Dorset County Council, Weymouth & Portland Borough Council, West Dorset District Council, South West RDA

# ECONOMIC VISION FOR WEYMOUTH & DORCHESTER

Vision : Evidence Base
February 2008

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# CONTENTS

# 1 INTRODUCTION

1.1 This document represents a collection of research and analysis completed during the summer of 2007 as background studies towards preparation of the Economic Vision for Weymouth and Dorchester.

1.2 It includes review of various strategies, plans and research which have been prepared for the two towns and the Districts of Weymouth & Portland and West Dorset, also by Dorset Council and other partners. Particular reference was made, from a long list of documents[1] to :

- "Raising the Game", Bournemouth, Dorset & Poole Economic Development Strategy 2005 – 2016
- "Population, Housing and Economic Characteristics of the Dorset Housing Market Areas" (draft, May 2007)
- Weymouth & Portland LDF Core Strategy Issues Paper, "Economy, Employment & Tourism" (draft, June 2007)
- "The Weymouth & Portland Economy: Context, Issues & Challenges" (Jan 2006)
- "Open for Business" Economic Regeneration & Tourism Strategy for Weymouth & Portland (Feb 2007)
- West Dorset District Local Plan Chapter 7 "Employment & Tourism" (2006)
- West Dorset District Local Development Framework Core Strategy "Issues and Options Paper" (July 2007)
- "The Future of South Dorset" Conference (Jan 2005)
- "Shaping our Future" – the Dorset Community Strategy 2007 -2016
- "Papers on Economy, Demography, Housing & Environmental Quality" for SWRSS EIP, DCC/ BBC/ BoP (March 2007)
- "Weymouth & Dorchester HMA Sub-regional Strategy (Matter 4/12)", for SWRSS EIP, SW RDA

1.3 To this research was added several discussions with client Project Group and consultations[2] with other agencies and the business community – the latter through workshops held in Weymouth and Dorchester and targetted interviews with businesses across the various sectors in the towns.

1.4 This document attempts to analyse and discuss the issues which are key to the economic future of the towns. **Section 2** sets the scene by providing a brief contextual description and summary of key data. **Sections 3 and 4** provide description and an overall analysis of Weymouth and Dorchester, to conclude with identification of key priorities. **Sections 5 and 6** look at Housing and Economic Issues respectively, drawing on several studies, statistical sources and consultations particularly intended to inform ideas about the strategic issues which may shape the future of the towns. **Section 7** reviews Priority Growth Issues and **Section 8** reviews selected economic sectors, focussing on those which require particular understanding if the economic potential of Weymouth and Dorchester is to be maximised.

[1] A full list of references is provided in Appendix One
[2] A list of consultees and business interviewees is provided in Appendix Two

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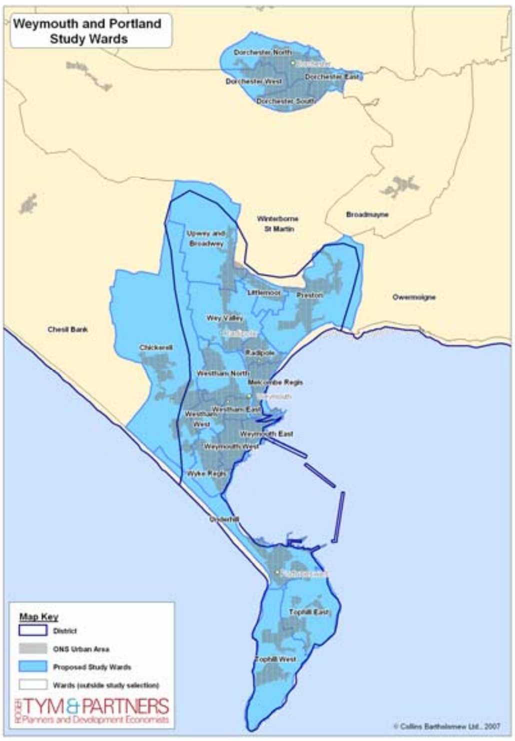
# 2 THE STUDY AREA

2.1 Weymouth and Dorchester are physically two distinct settlements (approx 8 miles apart), both part of the same Travel-to-Work-Area but with clear differences in their roles and images. They are considered to complement each other in terms of their respective roles and economic specialisms and they draw upon the same labour market (TTWA), leading to significant commuting between the two settlements.


2.2 They are both surrounded by areas of high environmental quality which, whilst contributing to the quality of life and attracting visitors from around the country, does restrict development opportunities thereby limiting larger scale growth options.

2.3 For the purposes of this study, the two towns have been defined by reference to relevant ward maps and data, following as closely as possible the boundaries of the existing built-up areas. Following discussion with the Steering Group, Weymouth is taken to include Portland and Chickerell; Dorchester comprises four wards as shown:




Note that this geography, in which the "town" of **"Weymouth"** is taken to **include Portland and Chickerell** is used consistently throughout this work, wherever possible, combining data for 16 wards as shown.

The "town" of "**Dorchester**" is consistently considered in terms of the four wards shown.

2.4 Weymouth is the larger of the two settlements with a population over three times that of Dorchester (Weymouth 58,923; Dorchester 16,164)[3], however employment levels are much more similar (Weymouth 22,957 and Dorchester 15,035)[4]. Dorchester is reliant on a high level of in-commuting whereas Weymouth experiences significant levels of out-commuting particularly to Dorchester.

2.5 Dorchester has a significant representation of public sector employment with a particular bias within the health and social work sector. Retailing and public administration are also important. Weymouth however has a much greater share of employment within the retailing and hotels and catering sectors, indicative of it's status as a large service centre and a holiday resort. The dominance of these sectors has implications in terms of skills and earnings levels – both are relatively low within Weymouth.

2.6 Both towns have limited success in terms of inward investment and entrepreneurial rates are low. Dorchester in particular has been reliant on the growth of indigenous companies.

2.7 As noted previously, development pressure within the area is significant. As a result of environmental designations and, in the case of Weymouth tight physical boundaries, there are limited opportunities for expansion. Pressure for both employment and housing sites is high. This, combined with high house prices, has created affordability problems.

2.8 In relation to the town's respective roles, Dorchester is a County town yet has a limited range of both cultural and community facilities to support this status. Weymouth has recovered from a difficult economic period and is seeking to upgrade its tourism role and diversify its local economy, further developing its sub-regional role. Both towns are seeking higher levels of self containment.

2.9 Dorchester and Weymouth both suffer from poor accessibility (perceived and real) and upgrading of the infrastructure network is likely to open up opportunities in both settlements.

2.10 The Bournemouth/Poole conurbation is located approx 40km from the Weymouth and Dorchester TTWA. It is the second largest urban concentration within the South West and has a clear relationship with both Dorchester and Weymouth in terms of in/out commuting. Higher earnings levels within Bournemouth/Poole may have had some impact upon resident's willingness to travel to work and upon skills issues within the Dorchester/Weymouth local economies.

[3] "Urban Areas" as defined for the purposes of this study using ward data see paragraph 2.3; 2001 Census, ONS
[4] ditto, 2005, ABI

## Summary Data

### Productivity - 2004 GVA /head

| Area | | GVA £ per head | Index UK=100 |
|---|---|---|---|
| United Kingdom | £ | 17,451 | 100 |
| South West | £ | 16,141 | 94 |
| Wiltshire | £ | 15,425 | 90 |
| Dorset[5] | £ | 12,250 | 72 |
| Devon | £ | 13,240 | 77 |

Source: ONS, NUTS3 GVA.

### Earnings - 2006 earnings as an index of the England and Wales Median Average Annual Earnings

| **Area** | **Residents Earnings Score (All - FT & PT)*** | **Residents (Full Time employed) Score*** | **Residents (Part Time Employed) Score*** | **Workplace Earnings Score**** |
|---|---|---|---|---|
| England and Wales | 100.0# | 100.0 | 100.0 | 100.0 |
| South West | 94.0 | 94.2 | 99.4 | 92.7 |
| Dorset | 96.8 | 96.9 | 100.6 | 95.1 |
| West Dorset District | 103.9 | 106.1 | 102.5 | 96.1 |
| Weymouth and Portland District | 91.0 | 87.0 | No Data | No Data |

Source: ASHE, 2006 (NOMIS)
# : England & Wales resident average earnings (all workers) is £19,712.
* Data for all working resident within the defined area

** Data for all workers within the defined area

### Employment Rates - 2006

| **Area** | **Emp. Rate (%)** |
|---|---|
| England and Wales | 74.1 |
| South West | 77.9 |
| Dorset | 78.2 |
| West Dorset District | 78.9 |
| Weymouth and Portland District | 75.1 |

Source: Labour Force Survey Jan 2006 - Dec 2006
Rate is percentage of working age population

### Skills - % of working age population with NVQ3+ and NVQ4+ qualifications

| **Area** | **NVQ4+ (%)** | **NVQ3+ (%)** |
|---|---|---|
| England and Wales | 27.0 | 44.8 |
| South West | 27.3 | 47.2 |
| Dorset | 29.0 | 47.6 |
| West Dorset District | 34.3 | 52.9 |
| Weymouth and Portland District | 17.8 | 38.1 |

Source: Labour Force Survey Jan 2006 - Dec 2006

[5] note all references to Dorset relate to the current County Council area

Housing Affordability - House price to income ratios (2005 prices)

| Area | Houseprice to income ratio |
|---|---|
| England | 4.43 |
| South West | 4.88 |
| West Dorset District | 4.75 |
| Weymouth & Portland District | 4.98 |

Source: Joseph Rowntree Foundation 2006

Deprivation - Most and Least Deprived Wards - 2004 Index of Multiple Deprivation for Weymouth and Dorchester study area
(grouped by wards to illustrate geography of deprivation in Weymouth & Dorchester)

| SOA | Equivalent Ward | Overall IMD SCORE | RANK OF IMD* |
|---|---|---|---|
| Dorset | | 13.01 | 130 |
| West Dorset | | 13.33 | 235 |
| Weymouth and Portland | | 21.15 | 125 |
| E01020514 | Chickerell | 5.24 | 29790 |
| E01020552 | Littlemoor | 41.30 | 4218 |
| E01020553 | Melcombe Regis | 38.56 | 5047 |
| E01020554 | Melcombe Regis | 50.42 | 2208 |
| E01020555 | Melcombe Regis | 39.59 | 4728 |
| E01020556 | Melcombe Regis | 34.28 | 6472 |
| E01020558 | Preston | 6.21 | 28677 |
| E01020559 | Preston | 5.84 | 29134 |
| E01020560 | Radipole | 7.68 | 26839 |
| E01020573 | Westham East | 35.14 | 6185 |
| E01020575 | Westham North | 38.76 | 4998 |
| E01020523 | Dorchester South | 3.99 | 31039 |
| E01020525 | Dorchester South | 2.15 | 32203 |

| | |
|---|---|
| (red) | Amongst 20% most deprived wards / l.a.s in England |
| (yellow) | Amongst 20% least deprived wards / l.a.s in England |

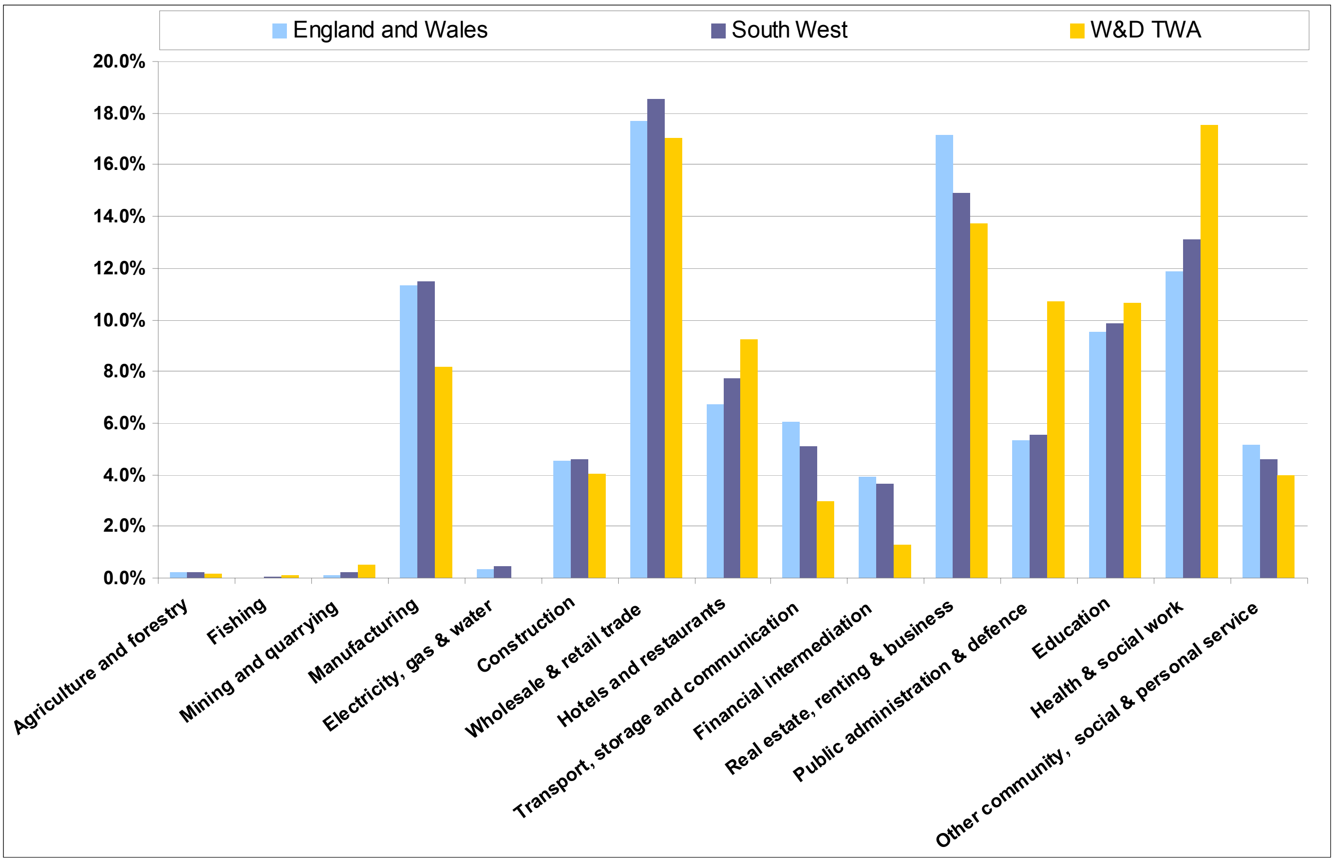
Source: IMD 2004.

* for wards, 1 is the most deprived and 32,482 the least deprived

* for Districts 1 is the most deprived and 349 is the least deprived

* for Counties, 1 is the most deprived and 149 the least deprived

Employment by sectors




Source: ABI, 2005 (NOMIS)

Knowledge-based economy - Business Units

| Area | 1998 | 2002 | 2005 | 1998-2005 % Change | % of total businesses | Total Business Units |
|---|---|---|---|---|---|---|
| England & Wales | 374,600 | 435,362 | 462,726 | 23.5 | 21.6% | 2,140,659 |
| SW | 30,881 | 37,200 | 40,705 | 31.8 | 19.2% | 212,120 |
| Weymouth & Dorchester TTWA | 492 | 598 | 694 | 41.1 | 14.9% | 4,659 |
| Weymouth inc Portland – study area | 203 | 245 | 293 | 44.3 | 12.6% | 2,332 |
| Dorchester - study area | 132 | 145 | 152 | 15.2 | 15.9% | 954 |

Source: ABI Workplace Analysis, 2005 (NOMIS)
OECD definition of ABI 2003 SIC codes used for KBE, see page 83.

Knowledge-based economy - Employees

| | 1998 | 2002 | 2005 | 1998-2005 % Change | % of total emp | Total Employ -ment |
|---|---|---|---|---|---|---|
| England & Wales | 4,565,718 | 4,965,416 | 5,193,683 | 13.8 | 21.6% | 24,097,848 |
| SW | 387,212 | 431,070 | 455,537 | 17.6 | 20.6% | 2,211,708 |
| Weymouth & Dorchester TTWA | 6,727 | 8,630 | 9,748 | 44.9 | 20.4% | 47,808 |
| Weymouth inc Portland - study area | 2,946 | 2,641 | 3,665 | 24.4 | 16.0% | 22,957 |
| Dorchester study area | 2,682 | 4,579 | 4,529 | 68.9 | 30.1% | 15,035 |

Source: ABI Employee Analysis, 2005 (NOMIS)
OECD definition of ABI 2003 SIC codes used for KBE.

# 3 WEYMOUTH

3.1 Weymouth is the largest urban area in Dorset outside the Bournemouth/Poole conurbation and is sited in the centre of the Dorset coastline. The Weymouth urban area also includes the settlements of Chickerell and Bincombe and the Isle of Portland also functions as part of the wider urban area.

3.2 The town is located in the south east zone of the South West region, 7 miles to the south of Dorchester on the A354 and there are direct rail links to London and Bristol. A seasonal catamaran also serves the Channel Islands. Weymouth and Dorchester function in a complimentary manner and share the same TTWA despite serving different administrative areas.

3.3 The quality of the natural environment is a major asset to the town and a key element of the area's identity and prosperity. Both the countryside and coastline are highly regarded by local residents and form the basis of the tourism industry. The designation of the Jurassic coastline as World Heritage Site has been important both from an environmental and economic perspective.

3.4 The town is a busy seaside resort with an important sub-regional function. Originally developed as a port and coastal town, it now also provides a key employment and retail role though historical links with the naval and defence industries are maintained.

## Local Economy

3.5 Until the 1990's a significant element of the local economy was based on defence related work at Portland. Following the closure of three of the main Ministry of Defence and Naval establishments on Portland, the area has retained some of the defence related employment but a more significant proportion of jobs are in the tourism & service sectors. Initial estimates suggested that there would be over 4,000 jobs and £45 million lost from the local economy however, programmes of regeneration and diversification efforts have mitigated some of the feared impacts of the closures.

3.6 More recent employment losses include the relocation of New Look's distribution base accounting for the loss of 580 jobs in 2006 and the closure of the Prison Ship HMP Weare with a loss of 300 jobs. Recent employment concerns include possible relocation of Qinetic activities (formerly DERA – Defence and Evaluation Research Establishment) to Winfrith.

3.7 Economic underperformance was an issue for Weymouth as a whole over the period 1991-2001 and today the town has a 'classic' economy in terms of the sectors employing the largest number of people. The Baseline Statement will provide more detailed information on the socio-economic circumstances of the town but to summarise, there is a prominent public administration sector and retail, professional services and hotels & catering sectors are also important employers. In line with the town's coastal tourism role there is a higher than average proportion of people employed in water transport and within traditional tourism based industries (hotels and catering etc).

3.8 Unemployment within Weymouth is traditionally higher than in other Dorset towns and the 'seaside resort' role of the town also results in a dependence on seasonal and often low paid jobs. There is also a low business start-up rate in Weymouth & Portland indicating a lack of entrepreneurs.

3.9 Since 2001 the area has experienced some economic recovery and the marine industry is one of a number of important growth sectors and one likely to strengthen further through the successful 2012 Olympic bid. Continued development of activities at Osprey Quay (a former naval site) and developments at Portland Port (also a naval site) are increasing the prominence of the marine sector alongside the success of the Weymouth and Portland Sailing Academy. This has successfully hosted a range of national sailing events and Olympic Trials and will go onto provide the base for the 2012 Olympic Sailing events. Both the County and Weymouth & Portland Council are keen that more weight is given to the role of developing Weymouth and Portland Ports in the future.

3.10 It is important that the economy grows and strengthens in the future, particularly to allow for the development of higher technology and higher wage industries to provide a better balance of employment and enable more residents to work within the town. Historical links with the naval and defence industries have fostered some growth of high tech businesses within the area and other growth sectors have included distribution, engineering and electronics.

3.11 Earlier studies[6] identified that Weymouth was a net exporter of employees (over 3,000) but, as a large employment centre, offers a self-containment of 66%. The majority of out commuting is to Dorchester (as implied by Weymouth's complementary relationship with Dorchester); other key employment destinations are Bournemouth, Easton/Weston and Fortuneswell. With the exception of Bournemouth the other towns are relatively close to Weymouth and therefore, though the town is a net exporter of employment, most of this is actually over relatively small distances and within the TTWA.

3.12 Recent monitoring reports indicate that, despite an apparently healthy supply of employment land in Dorset, most of the availability is outside Weymouth. There is little land available within Weymouth itself, and there are pressures on waterfront and other sites which may be necessary to accommodate growth in important sectors such as marine sector or marine leisure businesses.

## Housing

3.13 The Weymouth-Dorchester sub-regional housing market area (as defined in work for the South West Regional Housing Body by DTZ Pieda, 2004) is relatively small and comprises Weymouth and Portland and the southern parts of West Dorset District Council. Whilst house prices are not high (especially in comparison with other Dorset areas) recent maritime schemes and the successful Olympic bid are increasing house values. Given the low wage economy however there is still a housing affordability issue. The need for affordable dwellings equates to around 10 times the average annual supply of affordable housing.[7]

3.14 Some housing growth (the town is identified as a focus for growth) is inevitable and it is important that new proposals address housing affordability as far as possible.

3.15 Spatially Weymouth has grown to the north, west and east beyond its administrative boundaries. Some further outward expansion is likely given growth pressures however, Portland will probably require a more restrictive policy on growth not least to protect the character of the Island.

3.16 Over the period 1996-2006 2,666 dwellings were built in Weymouth (35% of all housing built in the Weymouth & Dorchester HMA). Weymouth had the highest levels of affordable housing built (17%) and also the highest numbers of flats (50% of all flats in the HMA). A heavy concentration of smaller dwellings was constructed in Weymouth, similar to proportions at Poole and Christchurch.

## Skills

3.17 Weymouth College provides further educational and some higher education courses in the town. Shortages of skilled labour have been reported in the engineering,

[6] Functional Analysis of Settlements, RTP, 2005
[7] Housing Paper, SWRSS EIP, March 2007

electronics and construction sectors and, in common with many other towns in the South West, there are problems in retaining the younger workforce.

3.18 The need to address learning issues in Weymouth is highlighted in the Community Plan. The need to promote training and life skills for young people, to improve the provision of learning and to address skills shortages in the construction trade were also identified.

## Communications

3.19 Concern about Weymouth's road traffic congestion has been a long term issue in the area. A new road scheme to create a bypass has now been given the go-ahead and should improve the situation considerably. Despite relatively good services, the Weymouth to Bristol railway has in the past being one of the most under-utilised of Dorset's railways. The local authorities have worked with rail operators to improve the marketing and attractiveness of this route.

3.20 The Port offers further opportunities for additional diversification and restructuring of the local economy. The Port will benefit from reduced congestion as a result of development of the Weymouth Relief Road.

3.21 Consultation on the Weymouth & Portland Community Plan identified that existing public transport infrastructure is considered inadequate in terms of availability and frequency of services. There were also concerns regarding the issue of affordability of public transport for young people. The need to support park and ride was also raised.

## Community

3.22 In relation to other Community Plans across Dorset, Weymouth residents had the greatest concerns regarding high crime levels. There were also calls for more effective deployment of CCTV.

## Prospects

3.23 A number of forecasts were produced for the Regional Assembly and SWRDA in relation to future economic potential. Whist these were carried out at the TTWA (therefore Dorchester & Weymouth TTWA) it is still possible to draw some conclusions regarding future employment growth.

3.24 Forecasting models indicate that Dorchester & Weymouth TTWA's share of the economy will remain stable. It will experience average growth in employment and below average for GVA indicating a drop in its relative position in terms of productivity.

3.25 Whilst Dorchester & Weymouth TTWA's proportion of regional employment has declined slowly between 1981-2005, it is expected to stabilise over the next 20 years. Total employment is expected to increase by between 13% (7,300 jobs) and 17% (9,500 jobs), 70% of which are likely to locate in the urban area. Distribution, Other business Services, Printing & publishing and education & health are set to be the fastest growing sectors. Distribution and education and health are expected to generate 5,500 -6,500 jobs alone over the period 2006-2026.

3.26 Forecasting analysis indicated that as the economy of Weymouth is more diversified that Dorchester (the economy here being reliant on the public sector) it seems well positioned in sectors forecasting to grow at a regional level especially professional services, retailing and hotels & catering.

3.27 One in five new jobs created in the next decade in the Dorset sub-region are likely to be located in the Dorchester & Weymouth Housing Market Area[8].

[8] Economy Paper, SWRSS EIP, March 2007

## Weymouth SWOT Analysis

3.28 A SWOT analysis completed for work in relation to draft RSS was completed in 2006, and has been reviewed and updated in the light of more recent research, and consultations conducted for this study:

*Strengths*

- Recent development of incubator and business space has proved popular and market demand in the area is healthy.
- High quality natural environment. To the north of the urban area is AONB and the coastline is a designated World Heritage Site.
- Historical links with the naval and defence industries have fostered some growth of high-tech industries – there is a need to build on this.

*Weaknesses*

- Characteristics of the south east zone of the South West include poor accessibility, lower prosperity and low levels of employment within the knowledge industries.
- Relatively fragile economy with the lowest wages in Dorset.
- Net exporter of employment though much of exported employment is to locations within the TTWA.
- A significant proportion of jobs are in the tourism and service sector.
- Low business start-up rates and poor survival rates.1
- Low skills levels

*Opportunities*

- Weymouth Bay and Portland Harbour provide ideal conditions for watersports and have contributed to its success as a traditional seaside holiday destination. This role is now widening, attracting special interest outdoor activities and water sports on a year round basis.
- A major mixed use town centre development for the Pavilion and Ferry Terminal and proposals for the expansion of Portland Port and Osprey Quay are under consideration.
- The 2012 Olympic and Paralympic Games presents the area with a unique opportunity to raise its profile within an international arena.
- New road scheme will address congestion issues and provide opportunities to develop new businesses.

*Threats*

- Concerns regarding the implications of road traffic congestion upon business efficiency and future growth potential.
- The relative shortage of available serviced land and modern industrial space is considered a constraint to expansion by established businesses. There is also a reported shortage of high quality office space.
- Increasing lack of affordable housing.
- Forecasts for the Dorchester & Weymouth TTWA indicate a drop in relative positioning in terms of productivity.
- Skills - need to provide training & retraining opportunities for local people
- Existing infrastructure within the Weymouth & Dorchester HMA is considered inadequate
- Concerns regarding the ability of the existing infrastructure to cope with the Olympic and Paralympic Games requirements

## Current Vision for Weymouth

3.29 The Corporate Plan 2007-2012 identifies that the vision for Weymouth & Portland is for

"..a.thriving, prosperous community where standards of living are rising and people are satisified with the quality of life offered."

3.30 In order to achieve this vision the Corporate Plan identifies that partners should work together to make the district a centre of marine excellence in leisure and commerce taking advantage of, but also protecting, its rich natural environment.

3.31 A reputation as a year round visitor destination with excellent water sports, outdoor activities, specialist events and at the centre of the World Heritage Coastline is also sought, in turn helping to support businesses, year round jobs, increased income levels and an improved quality of life.

3.32 A further key aim is the need to take advantage of Weymouth's status as a host venue for the London 2012 Olympic and Paralympic Games. In making the most of this opportunity, the Plan states that the vision can be achieved, lasting benefits to the whole community can be delivered and Weymouth and Portland can be repositioned economically, socially and environmentally.

3.33 Delivery of the Weymouth & Portland Community Plan and the Dorset Community Strategy are supported through the Corporate Plan.

3.34 The Corporate Plan (along with other local plans/strategies) identifies a number of key challenges and issues: these are as highlighted previously within this paper. In order to deliver the vision and address the issues, four Corporate Priorities have been developed. Each of these has specific objectives and a clear set of targets. These are:

- Priority 1 Promote Improvement in the Local Economy
- Priority 2 Meet the Housing Needs and Aspirations of the Borough
- Priority 3 Protect and improve the natural and built environment
- Priority 4 Be a Well Managed Council

3.35 In relation to Priority 1 regarding the local economy seven key targets (broadly discussed above) – these are:

- Weymouth & Portland becomes a centre of international marine and leisure excellence with a view to stimulating Dorset's economy, increasing wage levels and providing more year round employment.
- Develop prosperous local business with an increased number of new & successful businesses and a diverse business base
- Develop Weymouth & Portland as a centre of excellence for marine businesses in leisure and commercial sectors.
- Make Weymouth & Portland an international destination for water sports, marine leisure, outdoor activities and specialist events.
- Improve the quality and appeal of Weymouth & Portland as a visitor destination.
- Maximise the economic opportunities presented by the London 2012 Olympic and Paralympic Games and being host venue for an Olympic event.
- Work with partners to reduce deprivation within the borough and address areas of serious deprivation.

3.36 Overall the main components of the town's aspirations for the future are therefore the desire to develop its role as a sub-regional centre and to enable the economy to grow and strengthen, particularly for the development of higher technology, knowledge based industries in order to provide a better balance of employment in the town. Improving self-containment and provision of higher wage opportunities are also important.

3.37 There is a need for further work to provide more detail regarding the spread of forecast job growth across the Dorchester and Weymouth TTWA. This will have implications upon the need and type of requirements for housing and employment land and also for the type of skills and business support required within the future local economy. More analysis of how the opportunities accrued as a result of the Olympic and Paralympic Games 2012 could/should present themselves is also necessary.

## Prospects & Priorities for Growth

- Weymouth needs to develop its role as a sub-regional centre.
- It is important that the economy can grow and strengthen, particularly for the development of higher technology, knowledge based, higher wage industries to provide a better balance of employment.
- A growth of higher technology industries will be necessary to address the forecast drop in productivity (GVA).
- Future development should aim to improve the towns self –containment, providing a better balance between jobs and housing.
- Increase provision of affordable housing – this is one of the key factors in ensuring the retention and recruitment of a skilled workforce.
- Raise skills and workforce development.
- Improve business competitiveness, enterprise and innovation. Increase entrepreneurial rates and representation with innovative, high growth sectors.
- The town should look forward to developing as a leading edge tourist resort.
- The Olympic and Paralympic Games 2012 presents the area with a unique opportunity to raise its profile.
- There is a need to improve the retail offer of the town.
- Improve physical infrastructure and transport connectivity. Infrastructure will need to be improved in order to meet the future demands generated as a result of the Olympic and Paralympic Games and future housing and employment growth. Provision of faster and more frequent services between Weymouth and Waterloo are considered to be important and major expenditure is required on the Bristol-Weymouth line.[9]
- Portland and Chickerell should be addressed within growth strategies.
- Drawing on regional and Travel to Work Area forecasts it is likely that distribution, other business services, printing & publishing and education & health will be the fastest growing sectors. Future employment sites/skills will need to be in place to meet demand from these sectors.

[9] Raising the Game, BDPEP, 2005

# 4 DORCHESTER

4.1 Dorchester is the County town of Dorset and has an important sub-regional role. It is sited within West Dorset and has a key administrative centre function. With a population of just over 16,000 it is less than a third the size of Weymouth yet offers a sizeable range of services and employment opportunities (approx 14,000). It serves a wide rural catchment.

4.2 The town is located at the convergence of the A35 (the South Coast trunk road), the A37 to Yeovil and the north, the A354 and the A352. Bridport lies to the west and Bournemouth-Poole to the east. The town has two railway stations: Dorchester South is located on the London Waterloo-Weymouth line and Dorchester West on the Castle Cary-Weymouth 'Heart of Wessex' line. There are plans to turn Dorchester South station into the first solar powered railway station in Britain.

4.3 The town has a busy shopping centre with a mix of national and independent stores and rental rates for retail premises are relatively high, reflecting the town's wide catchment.

4.4 Whilst an attractive centre, the town is limited in its cultural offer. Entertainment, especially in terms of leisure and recreation, is poorly rated and considered to be in decline by local residents[10]. In addition there is scope to make more of the heritage offer within the town.

4.5 The town's image is closely linked to that of Poundbury – the high profile mixed use development located adjacent to Dorchester. Poundbury has done much to upgrade the image of Dorchester and this is reflected in the higher priced properties and land values in Poundbury. Development began in 1994 and just over a quarter of the proposed 2,200 dwellings have been completed so far. Further development at Poundbury would increase the resident population of Dorchester and may enable the town to develop a stronger leisure, cultural and entertainment role.

4.6 Dorchester is located in the 'South East zone of the South West region. This zone also comprises Bournemouth & Poole and rural Dorset. The main issues within this zone are relatively poor accessibility and lower prosperity and employment within the knowledge industries. All issues are pertinent to Dorchester's economy.

4.7 Dorchester is sited within an environment which is nationally recognised as high quality. The town is located to the south of the River Frome with water meadows to the north and downland countryside to the south. West of the town (beyond the bypass) is Dorset AONB. This setting contributes significantly to both the town's attractive status and the quality of life of residents yet restricts opportunities for expansion adding to development pressure within the area.

## Local Economy

4.8 West Dorset has a relatively diverse economy and its coastal towns and villages are heavily dependant on the tourist trade. Dorchester is less tourism dependant than the rest of the district and, as well as being an important shopping centre, has a concentration of employment within the administration, health and public sector services. Major employers include Dorset County Council, West Dorset District Council and the County hospital.

4.9 Dorchester Urban Area's sector specialisations lie in Health & Social work and public administration which means that the overall area is highly dependant on the public sector for employment.

[10] West Dorset Local Plan, 2006

4.10 The town provides almost twice the number of employment opportunities as it has economically active residents and one of the key issues for the town is its requirement for in-commuters. Whilst this creates a complimentary relationship with Weymouth (it provides the bulk of Dorchester's in-commuters) a more sustainable community would be created by reducing the imbalance between employment and population. The continuation of the development at Poundbury may address this imbalance by increasing the number of residents seeking employment.

4.11 In Dorchester there is considered to be demand for local employment sites and workspace including small offices, light industrial, R&D, general manufacturing or warehouse and distribution uses[11]. In terms of land supply available within the short term, there are 6ha identified in the Local Plan within the mixed use element of Poundbury, of which 2.14ha will be for B2 uses and the development brief reserves land for it.

## Housing

4.12 Over the period 1996-2006 1,311 dwellings were built within Dorchester[12] accounting for 17% of all housing developments within the Dorchester and Weymouth HMA. The major development at Poundbury has contributed significantly to this figure, increasing the development rate within Dorchester by 5%pa.

4.13 There were 205 affordable units built in Dorchester over the period 1996-2006 (15% of all housing development). The majority of housing built was houses (62%) contrasting to Weymouth where there was a much higher proportion of flats developed.

4.14 In terms of the type of housing built, Dorchester exhibits a pattern of new dwelling size more typical of a rural area than the other core (urban) areas within the region – 56% of new development was of 3 or 4+ bed size (again, contrasting with the profile of dwellings built in Weymouth). Dorchester has the highest proportion of all sub-market areas of small (1-3 room) dwellings in its stock and over 55% of its stock as terraced dwellings or flats therefore the development of larger dwellings may be balancing out the overall supply.

4.15 Spatially Dorchester has historically grown to the south although as Poundbury is located to the west of the town growth is now largely concentrated there.

## Skills

4.16 Kingston Maurward College on the outskirts of Dorchester provides higher education training in countryside/outdoor skills related courses. Vocational training courses are provided by Weymouth College through its Enterprise Connection at Poundbury.

4.17 There is a perceived skills problem which may in part be due to the low unemployment rate – the care industry in particular has historically reported shortages. In common with other towns in the South West and indeed Weymouth, there are problems retaining the younger workforce. There are also relatively low levels of higher skills in the labour force potentially constraining the town's ability to make the most of growth within knowledge industries.

4.18 Increasing provision of accessible learning opportunities, skills shortages in the construction trade and poor adult education and learning facilities are all highlighted as issues within West Dorset.[13]

[11] Demand & Supply of Employment Land & Premises in the South West, SWRDA, 2007
[12] Dorchester core, Housing Paper SW RSS EIP, March 2007
[13] Dorset Community Strategy, Draft report to the DSP Bridging Group

## Communications

4.19 The town has a large catchment population (approx 38,500 for major food shopping) and shopping is the main attraction for people visiting the town centre. The majority of people access the town centre using the car however both bus and rail services are provided and a relatively high proportion of residents do walk to the centre. Parking congestion is however perceived to be a problems during the peak summer months.

## Prospects

4.20 Dorchester and Weymouth TTWA represents around 2.2% of total regional employment and GVA. The employment share is expected to stabilise over the next 20 years after declining between 1981 and 2005.

4.21 Total employment within the TTWA is expected to increase by between 7,300 and 9,500 jobs. Distribution, other business services, printing & publishing and education and health are set to be the fastest growing sectors whilst manufacturing and banking & insurance are forecast to decline. Distribution and education & health combined are expected to generate between 5,500 and 6,500 jobs. Given Dorchester's strengths in many of these growth sectors, it may be better positioned than Weymouth to accommodate much of the bulk of growth within this sector.

## Dorchester: SWOT Analysis

4.22 A SWOT analysis completed for work in relation to draft RSS was completed in 2006, and has been reviewed and updated in the light of more recent research, and consultations conducted for this study:

*Strengths*

- Busy shopping centre with a historic core. The town offers a good mix of nationals and independent stores. Retail rents are higher than for other market towns in Dorset reflecting the town's wider catchment and higher annual turnover.
- Large number of employment opportunities.
- Low unemployment rate.
- Quality image – partly resulting from the positive press for Poundbury
- High quality environment.

*Weaknesses*

- . As one of the smallest County towns in the country, lacks some of the facilities normally associated with its status.
- The town has significant in-commuting and should aim to be more self contained. This will require a larger resident population.
- GVA per person in employment is lower than average (Dorchester & Weymouth TTWA).
- The cultural draw of the town should be developed – the leisure and recreational draw is particularly poor.
- High house prices – there is need for affordable housing provision.
- Low level of higher skills.
- Physical constraints (environmental designations) restrict the town's ability to expand.
- Employment land supply is, in the short term, limited to sites within Poundbury. This in turn limits uses other than B1. Further land is required to meet demand from manufacturing, warehouse and distribution uses.
- There has been little inward investment. The main growth has been from indigenous companies

*Opportunities*

- The heritage potential of the town could be explored further.

- Although the current station (“Dorchester South”) was only rebuilt in 1989, there are plans for a new station on the current site in the coming years.
- In addition to Poundbury other large development sites include the Eldridge Pope Brewery site on Weymouth Avenue. Uses include a hotel, apartments and houses (600 dwellings, community and retail. Proposed redevelopment of the Charles Street car park adjoining the town centre comprises retail and other town centre uses. These will impact upon employment supply in the longer term.
- Good demand for local employment sites and workspace
- High degree of representation within sectors forecast to grow.
- Potential for Dorchester to market itself as a ‘gateway’ to the Jurassic Coast World Heritage Site.

*Threats*

- Skills issue which may be due to the low local unemployment rate.
- High levels of economic growth will add to skills shortage unless it is addressed quickly.
- There are problems in retaining the younger workforce.
- Poundbury has upgraded the area, increasing housing and premises values. There are concerns that it priced itself out of the range of local companies.
- Development pressure in the area is considerable.

## Current Vision for Dorchester

4.23 A Vision for Dorchester is set out in the current West Dorset Local Plan, the local Community Strategy and the Core Strategy Issues and Options paper published by the District Council in 2007. These documents raise a range of issues, represented by the following:

“Dorchester will enhance its role as county town and have a better balance of housing and jobs with less commuting. This will be achieved through further housing development (so that people working in the town have better opportunities to live close to their work), further development of retail, cultural, leisure and community facilities, including significant redevelopment at the town centre, and environmental and traffic management improvements in the town. Development will be carried out to a high standard of design that preserves the historic character of the town.”
(Core Strategy Issues and Options, West Dorset District Council, July 2007)

## Prospects/Priorities for Growth

- The town is not considered to offer the range and scale of functions (cultural etc) that a County town should provide. This should be addressed – Taunton has been cited as an example as to the sort/scale of functions/facilities Dorchester should provide. A better and quality-focussed regional shopping role has bee identified as an important facet of this role.
- Skills shortages suggest the need for targeted action and improvement in skills levels. Dorchester is not a specialised economy and relies on a small number of sectors – it is essential that these sectors find the workforce required to ensure they can grow.
- Retention of young workers is key to the creation of sustainable communities – this must be addressed. A lack of affordable housing should be seen as a linked issue.
- Dorchester offers considerable heritage and cultural potential which could be explored further. There is a need to increase provision of leisure and recreational facilities.
- There is a need to address the imbalance between jobs and housing. It would be possible to increase self containment by increasing the economically active population.
- Further growth of the town should provide additional community facilities.

- There is a lack of general use industrial land/premises. There have also been calls for a modern business park.
- Drawing on regional and Travel to Work Area forecasts it is likely that economic growth will include these sectors - distribution, other business services, printing & publishing and education & health. Dorchester Urban Area has a good representation of businesses within these sectors and is likely to fare well from such growth provided there are no skills shortages.
- Dorchester and West Dorset are affected by relatively poor accessibility. There is a need to take measures to improve transport connectivity.

# 5 HOUSING : ISSUES

## Introduction

5.1 Providing a suitable supply and mix of housing in Weymouth and Dorchester is essential for supporting the local economy and future job growth forecasts. The 'Current Issues Position Statement' highlights a set of key priorities for future housing supply that are tackled in more depth in this paper. These issues are:

- Building housing to support current and future economic growth across the area
- Providing an appropriate mix of housing
- Providing an appropriate supply of affordable housing.

## Housing Growth

5.2 Dorchester and Weymouth is identified as one of the South West's Strategically Significant Cities and Towns (SSCTs) in the Draft Regional Spatial Strategy. SSCTs are defined as those places which offer the greatest opportunities for employment, and the greatest levels of accessibility by means other than car to cultural, transport, health, education and other services.

5.3 Total employment in the combined Weymouth and Dorchester TTWA is expected to increase by between 7,300 and 9,500 jobs over the next 20 years. Draft RSS (dRSS) proposed that an additional 200 dwellings per year be provided in Dorchester and 250 in Weymouth up to 2026. The Panel report from the Examination in Public (published December 2007) proposes increase in these figures to 350 and 285 respectively, which equates to 12,700 new dwellings in the TTWA up to 2026.

5.4 Over the last decade house building has taken place at a greater rate than that expected over the next twenty years. Between 1996 and 2006 a total of 7,723 dwellings were built in the Weymouth and Dorchester HMA. Of these, 63% were houses, 34% were flats and the remainder were bungalows. This represents a build rate of 772 per annum, compared to the 450 growth rate expected over the next 20 years.

### *Housing Allocations in Dorchester*

5.5 The West Dorset Local Plan based housing provision on the aim of meeting the draft RSS targets over the plan period and thus makes provision for the construction of some 4,875 (gross) or 4,722 (net) dwellings between 2005 and 2016. These figures will need to be reviewed in the light of the final outcome from the RSS process.

5.6 The release of land will be phased and controlled so that, as far as possible, previously developed land is brought forward before greenfield land and annual delivery rates are close to the rates of 515 per annum net from 2005-2011, and 327 per annum net from 2011-2016, with the aim of achieving the overall rate of 410 per annum net from 2005 to 2016 (including 200 in Dorchester). The 200 planned dwellings per year to be delivered in Dorchester will, in the main, be provided at Weymouth Avenue (town centre site - 600 dwellings) as well as Poundbury (West Dorchester urban extension), which will provide 130 dwellings per annum up to 2011 and 100 per annum thereafter. WDDC anticipate that other sites will come forward over the local plan period through windfall to allow draft RSS targets to be met in the period 2011 to 2021.

5.7 The increase in levels of housing development proposed in the RSS EiP Panel Report are challenging, and particularly post 2021 the rate of delivery is likely to drop off significantly unless further allocations are made[14].The Panel Report specifically

[14] Hilary Jordan – West Dorset District Council Planning Policy Manager

recommends a further large urban extension to Dorchester. It is therefore important, if Dorchester is to achieve greater levels of self-containment and the likely housing figures in the final RSS are to be met, that the emerging LDF allocates land for extending the town onto greenfield sites. This is likely to cause a problem as much of the land surrounding Dorchester is protected through environmental designations. These constraints include the Dorset AONB to the north and east of the town and groundwater source protection areas, particularly the area north of the watermeadows (Zone 1).

### *Housing Allocations in Weymouth*

5.8 The Bournemouth, Dorset and Poole Structure Plan set a target for 4,700 dwelling completions in Weymouth and Portland between 1994 and 2011.

5.9 Between April 1st 1994 and 31st March 2007 3,251 (net) dwellings were completed in Weymouth and Portland. When extraordinary additions are made (MOD stock) this brings the total to 3,481 dwellings entering the market.

5.10 In March 2007 planning permission had been granted for a total of 1,067 dwellings, some of which were under construction. The largest of the sites being developed is the Hardy Accommodation Complex, Castletown, which will result in 200 dwellings being completed in phase 1 and a further 215 units in phase 2 (2006-2011).

5.11 Of the remaining local plan allocations up to 2011 it is estimated that 232 (80%) of the 290 dwellings will be completed during the Local Plan period.

5.12 Weymouth also achieves an average windfall total of 120 dwellings per annum (480 to 2011). Two significant windfall sites, the Ferry Terminal (300-350 flats) and the Qinetiq site (100 flats) are likely to be developed in 2007-2011.

5.13 When these figures are added together it can be concluded that over the Structure Plan period 5,260 dwellings will be delivered in Weymouth and Portland. This represents an over-supply of 560 dwellings against the Structure Plan target of 4,700 (see table 1).

**Table 1: Housing Land Supply at 31st March 2007 – Structure Plan Requirement**

| | **Number of dwellings (Gross) – 80% take-up[15]** |
|---|---|
| **Structure Plan requirement to 2011** | **About 4,700** |
| Dwellings completed - 1st April 1994-31st March 2007 | 3251 (net) |
| Extraordinary additions completed (MoD stock) | 230 |
| Commitments – with permission or under construction at 31st March 2007 (80% take up of 1,334) | 1,067 |
| Local Plan Allocations to 2011 (80% take up of 290) | 232 |
| Windfall development (120 pa) to 2011 | 480 |
| **Total** | **5,260** |

Source: Weymouth and Portland District Council 2007

[15] Weymouth and Portland Local Plan – 'Based upon past and future predicted trends the commitments and housing allocations have been discounted on the assumption that 20% will not be coming forward as completions. This means that 80% of commitments and allocations are assumed to be taken up over the plan period – giving a total take-up rate of 80%.

5.14 Between 2011 and 2016 it is anticipated that windfall sites will continue to come forward at 120 dwellings per year and that the overall RSS target for the SSCT of Weymouth of 250 dwellings per annum will be achieved. It is too early to comment on housing targets post 2016 as the Local Development Framework is still being developed and consulted upon. A joint SHLAA will be commissioned to assess future capacity and allocations. It is likely that in the future, 80-90% of the required dwellings could be built on brownfield land in Weymouth.

5.15 However, it is inevitable that some greenfield land on the fringes of the urban area will need to be developed. This could prove to be difficult because although Weymouth is the largest urban area in Dorset it is a relatively small local authority area that is constrained by significant environmental designations, including the Jurassic Coast World Heritage Site and the AONB.

## Housing Mix

### *Household Size*

5.16 Currently the average household size in the Weymouth and Dorchester Housing Market Area (HMA) ranges between 2.23 and 2.25 people, substantially less than the region (2.31) and England (2.36) averages.

5.17 The average household size is decreasing as the area's population ages. Over the last ten years there has been a 26% fall in the number of people aged 20-34 years and a 34% increase in the number aged 50-64 years in the HMA. In addition, more people are choosing to live on their own, with 33% of Dorchester households and 31% of Weymouth households being single occupancy.

5.18 Much of the population rise can be attributed to net inward migration into the area. Over the last ten years there has been a net gain in migrants of 102 in Dorchester, 603 in Weymouth and 1,163 in the Weymouth and Dorchester periphery. Almost 87% of those moving into Dorchester from the surrounding periphery are under 60 years, mainly people in their 30s and 40s with children under 15 years.

### *Current housing Stock*

5.19 Of the total stock of dwellings in the Housing Market Area (HMA) it is unsurprising to find that there are higher proportions of detached (38.8%) and lower percentages of flats (12.8%) in the peripheral areas as opposed to within Weymouth and Dorchester.

**Table 2: Accommodation Type: Percentage of All Household Spaces**

| | Detached | Semi-detached | Terraced | Flats | Caravan |
|---|---|---|---|---|---|
| Dorchester core | 19.9 | 23.6 | 33.2 | 22.6 | 0.7 |
| Weymouth core | 27.9 | 22.6 | 27.6 | 21.3 | 0.6 |
| Dorchester & Weymouth periphery | 38.8 | 23.0 | 24.8 | 12.8 | 0.7 |
| South West | 30.9 | 27.9 | 23.8 | 16.5 | 0.8 |
| England | 22.8 | 31.6 | 26.0 | 19.2 | 0.4 |

Source: Dorset County Council (2007) 2nd Draft Interim Report - Dorset Housing Market Areas

### *Delivery Rates*

5.20 Between 2002 and 2006 the majority of new builds were houses with 3 or more bedrooms and 2 bedroom flats. Weymouth has received the majority of new flats, representing 49% of all new homes constructed in the core area.

5.21 Dorchester exhibits a pattern of new dwelling size more typical of a rural area than other core areas, with over 56% of new development being 3 or 4+ bed size. Whilst this is the case it should be noted that Dorchester has the highest proportion of all sub-market areas in Dorset of small (1-3 room) dwellings in its stock, and over 55% of its stock as terraced dwellings or flats, the development of larger dwellings over the last 4 years may be helping to balance the overall supply.

**Table 3: Dwelling Size as Percentage of Four Year (2002-2006) Total by Sub-Market Area**

| | Houses/bungalows % | | | | Flats % | | | | % |
|---|---|---|---|---|---|---|---|---|---|
| | 1 bed | 2 bed | 3 bed | 4+ bed | 1 bed | 2 bed | 3 bed | 4+ bed | Total |
| Dorchester core | 0.35 | 6.85 | 25.66 | 26.54 | 9.14 | 26.89 | 4.57 | 0 | 100 |
| Weymouth core | 0.28 | 6.76 | 19.81 | 10.53 | 9.76 | 48.60 | 4.16 | 0.10 | 100 |
| Dorchester & Weymouth periphery | 0.51 | 9.41 | 39.97 | 28.67 | 8.91 | 11.95 | 0.51 | 0.07 | 100 |

Source: Dorset County Council (2007) 2nd Draft Interim Report - Dorset Housing Market Areas

### *Future Requirements*

5.22 Based on past trends in household formation rates and the projected change in age structure, the household projections show a steady decrease in average household over the next twenty years[16]. Therefore more houses will be required just to accommodate the same size population.

5.23 The challenge for the planning process is to provide, through the provision of new houses, and a mix of dwelling sizes which provide an overall housing stock which best meets the needs of both those with property and likely to move and those seeking to enter the housing market for the first time.

**Table 4: Balancing Housing Markets Results for Weymouth and Portland (per annum requirement)**

| Tenure | 1 Bedroom | 2 Bedrooms | 3 Bedrooms | 4 Bedrooms | Total |
|---|---|---|---|---|---|
| Owner-occupation | 46 | 97 | 26 | 51 | 220 |
| Private rented | 20 | 47 | -54 | -35 | -22 |
| Intermediate | 65 | 47 | 31 | 0 | 143 |
| Social rented | 48 | 55 | 36 | -1 | 139 |
| Total | 180 | 246 | 40 | 15 | 480 |

Source: Fordham Research (2007) Dorset Survey of Housing Need and Demand - Local Authority Report for Weymouth & Portland Borough Council

[16] Dorset County Council (2007) Population, Housing and Economic Characteristics of the Poole/Bournemouth, Dorchester/Weymouth and North West Dorset Housing Market Areas

5.24 The Weymouth and Portland Survey of Housing Need and Demand identified a shortfall of 180 one bedroom and 246 two bedroom dwellings per annum (see table 4). The majority of these are required on a private rented, intermediate or social rented tenure. It is therefore important that over the RSS period current build rates of 1 and 2 bedroom flats, in particular, are maintained in Weymouth and increased in Dorchester so that suitable provision is made for key workers, first time buyers, elderly people looking to move to a smaller property and the rising number of single households.

## Affordable housing

### *Affordability*

5.25 Affordability of housing has become a key issue for Weymouth and Dorchester. The average house price to income ratios in West Dorset (5.16) and Weymouth and Portland (5.09) are higher than both the ratios recorded across the South West (4.74) and England (4.13)[17], and within the Districts it is apparent that average wages are significantlhy lower in the urban areas of Weymouth and Portland than, for example the more affluent rural areas of West Dorset.

5.26 The affordability gap is perhaps more pronounced for those people living and working in the more rural areas of the TTWA, where average house prices are typically between £250,000 and £350,000 and average wages are less than the more urban areas. Prices have to an extent been driven up by people buying second homes in the area. Within Dorchester and Weymouth core areas the proportion of second/holiday homes is low (approximately 1%) but in the periphery area this figure increases to over 6%[18]. This figure is almost ten times the national average.

### *Delivery of Affordable Housing*

5.27 Of the total number of dwellings built in Dorset, Bournemouth and Poole between 1996 and 2006, only 12.68% was affordable housing. However, affordable housing stood at 15.23% (1,176 affordable dwellings) of all completions in the Weymouth and Dorchester HMA[19].

### *Demand for Affordable Housing*

5.28 Unless more affordable housing is built it is unlikely that essential public sector workers and young workers in general will be able to afford to get on the housing ladder. (Though public sector workers in Dorchester are generally better paid than average, there are some key workers in this sector who are more lowly paid and will need housing if the sector is to continue to deliver services effectively). This is a particular concern in the TTWA because the sectors predicted to grow most over the next twenty years are health and education in Dorchester and retailing and hotels and catering in Weymouth[20], all of which offer relatively low levels of pay.

5.29 For organisations and business this can mean:

- Low recruitment/retention levels
- A lack of choice in potential recruits
- Difficulties in delivering public services
- Some key workers facing long journeys to work from places where they cannot afford to live.

[17] Joseph Rowntree Foundation (2005) Affordability and the Intermediate Housing Market
[18] Dorset County Council (2007) Dorset Housing Market Areas
[19] Dorset County Council (2007) Population, Housing and Economic Characteristics of the Poole/Bournemouth, Dorchester/Weymouth and North West Dorset Housing Market Areas
[20] Roger Tym and Partners (2006) Implications of Economic Potential in the South West

5.30 In the worst cases people who become homeless, fall into debt or move into poor housing are at risk of becoming excluded from social and economic life.

5.31 Housing Needs surveys undertaken in 2001 and 2004 show a total annual need of 1,250 dwellings in West Dorset (665) and Weymouth and Portland (585)[21].

5.32 The annual need for affordable housing is made up in part by the number of dwellings needed to reduce the level of backlog need, but the bulk is 'newly arising need' from new forming and in-migrant households who cannot afford market housing. The overall total is off set by the number of units that are made available through relets each year (481).

**Table 5: Housing Need Measured by Existing Local Housing Need Surveys**

| Authority | Date of survey | Annual need for affordable housing | % of total | Backlog need | Annual need to reduce backlog (over 5 years) | Newly arising need pa | Annual supply of units through relets (less vacancies) |
|---|---|---|---|---|---|---|---|
| West Dorset | 2004 | 665 | 11.7 | 490 | 98 | 818 | 251 |
| Weymouth and Portland | 2001 | 585 | 10.3 | 610 | 122 | 692 | 230 |

Source: Dorset County Council (2007) 2nd Draft Interim Report – Dorset Housing Market Area

Note this data may be superceded by the Housing Needs research prepared for Weymouth & Portland Borough Council and West Dorset District Council, 2007

5.33 The main property types required by those on the housing register in Weymouth and Dorchester are one and two bedroom dwellings. It should be noted that approximately 57% of those on the housing register in West Dorset require a one bedroom dwelling. This is higher than the 54% level recorded for the South West as a whole.

**Table 6: Size of Property Required by Households on Housing Register 2006**

| | 1 bed | 2 bed | 3 bed | 4+ bed |
|---|---|---|---|---|
| WDDC | 57.14% | 26.32% | 15.21% | 1.19% |
| WPBC | 53.13% | 25.99% | 15.82% | 5.05% |
| Total Dorset, P&B | 50.79% | 30.37% | 15.84% | 2.96% |
| South West | 54.02% | 29.08% | 13.01% | 2.82% |

Source: Dorset County Council (2007) 2nd Draft Interim Report – Dorset Housing Market Areas

5.34 The draft RSS (dRSS) states that within the 23,060 dwellings per annum required for the region, at least 7,500 affordable homes per annum will be provided in the period to 2026. These figures may be increased in the light of the findings of the EiP Panel, This rate of over 30% of development being affordable is the minimum proportion expected in draft RSS (dRSS) yet is twice the rate currently being achieved. In areas of greatest need authorities are expected to ask for up to 60% affordable housing or more.

5.35 Over the RSS timescale at least 2,700 affordable dwellings will need to be built in Weymouth and Dorchester, representing 30% of the 9,000 new dwellings. However,

[21] Dorset County Council (2007) Population, Housing and Economic Characteristics of the Poole/Bournemouth, Dorchester/Weymouth and North West Dorset Housing Market Areas

the need for affordable housing in the TTWA is far greater than the minimum requirement of 30% of new builds being affordable.

5.36 A key challenge for housing and planning services is to consider whether new initiatives could be taken to increase the amount of affordable housing to bridge the widening gap between need and supply. One concurrent debate is whether developers could contribute more affordable housing than at present, without significantly affecting overall profit margins.

5.37 Although the Regional Housing Strategy has the overall aim of reducing the use of temporary accommodation by 50% by 2010, it is important that appropriate levels of private rented stock are available in the area until significant affordable house building has occurred. There are currently good levels of private rented stock in Weymouth in particular. However, a Housing Stock Condition Survey undertaken for Weymouth and Portland Borough Council in 2004 showed that over 30% of private sector housing in the Borough does not meet the decent homes standard. The Council has received funding under the Private Sector Renewal Initiative to help address this issue.

### *Summary*

Analysis which informed draft RSS (dRSS can be interpreted to indicate potential growth of 7,300 – 9,500 jobs within Weymouth & Dorchester area over the period 2006-2026.

In order to support this growth there is a requirement for 9,000 dwellings over the same period. (200pa in Dorchester and 250pa in Weymouth) As noted above, all figures have been reviewed through the Examination in Public and the subject of comment in the Panel Report, which is likely to lead to (upward) amendment.

Within Dorchester there is land available to fulfill build rates to 2021 but the Panel Report indicates the need for a large urban extension, and in any case beyond 2021 some greenfield site allocation will likely be necessary to accommodate the existing proposals in the Local Plan.

In Weymouth there is an over-supply of housing completions anticipated up to 2011. However, meeting future targets (beyond 2016) maybe difficult due to environmental designations.

In Dorchester it will be necessary to increase build rates of flats.

In West Dorset affordable housing supply is only 37% of affordable need. In Weymouth & Portland supply is 39% of need.

Policy requirements for 30% affordable housing have historically been over twice the achieved build rate for affordable dwellings, but current commitments and pipeline schemes are achieving the target. Actual need requires provision significantly higher than 30%.

# 6 ECONOMY : ISSUES

6.1 This paper builds on the earlier key issues paper in order to build up a clear economic position statement for Weymouth and Dorchester. Some detailed baseline data will be identified in order to illustrate the scale of local economic issues and to outline the current economic position of both towns. In addition forecast data will be interpreted at a local level and contrasted with future ambitions. Employment land and key development projects will also be discussed and their potential impact upon the economic position of each town reviewed.

6.2 The conclusions within this paper will seek to identify future economic prospects in light of this detailed review and to highlight any issues which will require particular attention.

## Introduction

6.3 A number of 'critical ingredients' are necessary for a settlement to realise its economic potential[22]. These comprise:

- Diversity of economic structure enabling a good representation in growth sectors but no over reliance on any particular one.
- Connectivity including location relative to strategic transport infrastructure.
- Concentration of high value added, knowledge intensive sectors, businesses and institutions
- A highly skilled and adaptable workforce
- An entrepreneurial culture with high rates of business formation
- Quality of life

6.4 Many of the key indicators which are fundamental to the 'ingredients' listed above are key issues within the Dorchester and Weymouth economies. These include low earnings, low skills levels, a poor entrepreneurial rate and concerns regarding the local infrastructure network. In contrast however the towns also offer strengths which together provide them with the opportunities to realise their economic potential. These include good demand for employment sites, low unemployment, a high quality environment and the potential impacts of the 2012 Olympic and Paralympic Games and new Weymouth Relief Road (whose construction is still dependent on final consents).

6.5 The following section seeks to highlight those key indicators necessary for the settlements to meet their economic potential but, prior to that, it is useful to note the policies applicable to Weymouth and Dorchester which will have a bearing upon their capacity to develop economically.

## Policy

6.6 The draft *Regional Spatial Strategy* notes that Dorchester and Weymouth form one of the twenty one Strategically Significant Cities and Towns (SSCT's) within the South West. These comprise those settlements which will be the primary focus for development in the South West and offer the greatest opportunities for employment and the greatest levels of accessibility to cultural, transport, health, education and other services. Policy A of the RSS notes that provision should be made to maintain and enhance the strategic function of SSCT's.

[22] Spatial Implications of Economic Potential in the South West, 2006, RTP for SWRDA

6.7 In relation to the economic function of SSCT's the RSS stresses that the local economy should be supported to enhance educational skills, provide a range of premises and meet the changing needs of sectors. Employment land should be used to assist redevelopment and regeneration and improvements to infrastructure should be made to tackle congestion. The roles of both Dorchester and Weymouth should therefore be to provide these functions at the highest level; production of this Economic Vision will provide the means to deliver these functions.

6.8 The *Regional Economic Strategy* provides a focus for economic development in the region and adopts the following vision setting out where the region should go:

"South West England will have an economy where the aspiration and skills of our people combine with the quality of our physical and cultural environment to provide a high quality of life and sustainable prosperity everywhere."

6.9 This is accompanied by a statement of intent noting that the region will demonstrate that economic growth can be secured within environmental limits to bring prosperity to the region. Whilst clearly high level aspirations, they have resonance with the policy aims of SSCT's and as a result to the economic vision for Dorchester and Weymouth. It is the aim of this work to draw these aims and aspirations down to a local level in order to create a deliverable vision for Weymouth and Dorchester.

6.10 The *Bournemouth, Dorset and Poole sub-region*[23] has developed a single vision in order that a unified message is provided regarding the future economic development intentions of the area. This is,

"Develop a thriving, competitive business environment that delivers better quality employment opportunities and a better quality of life for local people in Bournemouth, Dorset and Poole."

6.11 Whilst taking into account the coastal and rural nature of the area, the Strategy notes that in view of the socio-economic issues which exist across the sub-region (see later baseline data and earlier Current Position paper) there is a need to 'raise the game' of the sub-region. This should be approached in a way that builds greater business confidence, strengthens the economy and creates an economy that delivers greater value for local people in terms of the quality of jobs available.

6.12 The Action Plan of the BDP Strategy identifies a series of priorities to be met by a number of strategic actions. The Economic Vision for Weymouth and Dorchester will support the aims of the BDP Strategy but will provide a more focused list of priorities and actions due to its smaller geographical area.

6.13 'Open for Business' is the Economic Regeneration and Tourism Development Strategy for Weymouth and Portland. This identifies the following headline vision for the area,

"..a dynamic and broad based economy which, through drawing upon local strengths and advantages, is able to adapt to changing economic circumstance and deliver increasing prosperity to the community."

6.14 This sets out a number of objectives and key areas for action. These are:

i. Increase business competitiveness through increased productivity in local businesses.

ii. Continue regeneration initiatives and project work to enhance the economic context of the Borough.

iii. Reduce social & economic imbalances by targeting areas of greatest need.

6.15 This Strategy notes that it has been developed following extensive consultation and has led to the 'formulation of a strong body of thought as to the future economic life of

[23] Raising the Game, Economic Development Strategy 2005-2016, BDP Economic Partnership

the Borough'. It will therefore be necessary that the Economic Vision for Weymouth is closely allied to the Strategy and draws upon thinking and analysis developed throughout the Strategy's development.

The aspirations for Dorchester are set out in the adopted Local Plan, Community Strategy, LDF Core Strategy Issues and Options Consultation Paper (July 2007) and the West Dorset Economic Development Strategy "Rural Revival: An Increasing Prosperity Strategy 2004 – 2008" though it is noted that most of the actions proposed in relation to economic development are generic to the District and do not set specific priorities or targets for the town.

6.16 Whilst highlighting the need to create a healthy, sustainable local economy there is a need for a more focused economic vision for Dorchester which will provide a strategy and action plan to meet future economic priorities.

## Economic Potential

6.17 Going back to the earlier list of 'critical ingredients' necessary to achieve a competitive local economy it is useful to review factors which address both the demand-side (business competitiveness) and supply side (skills and competitiveness of the workforce) of the economy.

### *Diversity*

6.18 A sustainable and competitive economy needs diversity in growth sectors without being over-reliant on a single sector. The employment profile of Weymouth has shown a shift from 'traditional' sectors with increases in employment in the service sector and retail, bringing it more in line with the rest of the sub-region, including Dorchester.

6.19 At present there are 954 businesses in Dorchester and 1,994 in Weymouth[24]. Both Dorchester and Weymouth are heavily represented within wholesale and retailing (27.8% and 24.3% as compared to 21.8% in the South West and 21.3% in England & Wales), indicative of their status as key shopping centres within the sub-region.

6.20 Health and social work are also key sectors, especially in Dorchester (10.3% compared to 5.9% in the South West and 5.3% in England & Wales) whereas Weymouth is strongly represented within the hotels and restaurant sector (13.9% as compared to 7.7% in Dorchester and 8% in the South West). Weymouth's status as a resort probably accounts for this significant representation.

6.21 Weymouth also differs from Dorchester in respect of the construction sector. 12.8% of businesses in Weymouth are classified within this sector compared to 8.6% in Dorchester and 9.5% in England and Wales.

6.22 Both manufacturing and real estate, renting and businesses activities have low representation in Dorchester and Weymouth in comparison to the South West and England and Wales (less than 10% compared to 26.9% in the South West and 30% in England & Wales). The latter sector has been identified an important growth sector and one for which the towns should seek higher levels of representation.

6.23 Employment trends over the period 1998-2005 indicate that within West Dorset public administration and defence, hotels and restaurants and manufacturing have all declined (-39%, 29% and 11& respectively) whereas wholesale & retail trade, construction and real estate, renting and business activities have all increased (27%, 39% and 59% respectively). Whilst West Dorset statistics obviously draw in data from Bridport and Sherborne in addition to Dorchester they are useful in providing an indication of the broader trends within the area.

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[24] ABI, 2005

6.24 Weymouth and Portland on the other hand have not seen such significant declines in any sectors (of the more significant sectors, wholesale & retail and hotels and restaurants showed the greatest declines – 12.2% and 9.8%). Most growth has however been from a relatively low base: real estate, renting and business activities grew by 217% over the period transport & storage & communication by 14.5%. Education and health & social work, two of Weymouth's largest sectors, changed by -0.7% and +2.7% respectively.

6.25 Of the 954 businesses within Weymouth, 83.5% are micro-businesses employing less than 10 people and in line with the regional and national averages. This contrasts with Dorchester where 18.6% of businesses have between 11-49 employees (compared to 12.4% nationally and 12.6% regionally) and only 76.6% are micro-businesses. *Check which sector if any has large businesses (health)?*

### *Concentration of high value added, knowledge intensive sectors, businesses and institutions*

6.26 Current vision statements and desk based research for the Bournemouth, Poole and Dorset and more local areas have generally indicated a desire for increased representation within broadly defined high technology, knowledge based, higher earning industries.

6.27 Weymouth currently has low levels of employees working within the knowledge based economy (17.8% compared to 21.7% in England & Wales and 20.8% in the South West). Dorchester however fares well and has almost 10% more employees working within the sector (30.1%) than nationally. There has been a 9% increase in employees within this sector over the period 2003-5 whereas in Weymouth the increase has been lower, 3.8%. Nationally however growth has been 3.1% over the 2 year period so both Weymouth and Dorchester have exceeded this.

6.28 Whilst Dorchester clearly has high levels of employees within the KBE, the actual proportion of businesses within this sector is lower than average indicating that many of these KBE's are large employers.

6.29 The Weymouth and Portland Economic Strategy identifies the marine, electronics and engineering industries as key to increasing business competitiveness. At present only 0.6% of employees are involved within marine sector employment, in line with the regional average. Opportunities to increase this level of representation exist particularly as a result of basing the Olympic and Paralympic Games 2012 sailing events in Weymouth and the designation of employment land at Osprey Quay and Portland; and the recent decision of Sunseeker to locate a manufacturing investment at Portland may itself create a total of 500 jobs.

6.30 The tourism sector is another identified growth sector for which Weymouth has significant representation (16.9% of all employees as compared to 11% regionally and 10.3% nationally). The industry has high levels of part time workers and is relatively low wage. The vision for tourism within the region identifies a need to drive up the quality of tourism market, offer sustainable tourism and provide better tourism management arrangements[25].

6.31 The opportunities which the Weymouth & Portland Sailing Academy and the 2012 Olympic and Paralympic Games offer to the local tourism market are considerable in terms of development of watersports, out of season and niche tourism. In addition the designation of the Jurassic Coast as a World Heritage Site has also been important for future tourism growth.

6.32 Advanced engineering has also been identified as a growth sector. Weymouth has higher than average numbers of employees within this sector (2.2% as compared to 1.7% nationally) however this is still a relatively small sector. Notably there has actually

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[25] Towards 2015 – Shaping Tomorrow's Tourism

been a loss of nearly 40% of jobs within this sector in Weymouth over the period 2003-2005.[26]

### *TTWA Forecasts*

6.33 Forecasts produced for the Regional Assembly and SWRDA indicated that Dorchester & Weymouth TTWA's share of the economy will remain stable and that it will experience average growth in employment and below average for GVA indicating a drop in its relative position in terms of productivity.

6.34 Total employment within the TTWA is expected to increase by between 13% (7,300 jobs) and 17% (9,500 jobs) over the next 20 years, 70% of which are likely to locate in the urban area. Distribution, Other business Services, Printing & publishing and education & health are set to be the fastest growing sectors.

6.35 Forecasts have indicated that in absolute terms the sectors across the Dorchester and Weymouth TTWA which are likely to create the largest quantities of additional new jobs are printing & publishing, distribution, hotels & catering, other business services, education & health and miscellaneous services.

6.36 Dorchester is better placed for sector growth in health and distribution although skills shortages may become an issue. Weymouth on the other hand has high levels of existing representation in the education, distribution and hotels and catering sectors. Whilst these are sectors which may therefore see the largest increases in growth, they are not however always those which are sought in terms of prosperity i.e. not KBE and often lower paid sectors.

### *Labour Market Accounts*

6.37 A series of labour market accounts were prepared by the Section 4 (4) authorities in respect of the South West Regional Spatial Strategy EIP.[27] These were based on the same Cambridge Econometrics job projections as those discussed above but updated using assumptions covering issues such as headship rates, national activity rates and local development proposals e.g. re-phasing of development in SE Dorset in the light of discussions with the Highways Agency on urban extensions.

6.38 The many assumptions which are required to interpret the possible impacts of development and change on labour supply mean that there is a high degree of uncertainty attached to any estimates. The work completed to date suggests that it is possible that with moderate economic growth (2.8%) there would be a small surplus of labour in the Dorchester & Weymouth HMA in the first period (2006-2016) but in the second period this situation would be reversed, with a significant shortfall of labour, possibly of several thousand workers. With a higher level of economic growth (3.2%) there would be deficit over both periods of even greater significance. (Note: this work is prior to the publication of the report of the EiP Panel into draft RSS and the publication of the Panel's recommendations for increase in housing allocations, which will clearly have an impact on the potential labour supply. An initial reading of the Panel recommendations suggests that labour supply might be more in balance with demand).

### *Settlement Forecasts*

6.39 It is possible to disaggregate the TTWA employment forecasts (based on SRDA and RSS figures) to the town level[28]. This indicates that employment growth in Dorchester over the period 2005-2026 will increase by almost 3,000 jobs and in Weymouth by 3,831 jobs (both 16.8% growth).

6.40 Within Dorchester the highest growth (greatest number of new jobs) is likely within the distribution (including retail) and education & health sectors (an additional 1,211 and

[26] ABI, 2005
[27] Papers on Economy, Demography, Housing & Environmental Quality, March 2007
[28] RTP 2007. - but note that extreme caution needs to be exercised, as noted earlier, in use of these figures

1,334 jobs respectively). In Weymouth the largest growth will be in the same sectors (1,667 and 1,143 jobs respectively) but transport & communications and other business services will also be important (603 and 707 jobs).

### *Priority Sectors*

6.41 Of the eight South West RDA priority sectors, several are pertinent to potential economic growth within Dorchester and Weymouth. Advanced engineering, leisure & tourism, marine and bio-medical &healthcare have all been recognised as those sectors for which growth is aspired for or likely. Whilst these are not necessarily high technology, knowledge based and/or high wage sectors they do offer opportunities for the future and/or may need some assistance and are important on a regional scale.

6.42 It is recognized that the public sector is an important generator of economic activity across the sub-region with a concentration of activity in the Dorchester-Weymouth TTWA.[29] Direct benefits include employment opportunities for professional/graduate workers. Indirectly good public services are increasingly seen as factors in attracting and retaining professional and managerial workers in the area. Safeguarding this tranche of employment in the light of both its impact and the recent Gershon and Lyons Review.

6.43 Support of higher value sectors is important and as such healthcare, retail and leisure remain key to a successful local economy. Forecasts indicate that there will be a continuing need for such work and for workers to fill these positions.

### *Highly skilled and adaptable workforce*

6.44 There have been several concerns regarding the skills base of the workforce within both Dorchester and Weymouth. Within Weymouth there are concerns that the workforce is relatively low skilled and in Dorchester there are concerns that the high level of vacancies will put pressure on key jobs for instance the care industry.

6.45 Regional employment growth forecasts[30] suggest that employment growth to 2026 will be strongest in high and intermediate level occupations notably in ICT and Creative sectors. In addition knowledge based and other related industries including higher education and health are predicted to grow along with those which are tourism and leisure based.

6.46 Whilst Dorchester performs relatively well in some of these sectors and therefore clearly has an existing workforce capable of providing these skills, the high levels of in-commuting and low unemployment rate do indicate that further expansion of these sectors will exert additional pressure on the workforce. This could manifest itself in a number of ways – increased in-commuting, high levels of vacancies or, should the new population (additional workforce resulting from population growth) be equipped with the right skills to meet this demand, a local workforce with the ability to take up local jobs.

6.47 Weymouth on the other hand has some work to do in order to provide a suitably skilled workforce capable of meeting the requirements of a more knowledge based, high technology economy.

6.48 The Local Futures[31] group has identified the proportion of the working age population with NVQ level 4 or higher qualifications as an important indicator to the growth of a modern knowledge based economy. Within Dorchester[32] 22.1% of the working age population have qualifications level 4 or above compared to 16.2% in Weymouth. Within the South West the figure is 18.8% and in England and Wales 19.8%. There is clearly some work to do in order that Weymouth upskills it's workforce in order to develop growth sector opportunities.

[29] Bournemouth University Economic Overview in BEP Economic Strategy
[30] DTZ Pieda 2005
[31] Local Futures, State of the Nation
[32] Census Urban area, 2001. ONS

6.49 The BDP Economic Strategy also highlights the relatively low proportion of the working age population with NVQ3 or higher. There are apparently concerns amongst employers especially in the manufacturing and retail sectors regarding skills gaps and shortages at this level. Retailing is a growth sector and clearly an important function within both Dorchester and Weymouth. Availability of an appropriately skilled workforce will be necessary in order for both locations to maintain and if possible increase their retail offer.

6.50 The skills base of an economy and the type of key sectors within an area has clear links with the earnings capability of those living/residing there. The average workplace earnings in England & Wales are £19,674 and in the South West £18,243[33]. In contrast the Dorset average is £17,342 and in West Dorset £16,673. No workplace earnings are available for Weymouth & Portland.

6.51 Resident earnings show that Weymouth & Portland residents earn considerably less than West Dorset residents (9%) with average earnings of £16,946 as compared to £18,632[34]. The increase between residents and workplace earnings of those in West Dorset indicates that a considerable number of residents work outside the district in higher earning localities.

6.52 The low earnings of those living within Weymouth tallies with the fact that the workforce is lower skilled and the economy less represented within the growth sectors.

### *Entrepreneurial culture*

6.53 New enterprises are an important source of employment growth and are often indicative of a healthy local economy. Knowledge industries and high technology sectors traditionally have a successful entrepreneurial culture and the presence of a higher education facility also tends to lead to higher than average start-up levels.

6.54 It has been widely reported that Dorset has a low rate of start-ups and in particular that Weymouth and Portland's rate is lower than average. Latest data indicates an average VAT registration rate per '000 working age population of 5.1 in England and Wales and the region. Within West Dorset this is 5.9 whereas in Weymouth and Portland it is 3, somewhat lower than average.

6.55 In contrast however the overall rate of business formation within Weymouth & Portland is actually significantly higher than average. Over the period 1995-2005 there was a 22.2% increase in the size of business stock[35] compared to 13.4% in the region and 15.4% in England and Wales. Dorset's increase was on par with the regional average whereas West Dorset fared poorly and increased by only 9.8%.

6.56 The distribution of businesses does however have a bearing upon the success of new enterprise growth. Sectors with historically poor records of business success include hotels and catering and the retail sector. Seaside towns often have high levels of business failure often exacerbated by seasonality issues. In this respect it is possibly unsurprising that Weymouth has low levels of start ups given its status as a holiday resort.

6.57 Self employment is a further way of reviewing the entrepreneurial rate although data is only available from the Census and therefore rather dated (2001). At this point self employment rates in Dorchester and Weymouth were higher than the national average (12.6% and 13.5% as compared to 12.4% nationally) but much lower than the regional and County average (14.9% and 17.6%).

[33] ASHE, 2006. Data only available to district level.
[34] ibid
[35] VAT registrations/de-registrations, 2005, NOMIS

### *Connectivity & Infrastructure*

6.58 Whilst there is no means of benchmarking the transport connectivity of Weymouth and Dorchester (or the rest of the sub-region) evidence reported through consultations has indicated that improved transport and access should be a key priority in terms of future economic development. Clearly ease of access to a town is a fundamental factor for both businesses and employees and overall infrastructure has a direct bearing on the competitiveness of the local economy.

6.59 A range of improvements to roads, public transport and parking is seen as essential to ensure that Dorchester and Weymouth can offer high quality infrastructure. Issues which have been noted include the need to retain and develop rail services on both the Weymouth-Waterloo and Weymouth to Bristol lines. Provision of faster and more frequent services to London are a particular priority.

6.60 The need to improve access to Weymouth has been highlighted by businesses and therefore the importance of implementing the Weymouth Relief Road 'Orange Route' is a priority, especially in view of the 2012 Olympic Games and its requirement for good access. The ports of Weymouth and Portland have also been identified as prime economic assets and therefore maintenance and development of their facilities is important. Current proposals for Portland Port (Harbour Revision Order) and improvements to Weymouth port will support the continued role in fishing, tourism/leisure and cross channel ferries, with links to Channel Islands and France.

6.61 Bournemouth is the nearest airport though Southampton and Exeter are also accessible. Improvements to the A31 East-west corridor and general links to the airport are important in order to increase and spread the potential economic growth linked to the airport.

6.62 Securing road and rail improvements will help bring forward development at strategic employment sites[36], including osprey Quay in Portland. Prioritisation given to development of the Weymouth Relief Road will increase the profile and demand for employment sites such as Portland Port and Southwell Business Park, Portland.

### *Sites and Premises*

6.63 The availability of sites and premises to meet market needs and employment growth will be critical to the local economy of the Weymouth and Dorchester area.

6.64 It is particularly important in a modern, competitive economy to ensure that there is a pipeline of supply of land suitable for development, and that existing and new sites and premises offer the particular qualities sought by occupiers in different sectors and with different requirements.

6.65 These issues are investigated in more detail in Section 7 of this Evidence Base.

### *Quality of Life*

6.66 There is little doubt that a high quality environment and a strong network of social facilities (schools, cultural facilities, health etc) are a key factor to the strength of a local economy.

6.67 The South West is ranked first among the regions in terms of the quality of the natural environment and West Dorset ranks within the top 10% nationally[37]. Weymouth and Portland however scores significantly lower than West Dorset, 155$^{th}$ (midway in terms of national rankings). This is slightly lower than both Bournemouth and Poole although a little higher than Christchurch.

6.68 The quality of the network of social facilities is not easily measured although the IMD does provide a useful tool for determining some aspects of this network within an area.

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[36] Bournemouth Dorset and Poole Workspace Strategy
[37] Quality of the Natural Environment, Local Futures, State of the Nation, 2005

Health deprivation, Education, skills and training deprivation, barriers to housing and services, living environment deprivation and crime are all ranked indices within the IMD and could help paint a comparable picture for conditions within Dorchester and Weymouth.

6.69 Cultural and leisure and recreation opportunities are also an important part of the social fabric of a town. The earlier Current Issues Paper identified that Dorchester is lacking in its cultural and leisure offer especially in view of its status as a County town. This will need to be addressed as part of enhancing its economic potential offer and particularly if its population is to expand considerably.

6.70 Weymouth is a larger settlement and therefore needs the facilities to serve a larger market. Whilst it has not been apparent that the town lacks any particular facilities there is still scope to enhance the retail offer.

6.71 The sustainability of a community has clear links with the balance of employment and housing within a settlement. It is well documented that Weymouth and Dorchester have a somewhat complementary relationship and together (with some peripheral areas) form the Dorchester and Weymouth TTWA.

6.2 Commuting levels between the town settlements are significant and, especially in the case of Dorchester, necessary in order that jobs are filled. Dorchester has a travel to work 'balance' of 191% with 13,775 trips in and 7,195 residents working.[38] Weymouth on the other hand has a 'balance' of 87% with 21,126 trips in and 24,336 residents working. Dorchester has the second highest balance of urban areas within the South West (only Truro is higher). Additional commuting data highlights that the Dorchester's main relationships (in terms of commuting) are with Weymouth and Bournemouth and similarly Weymouth's are with Dorchester and Bournemouth.

6.72 Future aspirations are however to provide a better balance of jobs and homes within the towns thereby potentially reducing the need for high levels of commuting.

6.73 The quality of life of an area also has links with its accessibility and therefore issues such as connectivity and infrastructure (which have already been discussed within this paper) are also relevant.

[38] Functional Analysis of Settlements, Regional Assembly, 2005

# 7 PRIORITIES FOR GROWTH

7.1 The following section reviews a series of themes which will be key to the development of a strategy which highlights both opportunities to capitalise on the towns economic strengths and those issues which need targeting in order that Dorchester and Weymouth can be best equipped to meet the challenges of economic growth.

7.2 The previous sections have provided a detailed baseline evidence base and outlined a number of the key issues in terms of successful economic growth within both Dorchester and Weymouth.

7.3 This section provides more detail regarding those issues identified as priorities for growth. These are:

- Skilled Workforce
- Supportive Infrastructure
- Sites and Premises
- Growth of Key/Core Sectors and
- Olympic and Paralympic Games 2012 Impacts

7.4 Earlier work identifies a series of sectors which have been identified as being of particular economic importance or as offering particular economic opportunity. Some of the sectors have been identified within local policy as important to the future development of the towns, others are significant due to their current representation, others are forecast as growth sectors[39] and others have been identified by the South West Regional Development Agency as regionally important growth sectors.

7.5 This section provides more detail as to the current representation of these sectors, identifies their broad prospects for the future and identifies current initiatives and opportunities within the sector. Analysis is based on research, forecasts and consultations.

7.6 The findings/analysis from this paper will be used to develop the strategy vision in terms of growth priorities and actions to achieve the vision.

## Workforce

### *Priorities*

7.7 Across Dorset as a whole there are a number of key skills issues related to the development of a strong local economy. These include the need to replace the skills of those retiring from the workforce (an increasingly aged population and high numbers of retirees being a factor of the Dorset economy) and a need to increase access to training and skills development.

7.8 As identified within the Local Area Agreement,

"Economic growth within the County is lower than regionally or nationally due to its rural context, limited employment and career prospects, substandard infrastructure and less than adequate access to training and skills development.[40]"

7.9 The Learning & Skills Council's Annual Plan for Bournemouth, Dorset and Poole 2007-08 note three key priorities:

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[39] Cambridge Econometrics forecasts as used by SWRDA and SWRA.
[40] Dorset County Council, Local Area Agreement

- Raise and improve the choice of learning opportunities for all young people to equip them with the skills for employment, further or higher learning and for wider social and community engagement.
- Raise the skills of the nation, giving employers and individuals the skills they need to improve productivity, employability and social cohesion.
- Raise the performance of a world class system that is responsive, provides choice and is valued and recognised for excellence.

7.10 Within the Annual Plan the LSC notes that there is a need to equip the local workforce to meet the challenges of a fast changing global economy where high-level skills and high-added value provide competitive edge. This is identified as growing the knowledge economy in terms of high calibre, well-paid jobs and attracting and retaining skilled people.[41]

*Current Representation*

7.11 The earlier Economy paper identified a number of skills issues pertinent to either Dorchester or Weymouth. These included Weymouth's low level of skills at qualification level 4 or above (16.2% as compared to 19.8% nationally) which contrasts with 22.1% in Dorchester[42].

7.12 Reviewing the proportion of the workforce with NVQ3 or higher shows a similar trend with Weymouth falling behind Dorchester (see following table), illustrating levels lower than the regional and national average.

**Qualifications**

| Variable | England & Wales % | South West % | Dorset % | West Dorset % | Weymouth & Portland % |
|---|---|---|---|---|---|
| % with NVQ4+ - working age | 26.1 | 26.5 | 25.7 | 29.6 | 16.8 |
| % with NVQ3+ - working age | 43.8 | 46.0 | 47.7 | 53.4 | 32.4 |
| % with NVQ2+ - working age | 62.5 | 66.2 | 68.3 | 69.6 | 58.7 |
| % with NVQ1+ - working age | 77.1 | 82.0 | 83.5 | 83.8 | 78.9 |
| % with other qualifications - working age | 8.6 | 7.9 | 7.8 | 8.5 | 6.8 |
| % with no qualifications - working age | 14.2 | 9.9 | 8.7 | 7.7 | 14.3 |

ONS, 2001

7.13 Recent skills research[43] at sub-regional level has indicated that the labour market within Bournemouth Dorset and Poole has slackened over the period 2003-05 with a smaller proportion of employers reporting vacancies; fewer of these have been reported as hard to fill. This is in line with national trends which have indicated a possible slowing of economic and employment growth, growing in-migrant labour and the effects of workforce development activity.

7.14 Vacancies for skilled trades people, personal service staff and for sales and customer service staff were most prevalent. This is again in line with national trends whereby the problem of delivering practical skills e.g. mechanics, construction workers etc

[41] BDP, Annual Plan 2007-8, LSC
[42] Census Urban Area, 2001
[43] National Employers Skills Survey 2005

remains a challenge and confirms the need to increase NVQ Level 2 & 3 achievements and for initiatives such as Train to Gain (workforce training).

7.15 Skills gaps were reported by 13% of employers in BDP, down from the 2003 position and lower than in the region as a whole. They were concentrated amongst sales & customer service staff and elementary staff and were considered most likely to arise where employees were new to the job and/or had a lack of experience.

7.16 Other skills gaps, particularly within sales and customer service staff, were caused by a lack of motivation and an inability to keep up with change and recruitment problems. The fact that many of these jobs are within industries with a high level of part time, lower paid and seasonal employment means that these historic and long term issues are unlikely to be successfully addressed without directing change towards development of higher value industries overall.

7.17 Whilst small businesses are more likely to report recruitment difficulties as ‘severe’ and to experience a loss of business as a result, few employers with skills gaps actually regarded them as critical to their business performance (only 1% of those surveyed).

7.18 Where gaps have been critical the most frequent action has been to increase workforce training. In 2005 63% of employers surveyed provided training, an increase of 6% since 2003 and there was also evidence of an increasing proportion of firms developing a training infrastructure. The proportion of skills training which sees training directed to formal qualifications is lower than the regional and national averages and the proportion of employers who train using FE colleges to do so may be reducing. The LSC has identified that there is a need to strengthen the responsiveness of FE provision to better meet employer needs.

7.19 Consultations have indicated that over recent years there has been high demand for trade based skills e.g. electricians, construction, plumbing and painting and decorating. Other popular courses include health/social care especially childcare, health/beauty, public services – training for police, forces and outdoor skills and travel/tourism.

7.20 Recently there has been increasing demand for engineering and marine/leisure courses. A level 4 and level 2 courses have been developed with a marine focus and both have proved popular. The siting of the sailing events of the Olympic and Paralympic Games 2012 within Weymouth is credited with increasing demand for skills such as decorating – there has reportedly been an increase in the number of buy-to-let properties in the area and this has led to an increase in renovation projects with a consequential increase in demand for trades’ people.

7.21 The majority of businesses within the area are small and in general employers are not proactive in terms of seeking skills training. When sought it is reported that general skills training e.g. business admin etc are most popular. Many of the larger businesses e.g. NHS, Sunseeker provide in-house training.

*Sector Skills*

7.22 The Sector Skills Councils have been set up to bring together businesses and stakeholders to meet the skills challenge – identifying skills their employees are missing and developing actions plans to tackle those skills shortages. Each SSC is an employer-led, independent organisation that covers a specific sector across the UK. The four key goals of SSCs are:

- To reduce skills gaps and shortages
- Improve productivity, business and public service performance
- Increase opportunities to boost the skills and productivity of everyone in the sector's workforce
- Improve learning supply including apprenticeships, higher education and National Occupational Standards (NOS).

7.23 Within the UK there are 25 Sector Skills Councils (SSCs) which make up the Skills for Business Network. Those relevant to the identified potential growth sectors within Dorchester and Weymouth include:

- People 1st – Tourism & hospitality (includes hospitality, leisure, travel and tourism)
- SEMTA – Science, engineering, aerospace and manufacturing technologies
- SkillsActive – Active, leisure, outdoor and play work
- Skills for Care – Social care sector
- Skills for Health – NHS, independent & voluntary health organisations
- Skillsmart Retail – Retail sector

7.24 Research undertaken in relation to skills levels within these industries[44] highlights some useful information relating to qualification levels and types of vacancies. Whilst data is collated at the regional level it is likely that the trends will be mirrored at the more local level.

**Regional Sector Skills**

| Sector | % with highest qualification level 4 + * | % of all vacancies within SW |
|---|---|---|
| People 1st – hospitality, leisure, travel & tourism | 11.2 | 11 |
| Skills Active – sport & leisure, health & fitness, outdoors, caravans | 24 | 1 |
| Creative & cultural – arts, museums, heritage & crafts | 51.9 | 1.1 |
| SEMTA – science, engineering, manufacturing technologies | 29.8 | 2.9 |
| Financial services | 32.6 | 6.1 |
| Education | 58.4 | |
| Lifelong learning – FE/HE | 65.6 | 3.2 |
| Skillsmart – retail | 13.6 | 11 |
| Government skills | 43.3 | 4.2 |
| Skills for Health | 51.8 | 3.7 |
| Skills for Care (includes social care) | 30.1 | 5.1 |

Sector Balance Sheet, South West SLIM, South West Observatory

* Average across all industries in England is 30.6%

7.25 This data indicates that the educational, health, public administration and creative and cultural sector have the highest qualified employees, maintaining previous assertions that the workforce within Dorchester is higher qualified than that in Weymouth (these sectors being more prominent in Dorchester).

7.26 Employees within the retail, hospitality and tourism and leisure sectors tend to have lower skills. As identified previously, these sectors are characterised by lower paid, more seasonal, more part time jobs and are likely to be found in higher levels in Weymouth.

7.27 The vacancy data indicates a trend towards higher level of vacancies within those sectors with lower skills levels though this may be driven by a combination of those factors identified above. The tourism & leisure and retail sectors had the largest level of vacancies.

[44] The Sector Balance Sheet is a key regional resource of labour market data at an industry level. It pulls together information that can be provided by key robust data sources such as the Annual Population Survey (APS) and the Annual Business Inquiry (ABI).

7.28 Other skills issues which have been identified include a lack of work related skills training centres and difficulty in accessing business support services.[45]

7.29 Consultations based on Train to Gain inputs (skills needs analysis undertaken by skills brokers within individual companies) indicated that within Dorchester the majority of NVQ Level 2 training was brokered within retail and health & social work companies. Similar trends were evident within Weymouth, illustrating similarities between the dominant industrial sectors within the area.

**Train to Gain Input Within Dorchester & Weymouth**

| | DT1 Dorchester | DT2 | DT3 Weymouth surrounds | DT4 Weymouth | DT5 Portland |
|---|---|---|---|---|---|
| Agriculture, Hunting And Forestry | | 1 | | | |
| Manufacturing | 1 | 2 | | 3 | |
| Construction | 2 | 4 | 1 | 2 | |
| Wholesale And Retail Trade, Repair Of Cars | 5 | | 1 | 11 | |
| Hotels And Restaurants | 3 | 1 | 1 | 1 | 1 |
| Transport, Storage And Communication | 1 | | | 2 | 2 |
| Real Estate, Renting And Business Activities | 3 | 1 | | 2 | 1 |
| Public Administration And Defense | 3 | | | 1 | |
| Education | 1 | 2 | 3 | 2 | 2 |
| Health And Social Work | 7 | 1 | 1 | 13 | 2 |
| Other Community, Social And Personal Service | | 1 | 1 | 2 | |

Train to Gain, Business Link Wessex, 1 Aug 2006 - 27 July 2007

### *Olympic and Paralympic Games 2012 - Skills Requirements*

7.30 Skills will clearly be an important component before, during and after the 2012 Games. A post 2012 Weymouth & Portland, with an international profile and potentially enhanced market share in marine, leisure and tourism, will require people with higher level skills in a range of sectors and occupations. The key sectors are construction, marine leisure and sports and retail, hospitality and tourism.

7.31 It is therefore important that the post 16 education and training provision in and around Weymouth & Portland and Dorset is able to accommodate this likely demand and address skills gaps or shortages that arise.

7.32 The following table maps the current educational and training provision for sectors relevant to the staging of the Games in Weymouth & Portland, against expected skills demand.

[45] West Dorset Community Plan

**Current education/training provision in key 2012 related sectors**

| Sector | Typical Skills levels required | Current skills levels in the locality | Main current provision |
|---|---|---|---|
| Construction | Medium | Locality is under represented compared to the SW | FE provision through B&P College & Weymouth College. |
| Public administration & business activities | High | Locality is under represented for high level skills. | FE provision spread across providers. No general work based learning provision. |
| Travel & tourism | Medium | Locality is under represented | B&P College though Weymouth has a number of learners. |
| Transport, ticketing & security | Low | Representative of skills in the locality | FE provision spread across the County. County Councils provide for a number of learners. Paragon is the largest work-based learning provider. |
| Recreational activities | Medium to high | Locality is under represented | B&P College and Kingston Maurward are key FE providers. Kingston Maurward & Paragon undertake work based training. |
| Retail trade | Entry/low to medium/high | Partly representative of skills in the locality | FE through colleges. Paragon undertakes work based training. |
| Hotels & restaurants | Entry/low to medium/high | Partly representative of skills in the locality Partly | Majority of provision is through B&P College & Kingston Maurward College. Work based learning through Locomotivation Ltd. |

Skills Impacts of the 2012 Olympics, Experien for LSC, April 2007

7.33 Further commentary on key 2012 related sectors (i.e. tourism and retail) is identified within the Sector Growth section (insert section no). It is however important to note that whilst meeting 2012 related labour requirements is important, this should not distract from the area's key priority – increasing representation of higher level skills (particularly NVQ3 and above).

### *Earnings*

7.34 There are clear links between the earnings capabilities of employees and their skills levels. The average workplace based earnings[46] in Weymouth & Portland are £358.10 (79.5% of England & Wales figures). Within West Dorset it is £407.60 (90.5% of England & Wales). In both authority areas residence based earnings are slightly higher suggesting that some residents are commuting outside the area for higher paid employment however, residence based earnings figures also perform poorly in comparison with South West and national averages.

[46] Median full time gross weekly pay, ASHE, 2006

7.35 The Dorset sub-region has about the same proportion of people working in the high pay sectors[47] as nationally (5%). Interestingly Weymouth and Portland has 4% of employees in high paid sectors whereas West Dorset has only 1%. In terms of low pay however Weymouth & Portland has a significant 34% of employees within low pay sectors (see footnote 3) compared to 24% in West Dorset, 23% in the region and 21% nationally. The high levels of employment within the retail and tourism & leisure sectors in Weymouth & Portland account for this high proportion of low pay employees.

### *Key Issues & Challenges*

7.36 The LSC Annual Plan 2007-8 notes that there needs to be an emphasis on the following:

- Focus on further improvements in the achievement and participation of young people.
- Drive up attainment of level 2 at 19 and apprenticeship completions.
- Further work on improving the basic needs of adults in order to achieve more skills and qualifications at levels 2 and 3.
- Supporting and encouraging Train to Gain in order to meet employer needs
- Further develop the Framework for Excellence – tool for self assessment(check details)
- Significant involvement in the 14-19 development, especially in relation to the new specialist diplomas.

7.37 These policy priorities indicate that increases in higher, further and adult education participation and attainment levels will be sought, potentially indicating an increase in numbers and skill levels.

7.38 It is also important to note that whilst meeting 2012 related labour requirements is another key objective, the Plan notes that this should not distract from the area's key priority – increasing representation of higher level skills (particularly NVQ3 and above).

7.39 Policies and interventions should be focused on raising skills levels in the relevant sectors, enhancing skills in languages and customer service, and encouraging progression through the qualifications system, over and above filling 2012 vacancies. [48]

7.40 Previous strategies (Raising the Game, Open for Business) have identified a number of initiatives within the study area which relate to the need to increase/address skills levels. This strategy will need to build on these initiatives further.

#### *Project Ideas*

7.41 See actions Employment & Tourism: Core Strategy, July 2007

[47] High pay sectors include oil/gas extraction, mining, financial services, IT, R&D, Electricity/water/gas, manufacture of tobacco products/other transport equipment. Low pay sectors include hotels/restaurants, retail, agriculture, tanning/dressing of leather, manufacture of apparel/textiles/furniture/wood, private households. As identified within The Lowdown for Bournemouth, Dorset and Poole, March 2007.
[48] Skills Impacts of the 2012 Olympics, Experien for LSC, April 2007

## 2012 Olympic and Paralympic Games

7.42 In July 2005 it was announced that London would host the 2012 Olympics and Paralympics with Weymouth and Portland the venue for the sailing events - the only Olympic event to be held outside London. The Weymouth and Portland National Sailing Academy (WPNSA) will be the host venue for the events. Sailing events are scheduled to take place between 27 July to 12 August 2012, with Paralympic events occurring between 29 August and 9 September.

7.43 The potential economic impacts presented by the Games in Weymouth & Portland have been extensively heralded. This section outlines the potential impacts of the Games, highlights some of the planned initiatives developed thus far and reviews a number of key challenges yet to be explored.

### *Weymouth & Portland National Sailing Academy*

7.44 The Weymouth and Portland National Sailing Academy is a centre for the sport of sailing on the Isle of Portland, Dorset, on the south coast of England, United Kingdom. The Academy building is located in Opsrey Quay on the northern tip of the island, whilst the waters of Portland Harbour and Weymouth Bay, adjacent to the site, are the main areas used for sailing.

7.45 The National Sailing Academy was opened in April 2000. It occupies former naval premises, to which it has added a new clubhouse and other onshore facilities. £7.3 million of funding came from a number of sources including the National Lottery and the South West Regional Development Agency.

7.46 A further £17 million has been agreed from LOCOG (London Organising Committee of the Olympic Games) to develop further facilities in the lead up to 2012. These include the building of additional pontoons, an extension to the slipway and temporary facilities for the duration of the event such as additional showers and changing blocks. The planned upgrade of the WPSNA is estimated to cost £6.4million.[49] With construction commencing in August 2007 and finishing before the end of 2008, Weymouth and Portland will be the first in the United Kingdom to completely build a permanent venue for the Olympic Games

7.47 The academy also operates Boscawen House, formerly an admiral's residence, which offers accommodation for up to 47 people.[]

7.48 Four hundred sailors from 61 nations are expected to compete for 54 Olympic medals, with more competitors expected for the Paralympic Games. The main reason that the Isle of Portland was chosen to host these events was the fact that the Academy had only recently been built, so no new venue would need to be provided. However, as part of the South West of England Regional Development Agency's plans to redevelop Osprey Quay, in which the WPNSA is built, a new 600 berth marina and an extension with more on-site facilities will be built.

### *Osprey Quay*

7.49 Osprey Quay offers 55,000sqm of waterfront development including the WPNSA. It is proposed that, once complete, the development will include 11.17ha of employment, 30.5ha of marine/leisure and 3.55ha of residential/mixed use including affordable housing. A 560 berth marina and hotel are also included.

7.50 Development has already commenced and to date a new waterfront promenade, public realm works, roads, infrastructure & flood defences, WPSNA and some employment sites/premises have been completed. It is estimated that the site has already provided 200 new jobs.

[49]Skills Impact of the 2012 Sailing Events, LSC, April 2007

### *Other Possible Developments*

7.51 Other proposals which have been mentioned include the proposed Olympic sub-village at Southwell Business Park which will accommodate race officials and support staff, new hotels in the Weymouth and Portland Harbour and the regeneration of Portland Harbour. The possibility of developing some accommodation on Portland which may later be used for affordable housing has also been mooted. There is still some uncertainty over all these developments.[50]

## *Potential Economic Impact of the 2012 Olympic Games*

### *Increased Profile*

7.52 Research by Bournemouth University[51] indicated that there are far too many unknowns to be able to estimate the number of increased visitors who would come to Dorset as a result of the Games. Looking at an increased level of activity between 2006 and 2011 tourist spend could increase by up to £1.6 million per year (an increase of 2.2% pa). The same research indicated that the total cumulative impact of increased visitor spends could be in the region of £9.6 million over the 6 years. If the trend continued for 6 years after the Games, the total figure of £19.2 million would be recorded over the 12 year period.

7.53 A positive visitor experience is likely to generate repeat visits and therefore repeat spend and in this way it will be important for businesses and service providers to ensure a high quality service in all areas throughout the Olympic and Paralympic Games experience.

7.54 An increased profile may also increase the level of exports for goods and services from the UK including the South West. The South West is a small exporter so even a 1% increase in exports as a result of a raised profile could add a further £97.4m pa to receipts in the South West. Clearly such an increase will depend on the ability of businesses to capitalize on the raised profile.

### *Increased levels of investment*

7.55 The Bournemouth University report identifies that, at present, there is little information from which to estimate local effects of increased investment. Improved infrastructure will help attract additional tourism demand and to this end the approval for the Relief Road may have some positive impacts. The mooted use of an off-shore facility for housing the athletes and officials will circumvent the need for a mini-Olympic camp however and therefore the investment which goes with this.

7.56 Local businesses may also invest small sums in order to enhance their facilities in view of anticipated increases in demand; cumulatively this may be substantial. Consultations have indicated that house prices and an increase in buy-to-let properties with associated renovation works have already taken place since the Olympic and Paralympic Games announcement.

7.57 The Bournemouth University report identifies that for each £10million that is invested in the infrastructure through new construction in the SW the impact on the regional economy is likely to be in the magnitude of 275 FTE's (145-direct, 81- indirect and 49 induced).

### *Increased Levels of Participation*

7.58 The leisure boating industry and spending on leisure boat activity has increased considerably over the last few years and the South West is a major stakeholder of the boating and sailing industry.

[50] Skills Impacts of the 2012 Games, ibid
[51] Paper on Olympic Effects in Weymouth & Portland and the South West Region 2012, Professor J Fletcher, Feb 2006

7.59 The main benefits of increased participation are when residents from outside the region participate in activities within the region. Evidence form other Olympic and Paralympic Games suggest that the Games will inject a significant level of additional demand into sailing activities throughout the coastal areas of the region. Increasing sailing activity in the South West by visitors from outside the region may increase demand for sailing by as much as 10% on average over the 6 years prior to the Games and for 6 years after. This could inject as much as £24m pa into the region resulting in a total direct increase of £288m.[52]

7.60 Given the high profile which Weymouth should have for sailing, it should be well equipped to cater for these increased levels of participation and therefore benefit from increased income generation within the local economy.

### *Economic Impacts During the Olympic Games*

7.61 Around 70,000 people are expected to attend the Games in London but there are wide ranging estimates of the number of people who may be spectators at the sailing events in Weymouth & Portland. The Candidature File for the London bid used estimates of 10,000 visitors per day coming to Weymouth & Portland but the true figure could be much higher. The Experien report tabled below indicates there will be in the region of 12,600-15,000 visitors.

7.62 The Bournemouth University report assumes that sporting representatives will remain in the local area for 27 days and that spend (for 10,000 staying visitors and assuming an average day spend of £33.84) would be in the region of £5 million for staying visitors and £3.5 million for day visitors (15,000 day visitors and £15.57 spend per person). Press spend could generate a further £270,000. In total expenditure during the period of the Game events could be between £5.8m and £9.5 m.

[52] Paper on Olympic Effects in Weymouth & Portland and the South West Region 2012, Professor J Fletcher, Feb 2006

### *Labour Market Opportunities*

7.63 The estimated gross labour market opportunities likely to arise from the 2012 sailing events are:[53]

| Phase | Impact on Labour Market | Labour market Opportunities |
|---|---|---|
| Creating the Built Environment | WPSNA upgrade | 57 person years of construction employment |
| | Indirectly related possible/ planned development | Over 800 person years of construction employment |
| Staging the Games | Planning, preparation & staging of sailing events | 70-375 officials / sports specialists during the Games |
| | Test events & preparatory camps | Officials / sports specialists in the lead up to 2012 |
| | Pre-volunteer programme & games-time volunteers | Estimates ranging from 750 a day to an overall total of 1,600-2,000 volunteers |
| Showcasing the locality | Estimates ranging from 12,600 – 15,000 visitors a day (official) to 70,000 visitors a day (unofficial) during the competition. | Estimates ranging from 100 (official visitor estimates) to 500 (based on unofficial estimates) jobs in hospitality, tourism & retail |
| | Test events, training camps | Jobs in hospitality, tourism & retail in the lead up to 2012. |

7.64 In respect to the demand for labour relating to the 2012 events in Weymouth & Portland, there are a number of key issues. These are as follows:[54]

- In quantitative terms, local labour (Weymouth, Portland and wider Dorset) should be able to fill most of the opportunities directly generated by the 2012 sailing events. If higher-end labour market impact scenarios are realised, pinch points may occur.
- If the higher end estimates of visitor numbers are realized (and they are net additional visitors) for a short period of the summer of 2012 there will be hugely increased demands on the local area - not only in terms of labour but also for accommodation, restaurants, local services etc.
- As impacts are likely to be concentrated during a short period of time it is important to demonstrate in advance to people working in or considering entering the sector that their skills will be in demand after the sailing events. Upskilling in the locality in line with wider aspirations for Weymouth & Portland i.e. aspirations to become a higher value visitor destination and an important centre for marine and leisure.

7.65 The particular skills requirements of the Olympic and Paralympic Games are outlined in the earlier Skills section.

### *Key Challenges & Prospects*

7.66 Whilst the 2012 sailing events is a huge opportunity for Weymouth & Portland the benefits are only 'potential benefits' and should not be taken for granted. It will be

[53] Experien, LSC, April 2007
[54] Experien, LSC, April 2007

necessary for local policymakers and businesses to use 2012 to take forward wider aspirations for the area, rather than seeing the sailing events as an end to themselves.

7.67 Local people and local businesses are unlikely to invest heavily in themselves if they believe it is for a one off occasion. If they however perceive the Games as one of a number of steps to ensuring that Weymouth and Portland becomes a more successful, prosperous and sustainable place to visit and in which to live and work, they are may well invest more time and effort.

7.68 The key challenges are:

- Enhancing Weymouth & Portland's offer to visitors and residents.
- Put Weymouth & Portland 'on the map' nationally and internationally.

*Proposals/Initiatives*

7.69 The Action Plan[55] identifies a number of 'legacy items' (objectives) which are relevant to the creation of an economic vision. These are outlined below along with how actions to achieve them, targets and identification of organizations charged with the responsibility for meeting the objectives.

[55] Legacy for Dorset from the 2012 Games

| Legacy Item | Actions | Milestones | Responsibility |
|---|---|---|---|
| Improved transport infrastructure with the Relief Road open & more frequent and faster trains to and from Weymouth | ○ Planning permission for Relief Road secured<br>○ Negotiate with rail franchises for physical improvements to the line | ○ WRR open prior to 2012<br><br>○ Increase in no. of trains per hour | DCC<br>ODA |
| Creation of top international sailing venue at the Weymouth & Portland National Sailing Academy (WPNSA) including improved facilities and a new marina for the benefit of the whole of Dorset. | ○ Contracts for structural improvements to WPNSA let by end 2008<br>○ Contract for marina agreed by end 2007 | ○ Physical improvements to WPNSA complete by summer 2010<br>○ Marina in place by end 2011 | WPNSA<br>ODA<br>SWRDA |
| Weymouth & Portland becomes a centre of international marine and leisure excellence with a view to stimulating Dorset's economy, increasing wage levels and providing more year round employment. | ○ Establishment of Osprey Quay as a high quality marine business location<br>○ International recognition of Dorset as a centre of excellence for marine leisure excellence<br>○ Investigate the possibility of establishing England's first Marine Park in the waters off Dorset | ○ 25 marine businesses located at Osprey Quay by 2010<br>○ 20% increase in the contribution of the marine to the Weymouth & Portland economy<br>○ Feasibility of establishing Marine Park undertaken by the end of 2008 | W&PBC<br>Business Link Wessex<br>MareNet<br>Chesil Marine Network<br>BMF Wessex<br>SWRDA<br>Dorset Coast Forum |
| Improved economic opportunities for wider Dorset with quality employment where younger people can see they have a future. | ○ Implementation of Raising the Game – the sub-regional economic strategy<br>○ Implementation of the recommendations for action contained in the 'Dorset Building Image & Identity' report.<br>○ Use of the Jurassic Coast & it's Gateway towns as the backdrop for media coverage through the creation of digital content for use across the advanced technologies. | ○ GVA per capita in BD&P to exceed SW regional average by 2016<br>○ Workplace based earnings in BD&P to exceed SW regional average by 2016<br>○ % of workforce in knowledge based employment to at least equal SE regional average by 2016 | BDPEP<br>LA's<br>Business Link Wessex<br>LSC<br>DSP (Economy & Environment) |
| Well trained & more highly skilled people in work or volunteering to support local communities and sustain the local economy beyond the Games. | ○ LSC Action Plan<br>○ Establish a County wide volunteering strategy building on the LAA Reward Element<br>○ Implementation of the volunteering passport scheme | ○ Increase in no. of volunteers building on from the target of 3800 by March 2009<br>○ % of Dorset's population with NVQ Levels 2, 3 & 4 to exceed SW averages by 2016 | LSC<br>LA's<br>DSP (Active Communities Economy)<br>BDPEP<br>Colleges |

| | | | |
|---|---|---|---|
| | ○ High profile county wide campaign to promote volunteering | ○ | FE Establishment<br>DCA<br>VOPF |
| High quality image, improved customer care and quality standards, backed up by high quality visitor accommodation | ○ Redevelopment of the Pavilion site to include marina, ferry terminal, hotel and Jurassic Coast visitor centre<br>○ Targeted business support activities<br>○ Provision of targeted language training<br>○ Provision of specific customer care training & increased awareness of cultural requirements<br>○ Development of a 4* hotel in S Dorset<br>○ Provision of accommodation with families | ○ Redevelopment of the Pavilion site by end 2011<br>○ 50% increase in no. of tourism businesses with foreign language speakers by 2010<br>○ 85% of tourist accommodation in Dorset assessed under NQA's. | D&NFTP<br>SWRDA<br>W&PBC<br>LA's<br>Jurassic Coast WHS<br>Colleges, FE<br>Business Link Wessex |
| Sustain the enhanced international profile of Dorset and through this continue to develop interest in the Jurassic Coast World Heritage site, cultural activities and Dorset's economic offer. | ○ Improved tourism & educational infrastructure for residents & visitors relating to the Jurassic Coast & natural environment<br>○ Use of the Jurassic Coast & gateway towns as a backdrop for media coverage through the creation of digital content for use across advanced technologies<br>○ Implementation of Jurassic Coast Arts Strategy<br>○ Full involvement of Dorset in the Cultural Olympiad | ○ Enhanced tourism & educational infrastructure in place by spring 2012<br>○ Jurassic Coast Arts Strategy given National Level Arts Council support<br>○ Cultural Olympiad activities taking place in Dorset from 2008 | DSP (culture)<br>LA's<br>SWRDA<br>Jurassic Coast WHS<br>Dorset Coast Forum<br>DSP (Environment) |
| Provide a stimulus to improvement in the social, cultural & economic fabric of Weymouth & Portland together with improving the supply of housing accommodation including affordable housing. | ○ Implementation of revised W&P Community Strategy<br>○ RSS & emerging LDF targets for housing & affordable housing.<br>○ Enhanced presentation of the historic built envt of W&P & strengthened links to tourism & education<br>○ Enhancement of conservation areas | ○ Meet RSS and emerging LDF targets | Weymouth & Portland Partnership<br>W&PBC<br>Housing Associations<br>SWRDA<br>DCC |

Legacy for Dorset Action Plan

7.70 The Olympic Working Groups[56] are currently formulating action plans to address the perceived lack of information and planning in relation to the economic, cultural and tourism potential of the Games. At this stage however no documents are available which communicate action plans to the local and sub regional private sector.

## Infrastructure

7.71 A number of key infrastructure projects are planned for Weymouth and Dorchester over the twenty year timescale of the Economic Vision document.

7.72 These are:

- The Weymouth-Dorchester Relief Road
- Weymouth Pavilion and Ferry Terminal
- Portland Marina and other work associated with the Olympic and Paralympic Games

7.73 These projects are discussed in more detail in the following sections.

### *The Weymouth-Dorchester Relief Road*

7.74 Congestion on the A354 corridor between Weymouth/Portland and Dorchester occurs throughout the year, especially at peak periods on weekdays and at weekends. The cause of congestion is not simply high traffic volumes, but also a large percentage of turning movements, numerous frontage accesses to residential and commercial properties and high volumes of pedestrian and cycle movement along and across the road.

7.75 Improving traffic movements along the A354 corridor is recognized as being key to sustaining the local economy. The draft RSS highlights the need to improve the efficiency of the A354 corridor, highlighted as a Regionally Significant Raod (RSR), as part of a package of measures needed to improve transport within the Weymouth SSTC.

7.76 In response to this Dorset County Council, the highway authority, has applied for consents to:

- Construct a single carriageway road approximately 7km long between the Ridgeway and the existing Manor Roaundabout, providing a by pass for through traffic to Redlands Broadwaey and Upwey
- Construct a Park and Ride car park with a capacity of 1,000 cars on the remediated site[57].

7.77 The proposal will help to improve accessibility between Weymouth and Dorchester resulting in a number of direct and indirect economic benefits. Without the proposals it is expected that the following will occur:

- Sustained economic decline in Weymouth and Portland, with further job losses and continued contraction of the local economy
- Existing pockets of deprivation in Weymouth and Portland would be unlikely to receive inward investment necessary to bring about regeneration
- The further divergence of the economies of Dorchester and Weymouth and Portland, with the Dorchester economy continuing to attract and retain employers and employees from the wider TTWA not reliant on the Weymouth-Dorchester corridor

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[56] As identified within the Tourism & Leisure Service Plan. Groups comprise local authority representatives and/or private & voluntary sector organisations.
[57] Dorset County Council (2007) Weymouth Relief Road Environmental Statement

- Opportunities for expansion at Weymouth and Portland Ports will continue to be constrained.

7.78 The construction of the road will:

- Assist the achievement of proposed regional housing and employment growth
- Encourage the diversification of the economy
- Help to retain and encourage new skilled workers to the economy
- Help to maximize the potential benefits accruing from the 2012 Olympic and Paralympic Games, ensuring they have a lasting, positive legacy on the local economy
- Assist the development of a more balanced economic position between Weymouth and Portland and Dorchester.

7.79 The route now has planning permission and an Inquiry into the CPO and Side Roads Orders has been held, with a view to the Orders being confirmed by March/April 2008 and the planned improvements to the A354 corridor being completed in time for the 2012 Olympic and Paralympic Games.

### *Weymouth Pavilion and Ferry Terminal*

7.80 Howard Holdings are leading on the development of proposals to rejuvenate the 10 acre Weymouth Pavilion and Ferry Terminal site. The site is currently occupied by tired buildings, an unsightly car park and derelict land.

7.81 If planning permission is secured, the site will be transformed to include:

- A 120-150 bed four star hotel
- Up to 345 residential units
- Affordable housing
- A remodeled theatre and conference centre, capable of seating 900 people
- A new World Heritage Visitor Centre
- Significant community space
- A cultural and entertainment quarter including restaurants, bistros and lifestyle retail businesses
- Waterside walkways, piers and public spaces
- A 300 berth marina
- A car park with 800 spaces (including 400 public spaces)
- A new ferry terminal providing segregated traffic flows at the lower dock level and improved security, pedestrian access and safety[58].

7.82 Howard Holdings anticipate that planning permission should be secured by the end of 2007 in order to allow the site to be redeveloped in time for the Olympic and Paralympic Games in 2012.

7.83 It is predicted that the £120 million investment on the site could result in an annual additional contribution of £11,304,000 to the local economy. In addition, in is estimated that the attraction would help to attract an additional 98,300 day visitors into Weymouth per annum and could support the creation of 400 new jobs[59].

[58] Weymouth Pavilion Development - Scheme So Far - www.weymouthpaviliondevelopment.co.uk/mainpages/scheme-so-far.html
[59] Bournemouth University (2007) Pavilion Quay, Weymouth Economic Impact Assessment

### *Portland Yacht Marina*

7.84 The South West Regional Development Agency has secured planning permission to develop a new 600 berth marina adjacent to the Weymouth National Sailing Academy. The new marina will be the largest single yacht marina constructed in the UK since 1993.

7.85 A bar and restaurant will be constructed next to the marina. In addition, the marina will have a range of modern facilities including a fuel berth and travel hoist and space for a chandlery as well as brokerage and marine engineers.

7.86 Dean and Reddyhoff are now constructing the £5.5 million marina, which it is anticipated will be opened by the end of 2008 and will be used as part of the venue for sailing events at the Olympic games[60].

### *Rail*

7.87 Rail is a key part of the transport infrastructure serving Weymouth and Dorchester. The towns are served by a mainline connection from Waterloo.

7.88 An increase of train frequency to two trains per hour is now proposed. Longer term aspirations to improve rail links northwards to Bristol, and improvements necessary in connection with the Olympic and Paralympic Games, are all likely to bolster the attraction of rail as a mode of travel to and from Weymouth[61].

7.89 In addition, interchange improvements at Weymouth station as currently proposed within the Local Plan and LTP, should help to provide a more joined up public transport network within Weymouth. This, coupled with the creation of a park and ride car park, should help to increase numbers of people using public transport and alleviate traffic congestion in the town centre.

## Employment Land

### *Introduction*

7.90 This sub-section discusses employment land availability, take-up and future needs in Weymouth and Portland and Dorchester. In particular, it focuses on current larger employment sites, employment land allocations and take-up for the current Structure Plan period and highlights particular issues that will need to be dealt with during the Regional Spatial Strategy timescales and the Economic Vision.

7.91 Economic Policy A of the Bournemouth, Poole and Dorset Structure Plan states that provision will be made to ensure that 300 hectares of land are developed for employment uses (B1 to B8) between 1994 and 2011. This includes 71 hectares of employment land in West Dorset and 41 hectares in Weymouth and Portland.

### *Weymouth and Portland*

7.92 Approximately 65 hectares (160 acres) of employment land was committed in Weymouth and Portland for development between April 1994 and 2005 (see table 1.1). The fact that the Structure Plan target has already been exceeded can mainly be attributed to former MOD sites coming forward.

7.93 Note that the availability of employment land serving the Weymouth area is enhanced by the provision of a number of sites at Chickerell which lie within West Dorset District, but form part of the Weymouth built-up area.

7.94 The data presented in table 1.1 is for Weymouth & Portland Borough area, to be consistent with local planning information, but the West Dorset District contribution to

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60 Dean and Reddyhoff (2007) Portland Marina - www.portlandmarina.co.uk

61 Weymouth and Portland BC (2007) Weymouth and Portland LDF Core Strategy Issues Paper 13: Transport and Movement

the area includes land west of Putton Lane and land north of Wessex Stadium, which are discussed later, in paragraph 7.121, contributing a total of 8.2ha for employment uses.

Table 7.1: Position of Sites with Planning Permission for Employment 1994-March 31st 2007

| Site | Area (ha) | Area (acres) | Completed |
|---|---|---|---|
| Portland Port | 31.78 | 78.53 | Part |
| Southwell Business Park | 4.87 | 12.04 | Part |
| Osprey Quay | 20.23 | 49.98 | Part |
| Mount Pleasant Business Park (1 & 2) | 5.68 | 14.03 | Yes |
| Radipole Lane (Police HQ) (WDDC) | 1.11 | 2.74 | Yes |
| Tradecroft Industrial Estate | 2.09 | 5.16 | Yes |
| Jubilee Business Park | 0.91 | 2.24 | Yes |
| Castletown Pier (boatyard) | 0.40 | 1.00 | Yes |
| **Total** | **64.82** | **160.13** | |

Source: Weymouth and Portland BC (2007) Issues Paper 12: Economy, Employment and Tourism

### *Granby Estate*

7.95 Much of the diversification of the economy of Weymouth away from MOD and more traditional sectors has taken place on Granby Industrial Estate (32.69 ha), which is in the West Dorset District Council area (and thus is not included in the above table) - nonetheless the Granby Estate is particularly important to Weymouth.

7.96 Granby is now almost full, with just 2 acres left for B1 uses.

7.97 Granby Estate includes several significant local employers, including DEK (with over 400 employees), Ultra (approx. 200) and the Land Registry. Some premises, e.g. DEK, are of particularly high quality.

### *Portland Port*

7.98 After the closure of the Naval base in 1996, Portland Port purchased the site to generate a commercial port and became the statutory Harbour Authority. Portland Port is proceeding with a major re-development plan involving reclamation of 35 acres from the seabed to provide deep water berths capable of handling even larger ships.The economic importance and potential of the Port is acknowledged and supported by W&PBC. Consequently Portland Port is the largest site in the Borough for which employment related planning permission is granted. Approximately 31.78 hectares of land has received planning consent for port related uses. The Port has expressed concern that there may be a shortage of land in the longer term if the development of the Port proceeds as planned.

7.99 However, the apparently large areas of land available for employment use at Portland Port are not in fact a useful contribution to the overall supply in the Borough, as Portland Port retains the land for a small targetted sector and has a poor record in making land and premises available for use not related to port activities. It is therefore appropriate to consider that the majority of this land will not be useful for the economic growth considered in this Economic Vision, and that only a small proportion of may become available specifically for marine sector employment.

### *Southwell Business Park*

7.100 The Southwell Business Park on Portland is an ex-MoD site used to create flexible workspaces for businesses and start-ups. Since it opened in 1997 over 500 businesses have taken space in the Park. It currently has 93 businesses on site, employing 431 workers. The businesses are mainly micro-businesses from a wide range of service sectors. The site also includes 350 storage units, a fitness centre, hotel and conference venue. Additional land is allocated for the construction of 25-40,000 ft$^2$ of light industrial space.

7.101 Southwell Business Park is an impressive set of buildings in a spectacular setting which provides a combination of useful, flexible space for small businesses, a mix of facilities to support employment growth, and the potential to attract larger specialist or niche businesses. Its potential is very distinct because of its relative inaccessibility, being at the southern end of Portland, which is itself relatively inaccessible – thus affecting the ability of businesses to access suppliers, customers and labourforce. However, within diverse markets it may be capable of creating its own profile and success.

### *Osprey Quay*

7.102 Osprey Quay has been redeveloped to assist the creation of a marine based cluster. Osprey Quay current occupiers are:

- Sunseeker – intend to employ up to 500 people on site. This would represents an expansion rather than a relocation.
- Weymouth and Portland National Sailing Academy
- Marine Coast Guard Agency
- Navigator Park – tenants include O3 (wetsuits), G3 (defence), Catbits (Catamarans) occupying up to 4,000 $ft^2$ units.

7.103 Plots E and F are under negotiation. A marine company would like to build its own unit on site and another developer wishes to build speculative 750-1,500 $ft^2$ units for marine uses. The Southern employment area is also currently under negotiation. A marine sector business would like to build a new 5,000 $ft^2$ workshop facility on site. In addition, a private developer wishes to build speculative units on Plot X as well as a mixed use site comprising offices. Plot W is being marketed but will not be released yet. After the Olympic and Paralympic Games the Mere Tank Farm will be redeveloped for 7 acres of B1 and B2 (500$ft^2$ - 1,500 units and 4000 to 10000 $ft^2$ units).

7.104 Adjacent to Osprey Quay, Castle Court is being developed, an 8 acre scheme including hotel, apartments, business units, etc..

7.105 The development of Osprey Quay provides an excellent, high quality site for a range of possible employment sectors and types of premises, but with obvious advantages (particularly flat land adjacent to the waterfront) for industrial, research & development types of use, in a range of possible sizes and configurations. It would provide an excellent setting for office uses, but given its particular advantages for industrial type uses, office developments should be restricted to those ancillary to the main employment purpose.

7.106 It will be important to use this major opportunity to stimulate cluster development, and the provision of the Sailing Academy with training and events activities; hotel; and other facilities will assist this process.

### *Mount Pleasant Business Park*

7.107 Planning permission has recently been granted for a new headquarters for New Look, non food retail units, offices, an enterprise centre, new Fire Station, health centre and hotel on this site, which is planned to be implemented in the next 2 – 3 years. With over 14 ha allocated, and an excellent location with good road access and attractive views, this site should make a useful contribution to economic growth.

### *Radipole Lane*

7.108 This development comprises medium-sized industrial units next to the football ground and the Granby Estate, and includes police premises. The development is largely complete but may offer a limited growth opportunity.

### *Tradecrofr*

7.109 This is an industrial site with poor internal environment on Portland, and does not offer significant opportunities for investment by modern growth sectors.

### *Lynch Lane*

7.110 The Lynch Lane industrial estate comprises small dated units, mainly in sales, and is hemmed in by residential areas. The estate is complete.

### *Jubilee Business Centre*

7.111 In Weymouth itself, the Jubilee Business Centre offers 31 self contained business units suitable for office and workshop use. These are predominantly aimed at micro-businesses. The Centre is owned and managed by Basepoint and offers an 'easy in – easy out' lease.

### *Bincleaves*

7.112 An important opportunity is presented by the Qinetiq site, known as Bincleaves, which has become vacant. Proposals for a mixed use scheme on the site were refused permission, amended proposals are being progressed. An option preferred by the Chesil Marine Forum was understood to create space for smaller marine businesses that require a waterside location but cannot afford to take space at Osprey Quay.

### *Current Demand for Premises*

7.113 Demand in Weymouth is for local employment sites and workspace including small offices, light industrial, research and development, general manufacturing or warehouse and distribution uses[62].

7.114 There is a reasonable level of enquiries from firms looking for sites within the Weymouth area. The majority of these enquiries are from local firms seeking to expand though it is considered that the low number of enquires from firms outside the area is as result of little marketing and a lack of inward investment grants. Throughout Weymouth there is a general shortage of employment sites and buildings which can be brought forward quickly and/or made readily available. More specifically there are very few mid-range industrial units available within the town and there is demand from across all sectors[63].

## *Dorchester*

7.115 The existing employment sites in Dorchester include the Grove Trading Estate (7.1 ha), Poundbury Trading Estate (5 ha), Marabout Barracks (2 ha), Railway Triangle (1.4 ha), Great Western Centre (1.4 ha) and Casterbridge Industrial Estate (1.1 ha).

7.116 Between 1994 and 2001, 20 hectares of land were developed for B1, B2 and B8 uses in West Dorset and a further 28 hectares had extant planning permission.

7.117 To ensure that there is a reasonable supply and choice of employment sites to meet the Structure Plan's requirement of 'about 71 hectares', the Local Plan identifies 32.7 hectares of land for employment use, and the remainder of the requirement will be met through completions, extant permissions and development of mixed use sites.

7.118 The main employment land sites being developed in Dorchester are at Poundbury. Approximately 4.5 hectares of employment land have already been provided in phase 2 of the development, the outline permission for which included provision for a total of 6 hectares of employment land. Approximately 6 hectares of further employment land is allocated within the EA17 and 18 sites, of which 2.14 hectares will be for B2 employment. Employment land will also be provided within the later phases of the

[62] Demand and Supply of Employment Land & Premises in the South West, DTZ for SWRDA, 2006-2026.
[63] Weymouth & Portland Economy: Context, Issues & Challenges: Jan 2006

EA19 site[64]. As the employment allocations at Poundbury are mixed in with residential, the design specifications for each unit are very strict. Therefore, premises are much more expensive than the average rental rates across the district.

7.119 In addition there are three allocated sites in rural locations outside Dorchester. These are:

- Charlton Down (0.8 ha) - B1 (allocation carried forward from 1998 plan)
- Crossways (2.1 ha) - B1 land to the west of Wormwell Rd (allocation carried forward from 1998 plan)
- Puddletown: Northbrook (1.7 ha) B1/B2 (New allocation).

7.120 Both Charlton Down and Crossways are allocations that have been carried over from the 1998 Local Plan. Planning applications for residential development have been made on these sites in the past but permission has been refused. It is likely that WDDC, and partners, will have to invest in these sites if they are to come forward for employment purposes.

7.121 Other sites allocated within the Dorchester and Weymouth TTWA include Putton Lane and Radipole Lane in Chickerell. Putton Lane is identified for a comprehensive mixed use scheme comprising 4 hectares of employment land, and including B1 floorspace. The Radipole Lane site, also known as Chafeys Lake, is allocated for 4.2 hectares of B1 and B2 uses.

7.122 West Dorset District Council is keen to ensure that existing employment allocations are retained for employment and are not developed for other uses. Policy ET1 states that proposals that would lead to the loss of employment land will only be permitted where no appropriate employment uses can be attracted to a site and/or a mixed use redevelopment would offer important community benefits and opportunities for regeneration.

### *Current Demand for Premises*

7.123 The results of a recent business survey, undertaken to inform the West Dorset Employment Land Study, provide useful information regarding demand for premises.

7.124 A total of 522 businesses responded to the survey. The most popular size of premises currently occupied by the respondents is 50-149 metres$^2$. Approximately 58% of businesses occupy their premises on a freehold basis.

7.125 When asked why they had located in West Dorset, a majority of businesses cited:

- Resident or family ties
- Historical reasons or established in the area
- Location.

7.126 When asked about key constraints limiting the operation of their firm, the most popular responses included land availability or space, the availability of skilled labour, price of land and infrastructure.

7.127 A total of 88 businesses indicated that they have plans to relocate over the next 5 years. Of these, 79 wish to move to an alternative site or premises in West Dorset. A range of business units are sought, the main size range being 150-249 metres$^2$.

## *Employment Growth, Weymouth & Portland and Dorchester*

7.128 Employment forecasts for the TTWA show that there is likely to be a 7,300 to 9,500 growth in jobs between 2006-2026. However, only 33% of these will require land to be

[64] West Dorset District Council (2006) West Dorset District Local Plan Adopted Plan 2006

provided for the B1/B2 and B8 sectors. The Economic Vision developed through this study seeks to increase the total level of employment even further.

7.129 A 2006 study by DTZ provides a strategic review of the requirement for employment land based on the Regional Economic Strategy growth scenario of 3.2% growth across the region. Tthe projected requirement for jobs, floorspace and land has been determined at TTWA level – though the study refers to the SSCT of Dorchester and Weymouth the output actually relates to the TTWA[65].

7.130 This study stated that within Dorchester and Weymouth the required for employment land could be broken down as follows:

**Demand for Employment Land (ha)**

| TTWA | Office | Industrial | Warehouse | Non B Use | Total |
|---|---|---|---|---|---|
| Dorchester & Weymouth | 2 | 13 | 11 | 7 | 33 |

Source : DTZ, Table 4.2

Total figures do not sum – DTZ paper states 28ha, whereas above (taken from contextual paper) is 33ha

7.131 Initial feedback regarding these figures is that it will be challenging to find the required amount of new employment land within the conurbation and there are concerns regarding the provision of the associated housing land which would accompany this level of economic growth.[66]

7.132 However, our analysis in this Evidence Base, and the identification of key sectors for growth developed through the Strategy and the Vision suggest that the balance of employment land types needs to be reconsidered, and the scale of growth creating the demand for land in each type could be substantially different. This analysis will need to be developed through the workspace strategy study now under way.

### *Current Land Availability*

7.133 Within Weymouth there is on paper 58.88ha available with 12.09ha available in the short term including an element at Osprey Quay. Development of this land is apparently likely to proceed fairly rapidly and supply will then become more restricted. 9.87ha is available within the medium term and 36.92ha within the long term.

7.134 However, land considered available within the long term is actually subject to significant constraints – particularly the land at Portland Port (over 30ha included in the Employment Land allocations) which is unlikely to be developed for the range of employment uses we consider to be a priority.

7.135 There are 6ha of employment land available within Dorchester within the short term and nothing within the medium and long term. The 6ha is part of the mixed use element of Poundbury Urban Village.

7.136 There is considered to be demand for local employment sites and workspace including the full range of small offices, light industrial, research & development, general manufacturing or warehouse and distribution uses. The employment land allocation at Poundbury includes 2.14ha for B2 uses out a total of 6ha. It is apparent that further land will need to be made available in order to accommodate manufacturing, warehousing and distribution uses.[67]

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[65] Demand and Supply of Employment Land & Premises in the South West, DTZ for SWRDA, 2006-2026.
[66] Brief for Review of Workspace Strategy, Bournemouth, Dorset & Poole Area Contextual Paper, 2007
[67] Demand and Supply of Employment Land & Premises in the South West, DTZ for SWRDA, 2006-2026.

7.137 Overall, the true land supply in Weymouth & Portland and Dorchester is more in the region of 27.96ha, largely in line with the demand forecast using RES growth figures..[68] However, further consideration needs to be given to this analysis in order to properly reflect:

- the significant levels of further growth, in key sectors, which is envisaged in the Economic Vision for Weymouth and Dorchester
- the specific sites and premises requirements within these sectors which will need to be satisfied if growth is to be secured.

## *Sector Growth*

7.138 The growth envisaged in the Economic Vision and Strategy prioritises the following sectors:

Employment Sector Growth Targets (FTE)

| | Weymouth | Dorchester | Total |
|---|---|---|---|
| Manufacturing | 700 | 300 | 1000 |
| Tourism & Leisure | 1000 | 500 | 1500 |
| Construction | 400 | 400 | 800 |
| Distribution | 800 | 700 | 1500 |
| Business and Professional Services | 2000 | 1500 | 3500 |
| Education and Health related | 1300 | 1200 | 2500 |
| Miscellaneous Services | 800 | 400 | 1200 |
| TOTAL GROWTH | 7000 | 5000 | 12000 |

7.139 The implications of this scale of growth need to be considered carefully against current land availability, but in consideration of the relative employment densities of each of these sectors suggest the following issues:

- for industrial (particularly marine, advanced engineering and creative industries) there may be a sufficient quantity of land available in Weymouth, but there will need to be attention to ensuring a continuing pipeline of supply; and in Dorchester there may be a need to identify further sites. In both cases, the quality of the sites will be critical to attracting good quality businesses, and in Weymouth waterfront access and a waterfront setting are likely to be critical if growth is to be supported in the marine sector
- for tourism and leisure, a range of types of sites will be required - mostly not currently considered within "employment land" for planning purposes. Sites will be needed to accommodate new hotels, restaurants, bars; tourist attractions and leisure facilities; cultural facilities such as galleries, museums; - and specific proposals for outdoor events facilities and facilities for active leisure will be required. Some should be in the town centres, some in other locations including waterfront. Active planning policies are required to provide for this growth
- for construction, sites for builders and construction firms, builders merchants and other suppliers should be considered within the general industrial and distribution categories. There is a need to identify suitable sites within these broad categories and it is important to acknowledge that the construction industry is an important sector of demand. Sites of reasonable quality are required in locations with good road access and with limited environmental impact on surroundings.
- for distribution, there is apparently some appropriate supply, but there is a need to identify sites particularly for logistics, storage and wholesale distribution, particularly in relation to Dorchester. Retail is a particular priority in this sector, again not within normal employment land studies. For Weymouth the key issue is to identify sites within the town centre for reinvestment and better quality "high

[68] Demand and Supply of Employment Land & Premises in the South West, ibid

street" retail; in Dorchester, following the development of Charles Street there will be need to identify suitable sites for high quality, specialist retail as part of integrated, mixed use town centre development.

- for business and professional services, provision of new, good quality offices of a range of types, sizes and locations will be important, however, town centre locations should be prioritised. The growth targets suggest a need for around 40,000 sqm (net) office floorspace in Weymouth and 30,000 sqm (net) in Dorchester.
- for education and health (again, not included in "employment land" figures) – special sites should be identified adjacent to (or to include replacement of) existing sites. The levels of growth predicted are high and will required good quality sites, possibly of some size. Work will be needed with the existing stakeholders to identify the most useful sites. One specific proposal is a for a "health park" or "medi-park" as a business location linked to Dorchester Hospital. It will require a range of flexible units fo various sizes to accommodate research & development, ancillary offices, and more industrial type uses. A site of at least 1 ha, with room for expansion, should be considered. A similar size and type of site may be appropriate in Weymouth linked to education growth.
- for miscellaneous services, a range of types of premises and locations may be required – but particularly to support cultural industries, sites should be identified in town centres to accommodate galleries, museums, theatre/cinema/cultural centres.

7.140 If good quality modern growth businesses are to be retained and attracted to Weymouth & Portland and Dorchester, it is critically important that good quality industrial and warehousing/distribution premises and sites are available, with a pipeline of supply. For the marine sector, waterfront location and access to the water if often critical. For distribution, clearly good road access, accessibility within the towns, and access to the strategic road network is important.

7.141 The Mount Pleasant site in Weymouth offers some capacity, and Osprey Quay is an excellent development opportunity, however there are otherwise very limited opportunities. There is a need to identify more good quality sites for both Weymouth & Portland and Dorchester, and it is important (given the good progress being made on Portland itself) that sites are identified for Weymouth itself.

7.142 For office development, which will include some sectors of creative industries, business services, professionals – and may include a range of sizes of business from micro- to larger corporate enterprises, it is critical that there is a range of sizes of units available, but all in quality settings. This should particularly include good quality office space to modern standards (of space, sustainability, communications, energy infrastructure, etc..) in the town centres; and also in business park or employment "clusters" within new developments. The latter should be properly integrated with new housing, local public transport and local centres; but should also establish a local business profile and visibility. Specialist clusters, for instance in creative industries, professional services, education, and health, may be require specific sites and types of premises, and if there is the opportunity to implement specific cluster developments this should be encouraged.

7.143 There is very little opportunity to develop such office premises within current plans for the towns. There is an urgent need to identify sites which are suitable for development and to promote the opportunities through LDF and other planning and development mechanisms.

## Town centres

### *Weymouth*

7.144 Weymouth now functions principally as an employment and retail centre with a key tourism role, having originally developed as a port and coastal resort. The town centre is located adjacent to the beach, marina and harbour and the overall layout of the town means that the waterfront feel of the town is key to the role of the centre.

7.145 The seafront of Weymouth's esplanade is composed primarily of Georgian terraces which have been extensively converted into apartments, shops, hotels and guesthouses. Almost all these terraces still survive and form a continuous arc of buildings which face Weymouth Bay. Whilst some are visibly run down the potentially high quality of the urban fabric is clearly evident.

7.146 Weymouth town centre is occupied mainly by small shops reflecting the historic nature of the town centre though there are a number of major stores e.g. Debenhams which add to the draw of the centre. Over the past 10 years there has been a significant increase in prime rents, probably due to development such as the New Bond Street scheme and the Jubilee Retail Park. National retailers including Argos, Boots, Marks & Spencer, Next and New Look are all present within the town.

7.147 The shopping catchment of the town (major food shopping) extends approximately three miles towards Dorchester and seven miles easterly and westerly, encompassing in the region of 70,000 people. The main food store is Asda, at the edge of the town centre and Morrisons is sited to the northern area of the town. Jubilee Retail Park includes national such as Comet, Curry's, Halfords, B&Q and Aldi. Bournemouth, Poole and Southampton have an influence on retailing patterns and Dorchester, 13km away provides an alternative smaller centre shopping option.

7.148 The trading strength of the town is increased by the large tourist population who provide additional seasonal spend. The individuality of shops within the town is considered a key asset for the centre and one which is important to maintain the town's distinctiveness[69]. The Brewery Quay is a covered complex adjacent to the harbour and houses specialist shops and food and drink options.

7.149 Weymouth town centre has experienced considerable investment in the leisure economy including a number of national pub chains and has built up a reputation for a lively night time economy.

7.150 The town centre provides some office accommodation and schemes at the Jubilee Enterprise Centre and Southwell Business Park have proven popular.

### *Cultural Offer*

7.151 Weymouth (and Portland) offer a variety of cultural and leisure attractions and venues including Pavilion Theatre, Royal Manor Theatre, Weymouth Museum and the cinema. A range of theatres and arts and community venues are listed in the Appendix.

7.152 There are a number of proposals which are currently being developed which will improve the cultural offer of the town. There are plans for extensive redevelopment of the Pavilions as part of the Pavilion and Ferry Terminal redevelopment scheme and this will also include a heritage visitor's centre and formal public square. The Esplanade upgrades will also provide additional outdoor public areas which could be used to support many events which currently utilize the beach area.

7.153 The significant impact which major events can have on the local economy is recognised in Weymouth. Previous events such as the Tall Ships race in 1994 and the annual Weymouth carnival have shown that a range of arts projects/festivals planned

[69] Retail Issues Paper, LDF, Weymouth & Portland

for the Olympic and Paralympic Games 2012 could help tourism on both a short and long term basis.

### *Future Proposals*

7.154 There a number of initiatives which are currently under discussion which are likely to have a significant impact upon the town centre. The Resort Regeneration project includes a number of separate schemes including the Pavilions project, the Townscape Heritage Initiative, Esplanade project and Civic Pride initiative. All schemes intend to provide a much upgraded public realm and add to the quality and number of facilities within the town.

7.155 The Pavilion project will provide over 300 new residential units, a remodelled theatre, new ferry terminal, four star hotel, marina, new retail premises and a cultural and entertainment quarter. The addition of high quality housing and tourism facilities have the potential to attract a different market to Weymouth, potentially one with a higher spend and demand for different associated facilities – food and drink establishments, niche retail etc. This scheme has the capacity to significantly change the feel of the town centre.

7.156 The Esplanade scheme includes significant restoration of the Georgian seafront, improved public realm, new toilets, new TIC, refurbished bus interchange and a sand sculpture exhibition building.

7.157 Other opportunities within the town centre may be developed through the Vision for 2020, an initiative led by the Harbour Traders Association based around the old harbour. This is reviewing some of the uses around the harbour and looking to increase the 'branding' of the area and explore potential new/different uses/offer of the area.

7.158 A recent application by Asda for a new site to the north of the town centre has been refused however, should this option be explored further there may be future opportunities for the reuse of the Asda site. The potential relocation of the fire station (close to the Asda site), also to a site to the north of the centre, reinforces the possibilities for future redevelopment of this part of the town. Its situation close to the marina and within relatively close proximity to the town centre offers an attractive development option for a variety of uses.

7.159 A Weymouth Town Centre Area Action Plan will be prepared as part of the Weymouth & Portland LDF. This will be a regeneration plan based on the heritage, waterfront and other assets of the town. The Vision 2020 group will input to the TCAAP and assist in delivery.

### *Aspirations*

7.160 The overall aim will be in line with those sought through the Town Centre Action Plan, "to maximize the potential for tourism, retail and related businesses whilst improving the quality of the townscape in order to improve the town centre's overall competitiveness and contribute to the economy of the Borough as a whole.

## *Dorchester*

7.161 Dorchester has developed as a market town and an administrative centre, being the County town of Dorset. It is a very attractive centre with many buildings of archeological interest and a large proportion of listed buildings.

7.162 Despite the relatively small population of Dorchester itself, the town is an important shopping and service centre for a large rural hinterland as well as providing significant employment within the administrative and public sector. The County Council and District Council are key town centre employers and the County hospital, sited to the west of the town exerts considerable influence over employment patterns within the town.

7.163 The town centre has three main shopping streets and is dominated by mainly local businesses. National retailers including Marks & Spencer, Next, Body Shop, New Look, WH Smiths and Monsoon are all present and a Waitrose, Iceland and Somerfield are also sited within the town centre. An out of centre retail park comprises Tesco, Halfords, Curry and Allied Carpets.

7.164 The shopping catchment for major food shopping is approximately 8 miles in a northerly, easterly and westerly direction but only 2 miles towards Weymouth. Within this catchment is a population of approximately 38,500.

7.165 Dorchester has a relatively strong centre in terms of rental values and limited vacancies however there are concerns relating to low representation of flagship/national stores, and there are aspirations to achieve a stronger representation of quality national retailers and specialists. It is apparent that the relatively small size of Dorchester compared to many other county and historic towns means that it will struggle to attract the range and quality of stores which may be evident elsewhere.

7.166 The high number of independent retailers with a bias towards the higher quality offer is also a strength in Dorchester's retail offer, but likely to be of limited long-term effect unless the range and diversity of high street names can be extended to complement them. A key issue is the limited extent of the town centre primary retail area which severely constrains the opportunities for new stores to enter the town centre; and within that area because of physical limits and the important Conservation Area and Listed Building designations, there is little opportunity to create the kind of "floorplate" which is sought by modern retailers.

7.167 The limited evening offer of Dorchester town centre contrasts clearly with Weymouth although consultations have indicated that the food and drink offer has increased over recent years as more restaurants/café bars have extended their evening opening. Entertainment, especially in terms of leisure and recreation, is however poorly rated by local residents.[70]

7.168 There are a number of current initiatives which together have the potential to change the feel of the town centre significantly, as follows:

*Initiatives/Current Proposals*

7.169 The Dorchester Business Improvement District (BID) has been set up within Dorchester town centre in order to enable businesses o come up with solutions to town centre problems and enhance the town centre environment. Generally BID's have been developed within larger towns though Keswick (a smaller town within Cumbria) has also set one up.

7.170 The Dorchester BID programme is still being worked up and at present a list of issues and potential projects is being worked up. At present the list includes projects such as changing car parks to pay on exit tariffs, improving the Christmas lights and creating a Land Train to transport people around the town. A ballot is planned for February 2008 and if this successful, projects would start happening in April 2008.

7.171 The Charles Street site occupies a 1.7ha site currently used as a car park, public toilets and a small temporary skate park. Development on the site will be retail led and mixed use. The proposed scheme will include new shops, housing and will continue to provide car parking and public toilets. The exact details of the proposal are not yet established though Simons Development Limited (the development partner for the site) is currently undertaking investigations and consultations in relation to archeology, housing, shopping, business, townscape and environment and transport and accessibility. A planning application is expected by March/April 2008.

[70] West Dorset Local Plan 2006

7.172 The Weymouth Avenue Brewery Site is a significant site on the edge of the town centre. Earlier this year an application was approved for approximately 600 residential units, retail (A1 and A3) cinema, solar powered railway station, nursing home, offices, public realm, play areas and open space. A hotel will also be provided. New retail uses will increase the existing retail floorspace by 15%.

7.173 Brewery Square Ltd are developing the scheme which will cost in the region of £100 million and provide 11 acres of shops, restaurants and apartments, doubling Dorchester's existing town centre.[71]

7.174 The scheme is clearly substantial and using English Partnerships employment densities[72] the proposal has the capacity to provide at least 200 new jobs (retail and office) with additional employment required at the nursing home and cinema.

7.175 The arts offer of Dorchester has historically been identified as under par with that which should be expected from a County town. Opportunities for extending the arts offer include the Maltings arts centre, part of the redevelopment of the former Eldridge Pope Brewery site. Supporters of the arts centre envisage the building being converted to include a possible 450-seat theatre, music studios and a gallery. The cost could increase or decrease depending on the sophistication of the final plan.

7.176 The Dorchester Arts Action Group is currently involved in helping to raise the money needed to get the project off the ground – it is envisaged that between £5 and 6 million will be required to create an arts centre with a potential catchment of 200,000.

7.177 There are also plans for a redeveloped leisure centre in order to provide a new swimming pool, new learner pool and leisure centre facilities e.g. gym etc. The new facilities will be redeveloped on the existing Thomas Hardye site.

*Aspirations*

7.178 Dorchester town centre is recognised as providing a good retail offer within an attractive setting. There is potential for greater representation by multiples but the centre appears to have a particular niche in terms of drawing quality retailers, particularly independents, which it is keen to retain. There is a lack of existing retail space however both the Charles Street and Brewery Site have the potential to increase the offer substantially.

7.179 The evening economy is relatively poor in Dorchester but the Weymouth Avenue scheme in particular with its restaurant/café offer, additional town centre residential and new cinema could increase the scope for a more vibrant evening economy.

7.180 Both proposals will add to the scale of the retail offer substantially and will enable a greater representation by multiples though it may be preferable to align the retail experience to that which is currently successful in Dorchester – more specialist, higher quality retailers. This will ensure that Dorchester continues to provide a good retail service for residents but also differentiates itself from the retail offer in surrounding centres (Weymouth and Yeovil) thereby increasing its use by both visitors and residents from a wider catchment.

7.181 Feedback from residents regarding the new developments in town has been broadly positive with recognition of the fact that Dorchester needs to increase its town centre offer in order to meet its County town status.

7.182 The low unemployment rate and high levels of in commuting could potentially cause difficulties in terms of recruiting employees for new jobs within the developments. There will be a need to ensure that there are appropriate levels of skills within the local workforce in order that the new employment opportunities are both filled and undertaken at a quality level.

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[71] BBC Dorset, 10 July 2007
[72] Employment Densities, July 2001, English Partnerships

# 8 SECTOR GROWTH

8.1 A number of sectors, for a variety of reasons, are important to the future economic growth of Weymouth and Dorchester. Some of the sectors have been identified within local policy as important to the future development of the towns, others are significant due to their current representation, others are forecast as growth sectors[73] and others have been identified by the South West Regional Development Agency as regionally important growth sectors.

8.2 In order to understand clearly the impact these sectors have both now and potentially in the future, it is necessary to review them in greater detail.

8.3 Each of the following sections provides an overview of the sector, identifies current representation of the sector both in terms of business size and employees, presents some forecasts for future job growth within the sector and highlights key issues and challenges.

[73] Cambridge Econometrics forecasts as used by SWRDA and SWRA.

## Tourism & Leisure

### *Overview*

8.4 The tourism and leisure sector comprises a variety of activities which provide services to visitors and locals, including hotels and other accommodation providers, restaurants, transport services, retailers, visitor attractions and entertainments[74].

8.5 Whilst the tourism offer within Dorchester is more limited, Weymouth has a longstanding reputation as a tourism resort. The Regional Spatial Strategy identifies Weymouth & Portland as a major recognizable holiday resort within the region.

8.6 The geological, landscape and nature conservation assets of Weymouth Bay and Portland Harbour provide ideal conditions for special interest and watersports holidays and have contributed to its success as a traditional seaside destination. This role is now widening, attracting special interest outdoor activities and watersports on a year round basis. The Weymouth esplanade is a key resource and is the basis for a wide range of facilities and services. Portland's outdoor activities also have an increasing nationally respected reputation – these include diving, sailing, wind, kite surfing and angling.

8.7 Key tourism attractions within Weymouth include the Sealife Centre, Radipole Lake, Brewers Quay shopping centre and Nothe Fort and several museums within Dorchester. Recent investments within the industry include a new visitor centre and TIC at Portland Bill, improvements in the Lodmoor Country Park area, new visitor facilities at Radipole, a new marina and pontoons in Weymouth Harbour, protection and enhancement of buildings along the seafront and improvements at Hope Square.

8.8 Tourism is the largest industry in Weymouth and there are several caravan & camping sites just outside the town as well as many hotels along the seafront and a significant number of guesthouses near the town centre.

### *Current Representation*

8.9 There are 153 businesses within the tourism & leisure sector in Weymouth and Portland (6.6% of all businesses) and 50 in Dorchester (5.2% of all businesses), both in excess of national and regional averages. Employment within the sector again exceeds the regional average, especially in Weymouth & Portland where the 1,543 employees within the sector accounts for almost 7% of all jobs. There are 490 jobs in Dorchester accounting for 3.3% of all jobs.

8.10 Trend data however indicates that in Weymouth & Portland, whilst the number of businesses has increased over the period 1998-2005, the number of jobs has decreased by over 16%. In Dorchester however the number of businesses and employees within the sector has increased significantly.

[74] A full list of SIC codes is appendicised.

Trends Tourism and Leisure Business Units between 1998 and 2005

| Data Units | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | 2005 % of total businesses | Total Businesses |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 64,432 | 66,630 | 67,878 | 69,037 | 69,737 | 59,790 | 60,475 | 61,984 | -3.8 | 2.9% | 2,140,659 |
| SW | 7,871 | 8,011 | 8,081 | 8,224 | 8,302 | 6,593 | 6,802 | 7,061 | -10.3 | 3.3% | 212,120 |
| Weymouth & Dorchester TTWA | 239 | 247 | 253 | 267 | 270 | 209 | 215 | 216 | -9.6 | 4.6% | 4,659 |
| Weymouth inc Portland – study area | 131 | 135 | 136 | 139 | 144 | 146 | 153 | 153 | 16.8 | 6.6% | 2,332 |
| Dorchester – study area | 40 | 42 | 49 | 52 | 53 | 52 | 49 | 50 | 25.0 | 5.2% | 954 |

Source: ABI, 2005. NOMIS

Trends Tourism and Leisure Employment between 1998 and 2005

| Employees | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | 2005 % of total emp | Total Employment |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 749,575 | 800,944 | 847,594 | 850,970 | 884,059 | 620,575 | 639,770 | 641,063 | -14.5 | 2.7% | 24,097,848 |
| SW | 85,427 | 84,618 | 88,025 | 92,256 | 93,925 | 59,681 | 62,432 | 59,646 | -30.2 | 2.7% | 2,211,708 |
| Weymouth & Dorchester TTWA | 2,896 | 2,592 | 2,683 | 2,782 | 2,639 | 1,617 | 1,719 | 1,447 | -50.0 | 3.0% | 47,808 |
| Weymouth inc Portland – study area | 1852 | 1503 | 1546 | 1541 | 1401 | 1,405 | 1,552 | 1,543 | -16.7 | 6.7% | 22,957 |
| Dorchester – study area | 283 | 361 | 451 | 571 | 577 | 654 | 494 | 490 | 73.1 | 3.3% | 15,035 |

Source: ABI, 2005. NOMIS

8.11 Within Weymouth and Portland £163.3 million was spent by visitors in 2005[75]. It is estimated that this accounts for 4,490 jobs within the borough (14%) of the total employment.

8.12 Whist there are no figures for Dorchester specifically, £252.6 million was spent by visitors within West Dorset in 2005 and across the district there were 6,031 jobs related to tourism spending (also 14% of all employment). In Dorchester there were 250,000 visitors to the TIC last year indicating that the town has a key role in terms of tourism visits even if it is not a key provider of tourist accommodation.[76]

### *Trends & Prospects*

8.13 Tourism is identified as a priority sector in the Regional Economic Strategy and the Cambridge Econometrics forecasts also identify it as important for future growth.

8.14 The Regional Tourism Strategy[77] identifies three priorities – sustainable tourism, increased quality and improved destination management arrangements.

8.15 Weymouth & Portland's Tourism & Leisure Service Plan seeks to ensure that Weymouth and Portland can be,

"a leading holiday and marine destination by maximizing the economic opportunities presented by the London 2012 Olympics and Paralympics."[78]

8.16 Corporate priorities, and therefore targeting of resources, specifically note:

- Improvement of the local economy - identifying increasing wage levels, reducing seasonality and developing a skilled workforce as key objectives.
- Developing a prosperous local business with an increased number of new & successful businesses and a diverse business base
- Developing Weymouth & Portland as a Centre of Excellence for marine businesses in leisure & commercial sectors
- Make Weymouth & Portland an international destination for water sports, marine leisure, outdoor activities and specialist events
- Maximise the economic opportunities presented by the 2012 Olympic and Paralympic Games.

#### *Forecasts*

8.17 At the national level, output trends within the hotels and catering sector have been quite positive. This trend is projected to be maintained over the medium term, albeit at more modest rates – output is expected to grow by around 2% per annum. The growth in employment levels in the sector is however expected to slow somewhat though significant increases are still expected. At the national level this may amount to around 100,000 extra jobs by 2014.[79]

8.18 Visitor numbers to the South West are set to grow over the period to 2015 with a likely increase in visits off-peak. Within Weymouth & Portland and West Dorset the number of tourism nights and trips has remained fairly static (there has been some overall decline towards the end of the period) over the period 2000-2005 but spend has increased.[80]

8.19 At the town level, analysis of the regional forecasts suggests that over the period 2005-2026, there could be an increase of around 350-400 jobs in Weymouth & Portland and

[75] Value of Tourism, Dorset 2005: South West Tourism
[76] Consultation, West Dorset EDO, 2007
[77] Towards 2015, SWT, 2005
[78] Weymouth & Portland Tourism & Leisure Units Service Plan, 2007
[79] Working Futures 2004-2014: National Report, Skills for Business
[80] Value of Tourism, 2005 and Dorset DMO

around 135 in Dorchester. This is broadly in line with national trends (hotels & catering) but does indicate that Weymouth in particular will have to work hard to prevent further losses of employment and to ensure new employment opportunities are taken(as illustrated in the trend data)[81].

## *Key Issues & Challenges*

8.20 The well recognised natural environment, Jurassic Coast and historic strengths of Weymouth as a destination will ensure that tourism remains important within the local economy however, the issues of seasonality, lack of highly trained staff and public realm & infrastructure issues have all been identified as weaknesses which will need to be addressed in order that the sector's potential is not inhibited.

### *Skills*

8.21 Around 40% of tourism businesses in the SW have links with education, in line with the Dorset average though most of these links are through schools with work experience the most common activity.

8.22 Many tourism businesses do not have education links nor participate in careers events. Whilst it is recognised that such activities are crucial to building a future workforce, the reality is that most businesses believe that they do not have the time or the resources to contribute in this way.

8.23 Consultations[82] indicate that there is little uptake of apprentices by employers in the SW and 85% of hospitality businesses are classed as micro businesses who believe they cannot afford to take on apprentices for financial or resource reasons.

8.24 There will be a need to work with local businesses to find ways to get around these barriers in order that customer service levels can be raised and ensure that the tourism offer within Weymouth & Portland becomes higher value.

### *Other*

8.25 There are a number of key opportunities for the tourism and leisure sector. The siting of the sailing element of the Olympic and Paralympic Games 2012 within Weymouth provides an opportunity to significantly increase the profile of the area, especially to the marine fraternity. In addition public realm works and specific development schemes e.g. Weymouth Esplanade and Weymouth Pavilion will improve the quality of the town's offer.

8.26 The Pavilion Quay redevelopment comprises environmental enhancements and development of: World heritage visitor centre, amphitheatre, pavilion, arts & performance space, market, commercial units, residential units and a new marina.

8.27 It is estimated[83] that this could increase the volume of day visitors by between 8 and 17% and the number of staying visitors by between 4 and 6%. Other economic impacts include an additional 400 jobs generated by the development and people with higher incomes moving into the area (into the new apartments).

8.28 The Weymouth & Portland Tourism & Leisure Service Plan identifies a number of key issues which will need to be addressed. It states that there is a need to overhaul the product and generate a new focus for the area using the Olympic and Paralympic Games and Jurassic Coast to give a higher value and quality brand. There is also a need to lengthen the season and attract new visitors year round in order to generate further employment opportunities.

[81] RTP forecasts based on Cambridge Econometrics data
[82] As referred to in Skills Impact of 2012 Games, Experien for LSC, April 2007
[83] Pavilion Quay, Economic Impact Assessment, the market research group, 2007

## Wholesale & Retailing

### *Overview*

8.29 The sub-regional town centres of Weymouth and Dorchester occupy similar positions within the shopping hierarchy. The closest regional centres are Southampton, Cribbs Causeway, Bristol and Bournemouth-Poole.

8.30 Weymouth and Dorchester have similar prime retail rents (£753/sqft in 2004)[84] although Weymouth has seen a faster increase over the past 10 years, probably due to successful retail developments such as the New Bond Street scheme and the edge of town Jubilee Retail Park.

8.31 Weymouth town centre is occupied mainly by small shops reflecting the historic nature of the town centre though there are a number of major stores e.g. Debenhams which add to the draw of the centre. The trading strength of the town is increased by the large tourist population who provide additional seasonal spend. The individuality of shops within the town is considered a key asset for the centre and one which is important to maintain the town's distinctiveness[85].

8.32 Dorchester has three main shopping streets and is also dominated by mainly local businesses. It has a relatively strong centre in terms of rental values and limited vacancies however there are concerns relating to low representation of flagship/national stores and the limited offer in terms of the evening economy.

8.33 Weymouth town centre however has experienced investment in the leisure economy including a number of national pub chains and has built up a reputation for a lively night time economy. Whilst there are sometimes concerns regarding the impacts of this (noise, crime, image etc) these should be balanced against the benefits for the local economy.

### *Current Representation*

8.34 The wholesale and retail sector is significant in both Dorchester and Weymouth and Portland (22.9% and 20.4% of businesses as compared to 17.7% in the region and 17.8% nationally). This is indicative of their status as sub-regional shopping centres. In respect of employment, both towns offer higher than regional levels of employment within this sector – 15.8% in Dorchester and 17.3% in Weymouth & Portland, again higher than regional and national averages.

8.35 Employment trends indicate that the sector has increased by 27.7% over the period 1998-2005 in Dorchester whereas in Weymouth and Portland the sector decreased by over 12% despite the fact that the number of businesses increased by 12% over the same period. This decrease may be as a result of a large loss of jobs within the distribution sector (specifically New Look, other?) and misrepresents what was actually a strong period of growth within Weymouth's retail sector.

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[84] Dorset Rents, Colliers CRE
[85] Retail Issues Paper, LDF, Weymouth & Portland

## Retail & Wholesale Business Units between 1998 and 2005

| Data Units | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total businesses | Total Businesses |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 392,665 | 392,242 | 391,906 | 389,620 | 386,838 | 383,941 | 380,860 | 381,923 | -2.7 | 17.8% | 2,140,659 |
| South West | 37,406 | 37,577 | 37,553 | 37,730 | 37,369 | 37,292 | 37,047 | 37,514 | 0.3 | 17.7% | 212,120 |
| Weymouth & Dorchester TTWA | 783 | 781 | 787 | 808 | 812 | 815 | 826 | 864 | 10.3 | 18.5% | 4,659 |
| Weymouth inc Portland – study area | 424 | 421 | 419 | 442 | 443 | 448 | 448 | 475 | 12.0 | 20.4% | 2,332 |
| Dorchester – study area | 210 | 202 | 206 | 211 | 218 | 210 | 210 | 218 | 3.8 | 22.9% | 954 |

ABI, 2005, NOMIS

## Retail & Wholesale Employment between 1998 and 2005

| Employees | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total emp | Total Employment |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 3,477,785 | 3,504,524 | 3,617,075 | 3,660,586 | 3,712,713 | 3,725,413 | 3,773,481 | 3,733,973 | 7.4 | 15.5% | 24,097,848 |
| SW | 313,172 | 320,114 | 334,409 | 338,699 | 350,759 | 360,301 | 363,055 | 349,974 | 11.8 | 15.8% | 2,211,708 |
| Weymouth & Dorchester TTWA | 6,932 | 5,887 | 6,329 | 7,194 | 7,545 | 7,289 | 7,194 | 6,928 | -0.1 | 14.5% | 47,808 |
| Weymouth inc Portland – study area | 4,459 | 3,317 | 3,686 | 4,574 | 4,741 | 4,133 | 4,086 | 3,913 | -12.2 | 17.0% | 22,957 |
| Dorchester – study area | 1,862 | 1,844 | 2,065 | 2,070 | 2,238 | 2,466 | 2,401 | 2,377 | 27.7 | 15.8% | 15,035 |

ABI 2005, NOMIS

8.36 Weymouth has four main supermarkets - Asda, Morrisons, Lidl and Aldi. National multiple retailers include Woolworths, Boots, Marks & Spencer and WH Smith. The catchment population of Weymouth is 70,000 whereas Dorchester's is in the region of 37,500 (both 2001, need to update). [86]Dorchester has three large supermarkets - Somerfield, Waitrose and Tesco's.

8.37 The following table identifies key retail statistics within Weymouth and Dorchester.

Retail Data (sqft)

| | Weymouth | Portland | Dorchester |
|---|---|---|---|
| Total Retail Floorspace | 324,609 | 30,572 | 220,535 |
| Total No. of Retail Shops | 179 | 33 | 138 |
| Food outlets No. of Units (excluding pubs) | 54 | 8 | 27 |
| Estate Agents No of Units | 16 | 4 | 13 |
| Hair & Beauty No of Units | 12 | 5 | 10 |
| Vacant Floorspace | 10,506 | 3,875 | 6,799 |
| No of vacant shops | 11 | 6 | 10 |
| Total Floorspace (% of floorspace in Dorset | 404,006 (20.6%) | 44,385 (2.3%) | 274,532 (14%) |
| Total no. of shops/units | 292 | 58 | 230 |

Dorset County Council, 2005

## *Trends & Prospects*

8.38 The retail sector is growing and is of clear importance to both Dorchester and Weymouth's local economies. Whilst retailing is not a RES priority sector it is one of the key forecast growth sectors (Cambridge Econometrics) for both towns and is also an LSC priority sector with clear links to the tourism sector (another key local growth sector).

### *Forecasts*

8.39 Retail output has been on a rapidly rising trend for the last two decades. Growth has however slowed recently and the prospects for the next decade are expected to continue at a much more moderate rate of around 2% per annum.[87]

8.40 The time profile for productivity is similar with a marked slow down in growth expected over the next decade as opportunities for continuing efficiency gains become harder to find.

8.41 In response to the rapid increases in output, employment levels have risen steadily for many years. This trend is expected to continue albeit at a much less rapid rate with some 280,000 extra jobs projected over the next decade. Employment in retail has been driven by clothing, cosmetics, medical and food & drink retail sub sectors.

8.42 At the town level, analysis suggests that over the period 2005-1026, there could be an increase of around 1,600 jobs within the retail and wholesale sector in Weymouth &

[86] Update. From Dorchester Town Centre Health Check and Retail Issues Paper Weymouth.
[87] Working Futures 2004-2014, National Report

Portland and around 1000 in Dorchester. This is broadly in line with national trends (retailing)[88].

8.43 Estimates of new scheme jobs? Use EP density figs

## *Key Issues & Challenges*

8.44 Both towns are performing well with relatively good environmental quality, below average retail vacancies and above average comparison goods shopping representation.[89] The development of the New Bond Street scheme which included a 9 screen cinema and Debenhams as an anchor store has been very successful and attributed to faster than average increases in rents in the town.

8.45 Dorchester has been criticised for its relatively poor offer of multiples however the Eldridge Pope scheme (2,333sqm of retail and 774sqm of food and drink) will improve the retail offer though whether this will be though an increased range of independents or more representation by multiples is not yet established. The redevelopment of the Charles Street site (1.7ha of retail led mixed use development) will also add to the retail offer of the town.

8.46 These schemes are likely to increase the fortunes of Dorchester's retail sector (increased jobs and spend) though there will be a clearly be an increase in the demand for retail skills and available employees. The Eldridge Pope scheme alone is likely to have a requirement for in excess of 200 jobs. Both factors will put pressure on the local labour market.

8.47 There may also be some impact on the Weymouth retail sector. Whilst the Weymouth catchment is described as relatively self contained, the close proximity of Dorchester and the already relatively high levels of commuters to Dorchester from Weymouth may influence shopping patterns of some existing Weymouth shoppers.

8.48 Both Dorchester and Weymouth have a high concentration of smaller, independent retailers and a historic shopping centre.

[88] RTP forecasts based on Cambridge Econometrics data
[89] Based on 2001 Retail assessment data, Donaldsons and Nathaniel Litchfield.

# Education

## *Overview*

8.49 Education is a core sector within the Weymouth and Dorchester TTWA, especially in Weymouth and will therefore be important in terms of the economic future of the area. There are also clear links between the educational sector and skills issues within the study area, a factor which has already been highlighted in this report.

8.50 The responsibility for education within the Dorchester and Weymouth lies with Dorset County Council. The Dorset Education Plan 2002-07 outlines the actions that the County Council should deliver in order to deliver the quality of education in the lives of people of Dorset.

8.51 Dorset has a good reputation in terms of educational standards. In the academic year 2004/4, 59% of pupils in Dorset achieved 5 or more GCSE's graded A to C compared to an average for England of 53.7%. Achievement has risen consistently over the last 7 years: by 2005 it had increased to 60.5%.

8.52 In terms of adults (and as outlined in the previous skills section of this report) the level of qualifications held in Dorset is slightly lower than the profile for the SW but remains higher than the national profile. Weymouth & Portland has a significantly lower level of people with higher level qualifications whereas West Dorset is higher than both the regional and national average.

8.53 Within both Dorchester and Weymouth there are a range of primary and middle schools, some specialist school provision and several independent schools.

8.54 The table below identifies secondary school provision within the area. Dorchester has only one secondary school though this is very large, offers sixth form provision and also attracts pupils from Weymouth.

Secondary School Provision

| Name | Location | Age Range | Pupil Numbers |
|---|---|---|---|
| Thomas Hardye | Dorchester | 13-18 | 2206 incl. sixth form |
| Budmouth Technology College | Weymouth | 11-18 | 1558 incl. sixth form |
| Wey Valley School | Weymouth | 11-16 | 1169 |
| Royal Manor Arts College | Portland | 11-16 | 787 |
| All Saints C of E | Weymouth | 11-16 | 930 |

Weymouth & Portland Council Website, dorsetforyou, Ofsted, 2007

8.55 In addition to sixth form provision as highlighted above both Kingston Maurward and Weymouth College provide training/education for 16-18. They are also the key local providers of higher education and further education for the wider community. All are key employers.

8.56 Academic results at the schools vary but Thomas Hardye in Dorchester is recognised as achieving the best results academically (GCSE and A level). The sixth form at this school is one of the largest in the country and outperforms other sixth forms in Dorset by a wide margin. This reputation has increased the number of pupils travelling in from outside Dorchester.

8.57 There are 490 teachers and 370 teaching assistants within the South Dorset constituency (includes Weymouth & Portland) and 880 teachers and 550 teaching assistants within the West Dorset constituency (includes Dorchester).[90]

[90] Dfes, local educational stats, 2006

8.58 The lack of a wide range of further and higher education courses is considered to be one of the reasons for the migration of many local people from Weymouth (and Dorchester) to other larger cities and towns with specialized educational facilities. Whilst education may well be a contributor to this trend, the reason for the migration also lies with a combination of higher wages and greater career opportunity in large cities elsewhere in the UK.[91]

### *Kingston Maurward*

8.59 Kingston Maurward College is a specialist land based college set in 750 acres, two miles from Dorchester. It is the only land based college in Dorset and offers courses in six of the 15 sector subject areas.

8.60 The college offers a diverse range of vocational education and training in land based subjects including agriculture, countryside & food, animal care & vetinary nursing, equine, horticulture, arboriculture & floristy, outdoor education & sports leadership as well as provision in business administration, ICT and education & training. It offers work based training in agriculture, horticulture & animal care, engineering & manufacturing technologies, leisure, travel & tourism and business & administration.

8.61 The curriculum extends from foundation level to higher education for full and part time students: the majority of enrolments in 2005/6 were for adult learners. Just over 40% of all enrolments were on entry and Level 1 courses, a third on Level 2 and 11% on Level 3 courses. While the number of enrolments is higher for students aged over 19, full time equivalent numbers are broadly balanced between adults and students aged 16 to 18. The college also works with schools across the county to provide an increasing range of vocational options for pupils aged 14 to 16.[92]

8.62 The College currently employs 265 staff (positions rather than FTE's). This includes 120 administration staff, 106 lecturing & instructing staff, 24 management staff and 15 technicians.

### *Weymouth College*

8.63 Weymouth College is a medium sized tertiary college serving Weymouth, Portland and south and west Dorset. The college is the main provider of vocational and academic education within the area (Kingston Maurward specializing in land based industries). One of the local secondary schools has a sixth form (Budmouth College) and some young people travel from Weymouth to Dorchester for their sixth form provision (Thomas Hardye). Most of the college's work is delivered on the main college site with some provision in ICT and English for speakers of other languages (ESOL) is delivered in community venues.

8.64 The college enrolls around 2,500 learners each year. In 2004/5 there were 2,585 (FTE) learners. Those aged 16-18 numbered 1,426 (FTE) and those aged over 19 numbered 1,158 (FTE).

8.65 The college has close links with local prisons and has delivered teacher training for Skills for Life through an LSC funded pilot. Weymouth College in partnership with two other colleges is a joint Centre of Vocational Excellence (CoVE) for stonemasonry. The college is a partner is an increased flexibility programme for school students wishing to sample vocational courses.[93]

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[91] Education Issues Paper, July 2007, W&PC
[92] Kingston Maurward Ofsted report, July 2007
[93] Weymouth College, Ofsted report, Jan 2007.

## Current Representation

8.66 Within Weymouth & Portland there are 62 businesses within the educational sector (2.7% of all businesses) and 25 in Dorchester (2.6%), broadly in line with the regional and national averages.[94]

8.67 Employment in Weymouth is however significantly higher in the sector (11.8%) as compared to 5.7% in Dorchester, comparing to an average of 9.5% in England and Wales and 9.8% in the South West. Weymouth College is a key employer within the Borough and may account for the higher than average employment within this sector. It should be noted that Kingston Maurward falls outside the Dorchester study area and as such provides employment for a further 265 people within the educational sector locally.

8.68 Trend data indicates a lower than average (both regionally and nationally) increase in the number of businesses and employees within Weymouth & Portland. Over the period 1998-2005 the number of employees had increased considerably regionally (37%) whereas in Weymouth it was only 9.9%.

## Trends & Prospects

8.69 Employment in education services has experienced underlying growth for many decades and this has been accelerated by existing policy commitments to expansion of education. The rate of growth in investment in education in the long term is however expected to be rather more modest that that seen in the last 5-10 years when the strong growth in investment focused in part on improving the education infrastructure. Whilst there will continue to be a need to invest in new technologies, there will also be a downward trend in the number of children of school age[95].

8.70 Educational output is measured by public expenditure. Over the next decade, substantial growth is expected, reinforced by private sector demand. Employment in the sector has grown rapidly over recent years although much of this increase has been on part-time workers. The combination of strong output growth and only modest productivity gains will result in many thousands of extra jobs by 2014. This employment growth rate will not be as rapid as that achieved in the preceding decade.[96]

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[94] ABI, 2005
[95] Working Futures 2004-2014: National Report
[96] Working Futures 2004-2014: National Report

## Education Business Units between 1998 and 2005

| Data Units | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total businesses | Total Businesses |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 45,352 | 48,911 | 49,536 | 50,042 | 49,511 | 51,383 | 52,522 | 58,788 | 29.6 | 2.7% | 2,140,659 |
| South West | 4,611 | 4,709 | 4,717 | 5,190 | 4,869 | 5,136 | 5,301 | 6,028 | 30.7 | 2.8% | 212,120 |
| Weymouth & Dorchester TTWA | 109 | 101 | 114 | 113 | 111 | 118 | 122 | 137 | 25.7 | 2.9% | 4,659 |
| Weymouth inc Portland – study area | 52 | 46 | 52 | 52 | 50 | 52 | 57 | 62 | 19.2 | 2.7% | 2,332 |
| Dorchester – study area | 17 | 19 | 23 | 23 | 22 | 23 | 21 | 25 | 47.1 | 2.6% | 954 |

ABI, 2005, NOMIS

## Education Employment between 1998 and 2005

| Employees | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total emp | Total Employment |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 1,722,970 | 1,854,053 | 1,895,119 | 1,954,669 | 2,040,557 | 2,123,519 | 2,168,339 | 2,277,273 | 32.2 | 9.5% | 24,097,848 |
| SW | 156,840 | 162,447 | 186,620 | 192,341 | 195,611 | 202,835 | 209,217 | 215,223 | 37.2 | 9.7% | 2,211,708 |
| Weymouth & Dorchester TTWA | 4,207 | 4,541 | 3,921 | 4,123 | 4,321 | 4,512 | 4,869 | 5,081 | 20.8 | 10.6% | 47,808 |
| Weymouth inc Portland – study area | 2,430 | 2,737 | 2,232 | 2,282 | 2,497 | 2,570 | 2,702 | 2,671 | 9.9 | 11.6% | 22,957 |
| Dorchester – study area | 712 | 781 | 673 | 700 | 822 | 825 | 805 | 864 | 21.3 | 5.7% | 15,035 |

ABI, 2005, NOMIS

### *Forecasts*

8.71 At the town level, analysis suggests that over the period 2005-1026, there could be an increase of around 650 jobs within the education sector in Weymouth & Portland and around 200 in Dorchester. This does indicate an increase of around 27% on current levels and will mean that trends more akin to national rather than local (see earlier trend data) will need to be followed.[97]

8.72 There are number of local and regional factors which may have some impact upon the education sector over future years. These include educational requirements, policy and population structure changes.

8.73 Between 2003/4 and 2004/5, enrolments on council funded further education provision rose by 1.22% within Dorset. During the same period participation by students on higher education courses in the UK remained static.[98]

8.74 LSC data indicates that participation in education may be affected in the future as follows:

- There has been a fall in the number of learners aged 16-18 enrolled in FE over the period 2004-2007. Will this continue?
- School sixth forms are increased – by 4.4% between 2005 and 06 and by 2% to 2007. Some schools are investigating capital grants from the LSC due to their substantial increases in post-16 numbers. What is the relationship between this and FE trends?
- Work Based Learning rates fell in 2006 partly due to a transfer of MoD military provision. Will this pick up again?[99]
- The SW Regional Spatial Strategy targets for housing growth indicate a further 50 additional 16-18 year olds in Dorset annually over and above population change.[100]
- There has been a sharp increase in the NEET figures (young people aged 16-18 and not in education, employment or training) over the last year.

8.75 The County Council has assessed the population growth and concluded that there is no long term physical requirement in the Weymouth to provide major new educational buildings or complexes. The present buildings have sufficient capacity to contain the projected school population in relation to primary and secondary schooling. There is therefore unlikely to be any significant change in staffing requirements at this level.

8.76 For those leaving school, employment within the sales sector is the most popular choice. In terms of gender, construction is the preferred option for male school leavers and hairdressing for females. Other popular choices include skilled engineering, vehicle trades and catering.

8.77 In terms of adult educational requirements, there is likely to be an increasing requirement for customer care, hospitality and catering training arising from the promotion of Weymouth as a year round tourist destination especially in light of the Olympic and Paralympic Games 2012 sailing events being held locally.[101] Consultations have also indicated an increase in demand for painting & decorating, plumbing and electrician training. Demand for courses such as social care, hair & beauty, travel and tourism and public services are perennially popular. The supply of courses in the area should be tailored to demand within the area with an appropriate level of educational employees to ensure courses can be provided.

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[97] RTP forecasts based on Cambridge Econometrics data
[98] DfES trends in education, April 2006
[99] LSC Perfromance Review Scorecard, Oct 2006
[100] LSC SW Strategic Analysis
[101] Weymouth College, Needs Analysis, 2006

### *Key Issues & Challenges*

8.78 There are number of key issues which will affect the education sector at the local level. As noted previously, there is likely to be a continuation of growth within the sector, with further emphasis placed particularly on the provision of adult education services. This will have impacts in terms of higher numbers within higher and further education and increased training though workforce development programmes.

8.79 The downward trend in the number of children of school age may have some implications on the educational sector however this is likely to be relatively limited as there are still efforts continue to reduce class sizes and increase the staff:pupil ratios.

8.80 Teachers and others involved within the educational sector are considered key workers. Within both Dorchester and Weymouth there are concerns regarding the affordability of property by key workers. Future increases in property prices compounded by a particular increase in Weymouth house prices (an area traditionally cheaper than the rest of Dorset) as a result of the 2012 announcement, does mean that the availability of housing may well be an increasing issue in terms of retaining a large key worker workforce.

## Health

### *Overview*

8.81 The health and social care sector is very significant within the study area, especially in Dorchester. This is extensively as a result of Dorset County Hospital's location within Dorchester. The health and social care sector includes a range of activities, mainly in the public sector including hospital activities, medical, dental and vetinary practices, other health activities and social work activities.

8.82 In Dorset more than one in four people in employment work for a public sector organisation including education and the NHS. South West Dorset PCT (both Dorchester and Weymouth and Portland are included) employs 500 staff and West Dorset General Hospitals NHS Trust employs about 2,500 staff across a range of disciplines.[102]

8.83 Dorset County Hospital occupies a large site to the west of Dorchester town centre. It became a flagship Foundation Trust hospital in June 2007 and employs 78 consultants across a wide range of disciplines. The hospital has 500 beds and offers a range of services including A&E. The hospital is overseen by the Dorset County Hospitals NHS Foundation Trust which employs over 3,300 staff in the main Dorchester hospital and across other smaller hospitals in the area.

8.84 Weymouth has a small community hospital (Weymouth Community Hospital) which includes a minor injuries unit and an outpatients department. Westhaven Hospital is also located in Weymouth and offers elderly care and physiotherapy and community rehabilitation. Portland Hospital centres upon care of the elderly, outpatient services and also offers a minor injuries unit.

8.85 There are at least 15 dentist's surgeries and 10 doctor's surgeries within Weymouth. In Dorchester there are at least 9 dentist and doctors surgeries. These are tabled by address, services offered and number of GP's employed, within the appendices.

### *Current Representation*

8.86 Almost a third of Dorchester's employment (30.2%) is accounted for by the health and social care sector. This is considerably higher than that for Weymouth & Portland (12.3%) and the national (11.9%) and regional (13.1%) proportions. There are 168 businesses within the sector in Weymouth & Portland and 98 in Dorchester (see table overleaf).

8.87 Trend data indicates that there has been a huge increase in employment within the sector over the period 1998 to 2005 in Dorchester (89.6%) whereas in Weymouth, and contrary to national and regional trends, employment actually decreased (-2.8%).

[102] Choosing Health in Dorset, The Dorset Public Health report 2005

## Health & Social Care Business Units between 1998 and 2005

| Data Units | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total businesses | Total Businesses |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 94,071 | 93,149 | 92,823 | 94,411 | 94,365 | 96,914 | 99,878 | 114,470 | 21.7 | 5.3% | 2,140,659 |
| South West | 10,382 | 10,049 | 9,935 | 9,984 | 10,177 | 10,401 | 10,723 | 12,442 | 19.8 | 5.9% | 212,120 |
| Weymouth & Dorchester TTWA | 285 | 263 | 271 | 255 | 270 | 265 | 286 | 332 | 16.5 | 7.1% | 4,659 |
| Weymouth inc Portland – study area | 162 | 147 | 145 | 125 | 132 | 131 | 141 | 168 | 3.7 | 7.2% | 2,332 |
| Dorchester – study area | 84 | 79 | 86 | 89 | 90 | 92 | 93 | 98 | 16.7 | 10.3% | 954 |

ABI, 2005, NOMIS

## Health & Social Care Employment between 1998 and 2005

| Employees | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 1998-2005 % Change | % of total emp | Total Employment |
|---|---|---|---|---|---|---|---|---|---|---|---|
| England & Wales | 2,264,303 | 2,305,709 | 2,363,379 | 2,456,751 | 2,504,487 | 2,627,865 | 2,730,073 | 2,848,330 | 25.8 | 11.8% | 24,097,848 |
| SW | 229,849 | 233,300 | 230,134 | 238,321 | 258,065 | 258,557 | 273,467 | 286,128 | 24.5 | 12.9% | 2,211,708 |
| Weymouth & Dorchester TTWA | 5,623 | 6,500 | 5,867 | 6,075 | 7,569 | 6,934 | 7,850 | 8,360 | 48.7 | 17.5% | 47,808 |
| Weymouth inc Portland – study area | 2,851 | 2,172 | 3,319 | 1,941 | 2,218 | 2,363 | 2,742 | 2,772 | -2.8 | 12.1% | 22,957 |
| Dorchester – study area | 2,409 | 3,927 | 2,111 | 3,681 | 4,777 | 4,069 | 4,214 | 4,568 | 89.6 | 30.4% | 15,035 |

ABI, 2005, NOMIS

## Trends & Prospects

### Forecasts

8.88 The demand for health and social care will be driven by a number of long-term factors such as the increase in the size of the elderly population, rising expectations about what health care should be available and increasing disposable incomes. The demographic trends will stimulate demand from both government and individuals and this is expected to lead to significant long term output and employment growth in the industry.[103]

8.89 As with education, output within the industry is measured mainly be public expenditure on health care. This has risen rapidly over recent years and this pattern of strong growth (around 3% per annum) is expected to continue over the next decade.

8.90 Employment growth has also grown rapidly. This is projected to continue although the rate of increase is expected to slow somewhat compared to 1999-2004. Despite this, more than 300,000 additional jobs are projected in the period to 2014 nationally.

8.91 At the town level, analysis suggests that over the period 2005-2026, there could be an increase of around 680 jobs within the health and social care sector in Weymouth & Portland and around 1,100 in Dorchester. This does indicate a substantial increase especially in Dorchester, and does point to potential issues in terms of an available and appropriately skilled workforce.[104]

8.92 At the sub-regional level it is reported that health and social care organisations often find it difficult to recruit staff and that some staff groups, particularly those with specialist skills, have a large proportion of workers nearing retirement age. Planning to increase local capacity and provide appropriate training for staff will be required to ensure continued delivery of high quality services by appropriately skilled and fully trained staff.

8.93 At the local level health visiting and school nursing are two areas where there are shortages of staff or predicted shortfalls in the future. In addition and according to a case report on the future development of the health visiting workforce for South West Dorset PCT there are areas that are likely to face significant shortfalls of staff in the coming years due to retirement. As an example, about half of the current health visiting workforce in the Bridport is eligible for retirement in the near future. This will require workforce planning strategies to address potential shortfalls in a skills area that is difficult to recruit to.[105]

## Key Issues and Challenges

8.94 The health needs of the local population create a number of key challenges within the health sector. There are almost 10% older people (over 65 years) within Dorset compared to the UK. This has direct implications upon the type and number of services provided by the health and social care sector and is compounded by the high number of retirees settling in Dorset and the relatively high level of out migration of young people. By 2020 it is estimated that over 30% of the Dorset population will be over 65 and 9% over 80.

8.95 In addition there are areas around Weymouth and Dorchester which are primarily rural and this has consequences in terms of access of services and mobility of staff providing health care.

8.96 Deprivation is a particular issue in Weymouth & Portland – over twice as many people fall within the most deprived section of the population in comparison with UK averages.

[103] Working Futures 2004-1014: National Report
[104] RTP forecasts based on Cambridge Econometrics data
[105] Choosing Health in Dorset, The Dorset Public Health report 2005

This has implications in terms of an increased level of service provision within this area e.g. Sure Start etc which in turn requires additional staff resources.

8.97 The Health Plan 2007-2010 highlights workforce development as one of its key enabling strategies though this does not include any assessments of future changes to the workforce size. No particular issues regarding skills or capacity levels of services are mentioned though the need to shift the emphasis from initiatives which increase the size of the workforce to a model which focuses on improving service delivery in order to achieve increases in productivity is identified[106].

8.98 As with education there will be a need to ensure that there is an appropriate supply of housing to key workers over the future period. Health workers (aside doctors, consultants etc) are traditionally relatively low paid and therefore the relatively high house prices within the area (especially in Dorchester and surrounds) are a key issue in terms of ensuring a good supply of local health care employees.

[106] Health Strategy 2007-2010 Consultation Document

## Knowledge based economy

### *Overview*

8.99 The Knowledge Based Economy (KBE) is a type of economy characterized not only by the production, dissemination and application of information and knowledge as products themselves, but by the general use of a new mode of production consisting of the generalized use of information and knowledge in the production of any kind of goods and in the provision of any kind of service.[107]

8.100 The KBE is recognized as being central to the current and future growth of the economy. This was recognised by the Lisbon European Council who set the strategic goal for Europe to become the most competitive and dynamic knowledge-based economy in the World, capable of sustainable economic growth with more and better jobs and greater social inclusion'.

8.101 The Government, in response to the Lisbon Agenda, has recognized the need to facilitate and foster KBE growth through initiatives linked to the following priorities:

- ICT in all businesses
- Take up and adoption of broadband
- Ecommerce
- Egovernment
- Developing skills relevant for the requirements of a KBE.

8.102 The KBE is not a sector as such. Several attempts have been made to define the KBE. For the purpose of this exercise the OECD definition of the sector has been adopted. This includes a wide range of activities from pharmaceuticals, advanced engineering, business and financial services to higher education, hospital services and telecommunications.

### *Current Representation*

8.103 There are currently 694 KBE businesses in the Weymouth and Dorchester TTWA. Within this total the main sectors are architectural and engineering activities (116 businesses), business and management consultancy activities (110), software consultancy (70) and other software consultancy and suppliers (66).

8.104 KBE businesses only represent 14.9% of the total business stock in Weymouth and Dorchester TTWA. This is significantly smaller than the spread of KBE businesses found across the South West (19.2%) and England and Wales (21.6%). Within the TTWA the proportion of KBE businesses in the Dorchester area (15.9%) is higher than that found in Weymouth and Portland (12.6%).

8.105 In terms of employment, there are 9,748 people working within the KBE in Weymouth and Dorchester TTWA. This represents 20.4% of the total workforce. This is only slightly lower than the KBE levels recorded across the South West (20.8%) and England and Wales (21.7%). The high levels of KBE employment in the area can be attributed largely to the 3,908 people who work at the hospital.

8.106 The concentration of employees at the hospital is the main reason that the number of KBE employees in Dorchester (30.1% of all employees) is almost twice as high as that recorded in Weymouth and Portland (16.2%).

[107] Final Materials (2003) Evaluating Socio-economic Economic Development: Sourcebook 1: Themes and Policy Areas - The Knowledge Based Economy and Information Society

8.107 The largest employers of KBE staff in the TTWA are the NHS (mainly at Dorset County Hospital in Dorchester), Weymouth College and Ultra Electronics Manufacturing and Card Systems. QinetiQ have recently ceased their operation in Weymouth.

Table 1.1 KBE Businesses

| | 1998 | 2005 | 1998-2005 % Change | % of total businesses |
|---|---|---|---|---|
| England & Wales | 374,600 | 462,726 | 23.5 | 21.6% |
| SW | 30,881 | 40,705 | 31.8 | 19.2% |
| Weymouth & Dorchester TTWA | 492 | 694 | 41.1 | 14.9% |
| Weymouth inc Portland | 203 | 293 | 44.3 | 12.6% |
| Dorchester | 132 | 152 | 15.2 | 15.9% |

Table 1.2 KBE Workers

| | 1998 | 2005 | 1998-2005 % Change | % of total emp |
|---|---|---|---|---|
| England & Wales | 4,565,718 | 5,193,683 | 13.8 | 21.6% |
| SW | 387,212 | 455,537 | 17.6 | 20.6% |
| Weymouth & Dorchester TTWA | 6,727 | 9,748 | 44.9 | 20.4% |
| Weymouth inc Portland | 2,946 | 3,665 | 24.4 | 16.0% |
| Dorchester | 2,682 | 4,529 | 68.9 | 30.1% |

### *Trends and Prospects*

8.108 Between 1998 and 2005 the number of KBE businesses in the TTWA grew by 41.1%. The growth in these years was particularly pronounced in Weymouth and Portland, which experienced 44.3% growth (+90 businesses). The growth experienced across the TTWA was significantly greater than the KBE business numbers growth across the South West (+31.8%) and England and Wales (+21.6%). It should be noted, however, that the KBE in Weymouth and Dorchester is growing from a very small base level.

8.109 Over the same period, employee numbers in the KBE increased by 44.9% across the TTWA (+3,021). This growth was more than twice that recorded across the South West (+17.6%) and England and Wales (+13.8%). Much of the growth can be attributed to Dorset County Hospital, which has almost doubled in size.

### *Key Issues and Trends*

8.110 Dorchester currently has a high proportion of KBE employees, although these are predominantly employed by the NHS.

8.111 In contrast, Weymouth has a relatively underdeveloped KBE. In recent years, however, the number of KBE businesses has grown significantly. This growth can mainly be attributed to the success of initiatives like the Southwell Business Park, which provides flexible units and a range of support measures, including a link to expertise at Bournemouth University.

8.112 It is important that this growth is sustained by Weymouth College, in particular, through business focused training initiatives and FE and HE courses.

### *Forecasts*

8.113 By 2026 it is expected that there will be an estimated 52,500 employees the KBE in the TTWA. Between 2005 and 2026 this represents an overall growth of approximately 13,000 KBE employees.

8.114 Much of the growth will be experienced in Dorchester, which will gain 950 KBE workers (+22%). Weymouth and Portland, in contrast will gain 350 workers (+9%).

8.115 This growth can be attributed, to a large extent by anticipated growth in the health and education sectors (+27%), as well as ‘other business services (+29%) and ‘miscellaneous services (+22%). Over the same period, electronics (-60%) and banking and insurance (-14%) are predicted to lose KBE workers.

## Marine

### *Overview*

8.116 The marine technologies sector consists of industries that are involved in all forms of marine construction, engineering and consultancy. This included the design, manufacture, and repair of all types of vessels and off shore platforms. It also includes the design and manufacture of technologies used by the marine industry such as navigation equipment.

8.117 The sector has experienced a decline in business and employee numbers at a national and regional level over the last decade. This can be attributed largely to the contraction of traditional ship building activities.

8.118 Within the sector there are, however, growth points. These are mainly in niche specialist markets linked to the leisure boat industry. The further development of the sector has been prioritised by the SWRDA and is supported through organisations like Marine South West.

### *Current Representation*

8.119 Weymouth and Portland is an ideal location for marine businesses, with its strong tradition of maritime activity and a skilled workforce.

8.120 There are currently 19 marine technologies businesses located in the Weymouth and Dorchester TTWA. Of these 16 are in Weymouth and Portland (see table 2.1).

8.121 Portland Navy base close in 1996. Since then the number of businesses in the marine sector in Weymouth and Portland has grown by 220% from 5 to 16 businesses. This growth has been facilitated by the development of Osprey Quay and the relocation of businesses to the area to take up waterside land and premises and to utilize the marine technologies skills base. It should be noted, however, that although the sector is growing it is still relatively underdeveloped compared to other sectors with just 0.40% of the total business stock.

8.122 In total there are just 176 people employed in the marine technologies sector in the TTWA. This represents just 0.40% of all workers. This is less than the South West (0.60%) as a whole (see table 2.2).

8.123 The largest employer in the sector, until recently, was Luhrs Marine. Following the withdrawl of Luhrs from Portland, Sunseeker, the leisure boat builders, have moved to the site and plan to create up to 500 jobs.

8.124 The Marine Transport sector is not included within the SWRDA definition of Marine Technologies. The Marine Transport sector comprises 22 businesses in the TTWA, employing a total of 134 people. In the main these are likely to be employed by the Channel Islands ferry service and at Portland Port (see table 2.4).

Table 2.1 Marine Technologies Businesses

| Data Units | 1998 | 2005 | 1998-2005 % Change | % of total businesses |
|---|---|---|---|---|
| England & Wales | 1,769 | 1,824 | 3.1 | 0.10% |
| South West | 312 | 367 | 17.6 | 0.20% |
| Weymouth & Dorchester TTWA | 11 | 19 | 72.7 | 0.40% |
| Weymouth inc Portland | 5 | 16 | 220 | 0.70% |
| Dorchester | 0 | 0 | 0 | 0.00% |

Table 2.2 Marine Technologies Employees

| Employees | 1998 | 2005 | 1998-2005 % Change | % of total emp |
|---|---|---|---|---|
| England & Wales | 48,843 | 39,800 | -18.5 | 0.20% |
| SW | 10,088 | 12,471 | 23.6 | 0.60% |
| Weymouth & Dorchester TTWA | 72 | 176 | 144.4 | 0.40% |
| Weymouth inc Portland | 64 | 174 | 171.9 | 0.80% |
| Dorchester | 0 | 0 | 0 | 0.00% |

Source: Annual Business Inquiry 2005

Table 2.3: Marine Transport Businesses

| Data Units | 1998 | 2005 | 1998-2005 % Change | % of total businesses |
|---|---|---|---|---|
| England & Wales | 2,208 | 2,561 | 16 | 0.10% |
| South West | 302 | 376 | 24.5 | 0.20% |
| Weymouth & Dorchester TTWA | 18 | 22 | 22.2 | 0.50% |
| Weymouth inc Portland | 17 | 21 | 23.5 | 0.90% |
| Dorchester | 0 | 0 | 0 | 0.00% |

Table 2.4: Marine Transport Employees

| Employees | 1998 | 2005 | 1998-2005 % Change | % of total emp |
|---|---|---|---|---|
| England & Wales | 33,740 | 32,964 | -2.3 | 0.10% |
| SW | 2,315 | 2,600 | 12.3 | 0.10% |
| Weymouth & Dorchester TTWA | 56 | 134 | 139.3 | 0.30% |
| Weymouth inc Portland | 51 | 130 | 154.9 | 0.60% |
| Dorchester | 0 | 0 | 0 | 0.00% |

Source: Annual Business Inquiry 2005

### *Trends and Prospects*

8.125 Whilst the marine sector has suffered a decline over the last decade, the sector has grown in Weymouth and Portland. Much of this growth can be attributed to the SWRDA redevelopment of Osprey Quay for marine activities.

8.126 Sector forecasts up to 2026 suggest that the marine technologies sector will experience a loss of close to 100 jobs and the Marine Transport sector will only grow slightly.

8.127 One of the key objectives of the Weymouth and Portland Borough Council Corporate Plan 2007-2012 is to establish Weymouth and Portland as a centre of international marine and leisure excellence. In achieving this the Council hopes to:

- Attract 25 marine businesses to Osprey Quay by 2010
- Increase the contribution of the marine sector to the local economy by 20%
- Increase the number of people employed by marine related businesses by 10% over a 5 year period
- Test the feasibility of establishing a Marine Park.

8.128 There are a number of projects and opportunities that could help to revive and grow the Marine sector in Weymouth and Portland. These opportunities include:

### *Olympic and Paralympic Games 2012*

8.129 Weymouth and Portland National Sailing Academy has been chosen to host the 2012 London Olympics and Paralympic sailing events. This presents an opportunity for marine and other businesses to capitalise upon the increased leisure craft and watersports usage that will occur in the area before and after the games. Dorset County Council studies indicate that the Sailing Academy has already created demand in regional service industries worth approximately £10 million[108].

8.130 The area has already benefited from the construction of a new £7.3 million Sailing Academy clubhouse, which opened in 2005. In addition, planning permission has recently been secured to construct a new 560 berth commercial marina, which will include a hoist, extensive boat storage and on-water refueling, along with mixed use retail and B1 developments.

### *Osprey Quay*

8.131 SWRDA purchased the land at Osprey Quay following the closure of the Royal Naval Air Station in 1999. A Master Plan for the redevelopment of the area for employment uses was accepted by W&PBC in December 2001.

8.132 Since then Navigator Park has been developed to provide a range of 1,500 metre$^2$ units, most of which are now occupied. After the 2012 games it is proposed that the site will become a leading sailing and marine industries site. The plans for the future phases of development include the redevelopment of the tank farm to accommodate new buildings suitable for B1, B2 and B8 employment uses, the development of the 2012 parking areas (Site Q) for high tech employment uses and large scale marine workshops.

8.133 As well as the proposed expansion of the Sunseeker operation at Osprey Quay, the SWRDA have received several promising enquiries for premises and land from marine related businesses.

### *Water Transport*

8.134 Portland Port plan to increase the capacity of the Port to handle roll-on roll-off ferries and liners. Similarly Condor Ferries will soon occupy new facilities on the Pavilion site and are assessing the possibility of operating additional destination services.

## *Key Issues*

8.135 The growth of the marine sector is being promoted by the SWRDA and W&PBC, as well as sector support groups like Marine South West. The growth of the sector needs to be supported through the protection of waterside sites for marine uses. One such site, the Bincleaves site that was previously occupied by QinetiQ, is being put forward for higher value residential development. The Chesil Marine Network argue that the Bincleaves site should be kept as employment land for fishing, diving and other activities.

8.136 The marine sector skills base in Weymouth and Portland is currently strong, with many ex navy personnel still living and working in the area. It is important to maintain this skills base to support the sector. Weymouth College has linked with Bournemouth University to provide Foundation Degrees in Marine Leisure, offering aspects of business planning, marketing, retail and customer service. In addition, the Paragon+ITE training group, which is located in Weymouth, offers accredited delivery of apprenticeships, advanced apprenticeships, National Vocational Qualifications and bespoke courses.

8.137 A Marine Skills Centre has been established in Poole. This offers a range of marine industry qualifications and bespoke training in marine engineering, marine electrical,

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[108] Weymouth and Portland National Sailing Academy - www.wpnsa.org.uk

boat building, laminating and upholstery. The possibility of establishing a similar centre in Weymouth and Portland is currently being assessed.

## Business services

### *Overview*

8.138 The Business Services sector is a wide ranging sector that can be split between:

- Financial Services – including banking and insurance
- Professional Services – including real estate
- Other Business Services – including accountants and lawyers.

8.139 Output among these sectors has been growing strongly over the last decade, particularly in Professional Services which has benefited from the UK property market boom. Growth prospects over the next ten years are less certain, but positive output growth is projected, albeit at a slightly lower rate than previously[109].

### *Current Representation*

8.140 The number of businesses (1,021) and employees (7,165) in the Business Services sector in the Weymouth and Dorchester TTWA grew significantly between 1998 and 2005. The growth in employees for example was approximately 73%, more than twice the growth rate recorded across the South West (+32%) and England and Wales (+21%). However, the overall proportion of businesses and employees in the sector remains relatively small in the TTWA compared to the regional and national levels (see tables 3.1 and 3.2).

8.141 Much of the growth in Business Services in the TTWA between 1998 and 2005 has been in Weymouth. During this time Weymouth has almost caught up with Dorchester, for which Business Services makes up almost 23% of all businesses and 15% of all employees.

Table 3.1 Business Services Businesses

| Data Units | 1998 | 2005 | 1998-2005 % Change | % of total businesses |
|---|---|---|---|---|
| England & Wales | 508,898 | 689,604 | 35.5 | 32.2% |
| South West | 42,997 | 61,352 | 42.7 | 28.9% |
| Weymouth & Dorchester TTWA | 644 | 1,021 | 58.5 | 21.9% |
| Weymouth inc Portland | 263 | 449 | 70.7 | 19.3% |
| Dorchester | 174 | 217 | 24.7 | 22.7% |

Table 3.2 Business Services Employees

| Employees | 1998 | 2005 | 1998-2005 % Change | % of total emp |
|---|---|---|---|---|
| England & Wales | 4,191,283 | 5,052,948 | 20.6 | 21.0% |
| SW | 307,769 | 405,163 | 31.6 | 18.3% |
| Weymouth & Dorchester TTWA | 4,137 | 7,165 | 73.2 | 15.0% |
| Weymouth inc Portland | 1,214 | 2,997 | 146.9 | 13.1% |
| Dorchester | 1,902 | 2,332 | 22.6 | 15.5% |

Source: Annual Business Inquiry 2005

[109] R.Wilson, K.Homeidou, A.Dickerson (2006) Working Futures 2004-2014

### *Trends and Prospects*

8.142 Forecasts for the Business Services sector suggest that the number of employees will grow by approximately 800 in Weymouth and 600 in Dorchester by 2026. Much of this employment will take place in small town centre offices rather than on employment land.

8.143 It is anticipated that much of this employment growth could be concentrated in the town centres of Weymouth and Dorchester. Specific allocations are also made for B1 space in the next phases of the Poundbury development.

8.144 Although there are already offices available at Southwell Business Park and other smaller sites around Weymouth and Portland and affordable offices for start up businesses at Prospect House, Poundbury, it is clear that more office space will need to be built to cater for such growth. The Structure Plan (The Replacement Bournemouth, Dorset and Poole Structure Plan July 2004 on deposit) and the Employment Land Monitoring Report both reflect the opportunity to build major new office space of more than 2,000 metres$^2$ in Weymouth and Dorchester.

8.145 If the average density of 19 metres$^2$ per person for general offices[110] is applied to the employment growth forecasts it can be predicted that over the next twenty years 15,200 metres$^2$ of office space may need to be built in Weymouth and a further 11,400 metres$^2$ of office space may need to be built in Dorchester to satisfy growth in the Business Services sector.

[110] Arup Economics and Planning (2001) Employment Densities: A Full Guide

## Advanced engineering

### *Overview*

8.146 Advanced engineering is very sensitive to fluctuations in the global economy because of its dependence on capital goods investment by other manufacturing sectors.

8.147 Rapid technological change throughout the 1990s led to strong growth in the electronics and electrical engineering sectors, but this trend has slowed over the last five years. The UK has faced strong competition from overseas, from countries like China, and many companies have chosen to outsource manufacturing activities. Following the recession a modest recovery is projected, with overall growth rates of between 2 and 3% per annum.

8.148 Advanced engineering remains the second largest employment sector prioritized by SWRDA with approximately 60,000 workers. It contributes approximately £3 billion to the regional output. The main specialisms are aerospace, automotive and measuring instruments and biomedical devices.

### *Current Representation*

8.149 There are 37 Advanced Engineering businesses in the Weymouth and Dorchester TTWA. This represents 0.8% of all businesses. A total of 21 of these are located in Weymouth and 5 in Dorchester.

8.150 Between 1998 and 2005 there has been a 32% rise in the number of businesses within the Advanced Engineering sector in the TTWA.

8.151 However, whilst the number of businesses has increased from 15 to 21, the number of Advanced Engineering employees has declined from 987 to 644, a decline of 35%. The loss in employee numbers is consistent with job losses at a national and regional level, but slightly more pronounced.

Table 4.1: Advanced Engineering – Businesses

| Data Units | 1998 | 2005 | 1998-2005 % Change | % of total businesses |
|---|---|---|---|---|
| England & Wales | 13,242 | 12,441 | -6.0 | 0.6% |
| South West | 1,268 | 1,238 | -2.4 | 0.6% |
| Weymouth & Dorchester TTWA | 28 | 37 | 32.1 | 0.8% |
| Weymouth inc Portland | 15 | 21 | 40.0 | 0.9% |
| Dorchester | 4 | 5 | 25.0 | 0.5% |

Table 4.2 Advanced Engineering - Employment

| Employees | 1998 | 2005 | 1998-2005 % Change | % of total emp |
|---|---|---|---|---|
| England & Wales | 533,008 | 399,988 | -25.0 | 1.7% |
| SW | 58,340 | 48,004 | -17.7 | 2.2% |
| Weymouth & Dorchester TTWA | 987 | 644 | -34.8 | 1.3% |
| Weymouth inc Portland | 577 | 474 | -17.9 | 2.1% |
| Dorchester | 114 | 99 | -13.2 | 0.7% |

Source: Annual Business Inquiry 2005

8.152 Within the sector there are three large employers. These include a business located at Granby that manufactures instruments for testing and measuring and two businesses, one on Granby and the other in Tophill West, that manufacture parts and accessories for vehicles.

### *Trends and Prospects*

8.153 The decline in employment in the Advanced Engineering sector looks set to continue up to 2026. By 2026 it is anticipated that the sector will have declined by a further 54% in employee numbers. In the main these job losses will be in the electronics sector.

8.154 A challenge for the future, therefore, is to retain existing engineering companies wherever possible and safeguard employment across the TTWA. Fostering closer links between academic institutions and local engineering firms can only serve to enhance the future development of the engineering sector in Weymouth and Dorchester.

# APPENDIX ONE

## SOURCES/REFERENCES

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| Replacement Bournemouth, Dorset and Poole Structure Plan | Bournemouth BC, Dorset CC, Borough of Poole | 2004 |
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| SE Dorset Sub-Regional Study | Bournemouth BC, Dorset CC, Borough of Poole | Sep-05 |
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| Portland Census Town Profile | Dorset CC | 2005 |
| Weymouth Census Town Profile | Dorset CC | 2005 |
| Community Strategy for Dorset | Dorset CC | |
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| Dorchester Area Community Partnership Local Action Plan | | |
| Workspace Strategy for BDPEP | | Dec-03 |

# APPENDIX TWO

## CONSULTATIONS

Consultation to date: November 2007

Consultations undertaken (in addition to officers in the Steering Group and Project Team):

- James Rowley - SWRDA - Osprey Quay
- Ed Gilliver - Chesil Marine Network
- Ray Bulpit - Southwell Business Park
- Peter Arey - Portland Port
- Gary Ayles/Mikey Jones - Granby Estate Forum
- Trevor Hedger – WDDC
- Gareth Jones – WPBC
- Simon King – WPBC
- Matt Ryan – WPBC
- Dennis Elkin – Dorset PCT
- Andy Stilman – Education, DCC
- Kieren Hasler – Weymouth College
- Mike Hancock – Kingston Maurward
- Mandy Swadel – Train to Gain
- Anne Grey – Dorset CC
- James Greaves – SWRDA – 2012 Olympics
- Valerie Stephens – Federation of Small Businesses
- Maria Clarke – Dorchester Town Council
- Pauline Cole – Dorchester Town Council
- Jude Allen – West Dorset District Council
- Louise Stewart – Weymouth & Portland Partnership
- Sue Thomason – Portland Town Council
- Trish Taylor – BDP LSC

Business Interviews undertaken

- David Scadden, Sunny Days Nursery, Dorchester & Weymouth
- Barry Thirlwell, Heart of Wessex Rail Partnership
- Jan Bergman, Dorset County Hospital Foundation Trust
- David Beaman, Sureline Buses, Portland
- Ray Coles, Ultra Electronic, Weymouth
- Tim Clotworthy, Stone Firms, Portland
- Claire Jenkins, Poundbury Systems, Dorchester
- Mark Williams, First Bus, Weymouth
- Phil Lambing, Phil Lambing & Sons Ltd, Portland
- Nick Roddis, Drumgrange Ltd, Portland
- John McKinlay, BJ Marine Tech Ltd, Portland
- Elaine Prowse, Vesitronics, Weymouth
- Gary Ayles, Granby Lynch Lane Forum, Weymouth
- John Knowles, DEK
- Steve Challes, New Look
- Hylton Jackson, Advanced Sheet Metal
- Ian Jollisse, Sunseeker
- Jo Lock, The Sherborne Hotel
- Paul Kinvig, Dorset Echo
- John Loosemore, Betterment Properties

## Summary

A total of 23 consultations and 20 business interviews were undertaken in addition to workshop invitations issued during the course of the study.

48 businesses were originally contacted with a view to arranging face-to-face interviews. Despite repeated chasing it proved impossible to engage all businesses in consultation. The approach was modified in order to increase the participation rate e.g. offering to undertake telephone rather than face to face interviews or to provide them with the business proforma and allow them to complete it remotely. A shorter questions proforma was provided in an attempt to increase completion rates. We also requested additional contact details where we had persistent problems in contacting certain individuals.

Overall 8 businesses stated absolutely that they would not be involved in the process. The contacts from the prisons were very reluctant to get involved and refused to assist contact via e-mail.

A further 18 either failed to return calls/e-mails (either through PA’s or personally) or did not return proforma despite promising to do so. When contacting businesses we explained the reason for our call and are confident that we have put forward the importance of business involvement to the development of the economic vision.