to build clusters of excellence that will grow to add value to the economy.

- 1.32 The LDF process faces a considerable challenge in accommodating the needs of a diverse range of employment sectors. Encapsulated within this aim is a focus on raising the quality of employment opportunities and encouraging the growth of sectors that make a significant contribution to sustainable economic development. In addition the plan area needs to attract and retain key workers through the provision of affordable housing and high quality public amenities.

2.0 Study Area Overview

- 2.1 Christchurch and East Dorset are situated within the South East Dorset sub region and form the study area for the employment land review. This area includes the eastern part of the South East Dorset conurbation, the adjacent coastal area, along with other urban centres set within the more rural area to the north. The study area has an overall population of around 130,000 residents⁶, this is characterised by an ageing demographic, with nearly 50% of the population of retirement age⁷. The study area performs a significant role in the sub region and includes significant local service centres which provide a range of shopping, sporting recreation and other community facilities.
- 2.2 Christchurch, which lies in the south of the study area, is divided by St Catherine's Hill, a ridge which runs broadly north-south between the valleys of the Rivers Avon and Stour. To the south this area has an urban character, while to the north it has a more open character. East Dorset lies immediately to the north and includes a predominantly rural area, with the most significant settlements located to the east and south east. A substantial area is designated as part of the South East Dorset Green Belt. This lies north of the south coast urban area and extends across much of the south-eastern part of East Dorset.
- 2.3 The study area encompasses a range of high quality environmental assets which include; the coastal environment, two river valleys, a variety of nature conservation sites, Scheduled Ancient Monuments, historic buildings and townscape. These interests are generally well recognised and protected by designation. This includes part of the Cranborne Chase Area of Outstanding Natural Beauty, situated within the north-west of the study area and the Dorset Heathlands, mainly situated in the centre of the study area. These environments support a significant range of nature conservation habitats, including some sites of international importance.
- 2.4 The area forms an attractive part of the South East Dorset Sub Region and it includes popular residential locations. Property prices having risen significantly in recent years throughout the study area. In East Dorset the average price of a detached house has risen from £130,000 (in 1998), to £317,647 (in 2006)⁸, with a similar situation in Christchurch, where the average price of a detached house has risen from £136,000 (in 1998), to 321,715 (in 2006)⁹. The high demand for housing has placed increasing pressure on existing employment land, particularly within the urban area of Christchurch. Over the plan period, the area will need to accommodate a significant quantity of housing, the amount of which will be established in the South West Regional

⁶ Dorset County Council 2007, 11

⁷ Dorset County Council 2007, 11

⁸ Land Registry 2007

⁹ Land Registry 2007

Spatial Strategy (RSS). The requirement to provide additional housing creates added pressure to provide accompanying employment opportunities to support the needs of a rising population. In this respect, there is a delicate balance to be reached in reconciling demands for employment land and housing.

Employment Land Character

- 2.5 The vast majority of employment land within the study area falls within the general industrial / business area market segment with most commercial premises located on industrial estates. There is a shortage of high quality business parks, research and technology / science parks in the study area. These types of employment land area are associated with economically productive businesses that generate high quality employment opportunities. The lack of these types of site is potentially significant for achieving sustainable economic growth.
- 2.6 The most prevalent business sectors in study area located on allocated employment sites include general manufacturing / engineering, distribution, transport & communications, and construction. There is an under representation of R&D and ICT companies which are associated with high levels of productivity and high quality employment opportunities. Other major employment sectors located in the study area include hotels and restaurants, public administration, education, health and banking / finance.
- 2.7 The supply of available employment land in the study area is concentrated within Bournemouth International Airport's Northern Development Zone. Dependent upon the future development scenario adopted for this site there is approximately 60 – 70 ha of land available for development. Of sites located elsewhere in Christchurch there is approximately 5ha of available employment land. Of the sites located in East Dorset 9.22ha of employment land is available for development. The entire stock of employment land totals 125ha in Christchurch and 107.87ha in East Dorset. These figures include allocated and non allocated sites.
- 2.8 Most commercial premises on allocated employment sites in the study area are established light industrial and general industrial units which fall within B1 and B2 uses. There are a number of business premises that combine uses which include elements of B1, B2 and B8. Most employment premises are small units between 93 – 486 sqm in scale and are predominantly leasehold. Additionally most businesses operating in the study area do so on sites of less than 0.25ha.
- 2.9 The study area has a number of locational attributes which serve to attract and maintain businesses in the area. These include quality of life, ability to retain skilled staff, flexibility in tenure, proximity to customers, access to the strategic road network (particularly along the

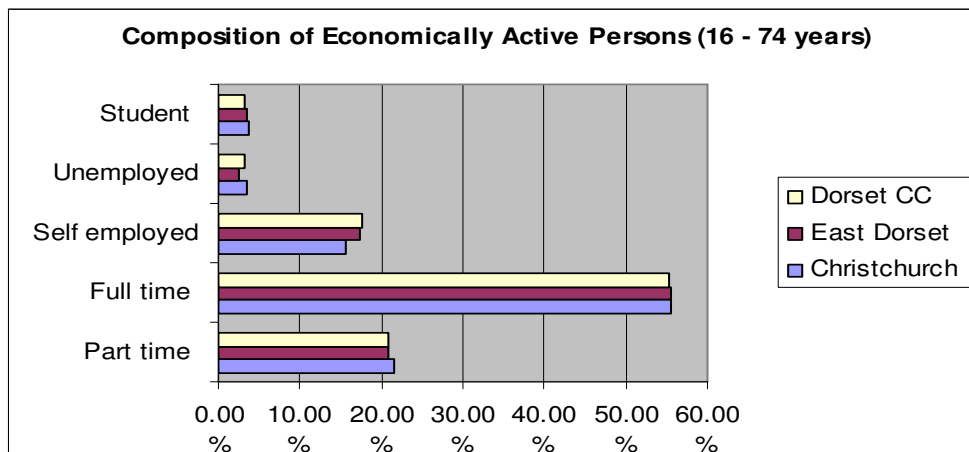
A31 route), access to broadband infrastructure, availability of car parking and proximity to Bournemouth International Airport.

- 2.10 Some significant factors which can act as a deterrent to businesses locating in the area include the availability of skilled workers, capabilities for future expansion, cost of land and premises, quality of land / premises, affordable housing availability, proximity to suppliers and environmental constraints.

3.0 Local Economy Review

Economic Activity in Christchurch and East Dorset

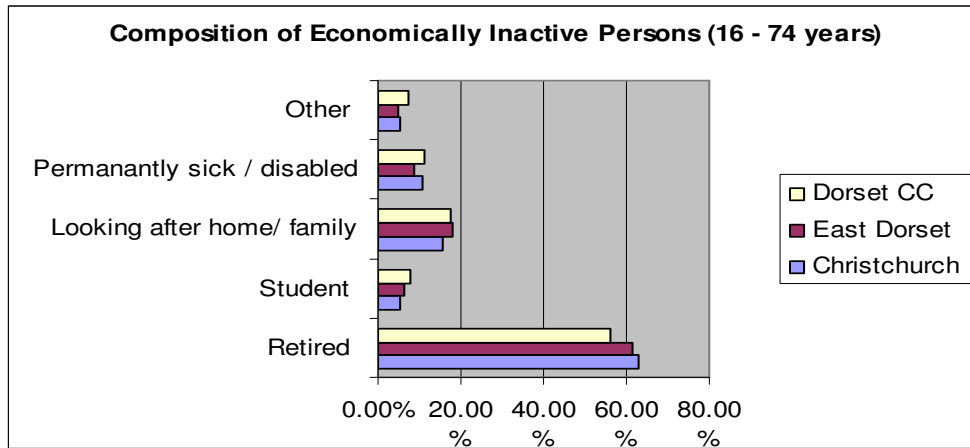
- 3.1 In comparison to the Dorset County Council average Christchurch and East Dorset have a lower than average number of economically active individuals. The main reason for this figure is the high number of retirees as a percentage of the total population. In addition the increasing percentage of the population entering further education also has a bearing on the figures. In Christchurch 61.3% of the population aged 16-74 are economically active equating to 18,859 individuals. Some 38.7% of this age group are economically inactive equating to 11,899 individuals¹⁰. Of the economically inactive 62.9% are retired. In East Dorset 64.8% of the population aged 16-74 are economically active, equating to 20,735 individuals. Within the group assessed as economically inactive 61.5% are retired which is above the Dorset average of 56%.



(Figure 1)

(Source: Census of Population 2001, ONS)

¹⁰ Census of Population 2001, ONS Copyright Reserved

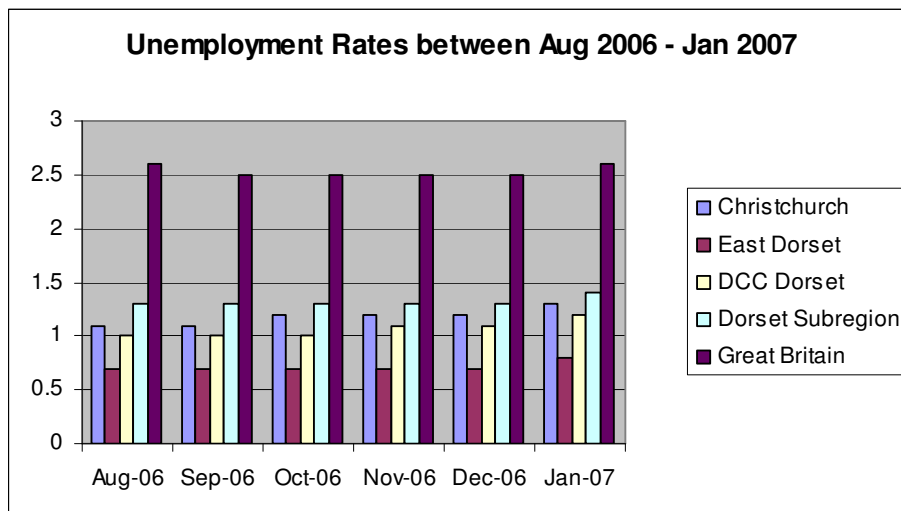


(Figure 2)

(Source: NOMIS)

Unemployment

3.2 In comparison to the Great Britain average Dorset has low levels of unemployment. Unemployment in Christchurch has remained fairly consistent at around 1.1% of the working resident population over the past 5 years. Unemployment in East Dorset has averaged at around 0.7% of the working population over the past 5 years. East Dorset has experienced a steady decline in unemployment in recent years.



(Figure 3)

Source: NOMIS

Employment Sector Activity¹¹ (2000 – 2004)

3.3 The following analysis of employment sectors reviews performance with regard to employment generation and productivity / GVA¹². This review has been undertaken in order to establish the nature of business activity in Christchurch and East Dorset and the extent to which current business activity contributes to sustainable economic growth. This section reviews the performance of key sectors identified

¹¹ As assessed in the Urbecon report (April 2006)

¹² Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK by estimating the value of its outputs (goods and services), less purchases and less net spending taxes.

in the Regional Economic Strategy which are considered important for establishing long term sustainable economic growth. The assessment of 'economic priority sectors' concentrates on employment generation due to a lack of data on productivity. Analysis of the 'core' employment sectors includes detail of both employment and productivity performance.

Economic Priority Sectors

Aerospace / Advanced Engineering

- 3.4 The South West Regional Development Agency has identified the aerospace industry as particularly important in terms of productivity / GVA output¹³. Aerospace has been acknowledged as a significant growth sector within the knowledge economy and is also one of the few sectors trading on a local and global level. This sector is particularly prevalent in Christchurch with large employers located in the centre of Christchurch and at the Airport. BAE systems (Grange Road) and Beagle Aircraft (Stony Lane) are examples of major high tech aerospace business occupying a central location. In consideration of the importance of this sector it is vital that sufficient land and the right type of premises are provided.
- 3.5 There has been a 30% decline in employment in advanced engineering in Christchurch and a 26% decline in East Dorset. The Urbecon report classifies advanced engineering as a failing sector in respect of its performance In Dorset, Bournemouth and Poole. However, without adequate data on GVA output it is not possible to assess the position of this sector in respect of its current contribution to the economy. Further data concerning productivity is necessary to adequately assess the position of this sector.

Information Communication Technologies (ICT)

- 3.6 Christchurch has seen a significant decline in ICT with a 45% fall in employment within this sector. Along with a decline in advanced engineering this is disappointing in terms of the knowledge economy overall. However, as a percentage of overall employment this sector only accounts for approximately 2% therefore the decline has limited impact.
- 3.7 East Dorset has experienced a more significant decline in ICT industries with a loss of 196 jobs representing a 29% decrease in employment in this sector for the period 2000 – 2004.
- 3.8 It is important to note that growth sectors such as finance and education accommodate a significant number of skilled ICT workers.

¹³ Overall contribution to the South East Dorset Sub Regional economy.

Therefore, this sector must be assessed in respect of how it is embodied in a range of employment sectors represented locally.

Biotechnology

- 3.9 Biotechnology in Christchurch has seen a 133% growth in employment. However, as the sector forms a very small percentage of overall employment in the Borough the impact of growth is low.
- 3.10 Biotechnology is also a small sector for East Dorset and does not currently make a significant contribution to the local economy. The district has experienced a 84% decline in employment in this industry. However, this is less significant given the extremely low numbers employed in this sector.
- 3.11 Growth in the Biotechnology is closely linked to the agriculture industry. In this respect growth tends to occur in more rural areas with more sustainable clusters / concentrations.

Creative Industries

- 3.12 This particular sector is very significant in terms of the sub regional economy and Christchurch has seen a 55% rise (135 employees) in employment. East Dorset has witnessed a small decline in this sector with a 12% decline in employment (equating to 61 jobs).
- 3.13 Growth and quality in this sector is significant in stimulating the knowledge economy overall. There is a particular impact here in terms the 'quality of life offer' in the sub region. Creative industries have been especially associated with media based industries and services.
- 3.14 The Urbecon report makes specific reference to the impact of the creative industries on attracting inward investment.

a vibrant media and a flourishing arts scene can make a substantial difference to the attraction of direct investment from overseas and from alternative UKL locations. (Urbecon 2006)

- 3.15 It is also helpful to consider the complementary relationship of this sector with tourism and leisure sectors which form a core element of the Christchurch economy.

Environmental Technologies

- 3.16 This sector is very significant for the knowledge economy, however, the Urbecon report identifies a 30% decline (-83 employees) in employment in Christchurch and no figure for GVA is available. East Dorset has also experienced a decline in employment with a loss of 80 jobs accounting for a 21% decline for the District.

- 3.17 There are issues for future growth in this sector as the Urbecon analysis raises concerns for whether local firms are in a suitable position to take advantage of growth opportunities.

Food and Drink

- 3.18 Food and drink is a small sector in respect of employment and the scale of employment has remained static. (No GVA figures available). This sector has performed more positively in East Dorset with a 19% increase in employment equating to 162 jobs.

Marine Technologies

- 3.19 The marine technology sector has had a 62% (115 employees) increase in employment. The prospects for this sector are positive overall with good performance across the sub region and particularly in Poole. (No GVA figures available).
- 3.20 This sector has not performed so well in East Dorset and has experienced a 9% decline in employment. Businesses in this sector have a preference for coastal locations which accounts for low representation in the District.

Tourism & Leisure

- 3.21 Although Christchurch has seen relatively no growth (5% increase in employment / 25 employees) in this sector we have fared better than neighbouring authorities in the sub region that have seen a decline in employment. East Dorset has experienced a decline of 7% in employment (61 employees). The performance of this sector in Christchurch is disappointing given the quality of the local tourism offer.

Packaging and Printing

- 3.22 There has been a decline of some 25% in employment which follows the overall trend for the sub region. Figures are unavailable for specific employment numbers. (No GVA figures available). East Dorset has also witnessed a decline in this sector with a loss of 134 jobs which is a 39% decline for the District.

Retail Trade

- 3.23 The retail trade is a very significant employer for the sub region and for Christchurch but there has only been a minor increase in employment of 8% equating to an increase of 220 employees (No GVA figures available). Similar levels of growth have been experienced in East Dorset with a 7% rise in employment (285 employees).

Health

- 3.24 Employment in the health sector for Christchurch is very significant and constitutes one of the largest sources of employment. However growth in employment has remained fairly static. (No GVA figures available).

East Dorset has experienced a significant decline in the health sector with a loss of 248 jobs which is a 18% decline for this sector.

Education

- 3.25 Education is a highly significant employer for the Borough which has experienced a 22% rise in employment equating to an increase of 247 employees. East Dorset has also performed positively in this sector with a 23% increase in employment (401 employees).

Core Employment Sectors Review (Source Dorset County Council / Annual Business Inquiry 2006)

Agriculture & Fishing

- 3.26 This sector has witnessed growth in GVA with a rise of 30% and a 16% rise in employment. However, it represents a very small proportion of overall employment and GVA for the Borough. In summary there has been very little change in this sector. East Dorset has experienced minor changes in this sector with a 9% rise in GVA and a 2% decline in employment.

Energy & Water

- 3.27 This has seen a decline of 14% in GVA and a 41% fall in employment. The proportion of those employed in this sector is unknown; GVA output is significant but substantially lower than other sectors with the exception of Agriculture and fishing. This sector has made a significant contribution to the economy in East Dorset with a 34% rise in GVA. However, there has also been a 9% decline in employment.

Manufacturing

- 3.28 In line with national trends there has been a decline in manufacturing in the Borough of 12% in GVA and 29% in employment. In contrast East Dorset has experienced a 21% increase in GVA and a slight decrease of 2% in employment.

Construction

- 3.29 The construction industry has seen the most significant change with a 92% rise in GVA output. This is set to increase in respect of the projected housing figures contained in the draft Regional Spatial Strategy. Employment in this sector has also benefited from a rise of

32% in this period. The construction industry forms a very significant element of the Borough economy so percentage rises in this sector are very significant. The construction industry has also fared well in East Dorset with a 56% rise in GVA and 9% increase in employment.

Transport and Communications

3.30 This sector has experienced a notable decline of 18% in GVA and a decline of 26% in employment. Decline has also been notable in East Dorset with a drop of 27% in GVA and 34% in employment. Decline in the performance of this sector is very significant as it is a major player in the local economy.

Banking, Finance and Insurance

3.31 This sector has also seen a substantial increase in GVA of 21% but a decline in employment of 7%. It represents the greatest contributor to economic output for the Borough and a very significant employment generator. Growth has also been substantial in East Dorset with a 97% rise in GVA and a 51% increase in employment.

Public administration, Education & Health

3.32 There has been a substantial rise in GVA of 25% but only a 12% increase in employment. This sector ranks second for the Borough in terms of employment generation and prominently in respect of GVA output. In East Dorset this sector has experienced growth in GVA and employment. GVA has risen 14% (this sector ranks third in the District in respect of GVA output). There has also been a 3% increase in employment.

Distribution, Hotels and Restaurants

3.33 This is the second largest sector in terms of GVA and has experienced a 20% increase in GVA output but only a 3% rise in employment. This sector performs at a similar level in East Dorset with a 24% rise in GVA and 7% increase in employment. This particular sector is not closely considered as part of the review but represents a very important contribution to the economy as a whole.

Industry	Christchurch	EDDC	Dorset	South West	Great Britain
Total Workplace Employment	16,854	28,118	139,548	2,194,693	26,024,704
Agriculture & Fishing	0.4%	2.3%	2.4%	1%	0.9%
Distribution, hotels and restaurants	31%	28.4%	27.2%	26.9%	24.7%
Public administration, education and health	20.5%	16.2%	28.9%	28.3%	26.4%
Manufacturing	15.7%	18.2%	13.3%	11.6%	11.9%
Banking Finance & Insurance	12.9%	18.9%	12.6%	17%	20%

Transport & Communications	8.7%	3.0%	3.7%	4.9%	5.9%
Construction	6.5%	8.2%	6.5%	4.6%	4.5%
Energy & Water	C	C	0.6%	0.7%	0.6%
Other Services	3.9%	4.7%	4.9%	4.6%	5.1%
Percentage knowledge driven	22.7%	16.1%	15.1%	19.8%	22.9%
Tourism	3.4%	4.2%	4.9%	4.8%	4.2%

(Figure 4) Employment by Sector in Christchurch and East Dorset
(Source: Annual Business Inquiry 2006)

Total Borough GVA Output CBC (2004)	£658,161
Top 10 Industries	
1) Banking, Finance and insurance	20.4%
2) Distribution, hotels and restaurants	19.6%
3) Manufacturing	19.6%
4) Public administration, education and health	13.7%
5) Transport & Communications	11.1%
6) Construction	9.2%
7) Energy & Water	2.1%
8) Agriculture & Fishing	0.4%
9) Other Services	4%

(Figure 5) Core Business Sectors Ranked by GVA¹⁴ (Christchurch)

Total Borough GVA Output EDDC (2004)	£1,147,989
Top 10 Industries	
1) Banking, Finance and insurance	28.56%
2) Manufacturing	21.64%
3) Distribution, hotels and restaurants	17.15%
4) Construction	11.18%
5) Public administration, education and health	10.32%
6) Transport & Communications	3.71%
7) Agriculture & Fishing	2.1%
8) Energy & Water	0.8%
9) Other Services	4.52%

(Figure 6) Core Business Sectors Ranked by GVA (East Dorset)

Business Structure

3.34 The business structures of Christchurch and East Dorset are comparable on a broad level. 85% of Christchurch and 88% of East Dorset firms are micro firms employing less than 10 individuals. These firms account for 25% and 32% of employment in Christchurch and East Dorset respectively. Less than 1% of firms in both areas employ more than 200 employees. However, 3% of Christchurch's firms employing 50 or more individuals account for 45% of employees in the

¹⁴ Figures derived from GVA data contained in the Urbecon 2006 report

Borough. In East Dorset 2% of firms employ 35% of the total number of employees for the District. Therefore, the small number of larger employers in both areas is highly significant for employment generation.

Economic Growth

3.35 Local estimates of Christchurch's GVA place it at around 14% of Dorset's total GVA. Local estimates of East Dorset's GVA place it at around 20% of Dorset's total GVA. GVA per head in Dorset is low at 70% of the England average and 76% of the regional level. Estimated GVA per resident in Christchurch has been consistently above the Dorset cc average since 1995 (Source: ONS & Dorset cc estimates 2007). Detailed changes in GVA output are set out below using data supplied by Urbecon.

Industry	GVA 2000 (£'000s)	GVA 2004 (£'000s)	Change + / -	Change %
1) Agriculture & fishing	1,899	2,465	566	30%
2) Energy and water	15,832	13,583	-2,249	-14%
3) Manufacturing	146,379	128,804	-17,575	-12%
4) Construction	31,468	60,562	29,094	92%
5) Distribution, hotels, and restaurants	107,208	128,840	21,632	20%
6) Transport and communications	89,708	73,219	-16,489	-18%
7) Banking, finance and insurance etc	110,609	134,375	23,766	21%
8) Public administration, education & health	71,883	90,091	18,208	25%
9) Other services	21,413	26,220	4,807	22%
Total:	596,400	658,161	61,762	10%

(Figure 7) Christchurch GVA Changes by Sector
(Source Urbecon 2006)

Industry	GVA 2000 (£'000s)	GVA 2004 (£'000s)	Change + / -	Change %
1) Agriculture & fishing	22,144	24,237	2,093	9
2) Energy and water	6,927	9,248	2,321	34
3) Manufacturing	204,774	248,469	43,694	21
4) Construction	82,347	128,306	45,959	56
5) Distribution, hotels, and restaurants	158,502	196,868	38,365	24
6) Transport and communications	58,290	42,607	-15,683	-27
7) Banking, finance and insurance etc	166,574	327,863	161,289	97
8) Public administration, education & health	103,644	118,463	148,189	14
9) Other services	51,155	51,928	813	2
	854,318	1,147,989	293,671	34

(Figure 8) East Dorset GVA Changes By Sector

Sector	2000	2004	Change + / -	% change + / -
Agriculture and fishing	56	65	9	16
Energy & water	80	47	-33	-41
Manufacturing	3,740	2,649	-1091	-29
Construction	809	1,088	279	35
Distribution, hotels and	5,060	5,231	171	3

restaurants				
Transport and communications	1,993	1,471	-522	-26
Banking, finance and insurance	2,342	2,180	-162	-7
Public administration, education & health	3,078	3,458	380	12
Other services	651	665	14	2
Total:	17,810	16,855	-955	-5

(Figure 9) Employment Changes by Sector: Christchurch growth / decline by BIGs 2000 - 2004
(Source Urbecon 2006)

Sector	2000	2004	Change + / -	% change + / -
Agriculture and fishing	653	639	-14	-2
Energy & water	35	32	-3	-9
Manufacturing	5,232	5,110	-122	-2
Construction	2,117	2,305	188	9
Distribution, hotels and restaurants	7,481	7,993	512	7
Transport and communications	1,295	856	-439	-34
Banking, finance and insurance	3,527	5,319	1,792	51
Public administration, education & health	4,438	4,547	109	3
Other services	1,554	1,317	-237	-15
Total:	26,332	28,118	1786	7

(Figure 10) Employment Changes by Sector: East Dorset growth / decline by BIGs 2000 - 2004

Sector	2000	2004	Change + / -	% change + / -
Advanced engineering	1322	964	-358	-27
Education	1108	1355	247	22
Defence	s	s	s	-100
Health	1257	1279	22	2
ICT	1278	698	-580	-45
Biotechnology	s	s	s	133
Creative industries	247	382	135	55
Environmental technologies	274	191	-83	-30
Food and drink	94	95	1	1
Marine technologies	186	301	115	62
Tourism & leisure	521	547	26	5
Printing and packaging	s	s	s	-25
Public administration	302	374	72	24

Retail distribution	2902	3122	220	8
Total	9569	9370	-199	-2

(Figure 11) Christchurch employment growth / decline by key sector 2000 – 2004 (Source: Urbecon 2006)

Sector	2000	2004	Change + / -	% change + / -
Advanced engineering	1351	993	-358	-26
Education	1730	2131	401	23
Defence	205	201	-4	-2
Health	1357	1109	-248	-18
ICT	688	492	-196	-29
Biotechnology	s	S	S	-84
Creative industries	530	469	-61	-12
Environmental technologies	381	301	-80	-21
Food and drink	837	999	162	19
Marine technologies	474	433	-41	-9
Tourism & leisure	1208	1126	-82	-7
Printing and packaging	346	212	-134	-39
Public administration	309	325	16	5
Retail distribution	4112	4397	285	7
Total	13,665	13,210	-455	-3

(Figure 12) East Dorset employment growth / decline by key sector 2000 – 2004

Wage Levels

Median Gross Weekly Earnings for Full Time Employees on Adult Rates				
	Christchurch	East Dorset	Regional	National
Workplace Based	£428	£404	£401	£434
Residence Based	£425	£448	£407	£435

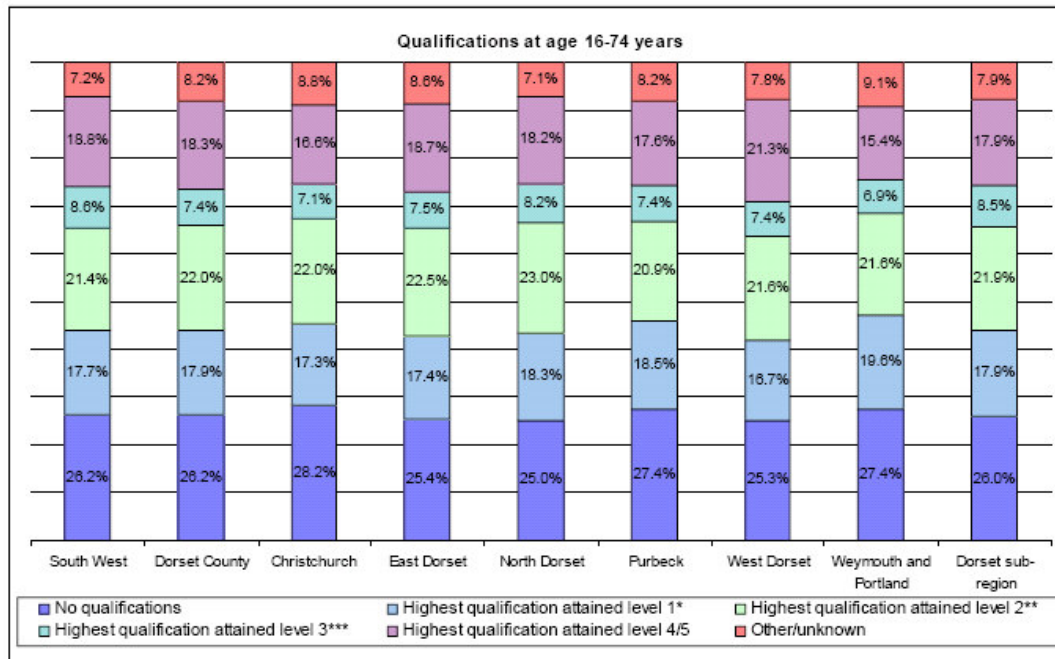
(Figure 13)(Dorset Data Book 2006)

- 3.36 On a workplace basis gross weekly earnings for full time employees on adult rates in Christchurch and East Dorset exceed the regional average but fall slightly below the national average.
- 3.37 In comparison to Dorset and the South West region Christchurch performs well in the knowledge based economy which performs relatively well in respect of GVA per industrial sector and GVA per employee. However, the majority of employment exists in the low value sectors e.g. Distribution, hotels and restaurants.
- 3.38 Gross weekly earnings for Christchurch and East Dorset are above the Dorset cc average. Over the period 2002 – 2004 weekly earnings for employees in Christchurch increased by 16%. However, during this

period house prices have risen by 38% creating an earnings to house price ratio of 5.61 in Christchurch and 5.31 in East Dorset.

Skills, Qualifications and Training

- 3.39 Christchurch has the highest proportion of individuals aged 16-74 with no qualifications (28.2% of the population) which is 2% higher than the County average. East Dorset performs slightly better with 25.4% of the population aged 16-74 with no qualifications.
- 3.40 22% of the population Christchurch have achieved GCSE grades A – C. Relatively low educational attainment is partly due to the high percentage of retirees in the Borough. In East Dorset 22.5% of population have achieved 5+ GCSE grades A-C which is slightly above the DCC average.
- 3.41 In Christchurch 16.6% of the population have attained level 4/5 qualifications which is 2% lower than the figure for Dorset cc. In East Dorset 18.7% of the population have attained level 4/5 qualifications which is on a par with County figures. The lower figure for Christchurch and East Dorset relates to a lack of suitable employment opportunities appealing to the graduate market.
- 3.42 With the advent of top up fees education providers envisage that more students will be seeking places at local universities i.e. Bournemouth and either living at home or in the local area.



Level 1	1+ 'O' level passes; 1+ CSE/GCSE any grades; NVQ level 1; Foundation GNVQ
Level 2	5+ 'O' level passes; 5+ CSEs (grade 1's); 5+ GCSEs (grades A-C); School Certificate; 1+ 'A' levels/'AS' levels; NVQ level 2; Intermediate GNVQ
Level 3	2+ 'A' levels; 4+ AS levels; Higher School Certificate; NVQ level 3; Advanced GNVQ
Level 4/5	First degree; Higher degree; NVQ levels 4 and 5; HNC; HND; Qualified Teacher Status; Qualified Medical Doctor; Qualified Dentist; Qualified Nurse; Midwife; Health Visitor
Other	Other qualification whose level cannot be determined

Figure 14) Level of Skills, Education and Training from a Regional to Local Level

4.0 Employment Land Losses: (April 2001 – March 2005)

4.1 Over the last 5 years there have been relatively few employment land losses and few significant losses. However, the majority of losses are in central locations on sustainable sites in close proximity to transport infrastructure and community facilities. Some of the losses have also had a significant impact on the character of established employment areas with implications for future planning decisions.

Significant Employment Losses

Peeks Warehouse

4.2 The loss of Peeks Warehouse to a children's play centre is significant in changing the character of an established employment area.

55 Bridge Street (Priory Motors)

4.3 The current planning permission for this site has yet to be implemented but this site represents an important loss of employment land. The site forms part of land identified for a mixed use development in the 2001

adopted Local Plan. The Local Plan identifies the requirement for a development brief for land between Bridge Street, Stony Lane South and the Civic Offices. The redevelopment of parts of the site without a development brief in place detracts from a more desirable balance of uses which could be realised on the site.

63 – 67 Somerford Road

- 4.4 Loss of employment land at 67 Somerford Road to uses connected with a retail warehouse is another example of the erosion of the prevailing employment character in the immediate vicinity of the Somerford industrial estates. The fringes of the Somerford industrial estates have been threatened by the emergence of retail warehouses and builders yards such as Travis Perkins and In Excess.

Unit B, 2 & 4 Airfield Way

- 4.5 The present planning permission for this site is yet to be implemented and has left in excess of 2000 sq ft of floorspace unused for over an 18 month period. In effect there has been a loss of employment generating land with no alternative put in place. As with the Peeks Warehouse permission this poses the danger of setting a precedent for the nature of future development on established employment generating land. This also cumulatively erodes the ability of the Borough to meet the needs of local business and inward investment contrary to adopted sub regional and regional economic strategies.

5.0 Site Assessment Criteria

Aim

- 5.1 Stage 1 of the employment land review examines the current portfolio of employment sites in Christchurch and East Dorset. This review process determines sites to be retained in employment use and those to be considered for non employment uses in order to safeguard vibrant and high quality sites.

Methodology

- 5.2 National guidance on employment land reviews states that sites of 0.25ha or above or with a floorspace of 500sqm + should be included in the review. Within the Christchurch area a number of sites have been included which fall below this threshold due to their significance for the local economy. The review process primarily examines premises in B1, B2 and B8 uses.

Sites Appraised in Stage 1:

- 1) Sites allocated for employment use in the development plan
- 2) Sites benefiting from permission for employment use
- 3) Sites vacant for over a year and / or potentially underutilised

4) Isolated employment sites

- 5.3 Due to the differences in policy approach sites assessed in East Dorset include those which are formally identified for employment use in the adopted East Dorset Local Plan.
- 5.4 Stages 2 and 3 of the review process will assess the remaining portfolio of employment sites which includes established employment sites not allocated in the development plan.
- 5.5 Sites included in stage one have been assessed against 3 core areas which address market attractiveness, sustainable development and strategic planning factors. The detailed fields that fall within these categories are set out in Figures 15 – 19.
- 5.6 A traffic light system has been adopted to flag up any physical, planning or market constraints. This provides an indication of whether the site is likely to be fit for purpose in meeting current and future business requirements.

Bolt-ons to the Study

- 5.7 The study has taken account of significant employment generating uses that fall outside of the B1, B2 and B8 uses. A number of retail warehouses have been recorded on the fringes of established employment areas. These are considered due to their potential to revert to established employment uses. Hospital buildings have been recorded due to their very significant contribution to employment generation in the Borough.

Figure 15: Sites Allocated for Employment Use in the Development Plan (Christchurch)

Site Reference and Area (Ha)	Site Name	Market Attractiveness Factors						Sustainable Development Factors						Strategic Planning Factors								
		Established premises likely to meet market demand	Planning permission likely to meet market requirements?	In Single Ownership / Occupation	Owned by a developer / agency known to undertake employment development	Actively marketed as an employment site	Recent Activity within the last 5 years	Formally Identified for employment for 10 years + (where less = green)	No constraints on availability?	Phasing of availability?	Classified as Brownfield?	Workforce accessibility by a range of modes	Agglomeration of uses in the vicinity	Amenity and character commensurate with employment uses?	No environmental impact on / off site	Employment likely to be the only acceptable use?	Area identified as of strategic importance in the RSS / RES?	Likely to be required for specific user or specialist use?	Part of a long term development or regeneration proposal	Viable without public funding?	Public funding committed?	Other policy considerations to override any decision to release?
26 (74.52)	Aviation Park West		N/A																			
27 (63.17)	North East Sector		N/A																			
34 (1.82)	Cimex International																					
18 (1.594)	Gasworks Site																					
37 / 41 (1.711)	Stony Lane																					
44 / 44e (0.6)	Wilverley Road																					
10t (0.5313)	Stour Road																					
16 (1.8)	Qinetiq																					

Figure 16: Sites Benefiting from Planning Permission for Employment Use (Christchurch)

	Other policy considerations to override any decision to release?		
Strategic Planning Factors	Public funding committed?		
	Viable without public funding?		
	Part of a long term development or regeneration proposal		
	Likely to be required for specific user or specialist use?		
	Area identified as of strategic importance in the RSS / RES?		
Sustainable Development Factors	Employment likely to be the only acceptable use?		
	No environmental impact on / off site		
	Amenity and character commensurate with employment uses?		
	Agglomeration of uses in the vicinity		
	Workforce accessibility by a range of modes		
	Classified as Brownfield?		
	Phasing of availability?	N/A	N/A
	No constraints on availability?		
Market Attractiveness Factors	Established premises likely to meet market demand	N/A	
	Planning permission likely to meet market requirements?		
	In Single Ownership / Occupation		
	Owned by a developer / agency known to undertake employment development		
	Actively marketed as an employment site		
	Recent Activity within the last 5 years		
	Formally Identified for employment for 10 years + (where less = green)		
Site Name	Fairmile Road 64 - 70 Bridge Street		
Site Reference and Area (Ha)	10s (0.71) 20 (0.1135)		

Figure 17: Sites Vacant (for over a year) and / or potentially under – utilised sites and isolated employment sites (Christchurch)

Site Reference and Area (Ha)	Site Name	Market Attractiveness Factors							Sustainable Development Factors							Strategic Planning Factors						
		Formally Identified for employment for 10 years + (where less = green)	Recent Activity within the last 5 years	Actively marketed as an employment site	Owned by a developer / agency known to undertake employment development	In Single Ownership / Occupation	Planning permission likely to meet market requirements?	Established premises likely to meet market demand	No constraints on availability?	Phasing of availability?	Classified as Brownfield?	Workforce accessibility by a range of modes	Agglomeration of uses in the vicinity	Amenity and character commensurate with employment uses?	No environmental impact on / off site	Employment likely to be the only acceptable use?	Area identified as of strategic importance in the RSS / RES?	Likely to be required for specific user or specialist use?	Part of a long term development or regeneration proposal	Viable without public funding?	Public funding committed?	Other policy considerations to override any decision to release?
28 (25.81)	South East Sector	Red	Green	Green	Green	Red	N/A	Orange	Green	Red	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
22 (7.95)	BAE	Red	Green	Green	Green	Red	N/A	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
1c (0.558)	Baptist Church Site	Red	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
21 (0.616)	Grange Road	Red	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
49 (1.53)	Hurwood Park	Red	Green	Green	Green	Green	N/A	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
48 (0.296)	Bostwick Farm	Red	Green	Green	Green	Green	N/A	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
10r (0.7054)	Bmth & West Hants Water	Red	Green	Green	Green	Green	N/A	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
51 (1.34)	Marine & Coastguard Agency Training Centre	Red	Green	Green	Green	Green	N/A	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

Figure 18: Sites Identified for Employment Use in the Development Plan (East Dorset)

Strategic Planning Factors	Other policy considerations to override any decision to release?		
	Public funding committed?		
	Viable without public funding?	n/a	n/a
	Part of a long term development or regeneration proposal		
	Likely to be required for specific user or specialist use?		
	Area identified as of strategic importance in the RSS / RES?		
Sustainable Development Factors	Employment likely to be the only acceptable use?		
	No environmental impact on / off site		
	Amenity and character commensurate with employment uses?		
	Agglomeration of uses in the vicinity		
	Workforce accessibility by a range of modes		
	Classified as Brownfield?		
	Phasing of availability?		
	No constraints on availability?		
Market Attractiveness Factors	Established premises likely to meet market demand		
	Planning permission likely to meet market requirements?		
	In Single Ownership / Occupation		
	Owned by a developer / agency known to undertake employment development		
	Actively marketed as an employment site		
	Recent Activity within the last 5 years		
	Formally Identified for employment for 10 years		
Site Name	Riverside Park	Ferndown	Ebblake
Site Reference and Area (Ha)	(1.15)	(57.34)	(14.81)

6.0 Stage 1 Summary Assessment Christchurch

6.1 Sites included within the preliminary assessment undertaken for Stage 1 have been grouped under the following headings:

- 'Best' employment sites to be protected (no issues, likely to meet current and future needs)
- Sites requiring further investigation through this review (some issues potentially overcome)
- Employment sites to be released (potential barriers exist)

'Best' Employment Sites at stage 1. To be reviewed as part of Stage 2.	Size (ha)	Land Supply	Sites requiring further investigation in Stage 2.	Total Site Size (ha)	Land Supply (ha)	Sites to be 'released' at Stage 1	Size (ha)
Stony Lane (Allocated)	1.7	0ha	Aviation Park West (Allocated)	67.6	37		
Wilverley Road (Allocated)	0.6	0ha	North East Sector (Allocated)	44	20		
			Southern Sector	17.09	0		
			Priory House	0.21	0.21		
			Cimex International	1.82	0		
			Gasworks Site (Allocated)	1.59	1.59		
			Qinetiq (Allocated)	1.8	0		
			Fairmile Road (Vacant Land at Avon Trading Park)	0.71	0.71		
			BAE	7.95	4		
			Baptist Church	0.56	0.56		
			Grange Road	0.61	0.61		
			Hurnwood Park	1.53	0		
			Bostwick Farm	0.3	0		
			Bmth & West Hants Water	0.71	0.71		
			Marine Coastguard Training Centre (bolt on to study)	1.34	0		
Totals	2.3	0ha		147.82	65.39		

6.2 This preliminary assessment indicates that 2.3ha of sites reviewed as part of Stage 1 have no significant issues to be overcome and can be considered 'Best'.

6.3 147.11ha of employment land in the Borough has been classified as requiring more detailed investigation as part of Stage 2 of the review. This represents the vast majority of the Borough employment land portfolio.

- 6.4 The Airport Northern Development Zone requires further investigation primarily due to the significant infrastructure constraints affecting the phasing of availability and the necessity for funding commitment to bring the whole of the site forward. The Gasworks site also falls under the constraints category in respect of contamination issues and timescales for availability.
- 6.5 The following sites require further investigation in respect of market attractiveness: Priory House, Cimex International, Qinetiq, BAE, Baptist Church and Grange Road.
- 6.6 The primary reason for further assessment of the Bmth and West Hants Water site relates to the extent to which the site is underutilised.
- 6.7 Hurnwood Park and Bostwick Farm are isolated employment sites with poor accessibility which also have significant environmental concerns.
- 6.8 The Marine Coast Guard Training Centre is a bolt on to the study and falls within a D1 use. It is an isolated site in a residential / coastal area in close proximity to a local nature reserve. It is unlikely to represent an appropriate location for allocated employment uses. Policy EI 1 of the adopted Christchurch Local Plan doesn't apply in this case as the present use does not fall under B1, B2 or B8 and it is not in industrial or commercial use.

Factors Acting on the Supply of Employment Land in Christchurch

- 6.9 In terms of land availability the vast majority of the remaining developable land is located in the Airport Northern Development Zone. In quantitative terms there is a healthy supply of employment land in the Borough for the plan period (2026). However, due to infrastructure issues and the absence of a comprehensive development framework i.e. Airport Area Action Plan, this land is mainly only available in the long term. Combined with demands on the Airport land from sub regional authorities there is a real shortage of employment land in the Borough to meet demand.

7.0 Key points for allocated Sites and those benefiting from planning permission (Christchurch)

Employment land supply at Bournemouth International Airport

- 7.1 Dorset County Council have determined that only 15ha of employment land is available in the short term and 40ha available in the medium term. There is very little land at the airport which is immediately available for development without significant delay thus creating serious issues for land supply.

BIA and the South East Dorset Economy

- 7.2 The employment allocation at the Airport accommodates a significant amount of the Joint Strategic Authorities (JSA) employment allocation for the South East Dorset Sub Region. The JSA proposals for the sub region identify a need for 110 hectares to be provided between 2001–2026. The Airport has been identified as providing in excess of 29ha of this total allocation. The significance of the Airport is even greater as other strategic sites such as Blunts Farm (Ferndown) are uncertain to come forward.
- 7.3 The importance of the Airport as a strategic employment allocation has been identified as part of the South East Dorset Sub Regional Study and ‘Raising the Game’. Regional Planning Guidance 10 (RPG10) identifies opportunities for the Airport to become a centre of aviation excellence with the promotion of high tech aerospace and other knowledge based sectors. However, the emerging RSS appears to have downgraded the status of the Airport from the original JSA proposals. The Airport allocation appears in the current draft RSS (July 2006) identified as ‘one of a number of key strategic locations in South East Dorset. This may have a bearing on the future of the site and its significance for the sub regional economy.
- 7.4 The Christchurch Local Plan identifies 80 hectares of land for employment development in the Northern Development Zone comprising Aviation Park West and Aviation Park East. The figure of 80ha was reached in 1998 and approximately 10ha has been developed as of March 2006. The figure for remaining developable land needs to be revisited in the context of appropriate densities and uses for the site.

Aviation Park West (APW): (Total Site Area 67.6ha)

Existing Employment Character

- 7.5 Aviation Park West has a prevailing industrial character but with emerging clusters of office development concentrated within the far western area of the aviation park. The Local Plan makes provision for a range of employment uses within B1, B2 and B8 uses, setting a framework for more diverse uses. Once in place The Airport Area Action Plan will set the planning framework to guide the nature of future development on site.

APW (Western Area) Enterprise Way – Basepoint

- 7.6 This area of APW is achieving a more cohesive cluster of complementary uses and character. The most cohesive cluster of businesses is located along Enterprise Way predominantly consisting of modern B1 office. Development in this part of the aviation park is commensurate with the character of a high quality business park.

There is some scope for further complementary uses over remaining developable land in this area of the aviation park. However, the scope of development is restricted in this part of the aviation park by the siting of a Mechanical Biological Treatment plant (MBT). This part of the NDZ has a distinct character which sets it apart from the prevailing industrial character of APW and APE.

North Aviation Park West

- 7.7 This area is characterised by a number of large hangers in poor condition. The Airport Estates Office has indicated that there are plans to repair and renovate these units. Renovation of the hangers provides a short term solution to maintain business activity at the Airport before the establishment of a comprehensive planning framework.

Aviation Park East (APE): (Total Site Area 44ha)

Existing Employment Character

- 7.8 The North East Sector considered in its entirety is the most underutilised of the three aviation parks in respect of land use. However, there is a high density of airside development comprising major aerospace employers such as Basco and FRA. The Basco and FRA developments are characterised by large modern hangers and constitute the primary concentration of development in this aviation park. These businesses are seeking sites for additional hangers with airside access which is promising in relation to their long term future at the Airport. They also make a very significant contribution to the knowledge economy and GVA levels. In this regard there is considerable scope for further development in APE to add value to this existing cluster.
- 7.9 A flight school with airside access is also located within APE generating small aircraft movements. The Airport¹⁵ has intimated that they wish to reduce the number of small aircraft movements may have an impact on this development.
- 7.10 The remainder of APE is considerably underutilised with a disparate mix of uses including a recycling plant and open storage sites which make limited use of this strategic employment site.
- 7.11 Road access to the North East Sector is via a narrow road directly off Matchams Lane. Poor access to this sector with no direct link to the strategic road network poses issues for the types of industry that can be attracted to locate here. Direct access to strategic highway networks is a recognised locational requirement for business.

¹⁵ This is a point that has been expressed by the Airport Estates Manager.

- 7.12 The need for a link road from the North East Sector to the A338 has been identified by the Airport in their Master Planning process and is a key issue addressed by the Airport AAP. The purpose of a link road is to enable strategic road access to the North East Sector to allow remaining employment land to come forward. It would also have the effect of alleviating congestion on Parley Lane. The potential provision of a link road is subject to significant environmental constraints as any prospective highway alignment would cut through SSSI.

Airport Southern Sector: (17.05ha)

Employment uses in the Southern Sector

- 7.13 The Southern sector is clearly dominated by the operational element of the Airport which provides a distinctly different character to the industrial feel of the Northern Development Zone. The employment element is concentrated in the north east of the Southern sector with terminal buildings and Airport car parking concentrated in the southern part of the sector.
- 7.14 The north east area of the Southern Sector comprises a variety of older warehouse units with a range of light industrial and storage uses. There are a small number of established office units concentrated in and around Brackley Close. The majority of units in this area are of older stock.
- 7.15 The Airport has expressed a desire to relocate existing employment uses not directly connected with the operational side of the Airport to the Northern Development Zone. A potential relocation of these employment uses to the NDZ places issues for how the site will be utilised for the operational side of the Airport.

Businesses Requiring an Airport Location

- 7.16 The Airport Area Action Plan (AAP) will consider appropriate complementary clusters of business development that distinctly require an airport location as opposed to town centre locations in Christchurch or elsewhere in the sub region.
- 7.17 The process of determining appropriate employment uses for the Airport will need to consider the balance of business sectors represented across the sub region. In this regard sectors located at the Airport should add value to the sub regional economy. Employment development at the Airport must be considered as a complementary and integral part of the sub regional economy that does not detract from the overall economic strategy for the sub region. With regard to the balance of employment uses at the Airport further technical work is required to determine the future mix of employment uses to be accommodated on site.

Knowledge Based Industries

- 7.18 In consistency with the regional and sub regional economic strategies it is desirable to support knowledge based industries that contribute to the long term sustainable development of the local and regional economy. In this respect prospects for attracting knowledge based industries to the Airport which will be further examined in Stage 2 of the review.
- 7.19 In general terms this employment study has identified a high demand for premises that have the flexibility to accommodate a range of uses. However, further technical work is required to determine the type of premises required by knowledge sectors which will be examined in detail within Stage 2 of the review.

Office Provision

- 7.20 The extent and scale of office provision to be provided at the Airport is also the subject of further technical work required to accompany the production of the Airport AAP. This will examine the scale and location of appropriate office development to complement existing office development in Aviation Park West.
- 7.21 The Basepoint development provides a good example of serviced office units for small businesses for which there is a significant demand in the local area. These units provide good starter units but there is a lack of complementary medium sized offices to provide sufficient grow space. Therefore, future office provision must consider the relationship with existing provision.
- 7.22 The nature and extent of office provision at the Airport needs to take account of future provision in Poole and Bournemouth town centres. Unrestricted office development at the Airport is potentially very significant for taking business away from Bournemouth and Poole. In addition it is not desirable to promote office use that will generate a large number of journeys or parking requirements. This has been identified in the JSA proposals submitted to the Regional Assembly.

Infrastructure Constraints

- 7.23 The capacity of access roads to the Airport is very significant for future employment growth. Access to Aviation Park West (APW) and the Southern sector is via Parley Lane and congestion on this road presents issues for the further take up of employment land at APW. The Airport Master Planning process has identified a need for junction improvements at Hurn and Chapel Gate to alleviate this congestion. The potential provision of a link road in the North East Sector is also envisaged to relieve pressure on Parley Lane.

- 7.24 The scale of future development at the Airport has to be considered in respect of the optimum scale of development that can be accommodated in a sustainable manner. It is accepted that increases in highway capacity are met and exceeded over time which presents limits for the scale of development that can be realised.

Land Ownership

- 7.25 As the Airport is not in single ownership the progression of the Airport AAP needs to facilitate a close working relationship between the relevant landowners.

Investment Programme

- 7.26 An investment programme needs to be determined to inform the short, medium to long term aspirations for the NDZ. Significant investment in off site road improvements is now required to facilitate further development.

The Planning Framework

Local Plan

- 7.27 Policy EI5 of the Local Plan identifies land within the boundaries of Bournemouth International Airport as delineated on the proposals map for comprehensive redevelopment. A comprehensive development brief is required setting out the phasing of development and the balance of uses permitted.

Airport Area Action Plan

- 7.28 The Airport Area Action Plan will provide the planning framework for future development at the Airport which will be informed by the Airport Master Plans. The Airport AAP is currently scheduled for adoption in mid 2009.

Airport Masterplans

- 7.29 The Master Plans produced by the Airport set out their aspirations for employment land in the Northern Development Zone and for the operational element of the Airport. The Northern Development Zone encompassing Aviation Park West and Aviation Park East are addressed by the EDAW 2003 Master Plan. The 2003 plan focuses on the mix of future employment uses to be realised on the site and the phasing of development.
- 7.30 In May 2007 the Airport produced a second Master Plan setting out how they envisage the operational element of the Airport developing over the next 25 years.

Town Centre Allocations

EI 2: Former Aircraft Factory Buildings at Somerford and Wilverley Road

Cimex International (1.82ha)

- 7.31 In the adopted Local Plan the Cimex building is identified for redevelopment under policy EI 2 for small industrial units (B1 light industrial) as the present use is considered an underutilisation of the site. The site has not been redeveloped as the present occupiers wish to continue to use it for storage purposes.

Wilverley Road buildings (0.6ha)

- 7.32 These units have subsequently been redeveloped. One of the units is now occupied by Travis Perkins for use as a retail warehouse. This particular use does not correspond with the intended Local Plan B1 use. The remainder of the site has been developed in accordance with the Local Plan policy.

EI 3 Industrial commercial premises at Stony Lane (1.71ha)

- 7.33 This site has been redeveloped and now comprises 2 car show rooms and light industrial units.

EI 8 Land adjoining the former defence research agency (1.8ha)

- 7.34 This site is presently used for research and development purposes by Qinetiq. The present occupiers have not expressed an intention to vacate the site implying that the present use is likely to continue for the foreseeable future.

EO 1 Land presently used for car sales and land formerly used as a ready mixed concrete site (0.73ha)

- 7.35 The land currently used for car sales is subject to a planning application for residential development. The land formerly used as a mixed concrete site has been development for residential use. The site was allocated for office or residential use in the 2001 adopted Local Plan, therefore development on site is in accordance with the development plan.

EO 2 The area between Stour Road / Railway, north of station approach (0.53 ha)

- 7.36 Policy EO 2 of the adopted Local Plan proposes the redevelopment of the site with potential for a transport interchange as part of a mixed use scheme incorporating B1 office uses. A significant element of the site is presently taken up by a builder's yard and residential uses. A lack of

activity on the site since the Local Plan allocation can be attributed to present market conditions indicating a lack of impetus for the form of development envisaged in the Local Plan. The existing uses on the site present obvious difficulties for achieving a comprehensive redevelopment of the site.

EO 3 Land Between Bridge Street, Stony Lane South and the Civic Offices (1.59)

- 7.37 Policy EO 3 of the adopted Local Plan identifies the potential of this site for mixed use redevelopment and the requirement for a development brief to be prepared. This site is also identified in the 2003 Town Centre Strategy within Land use action plan 12: Bridge Street/Stony Lane South. The Town Centre Strategy identifies a requirement for an outline development Masterplan that incorporates land covered by policy EO3. The site identified in the Town Centre Strategy also extends to cover land presently occupied by the Civic Offices and Two Rivers Meet Leisure Centre. A development brief has not been prepared for land covered by policy EO 3 or the larger site identified in the Town Centre Strategy.
- 7.38 Within the land covered by policy EO 3 there is a recent permission for residential development on the land presently occupied by a petrol filling station and repair workshop. This development is coming forward outside of a development framework and illustrates potential issues for piecemeal development of the site. The lack of a development brief for this site presents issues for guiding development in accordance with the Local Plan policy. At present the preparation of a development brief has not been programmed into the Council's Local Development Scheme.

EO 4 The site of 419 Lymington Road (0.19ha)

- 7.39 This particular site was also subject to policy H3 of the adopted Local Plan in making provision for a substantial block of flats 3 storeys in height. The site has subsequently been developed for residential use in accordance with policy H3 and is no longer the subject of this employment land review.

Key Points for Vacant, Underutilised and Isolated Sites

Baptist Church Site Airfield Way (0.55ha)

- 7.40 This particular site has an extant permission for a change of use from B1 offices for use as a church, multi purpose auditorium, meeting room complex, training centre and day nursery. Planning permission for this change of use has been left unimplemented for a period in excess of 12 months and the site has remained underutilised. There is potential for this site to revert to employment use if the existing permission remains unimplemented.

BAE (7.95ha)

- 7.41 BAE has declared approximately half of their existing site as surplus to requirements leaving this element underutilised. This BAE site is one of the very few sustainable employment sites available for development within the short term. With very little employment land immediately available at the Airport this site represents a vital source of employment land.
- 7.42 In accordance with the objectives of the sub regional economic strategy it is desirable to promote a complementary cluster of employment uses in this location. A high tech knowledge industry complementary to BAE is desirable to raise levels of productivity which contribute to long term sustainable economic growth. Stage 2/3 of the review will provide further examination of this site in respect of appropriate employment uses.

Grange Road (0.56ha), (0.61ha)

- 7.43 Christchurch Borough Council owns the land for the two elements of this site and currently occupy approximately 50% of the units on the 0.61ha site. The remaining units on the 0.61ha site and the entirety of the 0.56ha site are leased for a range of B1 and B8 uses.
- 7.44 As a whole the site is underutilised in respect of the density of development and the intensity of uses on site. Further assessment is required regarding future employment uses and appropriate densities. Due to the shortage of employment land in the Borough and particularly sites in proximity to the town centre this site should remain in employment use.

Hurnwood Park (1.53ha)

- 7.45 Hurnwood Park is an isolated employment site only accessible by private transport. The site is washed over with greenbelt and further employment development in this location is inappropriate in respect of its impact upon the landscape character. The site is currently occupied by a number of units of varying condition with some in very poor condition. This site will require more detailed assessment as part of Stage 3 to determine its future appropriateness for employment use.

Bostwick Farm (0.29ha)

- 7.46 Bostwick Farm is a small isolated employment site in the greenbelt which is also inaccessible by public transport. The site has a smaller number of older premises where the intensity of use is difficult to determine. Further expansion of this site is inappropriate in respect of its location in the greenbelt. This site will require more detailed assessment as part of Stage 3 to determine its future appropriateness for employment use.

Bournemouth and West Hants Water (Avon Trading Park) (0.70ha)

- 7.47 This particular site has been identified by the land owner as underutilised due to a low density of development on site. There is an issue, however with access to the site via Mill Road as any intensification of use is likely to generate additional traffic along this residential road. This site requires further examination as part of Stage 2/3 in respect of the type of business sectors and premises to be accommodated on the site.

Marine Coastguard Agency Training Centre (1.34ha)

- 7.48 The Marine Coastguard Training Centre is an isolated employment site in a residential area. Further employment development in this area is not commensurate with the prevailing residential character.
- 7.55 This site requires further examination in Stage 3 to determine its suitability for non employment uses. Should the site become surplus to the requirements of the Marine Coastguard Agency appropriate uses need to be established.

Sites Benefiting from Planning Permission

Fairmile Road: Vacant Land at Avon Trading Park (0.71ha)

- 7.56 This area of vacant land is situated on the edge of the Avon Trading Park. An extant permission exists for industrial units affecting a proportion of the site. Excluding the Airport this represents one of the very few sites remaining suitable for employment development. The prevailing employment character of Avon Trading Park and the lack of available sites for employment development make this site only suitable for employment use.
- 7.57 This site also benefits from reasonable access to the strategic highway network and is in close proximity to rail and bus links making it a relatively sustainable location for employment development.

64 – 70 Bridge Street (0.11ha)

- 7.58 This particular site is currently occupied by a builder's reclamation yard and benefits from permission for total redevelopment of the site for the erection of a 3 storey block of offices with ground floor parking and access onto Bridge Street. Works to implement the present permission have yet to commence.

Addendum (25th September 2007)

7.59 The allocations set out below have been deleted following the Secretary of State's direction to Christchurch Borough Council on the status of 'saved' policies in the Christchurch Borough Local Plan 2001, under paragraph 1(3) of Schedule 8 of the Planning and Compulsory Purchase Act 2004. The Local Plan allocations are no longer applicable to the sites due to changes in the market, plans of the site owners or due to the site being developed for other purposes. The sites remain protected for employment use by adopted Local Plan policy EI1.

- **EI2 – Former Aircraft Buildings at Somerford and Wilverley Road:**
- **EI3 – Industrial commercial premises at Stony Lane**
- **EI8 – Land adjoining the former defence research agency**
- **EO1 – Land presently used for car sales and land formerly used as a ready mixed concrete site.**
- **EO2 – The area between Stour Road / railway, north of station approach**
- **EO4 – The site of 419 Lymington Road**

8.0 Stage 1 Summary Assessment East Dorset

'Best' Employment Sites at stage 1. To be reviewed as part of stage 2.	Size (ha)	Sites requiring further investigation in stage 2.	Size (ha)	Sites to be 'released' at Stage 1	Size (ha)
Ferndown	57.34	Brook Road (south)	1.32	None	0
Ebblake	14.81	Brook Road (Flight)	4.72		
Riverside Park	1.15	Stone Lane	1.85		
		Gundrymor Industrial Estate	3.67		
		Woolsbridge	15.27		
		Bailie Gate	7.74		
	73.3		34.57		

8.1 This preliminary assessment indicates that 73.3ha (65%) of existing employment land in the District can be considered 'Best' in respect of generally meeting market requirements and in not presenting significant issues for access or utilisation.

8.2 A total of 34.57ha (35%) of the remainder requires further investigation in respect of overall market attractiveness, utilisation and accessibility. There are also some significant environmental concerns associated with the sensitive heathland environments located in close proximity to these estates.

8.3 No sites have currently been identified as being suitable or appropriate for release from employment use in favour of other development at this stage.

Factors Acting on the Supply of Employment Land in East Dorset

- 8.4 In terms of current land availability, the most significant area of the remaining developable land is located at Ferndown. In quantitative terms, there is a limited supply of employment land in the District for the existing plan period (to 2011). In 2002, there was a total of 19.53 ha available within East Dorset (BBC/DCC/PBC September 2002). By 2003, a total of 21.33 ha was available (BBC/DCC/PBC September 2003). During this period, there was a trend for slightly less land available for immediate availability (from 2.64ha to 1.97ha) and slightly more medium term availability (from 5.84ha to 7.82ha). The figure for long term availability remained constant at 8.4ha (BBC/DCC/PBC 2002-3).

Employment Land Availability in South East Dorset Sub Region

- 8.5 Estimates of employment land availability across the sub region need to be interpreted in respect of land that that can come forward in the short, medium and long term. This is necessary to identify from the total land stock how supply will meet demand over the course of the plan period.

Meeting Locational Requirements

- 8.6 Land that is available for employment purposes must also fulfil the locational requirements of a diverse range of employment sectors. Therefore availability of employment land in itself doesn't necessarily equate to meeting business requirements. Employment land must be available in the appropriate location and fulfil the necessary locational requirements to meet the needs of a diverse range of business sectors.

9.0 Key Points for Employment Sites identified in the development plan and those benefiting from planning permission (East Dorset)

- 9.1 Employment land in the District is dispersed across a variety of locations. Certain estates are situated within urban areas e.g. Brook Road, Stone Lane and Riverside Park in Wimborne Minster. Others are located within more rural settings e.g. Bailie Gate, Kingfisher Park and Woolsbridge. The remainder are located on the edge of urban areas such as Ferndown and Verwood which constitute the most significant sites for the District. All of these employment areas are largely dependent upon road transport, since there is no rail provision within the District (nor any other alternative provision, such as canal or navigable rivers). The road network is largely based upon the A31 Trunk Road which offers access to the east (Southampton and the South East) and the west (Dorchester, Weymouth, Yeovil and the wider South West). The individual areas are considered below:

Ferndown Industrial Estate

- 9.2 This is the largest and most significant employment area within the District at 57.34ha. This area includes over 400 businesses which include a wide cross section of commercial activity. This includes a range of uses, including (manufacturing, wholesale, transport, storage and distribution). Utilisation is generally high and demand is strong.
- 9.3 The Uddens estate, which is situated on the south-western side of the Ferndown industrial area, is generally composed of modern stock, which is well utilised and in high demand. This area is dominated by manufacturing and wholesale use.
- 9.4 An additional 8.43ha of land is currently being brought forward, through a planning application). A further 20ha of employment land proposed in the Draft RSS has yet to be formally approved and locally agreed. Beyond these options, the available land is limited by the extent of urban development and the presence of designated heathland; together these will effectively limit future growth options within this locality.

Ebblelake Industrial Estate

- 9.5 This site is located on the north-eastern edge of Verwood. This represents the third largest employment allocation within the District (at 14.81ha). It demonstrates a high level of vitality and a wide range of commercial activity. The buildings are generally modern, with some established stock present. However, there are some issues at the site which include: an intense parking pressure with access provided by means of two points of entry. There is also a small housing development to the southwest, which lies close to the site and which can only be accessed from the north western end of the employment area.

Riverside Park

- 9.6 This site is modern and stocked with newer premises, although it is of relatively limited extent (at 1.15ha). The site is well utilised, with wholesale, storage and distribution and other uses prevalent. The main issues at the site are access related, with a single entrance located within a one way road accessed through a residential area. This access is shared with Wimborne Market, which can cause significant congestion at times. There is also very limited scope to expand this development in the future, on account of the extremely limited undeveloped land within the vicinity.

Key Points for Vacant, Underutilised and Isolated Sites

Bailie Gate, Sturminster Marshall

- 9.7 This site represents the 5th largest allocation at 7.74ha. It is well established for employment use, occupying the site of a former milk factory and much of the building stock is dated, as some former factory buildings have been reused. There is a significant manufacturing base at this site, while construction, storage and distribution and other are also significant. Current levels of vibrancy across the site are variable, with some vacancy especially within the smaller units to the north-west. Several new constructions have been completed recently and there is some potential for further development within the eastern area of the allocation. The site raises several general issues. The site is located at a relatively remote location in the south west of the District, on the edge of Sturminster Marshall. Access is by means of a single entrance situated to the west and entry currently requires use of residential routes between the A31 trunk road and the employment area.

Stone Lane, Wimborne

- 9.8 This is one of the smaller sites at 1.85ha. The building stock is generally ageing and offers only a limited size range. The current usage is mainly characterised by manufacturing, storage and distribution activities. There are a variety of issues which affect this site. Most significantly, there is only a single point of entry and the existing road junction is narrow, with poor visibility. The site also lies within a wider area of residential development.

Brook Road (south), Wimborne

- 9.9 This site is well established and currently serves the needs of a specialist user and is currently manufacturing based. The future use of the site is currently under review. There are some issues including access (which is limited to entry from the north) and to the proximity of wider residential development.

Brook Road (north), Wimborne

- 9.10 This site lies within an existing area of light industrial/employment use. The northern and central areas (which are controlled by a single owner/occupier) are predominantly used for manufacturing. Some areas of this site are currently underutilised and the overall use is currently under review. To the south is a development of smaller units which are used for a mixture of purposes and predominantly storage, distribution and other. There are currently significant vacancies with the units here (at around 14%). In addition, there are several general issues associated with this site. It lies within a wider residential development and access is limited, with entry via a road to the north.

Gundrymoor Industrial Estate

- 9.11 This site is situated quite remotely in terms of the main settlements within the District and it is also quite limited in extent (at 3.67 ha). The building stock is well established and the existing utilisation is dominated by manufacturing, construction and other uses. Approximately 10% of the stock was vacant at the time of survey and there is also scope for greater intensification of the development. Wider issues include restricted access and a general parking pressure.

Woolsbridge

- 9.12 This represents the second largest employment allocation at 15.27 ha. The building stock is generally well established and some would benefit from updating. Current utilisation is dominated by transport, storage, distribution and other uses. The site is considered to be currently under-utilised within some areas, particularly the central western area. There are also several vacant units within Victory Close and Thorne Way. There is a general parking pressure on site and access is limited to entry from the north only.

Land to the East of Cobham Road, Ferndown

- 9.13 An area of 8.43 ha is allocated in the Local Plan for development into employment land. This site is located adjacent to the existing industrial area at Ferndown, which offers good access to the A31 trunk road. A planning application has now been received for the site, which is currently being assessed.

10.0 Introduction to Stage 2

- 11.0 Stage 2 of the review will provide a detailed assessment of demand to determine future requirements for land and premises. This stage will seek to assess specific requirements across the main business sectors in the Borough for the plan period.
- 11.1 A primary means of assessing the future requirements of business sectors for land and premises will be via the business survey distributed to commercial premises in the Borough.
- 11.2 In order to forecast demand over the plan period the Christchurch ELR will utilise the data collated put together for the purposes of the JSA proposals to the Regional Assembly.
- 11.3 Stage 3 of the review will confirm those sites to be retained or released and will identify gaps in the portfolio of employment sites.