

Employment Needs Assessment

Wareham Neighbourhood Plan

July 2018

Executive Summary

This assessment has been prepared as part of the evidence base supporting the Wareham Neighbourhood Plan. Wareham Neighbourhood Plan is well placed to consider the extent to which new employment land may be required, and existing land safeguarded. Key findings are summarized as follows:

- > The national policy context, whilst seeking to support economic growth through the planning system, recognises that this is better achieved through flexible policies that aim to proactively meet the development needs of businesses. It places less emphasis on the long-term protection of employment sites, and has introduced permitted development rights to this effect.
- > The strategic assessment of employment land provision suggests supply exceeds demand, even taking into account likely turnover, with the possible exception of B1 office use in Bournemouth and Poole. Evidence of enquiries shows a significant decline in local enquiries post-2009, with demand shifting to smaller units.
- > Most of the workforce resident in Wareham commute out to Bournemouth and Poole, and the majority of those employed in Wareham commute in from Bournemouth and Poole. As such the retention or provision of workspace in Wareham is unlikely to have a significant influence on commuting patterns.
- > There are three main employment estates in Wareham, the largest being Sandford Road. All three provide a variety of business needs primarily used for workshops, open storage and warehouse accommodation with a lesser degree of factory and office premises. St John's Road and Westminster Road are more likely to require modernisation, and Westminster Road has units sizes larger than typically demanded since 2009. The survey data suggests that both Westminster Road Industrial Estate and Johns Road are seriously under-occupied in terms of employment density.
 - The Sandford Lane Industrial Estate is comparatively modern, and its status as protected employment land appears to be justified. There is scope to extend the site at its eastern end to provide for future needs (in an area where housing would not be acceptable).
 - The Westminster Road industrial estate is not configured to meet typical demand. The decision by Daler-Rowney to relocate all of their operations from the site has created an opportunity to consider the long-term future of the estate, although businesses are moving in to the vacated units. Any net loss of employment land would not appear to be strategically significant or have any notable impact on commuting patterns.
 - Johns Road industrial estate occupies a key location on the entrance into Wareham by the railway station. Like the Westminster Road estate, it has become rundown with premises requiring modernisation. A more flexible approach to redevelopment in this location, to enhance this gateway location, would similarly be justified.

1. Purpose of this assessment

- 1.1 This assessment has been undertaken to provide the evidence base in relation to employment and business needs to inform the Wareham Neighbourhood Plan. This report does not include an appraisal of the town centre and associated uses, as this has been covered in the separate retail assessment.

2. Policy Context

National Planning Policy

- 2.1 National Planning Policy is set out in the National Planning Policy Framework (NPPF), published in 2012. This is likely to be updated in 2018 (and a draft for consultation has been issued). One of the core planning principles in the NPPF is to “proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs.” This depends on objectively assessing of the housing, business and other development needs of an area, and responding positively to wider opportunities for growth. The NPPF adds that “Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities”
- 2.2 The NPPF seeks to support economic growth through the planning system. This is through proactively meeting the development needs of businesses, and ensuring that the planning policies recognise and seek to address potential barriers to investment, including any lack of infrastructure, services or housing. It also makes clear that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose.
- 2.3 The Government has also implemented a number of changes to permitted development rights in the last 5 years, to enhance flexibility in the planning system in order to support business growth. This has included (subject to certain conditions / approvals):
- business (B1) to storage or distribution (B8)
 - business: office (B1a) to residential
 - business: light industry (B1c) to residential (set to expire in October 2020)
 - general industrial (B2) to storage or distribution (B8)
 - general industrial (B2) to business (B1)
 - storage or distribution (B8) to residential (set to expire in June 2019)
- 2.4 It is clear that whilst new employment areas are supported, the retention of existing employment areas is balanced against the need to retain that use, and other needs (such as for housing or regeneration). Para 51 states that local planning authorities “should normally approve planning applications for change to residential use and any associated development from commercial buildings (currently in the B use classes) where there is an identified need for additional housing in that area, provided that there are not strong economic reasons why such development would be inappropriate.”

Local Planning Policy

- 2.5 The current local plan for the area is the Purbeck Local Plan Part 1, 2012. This has a Policy ELS covers employment land supply, and Policy E covers employment. These policies were based on the 2008 SWRDA workplace strategy, and 2012 updated employment land projections.

- 2.6 The Local Plan (Table 2, reproduced below) recognises three major employment areas in Wareham, all of which at the time of the Local Plan were fully developed

Existing employment Lane (April 2011)	Parish	Total Site area (ha)	% Total Provision	Available area (ha)
Westminster Road	Wareham	5 ⁽¹⁾	3.46%	0
Sandford Lane	Wareham	9 ⁽²⁾	6.22%	0
John's Road	Wareham	0.3 ⁽³⁾	0.21%	0

(1) includes the Household Waste and Electricity distribution sites – excluding these as measured 2018 is approx. 3.2ha

(2) area as measured 2018 is approx. 8.8ha

(3) area as measured 2018 is approx. 0.8ha

- 2.7 The evidence indicated that for 2011-2031 the existing supply for Bournemouth, Dorset and Poole exceeded demand by approximately 17ha, and as such no further allocations were included in the plan. Policy ELS recognises that further assessment of supply is required, and that this will be carried out through a future review or individual neighbourhood plans, with existing employment sites to be safeguarded in the interim.
- 2.8 Policy E allows for new employment provision for B class uses in accordance with Policy LD (which refers to Wareham as one of the most sustainable locations for development), and at existing employment sites outside established settlements (citing examples such as Holton Heath). It also seeks to safeguard existing employment land (for B1, B2 or B8 uses, or for other employment-generating uses subject to certain criteria).

3. Local Plan evidence base

- 3.1 Since the Local Plan was adopted, its review has commenced and with it a number of new evidence reports have been produced. Possibly the most significant of these, in terms of employment, is the 2016 Workplace Strategy. This looks at the requirements for Eastern and Western Dorset separately, aligning with the defined Housing Market Areas. Purbeck falls within Eastern Dorset (which also includes North and East Dorset, and the conurbation of Poole, Bournemouth and Christchurch).
- 3.2 Appendix A of the 2016 Workplace Strategy includes a review of available land in relation to the main strategic sites. This identifies some 2.8ha of available employment land in Wareham (comprising 0.3ha at John's Road in Wareham (medium term) and 2.48ha at Sandford Lane (short / medium term)). The Westminster Road site is not listed (presumably due to no land being foreseen and becoming available at the time of the survey).
- 3.3 The strategy recommends taking forward the 'Step Change growth scenario at 20% Flexibility' - which of the four options tested provided for the most growth. For Eastern Dorset this means an employment land requirement of 222.7ha balanced against an employment land supply of 276ha in this area, indicating a 53.3ha surplus of supply, without any further employment land allocations and (or even despite of) including 20% flexibility to provide further choice to the market over and above baseline employment land projection figures. Such data suggests that the need to safeguard against the loss of existing employment land is not as paramount as the data supporting the current Local Plan suggested. The main focus of the recommendations on 'avoiding loss' is in relation to employment land suitable to meet market requirements for B1 office use, particularly in Bournemouth and Poole (where the main market lies).

- 3.4 The Strategic Economic Land Availability Assessment paper (June 2016) includes a breakdown of the employment sites which are safeguarded through the adopted Local Plan:

Status	Site	Parish	Total Site area (ha)	Used area (ha)	Available area (ha)
Allocation	Land N of North St	Bere Regis	0.7	0.0	0.7
Safeguarded site	North Street	Bere Regis	0.8	0.8	0.0
Allocation	Adj Old Milk Factory	Corfe Castle	1.0	0.0	1.0
Safeguarded site	Milk Depot	Corfe Castle	0.4	0.1	0.3
Allocation	Land off Huntick Road	Lytchett Matravers	0.5	0.0	0.5
Safeguarded site	Wareham Road	Lytchett Matravers	0.6	0.6	0.0
Safeguarded site	Axium Centre	Lytchett Minster & Upton	0.5	0.5	0.0
Safeguarded site	Factory Road	Lytchett Minster & Upton	3.9	3.9	0.0
Safeguarded site	Prospect Business Park	Swanage	2.2	2.0	0.2
Safeguarded site	Victoria Avenue	Swanage	2.4	2.4	0.0
Safeguarded site	John's Road	Wareham	0.3	0.3	0.0
Safeguarded site	Sandford Lane	Wareham	9.0	6.5	2.5
Safeguarded site	Westminster Road	Wareham	5.0	5.0	0.0
Cert. Lawful Use	Admiralty Park Holton Heath	Wareham St Martin	12.0	9.0	3.0
Safeguarded site	Holton Heath Ind. Estate	Wareham St Martin	35.0	28.0	7.0
Safeguarded site	Romany Works	Wareham St Martin	1.6	1.1	0.5
Safeguarded site	Dorset Green Tech Park	Wool & Winfrith Newburgh	50.0	10.0	40.0
TOTAL			125.9	70.2	55.7
Wareham subtotal*			14.3	11.8	2.5

* see previous tables regarding re-measured site areas

- 3.5 This shows a total of 70.2ha of employment land in active employment use on the main employment sites, and a further 55.7ha of available employment land. The main employment areas are at Holton Heath and Wool. Within Wareham, the three employment sites provide 14.3ha of land for employment use, of which 2.5ha is recorded as available.
- 3.6 The report also notes that within Wareham, land to the west of Westminster Road has been promoted for development which could include some employment (SHLAA ref 6/23/1314). This site is also identified in the most recent (January 2018) SHLAA report as potentially suitable for residential use.
- 3.7 The Local Plan Review options paper (June 2016) is consulting on potential changes which include the expansion of Sandford Lane Industrial Estate in Wareham by a further 1ha, and further employment land allocations at Holton Heath and Corfe Castle, amounting to an additional 7.5ha in total.

4. Government Business Rate data

- 4.1 Data on business rates valuation (April 2018) has been analysed to understand the current registered business uses in the three main employment areas by floorspace. The full data list is supplied in Appendix 1. This suggests there is in excess of 56,200m² of business floorspace within these three main estates, with Sandford Lane accounting for about two-thirds of the supply, Westminster Road accounting for just over a quarter, and Johns Road about one-twentieth.

Rateable units by area - comparison chart



- 4.2 The size of units varies considerably, from as little as 10m² (a small office on Sandford Lane) to over 3,000m² (Edenhall Concrete Ltd factory and premises on Sandford Lane and a cluster of 4 workshop units on Westminster Road). The average (mean) unit size is about 290m² in Johns Road, 500m² at Sandford Lane and 860m² in Westminster Road.
- 4.3 The main use comprises workshops (which accounts for 41% of total floorspace, with average floorspace of 390m²), followed by storage and warehousing (35% combined), factory (18%, with average floorspace of 900m²) and offices (6%, with average floorspace of 280m²). The spread of floorspace and uses by area is shown diagrammatically as follows:

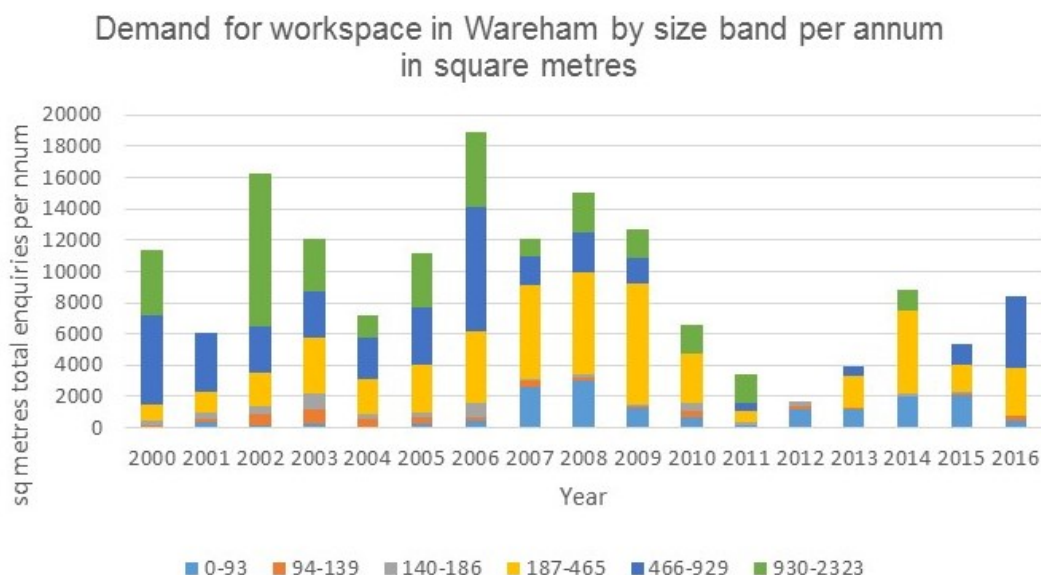
5. Population and Census data evidence

- 5.1 Census data on the distance travelled to work indicates that just over a third (36%) of the local workforce work locally, which would include those working from home (12%), in the town centre, local services (such as the schools) and in the main employment areas. The majority of the workforce commute outside of the area, with the Poole / Bournemouth conurbation likely to be the main destination.

QS702EW - Distance travelled to work - E05003733 : Wareham (ward)				
All usual residents aged 16 to 74 in employment				
Work mainly at or from home	293	12%	36%	Wareham
Less than 2km	610	24%		
2km to less than 5km	165	7%	7%	Sandford / Holton Heath
5km to less than 10km	362	14%	14%	Hamworthy / Winfrith
10km to less than 20km	623	25%	30%	Poole / Bournemouth
20km to less than 30km	137	5%		Christchurch / Dorchester
30km and over	131	5%	5%	Edge / outside Dorset
Other	217	9%		
Average distance (km)	15.3			

6. Annual level of enquiries for industrial units in Wareham parish

- 6.1 In April 2017 the Economic Development Manager of the District Council reported on his findings regarding the potential implications of redeveloping Westminster Road, Wareham employment site for housing. His review includes evidence of the annual level of enquiries for industrial units in the Wareham parish, as replicated in the graph below



- 6.2 This shows that there tends to be fluctuation in demand over time, but a significant drop in the level of enquiries occurred post-2009, relating to the national economic downturn at this time, since when demand has concentrated more on smaller units (under 465m² floorspace).

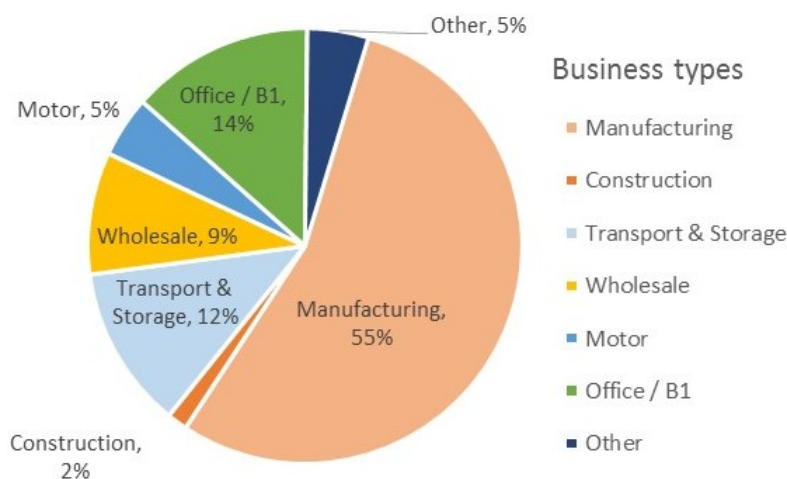
7. Survey of the Main Industrial Sites (Spring 2017)

- 7.1 In order to obtain a better understanding of the functioning of the various employment areas, a survey of occupants was undertaken in Spring 2017. The survey form is shown in Appendix 2. The survey was hand-delivered to 78 premises, with follow-up contact made where possible in order to maximise returns. A total of 42 responses were received, representing a total of 63 occupied units (5 from Johns Road, 9 from Westminster Road and 49 from Sandford Lane). 20 vacant premises were noted at the time of the survey.
- 7.2 Nearly half (46%) of the responses were from businesses that had been established for over 20 years, with businesses started up in the last 5 years accounting for just under a fifth (17%) of responses. About half were in freehold premises, and half in leasehold. Unit size ranged from 30m² (about 325sqft) to 1,100m² (12,000sqft)
- 7.3 In answer to the main question as to why they located in Wareham, the answers varied but the most common answers were based on convenience (to the business owner and to customers), and generally lower prices and availability of larger units (compared to Swanage etc)
- Close to home (business owner) (10)
 - Local customer base (8)
 - Cheaper accommodation than conurbation (6)

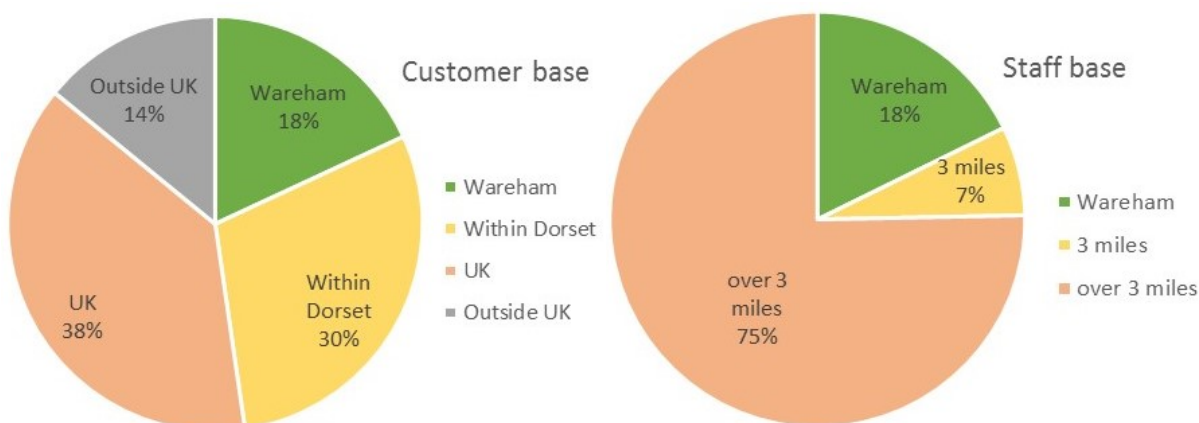
- Availability of large premises / site (5)
- Business was based here when acquired (4)
- Availability of staff (2)
- Other (1)

7.4 Over half (55%) of the businesses were involved in production / manufacturing. About 1 in 10 businesses considered they generated noise / pollution as part of their work – either due to the manufacturing processes or transport movements.

7.5 Most (63%) considered that they used the space they had efficiently and had not need for more space with slightly more (26%) under-occupying than being over-capacity (11%). The tendency to be under-occupying was more marked in the responses from the Westminster Road units. Few respondents (10%) in the Sandford Lane premises considered that their premises needed modernising, whereas half (50%) of respondents in the two other estates felt that their premises needed modernising.



7.6 In terms of local links, just under 20% of the customers were Wareham based, and a similar proportion of the staff. Over a half of the business customer base was from outside the county, and three-quarters of staff travelled more than 3 miles (and would therefore most likely be commuting into Wareham by car). At the time of the 2017 survey, the staff base was slightly more Wareham-focused on the older industrial estates (Johns Road and Westminster Road) where local residents accounted for about a third of their staff – the data was particularly influenced by the response from Daler Rowney (where a high proportion of staff were from the local area). The 2018 update for Westminster Road shows a much reduced level of Wareham-based employees (reducing the overall figure shown in the 2017 pie chart (below) to 12%, and over 3 miles increasing to 81%). None of the businesses responding had a difficulty recruiting staff.



8. Westminster Road Industrial Estate – Detailed Appraisal

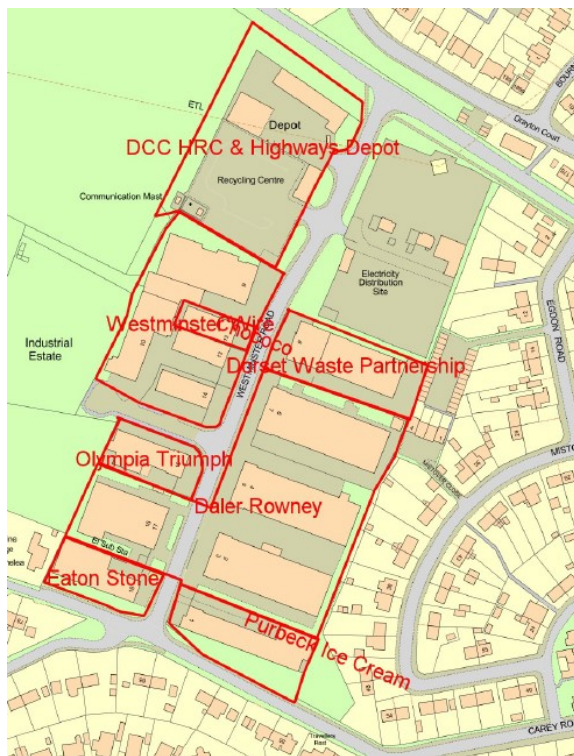


- 8.1 In February 2016 Daler Rowney were acquired by the FILA Group, a Milan based producer of art and writing supplies. Following a review of the operation they announced in Spring 2017 that they would close their Wareham manufacturing operation which would be transferred to Bracknell over a period of 2 years. They occupy a significant area of the estate (Units 2-7 and 16-17). The suggestion that Westminster Road be regenerated for housing came from local residents during the early consultation stages of the Wareham Neighbourhood Plan. With the recent decision by Daler Rowney to relocate from its premises, the opportunity to consider the long term future of the estate is timely for the Neighbourhood Plan.
- 8.2 The premises in Westminster Road were revisited in May 2018 to record the main changes that had occurred, in light of the relocation of Daler Rowney.

Site History and Current Occupants

- 8.3 The Westminster Road Industrial Estate was granted outline planning permission for light industrial use in Dec 1963 (ref 309410) and November 1964 (ref 310308) with detailed consent being granted subsequently. Development of industrial units commenced in 1966 and proceeded slowly from Carey Road in a northwards direction. The estate was completed by the mid-1970s. On completion, the units were occupied by a number of manufacturing businesses including metal plating, textiles and electronics.
- 8.4 Although described in 1962 as light industrial use, many of the subsequent processes carried out mean that most units may well have established a lawful B2 (general industrial) use, and the lack of specific conditions also means that factors such as normal working hours are not controlled. In an application on Unit 18 for a Certificate of Lawfulness (ref. 6/2016/0780) this issue was considered and it was accepted that a B2 use had been established.

8.5 The two largest businesses on the estate were Daler Rowney who manufacture materials in Units 2-7 and 16-17 and Westminster Wire who manufacture the sale of greetings cards, books etc in and 13-14. Unit 1 is used for storage by Ice Cream (previous split into 5 sub-units), Unit 8 is used for storage of vehicles for Waste Partnership, with the front portion as a dance studio) currently vacant, Unit Chococo for chocolate manufacturing, occupied by Olympia Triumph who manufacture safety equipment and Unit occupied by Eaton Stonemasons who manufacture kitchen worktops etc. County Council has a Household Recycling Highways depot at the northern corner of and there is an electricity distribution site opposite.



in 2017
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Units 9-10
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the estate

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8.6 By May 2018 a number of the premises vacated by Daler Rowney have been occupied, although Units 2, 3, 16 and 17 remain vacant. Units 4 and 5 have been occupied by Polar Glaze, who manufacture doors, windows and conservatories used locally (Dorset). They also have premises at Holton Heath (where they have been for over 20 years) but required a larger site. Unit 6 has been occupied by Evo Design, who manufacture flat-pack furniture for modern camper vans, with a mainly UK-focused customer base. Unit 7 is split between National Tube Straightening Service Ltd (using the ground floor) and Cater Cost Ltd (using the upper floor). National Tube Straightening Service Ltd repair and manufacture scaffolding products, and Cater Cost Ltd who provide software solutions for the catering industry, both of which whose customer-base is UK-focused.

Employment Levels and Employee Place of Residence

8.7 The Survey of the Main Industrial Sites (Spring 2017) was completed by 5 of the occupants of the Westminster Road Estate (Chococo, Daler Rowney, Eaton Stonemasons Ltd, Olympia Triumph and Westminster Wireworks) – representing 12,500m² of floorspace (according to the business rate data). No data was obtained from either Purbeck Ice cream (occupying the unit adjoining Carey Road) or Dorset County Council / the Dorset Waste Partnership, although Purbeck Ice cream have confirmed that there are no employees working from the premises.

8.8 The responses indicated that there were at least 138 full-time and 3 part-time staff employed on the Estate, giving an average of 1 FTE per 89 sq metres (compared to an industry average rate of 1 FTE per 36 sq metres for B2, and 1 FTE per 47 sq metres for B1¹). This illustrates that the site has been seriously under-utilised at around 47% of its theoretical occupancy, and is recognised by the occupants in the

¹ based on HCA "Employment densities guide 2010"

Spring 2017 survey.

- 8.9 Of the 44 employees who live in Wareham and work on the Estate, 40 work for Daler-Rowney who are closing their Wareham operation. With their departure, this leaves 4 out of the remaining 91 jobs taken by employees based in Wareham (4%).
- 8.10 One of the major employers (Westminster Wire) have said they would seriously consider relocating to Holton Heath to be closer for most of their employees to get to work.
- 8.11 The May 2018 update showed a reduction in employment (down to 112 full-time and 3 part-time staff) although it is noted that Polar Glaze stated that they would be recruiting some 20-25 additional people at the end of the year, bringing the figure broadly back to the 2017 levels. The new influx of businesses has also brought in further employees commuting from Poole / Bournemouth, with only 11% of current employees living in Wareham.

Fit for purpose

- 8.12 The Westminster Road Industrial Estate was developed in the 1960s and early 1970s and has provided useful employment space for some 50 years. The units are of similar design comprising long narrow plots with two storey flat roofed office accommodation at the front and a low asbestos cement roofed workshop at the rear.
- 8.13 Servicing is generally down a narrow, shared access between units allowing only side on rather than end on loading facilities. Parking on site is limited, resulting in considerable pressure for the on-street parking spaces by employees, which in turn makes manoeuvring of large goods vehicles very difficult.
- 8.14 The workshop units at the rear have relatively low eaves height which hampers stacking of pallets and efficient working. The office accommodation at the front of the units is cellular compared with more modern open plan and is very dated in its layout and appearance. Many of the buildings need considerable investment to improve weathertightness and achieve better energy efficiency, and the asbestos cement roofs are generally in need of renewal. The outdated nature of the accommodation and general need for modernisation is highlighted in the responses to the Spring 2017 survey. A number of the incoming businesses surveyed in May 2018 recognised this need to modernise their premises, reflected in the comparably lower cost of the units.

Purbeck District Council's Economic Development Manager's Report

- 8.15 In April 2017 the Economic Development Manager of the District Council reported on his findings regarding the potential implications of redeveloping Westminster Road, Wareham employment site for housing.
- 8.16 He notes the total built ground floor space at Westminster Road being 13,900m², and that the Westminster Road site helps provide a range and choice of site sizes. He estimated that, based on standard densities², the likely number of jobs supported would be in the region of 296 – 386 jobs (although the survey findings in 2017 and 2018 suggest in reality this is considerably lower at around 115 jobs). He lists 8 companies known to be located on the estate – although since then there have been

² 1 FTE per 36 sq metres B2, 1 FTE per 47 sq metres B1

further changes³.

- 8.17 His review included evidence of known site vacancy records for that site over the last 18 years, as replicated in the table below:

Property	Floor area m ²	Advertised on Evolutive	Date of offer or letting	Months on market
13 Westminster Road	425	7 October 2003	18 May 2005	19
6 Westminster Road	1760	7 January 2009	23 July 2009	6
15 Westminster Road	660	7 October 2009	3 January 2013	39
12 Westminster Road	475	22 July 2010	19 August 2010	1
8 Westminster Road	190	4 March 2010	9 September 2013	42
1 Westminster Road	1210	22 January 2013	30 April 2013	3
18 Westminster Road	865	20 May 2016	Remains available	11 (to date)

- 8.18 His report raises concerns about:

- The cost of replacing any lost employment land (taking into account current build costs and site values) as part of any ‘package’ for redeveloping the site
- The uncertainty regarding available and suitable land at Holton Heath and Dorset Innovation Park to cater for any displaced businesses
- The potential impact on job losses which may affect the local workforce and access to employment (particularly those walking to work)

Commercial analysis

- 8.19 Feedback from Jonathan Sibbett of Sibbett Gregory, the main commercial agent in the area, indicates that rental values in Wareham for industrial units of this type are low, about £4.00 per sq ft. At this level, significant investment or redevelopment of existing estates is not likely to be a viable proposition. The likely scenario over the next twenty or so years is therefore one of “patch and repair” with an increase in units used for storage and distribution but providing very limited if any employment.

9. Johns Road Industrial Estate – Appraisal



³ His notes refer to Jade-Aden Services Ltd being present, this firm have relocated their business to Holton Heath Trading Park and their unit acquired by Westminster Wireworks

- 9.1 Johns Road is a small industrial site established in the 1960s primarily used by businesses involved in the motor trade. It adjoins the railway station and is a gateway site into North Wareham. A major fire in two of the units has created an opportunity to rethink the future of the area.
- 9.2 Business rate data suggests that there is approximately 2,600m² of employment floorspace, split between 5 premises (some of which have been sub-divided to create 9 units in total). Responses to the Spring 2017 survey were received from 5 of the 9 units (accounting for about three-quarters of the workspace), employing about 9 staff in total (7 FTE). The majority of those responding considered that their premises were in need of modernisation. One unit was recorded as vacant.
- 9.3 As with Westminster Road, significant investment or redevelopment is not likely to be a viable proposition based on likely rental returns. As such, there is a real risk that this gateway location site will become more run-down.

10. Sandford Lane Industrial Estate – Appraisal



- 10.1 The Sandford Lane Industrial Estate is the largest industrial estate in the Neighbourhood Plan area, extending to 9ha and home to over 70 business units. It is bordered by the railway line to the north and floodplain of the River Piddle to the south although there are a few residential properties alongside the entrance road and residential development north of the railway. A significant proportion of the Industrial Estate is within the 400m heathland consultation zone, where housing would not be permitted due to the potential adverse impact on the European wildlife site.
- 10.2 Responses to the Spring 2017 survey indicate that the site is home to a mix of mainly manufacturing and office uses, however a review of the business rates data also highlights significant land areas used for storage (which appears to be manufacturing related). Approximately 15% of the units were recorded as vacant. The proportion of respondents suggesting that their premises required modernisation was much lower than the other estates, at just 10%.
- 10.3 A review of premises for sale / let in the industrial estate (May 2018) showed 2,255m² floorspace available for sale or to let, based on the following availability:
- Units 6 - 9 available for sale (1,485 m²) and vacant
 - Unit 10 available to let (80m²) and vacant
 - Unit 19 available for sale or to let (52m²) – not currently vacant (Bradfords)

- Units 20 and 21 available for sale (638m²) and vacant

11. Study conclusions / recommendations

- a) The policy context aims to strike an appropriate balance between the retention of existing employment areas and other needs (such as for housing or regeneration). Whilst Wareham is considered one of the most sustainable locations for employment growth, the adopted Local Plan recognises that further assessment of the supply is required, and that this can be carried out through a future review of the Local Plan or through individual neighbourhood plans, with existing employment sites to be safeguarded in the interim. As such, Wareham Neighbourhood Plan is well placed to consider the extent to which new employment land may be required, and existing land safeguarded.
- b) The most recent workspace strategy indicates that there is already a surplus of employment land supply within Eastern Dorset. This implies that the need to safeguard against the loss of existing employment land has lessened since the Local Plan was adopted. The main concern about potential loss of employment land is in relation to B1 office use, particularly in Bournemouth and Poole (where the main market lies).
- c) The demand for employment land in Wareham does fluctuate, but was notably impacted by the national economic downturn post-2009, since when demand has concentrated more on smaller units (under 465m² floorspace). The main reasons as to why existing businesses locate in Wareham relate mainly to convenience (being close to where the business owner lives and/or to its local customer base), generally lower prices than found in the conurbation, and the availability of larger units (compared to Swanage etc).
- d) The majority of the workforce commute outside of the area, with the Poole / Bournemouth conurbation considered to be the main destination. The majority of staff employed on the industrial estates in Wareham live outside the parish and commute into the area. This suggests that although opportunities to work locally may exist, in reality the availability of both job opportunities and workforce within the nearby conurbation of Poole and Bournemouth are the dominant factor. As such the retention of existing, or provision of new, workspace in Wareham is unlikely to have a significant influence on commuting patterns.
- e) Sandford Lane Industrial Estate accounts for over two-thirds of the employment land supply in Wareham, and includes a significant portion of storage land and premises and scope for expansion. Westminster Road accounts for about a quarter of the employment land a floorspace, with John's Road about one-sixteenth. There is a range of unit sizes, tenures and types on all three estates.
- f) There has not been any detailed consideration of the role that existing employment sites play in Wareham as part of the Local Plan review, but there is 2.5ha of available employment land recorded on the Sandford Lane Industrial Estate (equivalent to 17.5%), and the Local Plan Review options paper (June 2016) is consulting on potential changes which include the expansion of this estate by a further 1ha (bringing the amount of employment land available to 22.9%).
- g) The Sandford Lane Industrial Estate is comparatively modern, and its status as protected employment land appears to be justified. There is scope to extend the site at its eastern end to provide for future needs, as recognised in the Local Plan review, in a location where housing would not be considered acceptable due to the proximity to European wildlife sites.

- h) The Westminster Road industrial estate is now 50 years old and has become rundown with premises not ideally suited to modern uses, and as a result has been seriously underutilised in recent years (compared with its theoretical employment capacity). The decision by Daler-Rowney to relocate all of their operations from the site has created an opportunity to consider the long-term future of the estate, although businesses are moving in to the vacated units. This could be done on a phased basis in accordance with a master plan, to suit the timescales and future plans of the existing occupants. The net loss of employment land would not appear to be strategically significant or have any notable impact on commuting patterns.
- i) Johns Road industrial estate occupies a key location on the entrance into Wareham by the railway station. Like the Westminster Road estate, it has become rundown with premises requiring modernisation. A more flexible approach to redevelopment in this location, to enhance this gateway location, would similarly be justified.

APPENDIX 1 - Business Rates data list

Site	Address	Description	Unit area (m²)	Rateable value
Westminster Rd	18	Factory and premises	833.29	£29,500
Westminster Rd	2-3	Workshop and premises	1,818.35	£39,250
Westminster Rd	6	Workshop and premises	839.95	£29,500
Westminster Rd	15	Factory and premises	665.4	£25,500
Westminster Rd	4-5	Workshop and premises	1,792.85	£38,000
Westminster Rd	DCC Depot	Workshop and premises	726.66	£24,250
Westminster Rd	Recycling Centre	Civic amenity site	Not published	£23,000
Westminster Rd	DWP Education & Resource Centre	Offices and premises	84.14	£2,450
Westminster Rd	Unit E At 1	Workshop / premises	151.43	£6,700
Westminster Rd	Unit C At 1	Workshop and premises	152.8	£6,700
Westminster Rd	Unit D At 1	Workshop and premises	415.08	£16,500
Westminster Rd	Unit A and B 1	Workshop / premises	465.4	£22,250
Westminster Rd	7	Workshop and premises	1,088.42	£34,750
Westminster Rd	Purbeck District Council 8	Storage depot / premises	902.4	£34,000
Westminster Rd	Front Pt 8	Dance school / premises	103.28	£6,200
Westminster Rd	Rear Pt 8	Offices and premises	329.35	£20,250
Westminster Rd	9 -10 And 13-14	Workshop and premises	3,424.67	£65,000
Westminster Rd	12	Factory and premises	466.5	£19,000
Westminster Rd	16 -17	Workshop and premises	1,220.46	£35,750
Westminster Rd	Orange Telecom Masts Site No 139	Communication station	Not published	£14,750
Sandford Lane	2 Designer House, Anglebury BP	Offices and premises	126.56	£8,200
Sandford Lane	1st F 1 Designer House, Anglebury	Workshop and premises	92.44	£5,100
Sandford Lane	Gnd F 1 Designer House, Anglebury	Workshop and premises	93.89	£7,900
Sandford Lane	N E Davis, Sandford Lane	Factory and premises	844.2	£28,750
Sandford Lane	Acetip Ltd, Old Sandford Woodmill	Storage land / premises	3,300	£18,250
Sandford Lane	J T Sydenham, Old Sandford W'ml	Storage land	8,370	£29,250
Sandford Lane	Unit C Anglebury Business Park	Workshop and premises	450.9	£25,500
Sandford Lane	Social Services, Anglebury BP	Offices and premises	1,086.23	£32,000
Sandford Lane	Edenhall Concrete Ltd	Factory and premises	3,126.06	£74,500
Sandford Lane	1 & 2, Sandford Farm Ind Est	Workshop and premises	544.71	£31,750
Sandford Lane	5, Sandford Farm Ind Est	Store and premises	149.4	£9,600
Sandford Lane	6 & 7, Sandford Farm Ind Est	Workshop and premises	326.45	£19,750
Sandford Lane	8, Sandford Farm Ind Est	Workshop and premises	112.29	£6,700
Sandford Lane	9, Sandford Farm Ind Est	Workshop and premises	114.79	£6,300
Sandford Lane	3 Designer House, Anglebury BP	Workshop and premises	146.96	£13,500

Wareham Neighbourhood Plan – Supporting Evidence

Site	Address	Description	Unit area (m ²)	Rateable value
Sandford Lane	3, Sandford Farm Ind Est	Store and premises	112.3	£7,500
Sandford Lane	4, Sandford Farm Ind Est	Workshop and premises	238.39	£9,600
Sandford Lane	Quay House	Land used for storage	2,495.30	£25,000
Sandford Lane	10a Sandford Farm Ind Est	Workshop and premises	79.63	£5,700
Sandford Lane	10b Sandford Farm Ind Est	Workshop and premises	77.89	£5,300
Sandford Lane	Unit 1, Sandford Lane Ind Est	Workshop and premises	208.26	£13,750
Sandford Lane	Unit 2, Sandford Lane Ind Est	Warehouse and premises	208.22	£13,500
Sandford Lane	Unit 3, Sandford Lane Ind Est	Warehouse and premises	268.88	£14,750
Sandford Lane	Units 4-5, Sandford Lane Ind Est	Workshop and premises	880.34	£42,250
Sandford Lane	Units 6-9, Sandford Lane Ind Est	Workshop and premises	1,288.42	£47,750
Sandford Lane	Unit 11, Sandford Lane Ind Est	Workshop and premises	521.98	£35,250
Sandford Lane	Units 12-13, Sandford Lane Ind Est	Workshop and premises	302.06	£14,000
Sandford Lane	Unit 12a, Sandford Lane Ind Est	Workshop and premises	154.19	£12,000
Sandford Lane	Unit 14, Sandford Lane Ind Est	Workshop and premises	137.45	£7,100
Sandford Lane	Unit 15, Sandford Lane Ind Est	Workshop and premises	171.52	£9,100
Sandford Lane	Unit 15a, Sandford Lane Ind Est	Workshop and premises	73.4	£4,950
Sandford Lane	Unit 16a, Sandford Lane Ind Est	Warehouse and premises	313.61	£20,500
Sandford Lane	Unit 16, Sandford Lane Ind Est	Workshop and premises	577.07	£26,500
Sandford Lane	Units 17-18, Sandford Lane Ind Est	Workshop and premises	421.7	£29,500
Sandford Lane	19, Sandford Lane Ind Est	Workshop and premises	481.1	£32,250
Sandford Lane	Units 20-21, Sandford Lane Ind Est	Warehouse and premises	557.99	£34,750
Sandford Lane	Units 22-24, Sandford Lane Ind Est	Factory and premises	1,014.35	£47,250
Sandford Lane	Prospect House	Offices and premises	754.54	£57,500
Sandford Lane	10, Ryan Business Park	Warehouse and premises	917.41	£37,750
Sandford Lane	Units F2 & F6 1st Flr Ryan House	Offices and premises	272.15	£19,000
Sandford Lane	6 -9, Ryan Business Park	Factory and premises	485.26	£24,000
Sandford Lane	1, Ryan Business Park	Factory and premises	833.29	£29,500
Sandford Lane	Spea House & Unit 2, Ryan BP	Workshop and premises	1,818.35	£39,250
Sandford Lane	3, Ryan Business Park	Workshop and premises	839.95	£29,500
Sandford Lane	Gnd Flr Unit 4, Ryan Business Park	Factory and premises	665.4	£25,500
Sandford Lane	Suite F3, Ryan Business Park	Workshop and premises	1,792.85	£38,000
Sandford Lane	Suite F4, Ryan Business Park	Workshop and premises	726.66	£24,250
Sandford Lane	5, Ryan Business Park	Civic amenity site	Not published	£23,000
Sandford Lane	5 A, Ryan Business Park	Offices and premises	84.14	£2,450
Sandford Lane	1st F 4, Anglebury Business Park	Workshop and premises	151.43	£6,700
Sandford Lane	Gnd F 4, Anglebury Business Park	Workshop and premises	152.8	£6,700
Sandford Lane	1 -2, Omega Centre	Workshop and premises	415.08	£16,500

Wareham Neighbourhood Plan – Supporting Evidence

Site	Address	Description	Unit area (m ²)	Rateable value
Sandford Lane	3, Omega Centre	Workshop and premises	465.4	£22,250
Sandford Lane	4 -5, Omega Centre	Workshop and premises	1,088.42	£34,750
Sandford Lane	6 -7, Omega Centre	Storage land / premises	902.4	£34,000
Sandford Lane	Units 1-3, Justin Business Park	Dance school / premises	103.28	£6,200
Sandford Lane	Unit 4, Justin Business Park	Offices and premises	329.35	£20,250
Sandford Lane	Unit 5, Justin Business Park	Workshop and premises	3,424.67	£65,000
Sandford Lane	Unit 6, Justin Business Park	Factory and premises	466.5	£19,000
Sandford Lane	Units 7-8, Justin Business Park	Workshop and premises	1,220.46	£35,750
Sandford Lane	Unit 9, Justin Business Park	Communication station	Not published	£14,750
Sandford Lane	Units 10-11, Justin Business Park	Offices and premises	126.56	£8,200
Sandford Lane	1, Leanne Business Centre	Workshop and premises	92.44	£5,100
Sandford Lane	2, Leanne Business Centre	Workshop and premises	93.89	£7,900
Sandford Lane	2 A, Leanne Business Centre	Factory and premises	844.2	£28,750
Sandford Lane	3 -3a, Leanne Business Centre	Storage land / premises	3,300	£18,250
Sandford Lane	4, Leanne Business Centre	Storage land / premises	8,370	£29,250
Sandford Lane	5, Leanne Business Centre	Workshop and premises	450.9	£25,500
Sandford Lane	7, Leanne Business Centre	Offices and premises	1,086.23	£32,000
Sandford Lane	6, Leanne Business Centre	Factory and premises	3,126.06	£74,500
Sandford Lane	8 -8a, Leanne Business Centre	Workshop and premises	544.71	£31,750
Sandford Lane	9, Leanne Business Centre	Warehouse and premises	149.4	£9,600
Sandford Lane	13, Leanne Business Centre	Workshop and premises	326.45	£19,750
Sandford Lane	10 & 12-12a, Leanne Business Ctre	Workshop and premises	112.29	£6,700
Sandford Lane	11 -11a, Leanne Business Centre	Workshop and premises	114.79	£6,300
Sandford Lane	17, Leanne Business Centre	Workshop and premises	146.96	£13,500
Johns Road	Unit 5	Warehouse and premises	112.3	£7,500
Johns Road	Unit 5b	Workshop and premises	238.39	£9,600
Johns Road	Unit 6	Storage land / premises	2,495.30	£25,000
Johns Road	Unit 6c	Workshop and premises	79.63	£5,700
Johns Road	Unit 6d	Workshop and premises	77.89	£5,300
Johns Road	Unit 6a	Workshop and premises	208.26	£13,750
Johns Road	Unit 4	Warehouse and premises	208.22	£13,500
Johns Road	Saltfire Stoves Ltd Station Works	Warehouse and premises	268.88	£14,750
Johns Road	Unit 2	Workshop and premises	880.34	£42,250

APPENDIX 2 – Industrial Estate Occupant Survey



Employment Fact-finding Survey – Feb 2017

This survey is directed at businesses operating on the main industrial estates in the Wareham area, to understand current and future business needs for premises and labour. This will provide important evidence to underpin proposals in the Neighbourhood Plan, so thank you for taking part. The Neighbourhood Plan involves residents and businesses working together with landowners and developers to help shape future development in the Wareham Parish. More information can be found on our website www.warehamplan.co.uk.

Completing the survey should take no more than 15 minutes – if you are unable to answer a question please move onto the next. Individual survey responses will remain confidential, with any findings only reported at an aggregate level or not otherwise attributable to a single business.

Name of respondent: _____

Name of business: _____

Address of business: _____

Contact e-mail: _____

Contact telephone: _____

Q: Can you tell us how long your business has been running?

☐ Less than a year

☐ 6 – 10 years

☐ 1 – 2 years

☐ 11 - 20 years

☐ 3 – 5 years

☐ over 20 years

Q: Can you tell us why you located your business in the Wareham area?

Q: Can you describe the type of business that you run:

- | | |
|---|--|
| <input type="checkbox"/> Production / Manufacturing | <input type="checkbox"/> Transport & Storage |
| <input type="checkbox"/> Construction | <input type="checkbox"/> Wholesale |
| <input type="checkbox"/> Other (please describe) | |

Q: Does your business create noise, pollution etc that make it incompatible with a residential area?

- ☐ No
- ☐ Yes (please describe)

Q: Can you confirm the address of the units you use in the Wareham area, their approximate size, whether owned or leased, and if leased it would also be useful to indicate current rent levels:

Unit address	Size	Basis	Rent costs
		Leasehold / Freehold	
		Leasehold / Freehold	
		Leasehold / Freehold	
		Leasehold / Freehold	

Q: can you tell us whether the premises you use at the current time are -

- ☐ under capacity (there is considerable under use)
- ☐ broadly at capacity (you are using most areas efficiently and have no need for more space)
- ☐ over capacity (you require larger premises)

Q: can you tell us whether the premises you use at the current time are in need of modernising?

- ☐ No
- ☐ Yes (please describe)

Q: If you are looking to change premises in the next 5 – 10 years, please explain here the sort of premises you need, how soon and whether you need to be locally based to Wareham:

Type and size of premises needed:

Timescale for move:

Locational requirements:

Q: Where do most of your “customers” (market) come from? (approximate estimates)

	% from Wareham parish
	% from outside of Wareham but within Dorset
	% from elsewhere in the UK
	% from outside the UK

Q: Approximately how many people do you employ?

	Full-time employees
	Part-time employees

Q: Where do most of your employees live? (approximate estimates are fine)

	Number of employees living....
	...in Wareham parish
	...outside of Wareham but within 3 miles (Stoborough / Sandford / Holton Heath)
	...living more than 3 miles away

Q: Do you have difficulty recruiting staff due to the lack of available affordable housing in the local area?

	Yes
	Only sometimes
	Rarely / never

And finally...

Q: If there is other potentially useful information you can tell us about your experiences in general that you think may be useful for us to consider in preparing our neighbourhood plan, please use the space below

Please return the form by 13 March 2017 either by post -

Wareham Neighbourhood Plan Steering Group,
c/o Wareham Town Council,
Wareham Town Hall,
East Street, Wareham BH20 4NS

Or by Email - warehamnplan@gmail.com