ATKINS

Assessing the growth potential of Gillingham

Final Report

December 2009

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Executive Summary

Scope and purpose of Study

This report was prepared by Atkins (working with Buro Happold) for Dorset County Council (DCC) and North Dorset District Council (NDDC). The study assesses the growth potential of Gillingham for further employment and housing growth up to 2026 and beyond. The study also examines the potential of Gillingham to develop into a highly self contained town and whether there is scope for the town to merit designation as a Strategically Significant City or Town (SSCT). The findings of the study will be used to inform the preparation of NDDC's Local Development Framework (LDF) and will be used by DCC and NDDC to inform their discussions with Regional bodies on the review of the Regional Spatial Strategy (RSS) for the South West.

Context

There is increasing pressure to ensure that housing proposed at a regional level maximises the contribution to national housing targets. The Draft RSS for the South West made provision for 23,000 new homes per annum 2006 - 2026, and North Dorset District was required to provide 255 net additional dwellings per annum during this period. However, the RSS seeks to concentrate development in 21 main cities and towns, none of which are in North Dorset.

NDDC's response to the draft RSS argued for an overall increase in the level of housing for the District, as it was considered that the level of growth proposed in the region's more rural areas was too low to support viable communities, in particular there were concerns that this could have an impact on maintaining economic growth and delivering affordable housing.

Prior to the RSS Examination in Public (EiP) the Section 4/4 Authorities (strategic planning authorities in the region) were asked to assess the implications of population growth on housing requirements in their area. It was considered that although some additional growth could be accommodated in the main towns, there was not capacity to take the full requirement. As a result, the potential for further growth in market towns in the County was examined. The report identified that many market towns in the Dorset are constrained. However, Gillingham was identified as having capacity for growth post 2011 due to its largely unconstrained nature and could possibly develop into an SSCT.

Following the EiP, the Secretary of State's Proposed Changes to the RSS were published in July 2008. The Proposed Changes RSS raised the housing requirement for NDDC from 5,100 to 7,000; however, no specific guidance was given on distribution of the housing. The expectation is that housing will be distributed according to the overall RSS approach, which in North Dorset would concentrate development in the market towns, which the NDDC indicate are likely to be Blandford Forum, Shaftesbury and Gillingham.

A partial review of the RSS is due to take place in order to refine housing requirements, in order that the region can maximise the contribution to national housing targets.

In the short term there is a need to determine how the housing requirement in the Proposed Changes will be distributed across North Dorset. However, there is also a need to look longer term at the options for growth at Gillingham and the implications for the rest of the District to help inform future discussions on the RSS review.

Study methodology

Longer term growth potential of the town was assessed (see section 3) by looking at the existing evidence base (at the local level) and benchmarking the town against other small and growing towns across the south of England. The benchmarking considered population, self containment (the degree to which a town's residents stay within the town for work) and transport networks.

The study follows several steps to determine the future growth potential of Gillingham. These include:

- Developing growth scenarios – four growth scenarios were identified in order to assess different scales and distributions of development up to and beyond 2026 (see section 4);
- Assessing the infrastructure requirements / implications of growth scenarios;
- Evaluating the scenarios against sustainability criteria (including economic development; service centre functions and social infrastructure, and environmental capacity); and
- Evaluating individual sites in order to refine scenarios and scope out the least sustainable sites.

Following the evaluation of the sites and growth scenarios, the scenarios were refined and two preferred scenarios for the growth of the town were identified. The infrastructure requirements and implications of the preferred scenarios were tested in order to assess the deliverability and viability of future growth.

Key Findings

Long term growth potential

The study has assessed the long term (post 2026) growth potential of the town and whether the town could become an SSCT. Gillingham's potential to develop its economic and service centre functions do not limit its potential to become a town of 20,000 – 30,000 population over a longer term period (the next 30 – 40 years). However, the future growth potential of the town is currently constrained (to the levels of growth identified in the preferred scenarios) for several reasons including: economic potential; town centre capacity; transport issues; and environmental constraints.

The town's economy at the moment is largely a small business economy and recent growth in the economy has partly been facilitated by availability of land and labour supply. In order for economy in Gillingham to grow to the level required of SSCT, the following would need to happen: diversification of the economy; larger employers need to be attracted and retained; provision of higher skilled jobs; support for further education and skills training; and provision of better connections to the strategic road network. The study (see Section 5) has identified that jobs could increase to 6,300 and employment floorspace to 115,00sqm up to 2026; however, this is some way short of what is needed to support a larger sized town. The capability of the economy to grow will slow down the growth rate of the town.

SSCT's have a much wider range of retail and other town centre uses than Gillingham currently has. For the town to establish itself as a higher order centre within the retail hierarchy it would need to grow significantly (a minimum of 13,000sqm of additional floorspace would be required). The study shows that the town centre is constrained by existing development and flood risk, which means the town centre can only grow by approximately 7,000sqm. In order to grow further the town centre would have to expand south of Le Neuborg Way. Any further growth of the town centre would need to be carefully considered in order to ensure that the range and scale of provision does not an impact on the viability and vitality of Shaftesbury (which has a close relationship with Gillingham).

Transport improvements are critical to the long term growth of the town. Significant improvements to the strategic road network (in particular the A303) would be required to grow the town beyond what is identified in the preferred scenarios. These improvements are likely to require significant external funding.

Although relatively unconstrained by ecological or landscape designations, there are features that would constrain the physical expansion of the town. The higher ground to the east and west of the town constrain the potential area which may be developed, to the north the need to maintain a definable visual boundary around the historic village of Milton-on-Stour requires some separation between Gillingham and the village. Although the area to the south of town is less constrained by landscape issues, the area is affected by flood risk and sensitive natural and archaeological assets.

Preferred scenarios

The study identifies two preferred growth scenarios for Gillingham (see section 4), under these scenarios the town could grow by approximately 3,300 dwellings in total. This would increase the population of the town to around 15,000 by 2026 (2,296 dwellings), with a further 1,071 dwellings after 2026.

Infrastructure Issues

Under the preferred scenarios there would not be a requirement for improvements to the A303, as there would be improvements in the self containment of the town and there would be improved connections to the A30.

The study has identified requirements for a range of supporting infrastructure in the town (see sections 6 - 11). In particular, there would be a need for the following social and physical infrastructure:

- Transport – southern link road to join the B3081 and the B3092; eastern link; and Shaftesbury improvement (link between the B3081 and A30); plus local junction improvments to link development sites into the existing network;
- Health – Four new GPs; a diagnostic health centre;
- Education – Up to 3.5 forms of entry primary school provision; expansion of the existing Gillingham secondary school;
- Green Infrastructure – approximately 18 ha of open space; improved connections within the existing green ring; new formal town park;
- Community and Sports facilities – two new sports halls; and new community / meeting hall space;
- Town Centre / public realm improvements – approximately 1,000 – 9,000 sqm of additional retail floorspace; regeneration of the Station Road area to create a gateway to the town centre; public realm improvements linking the existing shopping frontage with the ‘historic core’ ‘education / leisure hub’ and the station; gateway developments at the northern and eastern entrances to the town centre.

Viability

The study shows that the overall costs of infrastructure for the town would be in the region of £69m. The study assesses viability of development in the town (see Section 11). The outcome of the viability assessment, as it stands, is that development in certain locations (Station Road and to a lesser extent urban extensions to the north and south) is not viable at present as the return on investment would be too low to facilitate development.

Although the viability assessment shows that development is unviable, this is with the assumption that all infrastructure costs will be funded by the developer. This is unrealistic, and it is therefore necessary to assess the scale of infrastructure costs that can be borne by a developer whilst allowing the scheme to be viable.

The viability analysis therefore reduced infrastructure costs to the point at which development would become viable. The overall infrastructure costs would need to be reduced by £44m in order to make the development viable. There is therefore a significant funding gap to fund in order to deliver the required infrastructure.

1. Introduction

Background

1.1 The Dorset County Council (DCC) and North Dorset District Council (NDDC) appointed Atkins (working with Buro Happold) in February 2009 to assess Gillingham's potential to accommodate future housing and employment growth in the period up to 2026 and beyond.

Scope of the Study

1.2 It is the purpose of this study to examine the potential for growth at Gillingham and consider how this should influence the future role of the town. The study will advise DCC and NDDC on whether Gillingham can develop into a model sustainable community capable of sustaining a range of services associated with a fully functioning, highly self-contained town and whether Gillingham has potential to merit designation as a Strategically Significant City or Town (SSCT).

1.3 The study includes a delivery plan highlighting how development should be taken forward; critical development thresholds requiring investment; potential funding arrangements and the key agencies and stakeholders involved with different aspects of delivery. The study includes options for implementation of future growth; identifying the most appropriate option.

1.4 The results of this study will contribute to any future discussions Local Authorities may have with Regional bodies on the review of the Regional Spatial Strategy (RSS) for the South West and will inform the future development of policy for NDDC's Local Development Framework.

Report Structure

1.5 This draft final report sets out the consultants' findings and recommendations. The report is split into 11 sections as follows:

- Section 2: Policy review
- Section 3: Potential for Gillingham to accommodate strategically significant development
- Section 4: Future Growth Scenarios
- Section 5: Economic development
- Section 6: Transport
- Section 7: Town centre and retail
- Section 8: Green infrastructure
- Section 9: Social and community infrastructure
- Section 10: Utilities
- Section 11:Implementation and delivery

2. Policy Review

Introduction

2.1 This section sets out the background to the study, including the regional and local policy context which has generated the need to undertake an assessment of the growth potential of Gillingham.

Housing Green Paper

2.2 The Housing Green Paper sets out the Government's ambition to increase the supply of new housing over the next 20 years. It is particularly concerned that the level of housing proposed in the emerging Regional Spatial Strategies (RSS) is below that anticipated by the latest household projections. It has confirmed its intention to ensure that each region maximises its contribution to the national home building targets by the speedy adoption of draft RSSs to be urgently followed by partial reviews, to be completed by 2011.

Emerging Regional Spatial Strategy for the South West

2.3 The following is a summary of the history of the emerging RSS and implications for Gillingham.

2.4 A new plan for the region (the Regional Spatial Strategy for the South West) is being prepared and will provide the regional framework for development from 2006 to 2026.

2.5 In short, the RSS:

- Sets out long term strategic spatial policies;
- Guides the general scale and location of growth across the region;
- Provides a framework for District Council's to prepare more detailed local policies; and
- Informs future investment decisions.

2.6 The RSS is structured in three main sections:

- A sustainable context
- A spatial strategy guiding the location of development, and
- Subject based policies, including housing requirements set out at district level

2.7 The spatial strategy for the region, which seeks to guide the location and scale of growth across the region is based upon the following elements:

- Concentrating development on named Strategically Significant Cities and Towns (SSCTs);
- Making provision to increase self containment and enhance the role of market and coastal towns (Gillingham); and
- Promoting stronger communities in small towns and villages

The Level and Distribution of Growth in Draft RSS

2.8 A key factor in determining the level of growth needed is the 'household projections' produced by the Office of National Statistics. The projections available in early 2006 suggested that around 25,000 new homes would be required each year across the region. However, after taking account of the ability of the region to absorb development, the South West Regional Assembly (SWRA) made provision for only about 23,000 new homes per annum in the draft RSS.

2.9 The draft RSS required North Dorset to provide 255 net additional dwellings per annum for the period 2006 to 2026. This was broken down into two 10-year phases are set out in Table 2.1.

Table 2.1 – Proposed Levels of Housing Growth in North Dorset – Draft RSS

Timescale	Dwellings Per Annum
2006 - 2016	290
2016 - 2026	220

2.10 The overall annual average net dwelling requirements set out in Table 2.1 are significantly below the rate of 335 net additional dwellings in the Structure Plan and the build rate of 444 dwellings per annum (dpa -gross) that has been achieved between 1994 and 2007. The South West is a largely rural region, with many small market towns. However, the draft RSS sought to concentrate growth in and around only 21 main cities and towns, none of which are in North Dorset. The main reasons for doing this are to locate new housing close to centres of employment and to reduce the need to travel, particularly commuting.

2.11 Development Policy B of the draft RSS also encouraged "locally significant development" in "market towns", although these were not specifically identified in the document. In North Dorset the most likely candidates for 'Development Policy B' status are Blandford, Gillingham and Shaftesbury. Outside the main cities and towns of the region, the draft RSS required that the bulk of new development would be concentrated in Development Policy B towns. However, it would be for the District Council to determine how much would go to each town through the development of more detailed planning policies at the local level.

The Council's response to the Draft RSS

2.12 When preparing the RSS, the SWRA is statutorily required to involve the 'strategic planning authorities' in different parts of the region in developing the strategy. In Dorset this means Dorset County Council, Bournemouth Borough Council and the Borough of Poole. District Councils, such as North Dorset, are much less closely involved, but can make representations when formal public consultation is undertaken.

2.13 The SWRA agreed the content of the 'final draft version' of RSS (the draft RSS) in March 2006 and full public consultation took place between June and August 2006. The District Council's Cabinet considered the draft RSS on 17th August 2006. Since there was no specific mention of Gillingham in the draft RSS, there was no specific reference to the town in the Council's response. The response raised no objection to the proposed distribution of development, but argued for an increase in the overall housing numbers for the District. The Council felt that the level of growth proposed in the region's more rural areas was too low to support viable communities. It was considered that the RSS was too "urban-focused" and did not take account of the needs of rural areas and market towns. In particular, there was a concern that low levels of development in rural areas would make it difficult to maintain economic growth and deliver affordable housing.

2.14 The Council also objected to the post-2016 figure (220 dpa) for North Dorset. The main concern was that a 50% reduction in the level of housing development over a 10-year period would hamper economic growth because of a shortage of labour. The post-2016 housing figure would also make it very difficult to deliver adequate affordable housing in the future.

Section 4/4 Authorities Report on Additional Growth

2.15 In October 2006 and prior to the Examination in Public the Section 4/4 Authorities were asked to look at the implications of the 2003 projections for the housing requirements in their area. In Dorset the Section 4/4 Authorities produced a joint report. It outlined the difficulties faced in meeting further growth in Dorset particularly against the existing strategy.

2.16 Although some of the additional growth could be accommodated in the main towns in Dorset (i.e. Bournemouth, Poole, Dorchester and Weymouth), it was considered that they did not have the capacity to take the full amount now being suggested. Consequently the market towns within the County were examined to ascertain what potential they had for further growth. Many market towns in Dorset are either constrained by environmental considerations, or are close to the main urban areas, where significant additional growth would encourage commuting.

2.17 The report suggested, however, that there was capacity for growth at Gillingham post 2011, as it was largely unconstrained and some distance from any major town. In particular it was felt that Gillingham could play a more strategic role in meeting the areas development needs and that it had the potential to grow its role and could possibly develop into a 'Strategically Significant City or Town' (as defined by the dRSS). The Section 4/4 Authorities noted this approach was inconsistent with the strategy outlined in the draft RSS and that it would not be fully realised until after 2026. They suggested this would best be considered through a Partial Review, alongside any other options for meeting development across the region.

2.18 The report indicates that this would translate into a development rate "in the order of 150 dwellings a year" for the town. This is slightly above the rate achieved between 1994 and 2007, when an average of 132 new dwellings were built each year. The report also recognises the need for infrastructure improvements and enhancement of the town centre. The overall level of development for North Dorset would increase to about 340 dwellings per annum under the 'preferred approach' (i.e. about the level that exists in the current Structure Plan).

RSS – Examination in Public Panel Report

2.19 An Examination in Public of draft RSS for the South West took place in 2007. Its timing was subsequent to the publication of the 2004 based household projections. Considerable debate took place on the need for and implications of accommodating further housing across the region, against both the 2003 and 2004 projections.

2.20 In North Dorset the concept of a new town/expanded town in the northern part of the District was discussed. The Report of the Panel conducting the EiP was published in January 2008. The Panels Report did not take forward an expanded role for Gillingham though did consider further housing should take place within the District. It suggested that much of this growth should be concentrated in the Gillingham/Shaftesbury area but expressed concern that additional growth at Blandford Forum in the south of the District could encourage commuting into South East Dorset.

RSS – Secretary of State's Proposed Changes

2.21 The Secretary of States Proposed Changes were published in July 2008, this is the latest version of the draft RSS. In the North Dorset District Council area, the housing requirement for the period 2006-2026 was raised from 5,100 to 7,000, an increase of 37%. However, no specific guidance was given for its distribution. Instead there is an expectation that this will be distributed against the overall RSS strategy. This will see the focus of development on market and coastal towns (Development Policy B). As part of work on the LDF Core Strategy the District Council has indicated that in North Dorset these are likely to be Blandford Forum, Shaftesbury and Gillingham.

Partial Review of the RSS

2.22 The Secretary of State has indicated in the Proposed Changes her intention to refine the RSS housing requirement through an early Partial Review. This is to ensure that the South West maximises its contribution to the national house building targets set out in the Housing Green Paper and to take account of the evidence provided by the National Housing Planning Advice Unit. The Secretary of State further goes on to say that:

'Any Additional housing will need to be planned and accommodated in the most sustainable way by identifying further broad locations to meet longer term development needs'

2.23 A brief and programme have not yet been published for the Partial Review but it is expected that this will commence during 2009. Across the region this will require an examination of spatial options for accommodating future growth.

Implications for this Study

2.24 In Dorset the environmental limits placed on development mean that it is important that careful and considered analysis of development options takes place. Whilst not prejudging additional work that will be required to contribute to the Partial Review it is important that an early opportunity is taken to investigate potential options.

2.25 On the basis of the earlier Section 4/4 work, Gillingham is known to be relatively unconstrained compared to other towns in Dorset. However, it has a very close functional relationship to Shaftesbury a town less than 5 miles distant. In this context development at Gillingham must be seen alongside the potential for growth at Shaftesbury and the need to ensure that Shaftesbury remains a sustainable and viable community.

2.26 The Secretary of State may publish the final version of the RSS in the near future. As a result, key decisions will need to be made in the short term on how the housing requirement as set out in the RSS will be distributed across the district. The three main towns of Gillingham, Shaftesbury and Blandford Forum are likely to be the main focus for growth. The District Council is currently assessing how development should be distributed across the District, taking account of its spatial characteristics.

2.27 Three research reports will help to inform this debate:

- North Dorset Strategic Housing Land Availability Assessment;
- Dorset Strategic Housing Market Assessment; and
- North and North East Dorset Transport Study

2.28 As a context for this research brief it is important that decisions taken on meeting the requirements of the soon to be published RSS do not prejudice the longer term potential for development at Gillingham.

2.29 This research must therefore look to both the short term need to allocate the RSS requirement and the need to consider creatively longer term options for growth at Gillingham and the implications for the rest of the northern part of the district, including Shaftesbury.

2.30 In summary, this study will need to take account of the fact that there is a need to plan for Gillingham under the existing RSS policy regime, whilst at the same time recognising that there is also a need for more information on the scope and potential to grow Gillingham before any future discussions on RSS takes place. The role of Gillingham can then be assessed alongside other regional options.

2.31 The study will provide both Dorset and North Dorset Councils with key information to support their respective roles in planning for the future of Gillingham. The outputs will also feed into both the LDF process and discussions expected to commence shortly on the future RSS.

Local Planning Policy

North Dorset Area District Wide Local Plan

2.32 The current adopted development plan for North Dorset is the North Dorset Local Plan which was adopted in 2003 and covers the period to 2011. The following list of saved policies are relevant to the study. These policies have been considered in connection with relevant sections. Those policies which represent policy constraints have informed the evaluation matrix in section 4 (See Table 4.3).

2.33 Policies on specific topics such as employment, transport retail and town centres and open space for example have been considered within relevant sections of this report.

Table 2.2 – Selected saved Local Plan Policies

Policy Number	Policy Title
1.1	Sustainable development strategy
1.2	Towns for major growth
1.3	Towns for moderate growth
1.4	Villages with settlement boundaries
1.5	Small villages and hamlets in the countryside
1.6	Development in countryside
1.7	Development within settlement boundaries
1.8	Standard assessment criteria
1.9	Important open & wooded areas
1.12	River valleys
1.15	Foul drainage
1.16	Groundwater source protection
1.17	Sewage treatment works protection areas
1.18	Waste recycling centres
1.20	Contaminated land
1.23	Setting of listed buildings
1.24	Character of conservation areas
1.28	Archaeological remains of national importance
1.29	Archaeological remains of local importance
1.31	Historic Parks and gardens
1.32	AONBs
1.33	Landscape character areas
1.34	International wildlife sites
1.35	National wildlife sites
1.36	SNCIs
1.37	Other landscape features of nature conservation interest
1.38	Protected species and habitats
1.39	TPOs
1.40	Landscaping of new development
1.41	Amenity tree planting
2.1	Housing provision1994-2011
2.2	Making best use of housing land
2.3	Distribution of development
2.4	Settlement allocations
2.5	Form of major housing development
2.6	Infill/ windfall within settlement boundaries
2.9	Phasing the release of land for development
2.10	Density of new development
2.13	Affordable housing within defined settlement boundaries
2.14	Rural exceptions sites
3.1	Overall employment strategy
3.2	Development on defined employment sites
3.3	Retention of employment areas and uses
3.4	Employment development within defined settlements
3.15	Promotion of shopping centres
3.16	New retail outlets in town centres
3.17	Change of use in retail areas

Policy Number	Policy Title
3.19	Out of town centre retail development
3.22	Development of local shopping facilities
4.1	Provision of specialised services
4.2	Land required for educational use
4.3	New community buildings, village halls and libraries
4.4	Percent for Arts
4.5	Provision of Outdoor Sports Pitches and other Recreational Open Space
4.6	Loss of Outdoor Sports Pitches and other Recreational Open Space
4.7	Indoor Sports and Leisure Provision
4.8	Play Areas and Amenity Open Space for Residential Estates
4.9	Countryside Recreation Proposals
5.1	Non strategic road network
5.2	New district distributor roads
5.3	Existing district distributor roads
5.4	Other rural routes
5.5	New urban local distributor roads
5.7	Provision for cyclists
5.8	Provision for pedestrians
5.9	People with a mobility impediment
5.10	Traffic management and pedestrian priority
5.11	General traffic management
5.12	Traffic calming
5.13	Restrictions on heavy goods vehicles
5.14	Environmental improvements to highways
5.15	Bus services
5.16	Rail Network
5.17	Parking standards
5.18	Parking for the disabled
5.19	Servicing
5.20	Development obligations
5.21	Safeguarding of land
5.28	B 3092 Madjeston Bends
GH1	Town for major growth subject to protection of local character
GH2	Royal Forest Project
GH3	“Areas of local character”
GH8	Employment site W, Park Farm
GH15	Sports pitches adj town football club
GH16	Recreation land south of Chantry Fields
GH17	Recreation land adj youth centre
GH19	Riverside footpath/ cycleway link Shaftesbury Road/ Kings Court Palace, over R Loddon
GH20	River bridge over R. Loddon
GH21	Option sites for community hall
GH22	Cemetery off Stour Meadows
GH23	Safeguarded land adj sewage treatment works
GH25	Footway on B3092 south of wavering Lane
GH27	Additional footways along the B3081
GH28	Routes for cycling safety measures
GH29	Gillingham Railway Station integrated transport interchange improvement

Policy Number	Policy Title
GRF1	Gillingham Royal Forest Project Area

Local Development Framework

2.34 The District Council commenced the preparation of its Local Development Framework in 2005. The evidence base to underpin the Core Strategy and other DPDs is developing. The most relevant documents for this study are:

- Core Strategy Issues and Options Paper and Supporting papers;
- Draft Sustainability Appraisal Scoping Report – Has been used to inform evaluation criteria (see section 4);
- Draft Core Strategy and Development Management Policies Consultation Document (2009);
- Appropriate Assessment Screening Document;
- Strategic Housing Land Availability Assessment (2007) – Has informed the identification of potential development sites at Gillingham including the identification of site capacities and developable areas (see section 4);
- Bournemouth/Poole Strategic Housing Market Assessment – 2008. Has informed the assessment of deliverability and viability and the confirmation of site development capacities;
- Dorset Survey of Housing Need and Demand (2008) – Has been used to inform the assessment of viability and deliverability;
- Managing Housing Land Supply in North Dorset;
- Bournemouth Christchurch East Dorset, North Dorset and Salisbury Strategic Flood Risk Assessment (Level 1);
- North Dorset Landscape Character Area Assessment (2008);
- Dorset Local Transport Plan (2006);
- North and North East Dorset Transport Study (2009);
- Gillingham Census Town Profile 2005;
- Gillingham Landscapes and Open Spaces Report (2003);
- Three Rivers Partnership Open Spaces Group Report Gillingham Dorset (2005);
- Open Space Audit and Assessment of Local Need (2006);
- Three Rivers Partnership Draft Community Action Plan;
- Community Strategy for Dorset 2007-2016;
- Shaftesbury Area Community Action Plan;
- Employment Land Review;
- GVA Grimley Workspace Strategy;
- Joint Retail Assessment (2008)- Assumptions have informed the assessment of town centre Retail Capacity.

2.35 The study will inform the Core Strategy (becoming part of the evidence base) regarding the overall level of growth which may be supported at Gillingham to 2026 and the supporting actions which are required to deliver growth. It will also identify additional capacity to deliver growth beyond the Core Strategy (post 2026).

Key Contextual Issues

2.36 This section presents a summary of the key contextual issues, largely identified by various strands of work to inform the emerging LDF, which are likely to affect the potential growth of Gillingham.

Settlement Pattern in North Dorset

2.37 North Dorset is a predominately rural area, covering 61,000 hectares. There are no Strategically Significant Cities and Towns (SSCTs – as identified in the draft RSS) in the District, the nearest being Poole (15 miles south-east of Blandford), Salisbury (20 miles north-east of Shaftesbury), Yeovil (16 miles west of Sturminster Newton) and Dorchester (17 miles south-west of Blandford).

2.38 The District has a population of 66,710 (mid-2006 estimate) with 49% of residents living in the four main settlements:

- Blandford (Forum and St Mary) (10,760);
- Gillingham (11,110);
- Shaftesbury (7,100); and
- Sturminster Newton (3,800).

2.39 These towns act as the service centres for the more rural parts of the District, providing a focus for employment, shopping and leisure facilities.

2.40 There are a large number of smaller settlements scattered throughout the District, the largest being Stalbridge.

Environmental Quality

2.41 The environment is generally of high quality, which is reflected in the large number of environmental designations in the District. A large part of the District (30%), the chalk downlands, is included within two Areas of Outstanding Natural Beauty (AONB). The Cranborne Chase and West Wiltshire Downs AONB lies to the north-east of Blandford and the area to the south-west is part of the Dorset AONB.

2.42 As a result of these protected landscapes, much of Blandford is constrained for future development. Gillingham is therefore the largest town in the District with the potential for future expansion.

Transport

2.43 Public transport provision is generally poor. The District is served by one railway station, at Gillingham, on the Waterloo to Exeter line. This is of particular importance to residents of the town and surrounding area, but also enables people to commute as far as central London. Templecombe and Sherborne stations in South Somerset and West Dorset are also used by North Dorset residents. Bus services are limited, the most frequent being the hourly service between Gillingham and Shaftesbury.

2.44 As a result, the residents of the District are dependant on the private car, especially those living in the villages and rural area. 86% of households owned at least one car or van in 2001. This is 13% higher than the national average. Vehicle ownership rates for the towns are lower than the District average ranging from Blandford Forum and Sturminster Newton at 79% to Gillingham at 82%.

2.45 The main road network is characterised by single carriageway, winding ‘A’ roads which connect the District with the nearest SSCT’s. The A350 corridor is particularly important as it links the District with Poole and Bournemouth to the south-east and Bristol and the M4 to the north. This road passes through a number of villages where the levels of traffic reduce the quality of life for

the residents. The A303 passes through the north of the District, by-passing Bourton, and the A31 cuts through the southern edge of the District for a short distance.

2.46 Gillingham is not connected to the main A road network, but is located approximately 4 miles from the A303 via the B3081 or B3092.

Population Growth

2.47 North Dorset has experienced a high rate of population growth over the past decade. Most of the growth has been in Gillingham, Blandford and Shaftesbury, while many of the villages have experienced large amounts of small scale growth. Gillingham has been one of the fastest growing towns (in percentage terms) in the South West.

2.48 Between 1993 and 2002 the population of the District increased by 15%, which is more than double the county average (7%). Much of this population growth is due to 'net inward migration', the majority of whom have been aged 0-14 years, or 30-44 years, therefore indicating young families. The county as a whole shows a reduction in the 20 to 24 age group (i.e. the loss mainly of students who go to university and do not return, as well as the fall in the birth rate). This is also found in North Dorset with a reduction in the 20 to 29 year old range. This migration of the skilled labour force has potential implications for the local economy.

Housing

2.49 The District has experienced a high rate of housing development, exceeding the planned figures for residential development in both the Structure and Local Plans. However, house prices remain high, coupled with low wages, affordability continues to be a major issue. North Dorset is one of the least affordable areas for first time buyers in the country, although Gillingham is slightly cheaper than other southern and central parts of the District.

Employment

2.50 Employment in North Dorset is concentrated within public administration, education and health (28%) together with distribution, hotels and restaurants (24%). A further 15% work in manufacturing which is above the county average. There are a high proportion of part-time workers, above the national average.

2.51 Unemployment rates are generally very low but more than half of those unemployed are aged 16-34 years. Average earnings are about 13% below the national average. The 2001 Census identified that the percentage of people aged 16 to 74 with no recognised qualifications (25%) in North Dorset was lower than the national and county averages of 29% and 26.2% respectively.

2.52 The development of employment land has exceeded the rate given in the Structure Plan and has kept pace with the development of residential land. In spite of this, the District has a net commuting loss, with more people commuting out than in. This movement leads to perceived traffic congestion.

The Role of Gillingham and Shaftesbury

2.53 Gillingham and Shaftesbury are the main service centres in the north of the District, which together serve a rural hinterland extending into Wiltshire.

2.54 Gillingham has been one of the fastest growing towns in the South West over the past twenty years. Housing growth has been matched by employment growth, as the town has been successful in retaining and attracting a variety of new businesses to a number of employment sites. The provision of infrastructure and community facilities has not always kept pace with the rate of growth and although the town has a large and successful secondary school, the town centre has a low number and a limited range of shops.

2.55 The Local Transport Plan shows that Gillingham has slightly more in-commuting than out-commuting. However, the vast majority of trips are car-based and only 4.4% of commuters from

Gillingham use the railway. More recent data from Network Rail indicates that the number of passenger journeys in this part of the rail network has grown in recent years and is forecast to grow further in the period up to 2016.

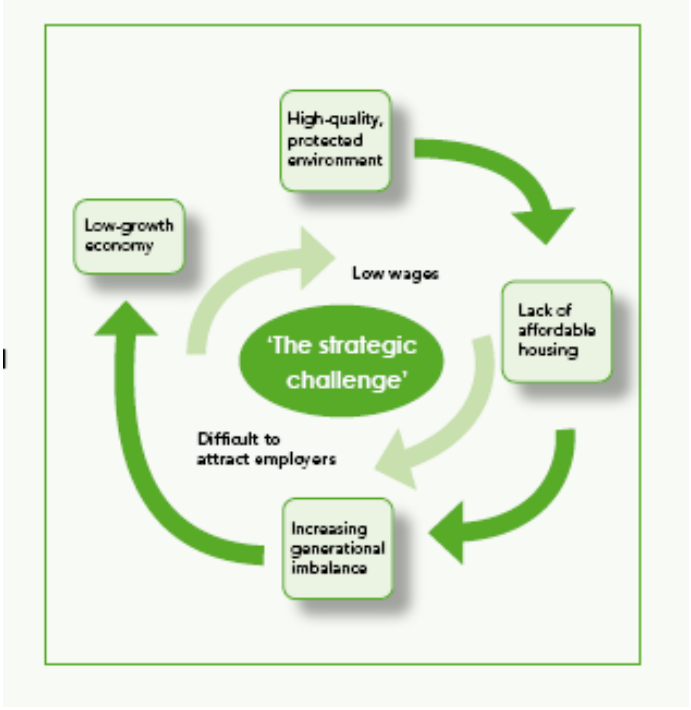
2.56 Shaftesbury supports Gillingham in serving the needs of the northern part of the District and the parts of Wiltshire immediately east of the town. Shaftesbury's historic core occupies a hilltop location and its attractive town centre supports a good range of shops and is a tourist destination. Beyond the historic core, the town has expanded onto the flat plateau land to the north and east, although it has expanded much more slowly than Gillingham in recent years. The town has two large industrial estates, a secondary school and a community hospital.

2.57 The Local Transport Plan shows that out-commuting from Shaftesbury significantly exceeds in-commuting. However, levels of car use by commuters are the lowest in rural Dorset (60% car drivers from the town compared with 75% in the rural County as a whole) and levels of walking are the highest (26% in the town compared with just 6% in the rural County as a whole).

Key Issues for Rural and North Dorset

2.58 The major issues facing the more rural parts of Dorset are set out in Dorset's Sustainable Communities Strategy (SCS). Many of these are inter-related and form part of the 'strategic challenge' which is shown in Figure 2.1 below.

Figure 2.1 – Dorset's Strategic Challenge



2.59 The SCS states 'the strategic challenge for Dorset can be summarised in the following scenario – that by 2016 the county has an increasing number of older people, second home owners and out-of-county commuters, with a generational imbalance. The economy has failed to develop higher-wage jobs for Dorset's workforce and wages remain low. Houses are therefore even less affordable for local residents, key workers and young people'.

2.60 The key issues (as identified by NDDC) from the SCS are:

- Safeguarding the environment;
- Addressing the lack of affordable housing;
- Tackling the causes and effects of an increasing generational imbalance; and

- Stimulating a low-growth economy.

Safeguarding the Environment

2.61 The SCS recognises the strategic environmental issues featured in RSS, but also identifies environmental issues that are more specific to Dorset. The many environmental designations in the County are a major constraint that is an important influence on the management of growth. However, the quality of the environment also drives the economy and is one of the reasons why people enjoy living and working in the area.

2.62 The key environmental features that need to be conserved and enhanced are:

- Landscapes, both within and outside AONBs;
- Wildlife habitats, geological sites and protected species;
- The historic built environment, including listed buildings, conservation areas, historic parks and gardens; and
- Archaeological sites, including Scheduled Ancient Monuments.

2.63 Development needs to be designed to take account of global issues such as climate change (i.e. through sustainable construction techniques and renewable energy generation) but more local environmental concerns, such as maintaining local distinctiveness and creating visually attractive and safe built environments, are also important.

Addressing the Lack of Affordable Housing

2.64 Relatively high house prices coupled with relatively low wages mean that the affordability of housing is a serious issue in North Dorset. In 2007 there was a 'house price income ratio' (based on average house prices and average incomes) of 9.95. This has steadily risen from 6.17 in 2001.

2.65 The affordability problem has generated a very significant level of need for affordable housing in North Dorset, with the recent Dorset Survey of Housing Need and Demand showing a total net annual need in the District for 399 affordable dwellings, which is higher than the average annual housing requirement for all dwellings in the District (i.e. 350 net additional dwellings per annum).

2.66 A balanced housing market assessment also revealed *"an ongoing requirement for owner-occupied accommodation"* and across the whole local housing market *"the main shortfall is for three bedroom properties with notable shortfalls also recorded for two and four bedroom accommodation."*

2.67 The challenge in North Dorset is to provide sufficient housing, including affordable housing, of a type, design and mix that meets the diverse needs of the District.

Tackling the Causes and Effects of an Increasing Generational Imbalance

2.68 The 'strategic challenge' in the Dorset SCS envisages a scenario where the county's older population grows (as a result of an ageing population and in-migration) and the younger population shrinks (as a result of lower birth rates and out-migration due to low wages and high house prices). Whilst this scenario is relevant to North Dorset, these population trends are less pronounced than in most other parts of the rural county.

2.69 The challenge for North Dorset is to improve the quality of life of residents, by helping to meet the needs of the older population and enhancing, as far as possible, the life chances of the young.

Stimulating a Low Growth Economy

2.70 The key characteristics of Dorset's economy are outlined in the SCS, which shows that:

- Economic growth is generally lower in rural Dorset than regionally or nationally;

- Gross value added (GVA) per resident is below the national and regional average;
- Dorset's rate of new business formation is below average; and
- Workplace-based earnings in Dorset are lower than the regional or national average.

2.71 The economy of North Dorset reflects the District's rural nature and it differs from the rest of the Dorset sub-region with more employment in primary sectors and utilities, manufacturing and construction whereas employment in financial and business services is well below the sub-regional average.

2.72 Past studies suggested that in the future there would be a shift in the employment structure of rural Dorset towards higher skill level occupations, but these studies pre-date the current global economic difficulties. Whilst the Credit Crunch brings an added degree of uncertainly to the District's economic prospects it seems likely that it is economic profile will continue to differ from that of the sub-region as a whole, because of its rural nature and the absence of large towns.

2.73 North Dorset is well positioned to take advantage of the likely changes to the sectors of the economy for a number of reasons:

- It performs well against a number of labour market indicators with a growing working age population, high economic activity rates and high skill levels;
- It has a track record for delivering employment land at above the planned rate;
- It already has sufficient employment land and a number of key employment sites identified to meet future workspace needs.

2.74 However, there are issues, such as site delivery and the need to ensure that employees' skills can be developed to adapt to changing business needs.

2.75 The challenge for North Dorset is to develop a more competitive economy that reflects wider sub-region aims, but also recognises the particular economic characteristics of the District and brings greater prosperity to its residents.

Community Vision for Gillingham and the far north of the District

2.76 The local community vision for Gillingham and the far north of the District is for:

- "A thriving local economy providing a range of employment opportunities appropriate to the skills and education of a growing population;
- Suitable opportunities for all members of our community to be fully engaged in cultural, sporting and artistic activities, underpinned by high quality, accessible facilities appropriate to the diversity of needs of local residents;
- A thriving, healthy and attractive town sensitively blended into its rural hinterland, cherishing and managing its built and natural environment and valuing and conserving its unique heritage;
- Enhanced transport links into Gillingham, improved management of traffic through Gillingham and better access to schools, work places and community facilities;
- A well-educated community, benefiting from high quality learning provision, guaranteeing a capable, adaptable workforce to meet the needs of the local economy and providing extensive opportunities for personal growth and enrichment; and
- A living, thriving, healthy community where everyone has a part to play in creating a better quality of life."

3. Potential for Gillingham to accommodate strategically significant growth

Introduction

3.1 This section assesses the overall long term growth potential of Gillingham to examine the town's potential to accommodate a level of growth which would meet the criteria for a Strategically Significant City or Town (SSCT) as well as identifying options for accommodating growth in the town within the existing RSS up to 2026.

Potential for Gillingham to grow to become a future Strategically Significant City or Town (SSCT)

3.2 The Section 4/4 authorities produced a joint report suggesting that there may be potential for "major expansion to grow the role of the town (Gillingham) into a SSCT of the future". The Section 4/4 Authorities recognised that this approach is inconsistent with the spatial strategy outlined in the Drat RSS and also noted that it was a "long term option" that would not be fully realised until after 2026. They suggested this option should be explored by way of a Partial Review.

SSCT Criteria

3.3 Within the Draft RSS Proposed Changes 21 towns within the South West region are identified as SSCTs. The SSCTs have not been identified because of size alone. The Draft RSS Proposed Changes refers to other criteria defining what constitutes an SSCT including:

- Being focal points for economic activity ,places where cultural facilities and a wide range of services fundamental to residents' quality of life;
- Where the requirements of individuals to travel can be catered for by better and more reliable public transport provision;
- Key places in the region with potential to achieve further significant development sustainably; and
- Being able to making best use of existing and planned infrastructure and investment.

3.4 A key consideration is the extent to which Gillingham has the potential to meet these criteria in the future. The key determinants influencing the potential include:

- Economic capacity and potential;
- Town centre capacity and potential to accommodate a wider range of services and facilities including cultural facilities;
- The potential for growth to be accompanied by sustainable travel patterns including the ability to enhance accessibility through extending and enhancing transport networks;
- The potential to accommodate additional development sustainably including consideration of issues such as social and community infrastructure provision and environmental capacity taking account of landscape character and visual impact, heritage and archaeology, impact on surrounding villages/towns, impact on ecology including designated areas, flood risk and drainage patterns.

3.5 To determine what would need to happen for Gillingham to become a SSCT evidence was considered from the Council's LDF Evidence base and benchmarking of other small and rapidly growing towns to establish possible growth trajectories in terms of town centre and employment

floorspace in relation to population, levels of self containment and availability and access of transport networks.

Population

3.6 Although population size isn't identified as a specific criterion relating to SSCT status clearly many of the other factors are related to population through the critical mass which is required to support services and facilities. Within Dorset the only SSCTs are the Bournemouth-Poole Conurbation, Dorchester and Weymouth, with Yeovil and Salisbury (both outside Dorset) also being categorised as SSCTs. These settlements have long been established as freestanding settlements with a legacy as urban centres representing centres of administration, industry or tourism. Dorchester at the time of the 2001 Census had a population of around 16,000 whilst the other nearest centres of Salisbury and Yeovil had populations of 43,000 and 41,000 respectively.

3.7 At the time of the 2001 Census, Gillingham had a population of 8,630 which has since grown to more than 11,000 people.

Economic capacity

3.8 The analysis of economic growth potential described in Section 5 has not identified a particular natural limit to the potential for the economic base within Gillingham to grow in the long term. The town is a service centre for the wider rural hinterland and has grown as a centre for manufacturing and services. Other than a small number of larger employers the base of the town is typified as a small business economy.

3.9 The growth of the economic base in Gillingham over the last 10-20 years has been partly facilitated by the availability of employment land and available supply of labour linked to the growing population of the town and new housing. These two factors have been less constrained than other towns and villages within North Dorset and the County as a whole.

3.10 In order for the local economy to grow sustainably to the level needed to fulfil SSCT criteria there would need to be the factors in place to enable:

a) Diversification in terms of the range of economic sectors represented within the economy;

b) Ability to attract and retain medium and larger sized firms;

c) Increased representation of higher skilled jobs;

d) Provision of appropriate opportunities and infrastructure to support further education and training at Post 16 level;

e) Provision of a wider range of employment sites and premises in appropriate locations;

f) Improved connections between Gillingham and the strategic road network and improved rail services; and

g) Increased capacity on the strategic road network most notably the A303.

3.11 Section 5 outlines several economic growth trajectories which show how the economy could grow and diversify. Based on past trends and accounting for the potential level of diversification which may be achieved based on actions (a) to (g) above it would take a significant period of time (more than 20 years) for the economy of the town to have the characteristics of SSCTs.

3.12 The benchmarking of other growing towns (refer to Appendix C) has shown that towns not located directly on the strategic road network with populations in the order of 15,000 – 25,000 population tend to have employment in the order of 7,500 to 18,000 jobs within their urban area (refer to Figure 3.1). Section 5 identifies that overall employment in Gillingham could grow from 3,500 to 6,300 up to 2026, this is some way short of the levels of employment which would be needed to support a larger sized town.

3.13 In terms of overall employment floorspace towns with populations in the order of 15,000 – 25,000 tend to have in the order of 100,000 to 250,000 sq.m of B Class employment floorspace (refer to Figure 3.2). Section 5 identifies that under the economic scenario with the highest level of growth (Economic Scenario 3) the Gillingham economy may be able to accommodate some 115,000 sq.m of B Class employment floorspace (towards the lower end of this range) by 2026.

3.14 In order to deliver higher levels of employment in Gillingham and more employment floorspace and to enable the town's economic base to develop beyond locally significant levels of growth, there would be a need for major investment in transport infrastructure networks coupled with further supporting actions to attract and support inward investment from outside the local economy. Actions aimed at attracting increased inward investment in Gillingham would help to establish the town as a strategic focus for employment and economic development within the South West region.

Figure 3.1 – Benchmarking of population and employment levels (selected settlements)

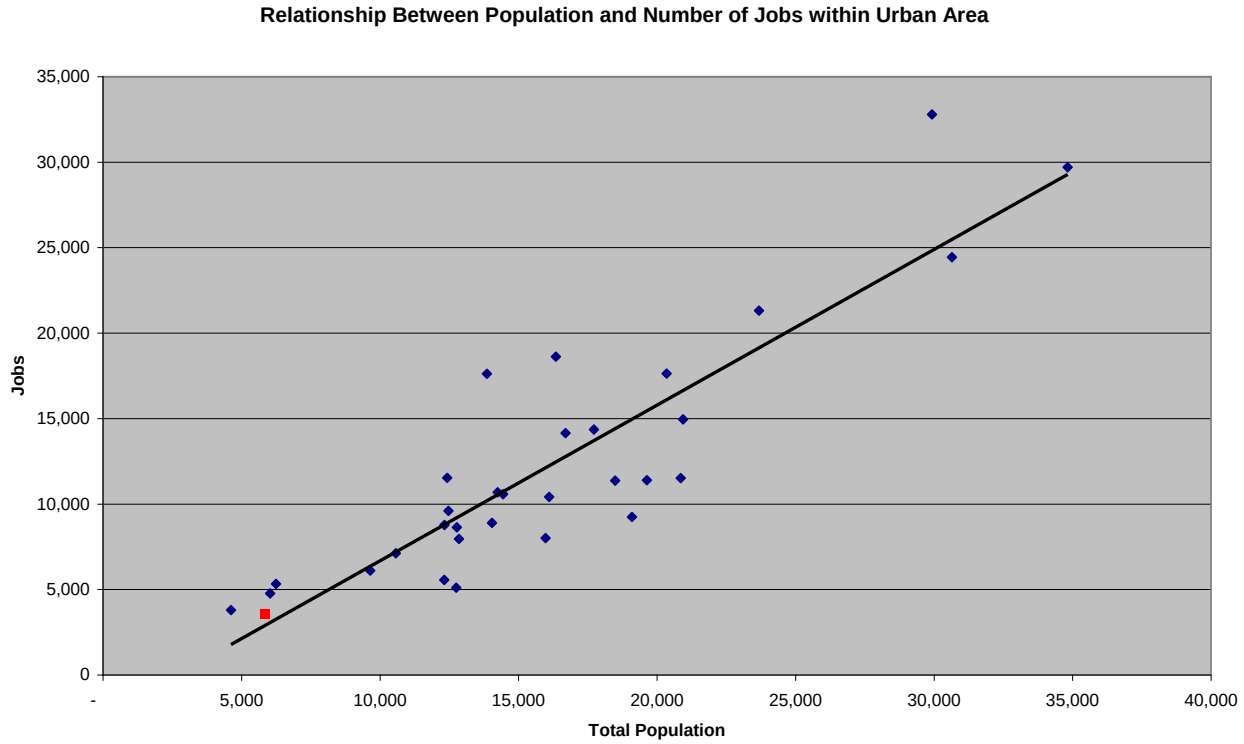
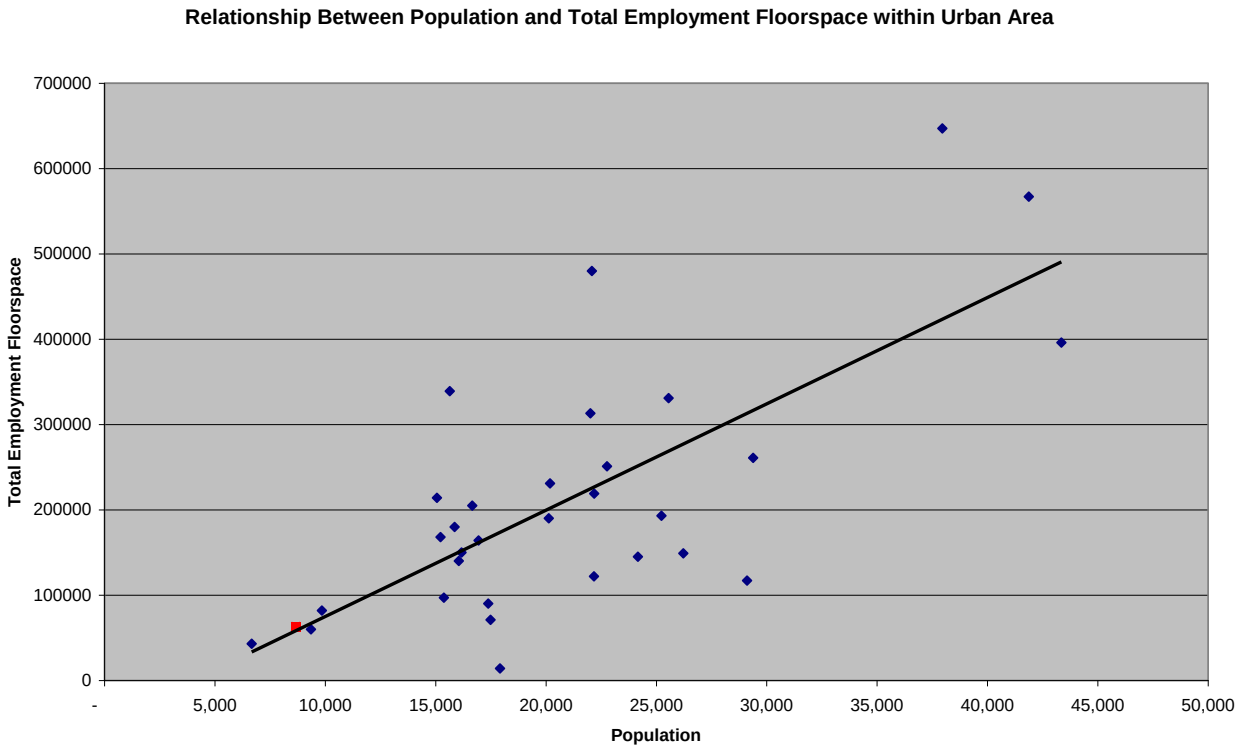


Figure 3.2 – Relationship between population size and B Class employment floorspace (selected towns)



Town centre and services

3.15 The town centres of SSCTs have a much wider range of retail and other town centre uses than Gillingham currently has. The Joint Retail Assessment[1] prepared to support the LDF identified that for most higher order comparison goods and services Gillingham residents have to travel either to Salisbury or Yeovil. The town also has a close relationship with Shaftesbury which offers a wider range of these goods and services than are available in Gillingham due to its role as a tourism centre.

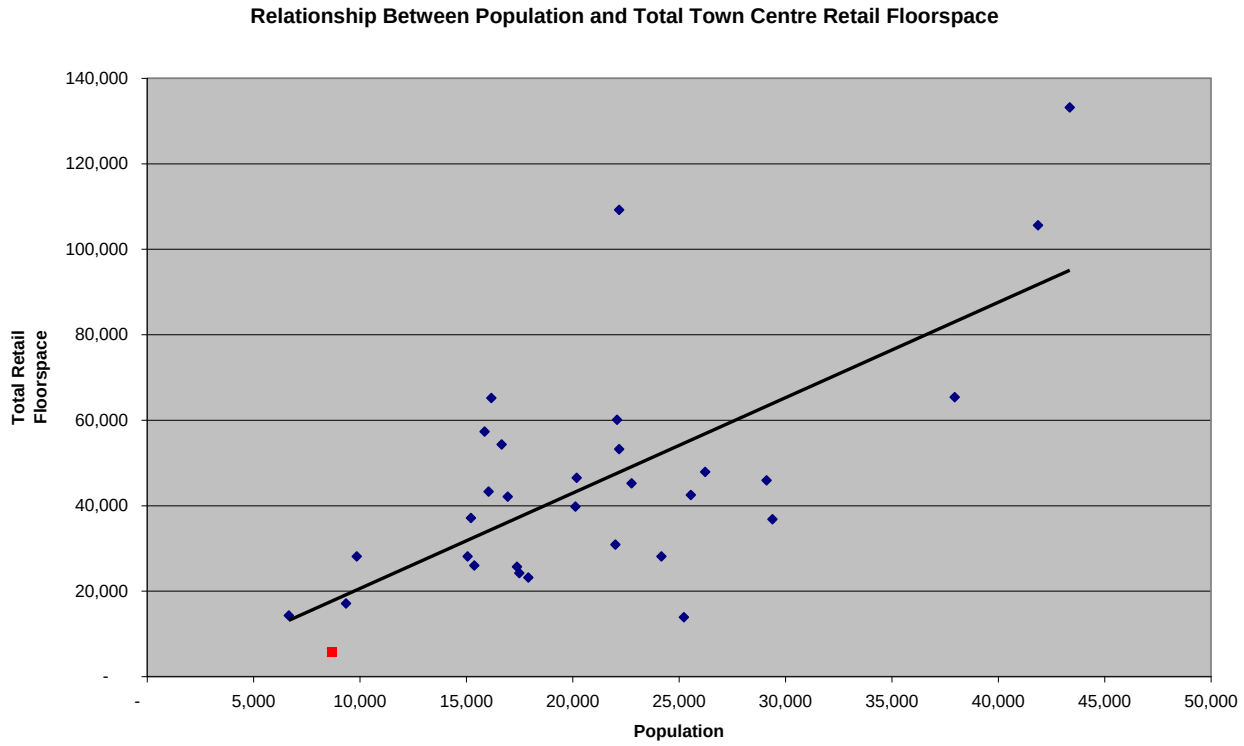
3.16 For Gillingham to establish itself as a higher order centre within the retail hierarchy it would need to grow significantly. With reference to the benchmarking in Appendix C, a town of between 15,000 – 25,000 population would normally have between 20,000 and 50,000 sq.m of town centre retail floorspace (see Figure 3.3). In addition there would be a need for the town centre to grow in such a way that it complemented the roles of Shaftesbury and other existing centres and did not impact on their viability or vitality.

3.17 Within Gillingham the existing town centre has some 7,000 sq.m of comparison retail floorspace (refer to Table 7.2). The town's potential for expansion is physically constrained by existing development and areas of flood risk. The only direction the existing town centre could grow would be to the south. Section 7 has identified that opportunities exist to extend the town centre to include the Station Road area which has capacity to accommodate further retail, office and town centre uses including up to 7,400 sq.m of additional retail floorspace which would in effect double the amount of retail floorspace within the town centre. It has been identified that this scale of growth could be successfully accommodated in transport terms.

[1] Joint Retail Assessment, NLP (2008)

3.18 However, to accommodate further growth there would be a need to consider the area to the south of Le Neubourg Way known as Chantry Fields. This area is of an appropriate size to accommodate the level of retail and town centre growth needed to support a town of up to 25,000 population. However, significant investment would be required in terms of additional transport links over the London-Exeter railway line to overcome the capacity issues of key road junctions within the town. A town centre which incorporated areas to the south of Le Neubourg Way would still not be of sufficient size to accommodate the functions represented in Yeovil or Salisbury. The scale of growth and range of uses would also need to be carefully considered in order to avoid impacting on the vitality and viability of Shaftesbury.

- Figure 3.3 - – Relationship between population and total town centre retail floorspace



Transport

3.19 Transport is a critical issue which would need to be tackled for Gillingham to become a SSCT. As the Council's Spatial Portrait document highlights, although Gillingham benefits from a location close to the Strategic Highway network including routes such as the A303, A30 and A350 it is not located on these routes. Significant investment would be required to improve links between the town and these networks. Section 11 of the study identifies that the costs of improving these links would be significant and could not be supported by the scale of developer contributions which could be realised in the town and would require external resources to enable delivery.

3.20 The Highways Agency has indicated that the A303 is at capacity and unable to support further vehicular trips and there are no proposals to improve this route within the Regional Transport Strategy. Up to 2026 this study has established a transport and land use strategy which could be realised without improvement to the A303 by focusing growth initially to the south of the town, improving links southwards to the A30 and making improvements to intra settlement routes and key junctions in the town.

3.21 The Network Management Plan prepared by Network Rail does not include proposals to dual the London –Exeter Railway beyond Salisbury which would be required to deliver more than an hourly

service. In addition there are no plans to increase the number or frequency of bus routes within the town which require public subsidy for them to operate at existing levels.

3.22 This study has identified an approach to development accounting for potential development of the economic base, town centre and local community facilities which has the potential to achieve an appropriate level of self containment with some 75% of new residents living and working in the town. However, to support a level of growth beyond that identified in the preferred growth scenarios there would be a need for additional major investment in strategic and local transport networks for growth to be delivered sustainably.

Environmental capacity

3.23 The scale of growth which could be achieved at Gillingham sustainably is limited by its environmental capacity. Compared with other towns within North Dorset, Gillingham is not constrained by national ecological or landscape designations. However, there are a number of features which constrain the extent to which the town can be physically expanded without creating major significant impacts on environmental and heritage assets.

Landscape and cultural heritage

3.24 The Landscape Character Area Assessment prepared by the Council identifies the key characteristics of landscape in the District which are significant and define its character. The Gillingham Landscapes and Open Spaces Assessment Report (2004) considers the quality of the landscape and its sensitivity to change and potential to accommodate development in more detail.

3.25 In summary the conclusions of these two studies with respect to the landscape are summarised below.

3.26 Gillingham is located in the Blackmore Vale at the confluence of three rivers. The topography rises to the east and west of the town creating a natural visual envelope which contains the existing settlement and adjoining agricultural landscape.

3.27 The western side of the town is encircled by the “North Dorset Limestone Ridges” landscape character area an area of elevated plateau areas of undulating farmland landscape with distinctive sloping edges in places. There are open views from higher areas across the Blackmore Vale to the chalk escarpment. There are numerous twisting hedge lined lanes, straighter ridge top roads and many public rights of way. From the edge of the existing Gillingham built up area the land slopes upwards from around 70 metres to 130 metres.

3.28 The northern, eastern and southern margins of the town are located within the “Blackmore Vale” landscape character area. This is defined by a broad expansive clay vale which is tranquil and unified. It includes a unique mosaic of woods, straight hedgerows and grassland fields dotted with distinctive mature Oaks. Open views are possible across the undulating to flat pastoral landscape to the chalk escarpment backdrop. The area also contains a network of ditches, streams and brooks which drain into the tributaries of the Stour.

3.29 Land to the north of the town is relatively flat. However it serves as a buffer zone between the northern edge of the Gillingham urban area and the historic village of Milton on Stour about ¾ mile away, the centre of which is a Conservation Area.

3.30 The current easterly extent of the town is bounded by Shreen Water. Land to the east rises upwards from around 70 metres to 100 metres at the summit of Bowridge Hill.

3.31 Land to the south of Bowridge Hill slopes away gently. South of the River Loddon the land is a relatively flat area of pastoral landscape until land rises again where the ‘North Blackmore Rolling Vales’ character area begins towards East Stour and Shaftesbury.

3.32 Within the landscapes described above the higher ground to the east and west of the town constrain the potential area which may be developed within the existing visual envelope of the town. To the north the most significant landscape constraint is the need to maintain a definable

visual boundary around the historic village of Milton on Stour which requires a degree of separation from the Gillingham urban area to achieve this and to avoid the coalescence of the two settlements. The hamlet around Colesbrook also should be protected from encroachment when considering areas with potential for development.

3.33 The area to the south of Bowridge Hill and the southerly extent of the existing urban area is less constrained in visual terms towards the hamlet of Madjeston and towards Shearstock Farm.

3.34 The potential for land in this area to accommodate development is affected by flood risk areas linked to the main watercourses and sensitive natural and archaeological assets such as Kings Court Wood an Ancient Woodland and Kings Court Palace a Scheduled Ancient Monument.

Flood risk, drainage and ecology

3.35 Notwithstanding landscape character the potential of land to accommodate development is affected by areas of flood risk. The Strategic Flood Risk Assessment (SFRA) undertaken on behalf of the Council has defined the areas at risk of flooding. In accordance with PPS25 and through the application of the sequential test areas located within Flood Risk Zones 1 and 2 should not normally be developed.

3.36 In addition, consultations with the Environment Agency, which have taken place as part of this study, have highlighted the high ecological value of rivers and streams in the town in terms of their biodiversity and as habitats for a number of protected species.

3.37 There is also a need to consider the cumulative effect of development in terms of drainage and the effect of runoff on flooding. Where possible sites should incorporate Sustainable Urban Drainage systems to contain the impact of drainage from sites on nearby watercourses.

Conclusions on potential for Gillingham longer term growth

3.38 The above considerations influence the extent to which Gillingham has potential to develop further in the longer term (beyond 2026).

3.39 This report identifies that under refined scenario 1 (see section 4), growth in Gillingham could include approximately 3,300 dwellings without requiring improvement to or impacting on the A303 by improving self containment and making improvements to the connections to the A30. This would increase the population to around 15,000 by 2026 (2,295 dwellings), with a further 1,071 dwellings after 2026.

3.40 In terms of Gillingham's longer term growth potential, and whether the town could become an SSCT Gillingham's potential to develop its economic and service centre functions do not limited its potential to become a town of perhaps 20,000 – 30,000 people over a period of some 30 - 40 years. However, its future growth options are currently constrained for a number of reasons:

- Economy – the capability of the economy to grow and diversify will slow down the growth rate;
- Transport - the potential to deliver appropriate improvements in accessibility and improved transport networks in terms of the capacity of the strategic transport network and the need for major development beyond the scenarios considered in this report;
- Town centre – growth of the existing town centre would be limited by the potential opportunities that exist in the town centre for new development, and the need to ensure the town centre growth does not harm the vitality / viability of Shaftesbury;
- Community infrastructure - growth would also need to be supported by appropriate social and community facilities and additional green infrastructure beyond that identified during the course of this study;
- Landscape / environmental capacity - the environmental capacity of the area also affects the potential of land to accommodate future development to meet the criteria for sustainable

development set out in PPS1 both long term and in the period of the emerging Core Strategy to 2026. The Council's Strategic Housing Land Availability Assessment (SHLAA) has accounted for these factors in establishing the suitability of land for development. In particular land to the north west and north east of the town is less able to accommodate further growth because of landscape constraints;

3.41 In terms of growing Gillingham beyond the growth scenarios set out in this report, it is not simply a case of providing more infrastructure to overcome these issues, in some instances that could help to overcome issues, however on the whole there is a need for a shift in both Regional and Local priorities to enable further growth. Appendix I sets out the thresholds for infrastructure provision.

3.42 To achieve an increased level of growth (over that identified in the growth scenarios) the following would be required:

- Transport – upgrade to A303, this would be subject to further appraisal that is beyond the scope of this study. This would have to be at a sub-regional level as other settlements in the A303 corridor would need to be considered. The Highways Agency would need to be convinced that an upgrade is necessary and include it in the Regional Transport Strategy.
- Economy – Regional priorities would need to change in order to place an emphasis on creating a step change in Gillingham's economy. Diversifying the Gillingham economy and achieving greater inward investment will be partly related to achieving strategic transport improvements (to the A303), and a high quality telecommunications network, attracting and retaining a highly skilled workforce and also creating an attractive place to locate a business and work. Local planning policy would need to assist in the delivery of a range of type and size of business accommodation to attract both higher quality and more medium and large businesses to the town.
- Town Centre – Opportunities for expansion of the existing town centre are limited to the expansion into Station Road. For the town to grow beyond the growth scenario there would be a requirement to expand onto Chantry fields, where both flooding issues and the loss of open would need to be overcome to achieve this. Without this expansion there would be a need to develop a secondary centre. The two options are developing to the north of the town or to develop to the east along the railway line, there are issues with this in that this may in effect be establishing a new settlement and could harm Gillingham town centre. These options require further consideration that is outside the scope of this study.
- Community Infrastructure – Further expansion would require commensurate community infrastructure provision. Health care and primary school facilities could be provided within any additional urban extensions, however town wide facilities such as additional indoor sports provision, community centres and an additional secondary school would be required. Finding sufficient land for these facilities in a location accessible to new communities would need to over come the landscape and environmental issues raised above.
- Landscape / environmental capacity – To overcome these issues further growth would have to be accommodated to the south of the town. This itself raises issues about impacts on Shaftesbury, there would be a need to carefully consider this issue at the local level.

4. Future growth scenarios

Introduction

4.1 This section of the report defines and evaluates potential future growth scenarios for Gillingham. The scenarios have not been constrained by existing RSS growth requirements but have been informed by consideration of factors which influence the extent to which growth may be accommodated sustainably in environmental, social and economic terms.

4.2 The package of supporting infrastructure needed to accommodate growth has also been considered along with an assessment of viability and deliverability issues. The availability and delivery of appropriate transport infrastructure has been found to be a key determinant of the level of growth which may be accommodated sustainably.

Establishing Overall Growth Potential

Current Housing requirement to 2026

4.3 The proposed changes to the South West RSS include a housing requirement for North Dorset District of some 7,000 dwellings for the period 2006 to 2026 (equivalent to 350 per annum) which compares with 5,100 within the Draft RSS. The SHLAA identifies enough land within the District to deliver over 13,000 dwellings over the next 15 years (see Table 4.1).

4.4 In line with principles set out within the RSS in Development Policy B which seeks to concentrate development outside of SSCTs within Market towns, growth in the District will be concentrated in the larger settlements of Blandford Forum, Gillingham and Shaftesbury.

4.5 Of these three towns, the area of land suitable for development is greater around Gillingham compared with the other two towns.

Strategic Housing Land Availability

4.6 Having established the strategic elements that inform growth potential at Gillingham, the consultants reviewed areas capable of accommodating urban extensions. This comprised of land adjoining the existing Gillingham urban area but falling within the landscape envelope around the town described above.

4.7 In establishing suitable sites, the starting point was to assess the North Dorset District Council's Strategic Housing Land Availability Assessment (SHLAA) completed in 2009. The SHLAA will inform the production of the Council's Core Strategy and Site Allocations DPD. The SHLAA identifies a 5 year supply of deliverable housing sites to ensure that land supply is not a barrier to housing. In addition the assessment identifies sufficient developable land to meet the needs for 6 to 15 year period.

4.8 The Council identified sites in the SHLAA based on those put forward from landowners and developers following a call for sites and those identified by the Council through other sources (land with no other apparent constraints to development).

4.9 The SHLAA included an assessment of sites in terms of their suitability, availability and achievability and assessed the potential capacity for development at each site applying density yardsticks and taking account of local character and constraints.

4.10 The SHLAA identified that the sites that were considered to be deliverable in the first 5 year period would supply 1,834 dwellings across the District, which is sufficient to meet the RSS requirement

for 1,750 and make up for the shortfall in completions in 2006/7. The SHLAA identified 72 sites in Gillingham 17 of these having planning permission and 16 were excluded following assessment.

4.11 Table 4.1 shows a summary of deliverable sites by settlement. The sites in Gillingham have potential for a total of 266 units in the first 5 year period. This is 15 % of total potential 5 year District-wide supply. For the following 10 year period there is potential supply of 4,417 units, equivalent to 39% of the total potential supply of units District-wide for this period (see Appendix G for a list of the sites included).

Table 4.1 – Potential Residential Units from NDDC Housing Land Supply

Settlement	Total Units 5 year Supply (2007 – 11)	%	Total Units year 6 -15 supply (2012 – 26)	%
Blandford	535	29	1,939	17
Gillingham	266	15	4,417	39
Shaftesbury	440	24	548	5
Other towns / villages	593	32	4,381	39
Total	1,834	100	11,285	100

Source: NDDC SHLAA 2009

4.12 If the land in the 5 year supply comes forward and the potential units identified are completed (1,834 dwellings) there would be a further need for 5,166 units for the period up to 2026 to meet the housing requirement in the Proposed changes to the RSS (7,000 dwellings).

4.13 Applying the proportions of potential supply in the District identified in Table 4.1, if Gillingham supplied 39% of units this would represent a total of some 2,066 additional dwellings between 2012 and 2026. This is equivalent to 137 units per annum, with reference to Table 4.2, this would be similar to past rates of development in Gillingham between 1994-2007.

Table 4.2 – Gross Dwelling Completions in North Dorset

Settlement	Gross Dwelling Completions 1994 - 2007	Completions Per Annum
Blandford	1,164	89
Gillingham	1,748	134
Shaftesbury	528	41
Other towns/settlements/rural areas	2,549	196
Total	5,989	460

Source: NDDC AMR 2008

4.14 The SHLAA (Table 4.1) indicates that there is capability for land in Gillingham to accommodate to a greater quantum of development than previous rates of development suggest. The additional potential represents (up to 2,351 units) over and above previous rates of development if all land were to be developed.

Additional sites with potential for growth

4.15 The consultants reviewed the findings of the SHLAA including those sites which were excluded from the assessment (mainly sites put forward as part of the call for sites which did not fulfil suitability, availability, or achievability tests). The Consultants also undertook a desk top review

and a strategic site reconnaissance exercise to identify land not previously identified as part of the SHLAA to consider its potential for development.

4.16 This exercise resulted in six town centre sites and two edge of settlement sites in Wyke being identified as being capable of being developed for housing or other uses. The additional sites include:

- Land at Wyke Hall;
- Wyke land east of Dry Lane;
- Wyke land east of Culvers Lane;
- Part of Chantry Fields;
- Focus store / car showroom (Station Road);
- Corner Le Neubourg Way / Station Road;
- Station Road land to north of station;
- Car sales forecourt Station Road; and
- Station car park and storage sheds (Station Road).

4.17 These sites were added to those identified in the SHLAA for consideration in developing future growth options and further assessment. Appendix G includes a table and map (Figure G.1) with all the SHLAA sites and all the additional sites above.

Definition and Assessment of Growth Scenarios

4.18 The consultants tested the overall level of growth Gillingham may be able to accommodate sustainability through a scenario building approach. The process included:

- Step 1 – Develop initial growth scenarios to investigate alternative scales and distribution of development
- Step 2 – Establish infrastructure needs and supporting amenities required to support growth
- Step 3 – Evaluate initial growth scenarios against sustainability criteria to establish town wide potential
- Step 4 - Assess sustainability of individual land parcels
- Step 5- Refine the initial growth scenarios to reflect the scale of growth which can be accommodated sustainably at the settlement scale and the potential for individual parcels to accommodate growth sustainably.
- Step 6 – Refine assessment of infrastructure needs and supporting infrastructure to reflect refined growth scenarios.

Step 1: Initial growth scenarios

4.19 The initial growth scenarios sought to test the overall scale of growth which may be accommodated at Gillingham whilst fulfilling the development principles set out in the RSS. The scenario building process was also used to consider alternative growth directions in order to assess whether different directions of growth perform differently in terms of their potential benefits, impacts and contribution towards meeting sustainable development objectives.

4.20 The land considered in all scenarios included the SHLAA sites and additional sites identified by the consultants identified above.

4.21 Following consultation with North Dorset District Council, and Dorset County Council, a workshop with local stakeholders (see Appendix H for a list of attendees) and site visits to locations in and around the town, four growth scenarios were formulated for consideration. These were:

- Maximum growth – maximising potential of all land capable of supporting development;
- Southern focus – concentrating growth in the south of the town;
- Northern focus – concentrating growth in the north of the town;
- Incremental growth – dispersed growth in multiple directions to north and south of town.

Key assumptions

4.22 The initial scenarios reflected assumptions from the SHLAA regarding:

- Developable area of land parcels - areas within flood risk zones 1 and 2, ecological designations and other constraints;
- Densities – The SHLAA sets out assumptions about the likely capacity for housing that could be achieved on each site. For sites that are not included in the SHLAA a density of 30dph was applied for sites on the edge of the urban area, for Chantry Fields a density of 45dph has been assumed (as the site is closer to the town centre), and for the additional town centre sites a density of 60dph is assumed, reflecting the pattern of development which has been achieved on town centre sites.
- To identify the population yield that would be generated from development an average household size of 2.17 has been assumed. This reflects the projected average household size for the District in 2026 (Source: DCC Household Projections).

4.23 An allowance was made for the land required for supporting infrastructure and deducted from the developable area. This reflected the following assumptions:

- There is a need for sites to accommodate appropriate open space to meet the needs of the future population. Within urban extension sites requirements have been derived by applying the Fields in Trust (FIT) standard (2.45ha/1000). It has been assumed that 1/3rd of open space requirement may be accommodated within floodplain areas.
- The large urban extensions to the south and north west would require provision of a local centre (0.35ha shops and doctors/services) and land to accommodate primary school provision. In addition it has been assumed that the Southern site would include a 2ha site for the proposed diagnostic centre which the PCT has identified a requirement for.
- In addition, sufficient employment land was also included providing for the equivalent of some 75% of new economically active residents having potential to live and work in Gillingham.

4.24 Further explanation and justification of these facilities is provided in Sections 8 and 9.

4.25 Each of the growth scenarios is described below followed by a summary of the supporting infrastructure and amenities required to accompany each scenario. Each scenario includes sites from the NDDC SHLAA and in some cases additional sites that the consultants have identified. (See Appendix G for a full list of sites that are included in each of the scenarios - for the purposes of the study the Consultants have given each site a unique reference number).

Scenario 1 – Maximum Growth

4.26 The maximum growth scenario, incorporates all potential land identified as capable of supporting development, including growth to the north west, north east, south, part of Chantry Fields, sites within the town centre (at Station Road) and land west of Wyke. The potential dwellings and population from this scenario are:

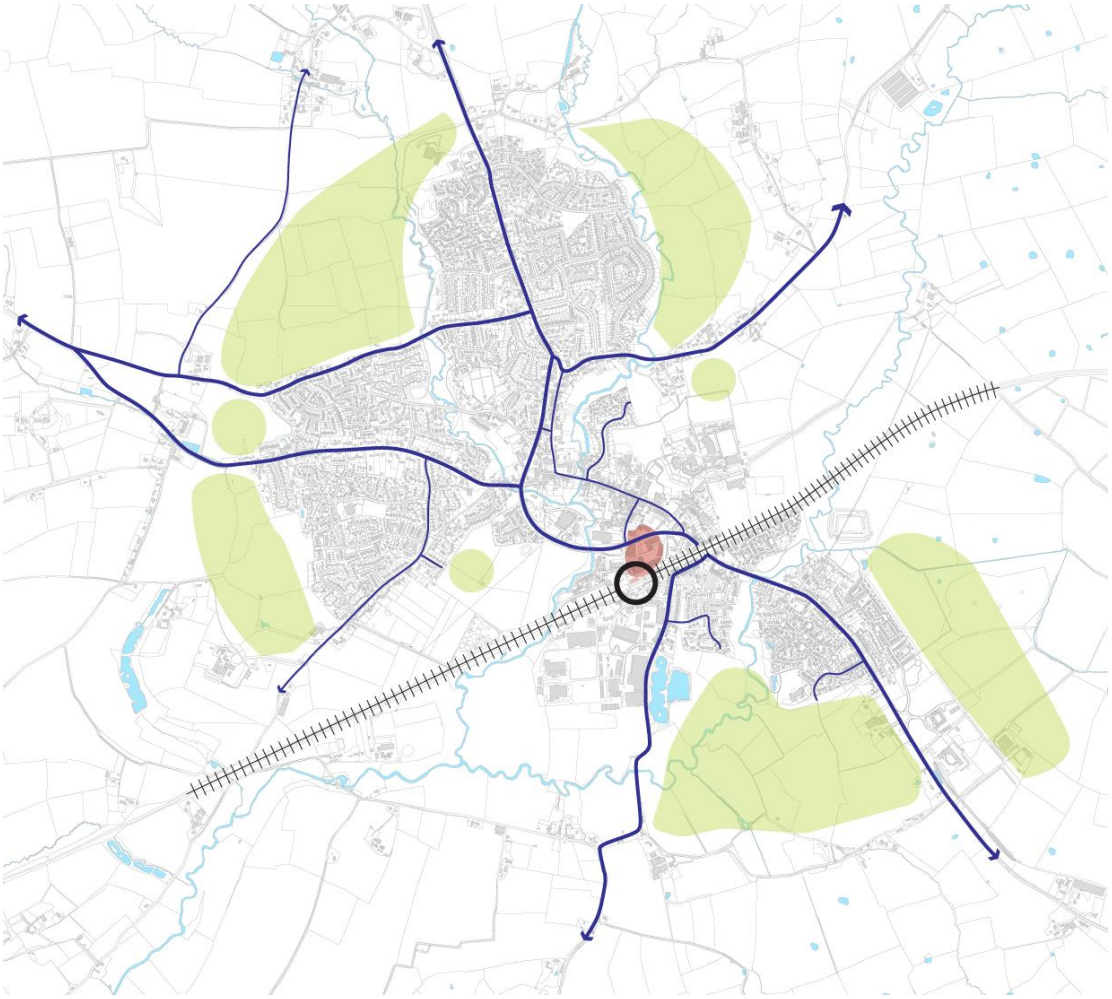
- Potential dwellings – 4,976

- Potential Population – 10,798

4.27 The maximum growth scenario would require:

- 5 forms of entry for primary school and would cause significant problems in accommodating growth at the secondary school;
- Accommodation for 6 new GPs;
- 26.45 hectares of open space;

Figure 4.1 - – Scenario 1: Maximum growth



Scenario 2 - Southern Focus

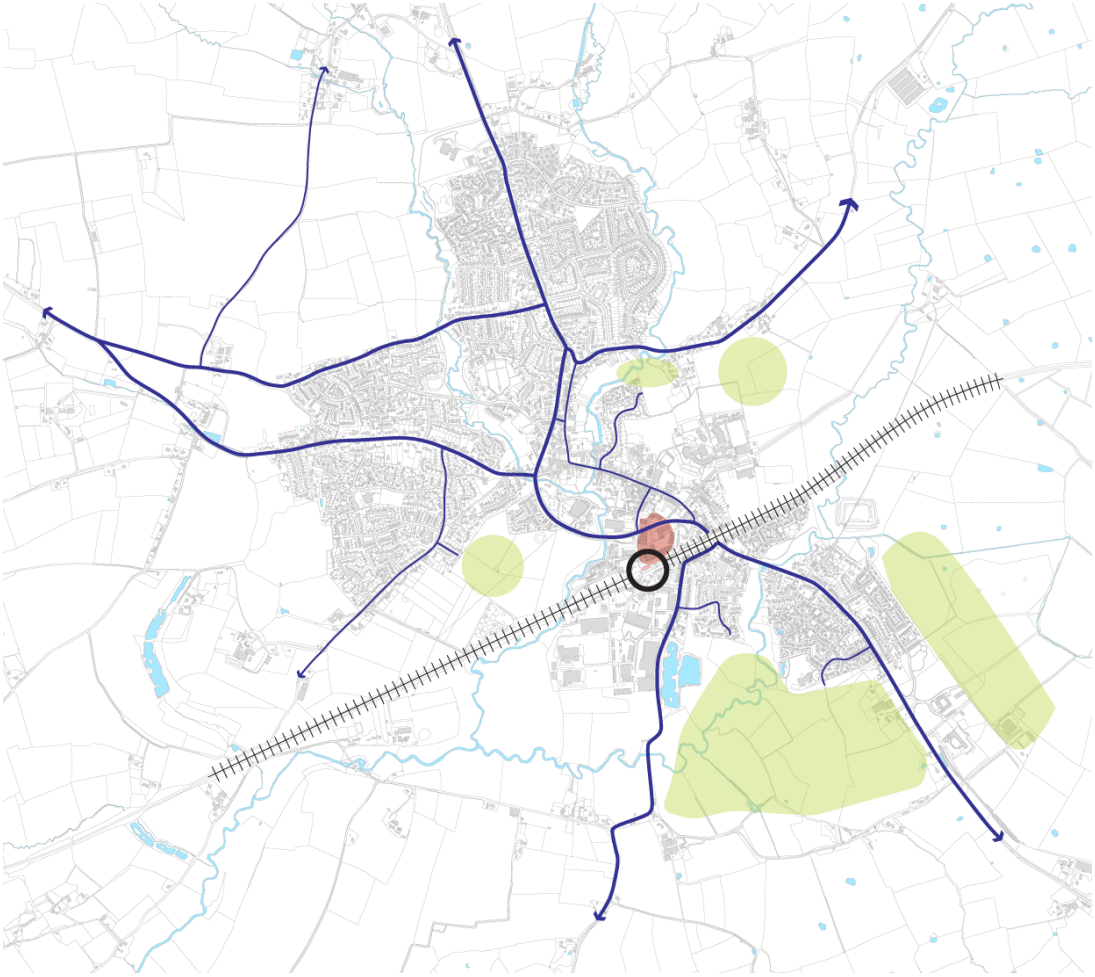
4.28 This scenario concentrates growth to the south of the town including Chantry Fields and some development to the east at Windybridge Farm and at Station Road. No growth is envisaged to the north east, north west, or west of the town. The potential dwellings and population from this scenario are:

- Potential dwellings - 2,490
- Potential population - 5,403

4.29 The southern focus growth scenario would require:

- 2.5 forms of entry for primary schools;
- Secondary school requirements accommodated at existing secondary school;
- Accommodation for 3 new GPs; and
- 13.23 hectares of open space;

Figure 4.2 – Scenario 2: Southern focus



Scenario 3 – Northern Focus

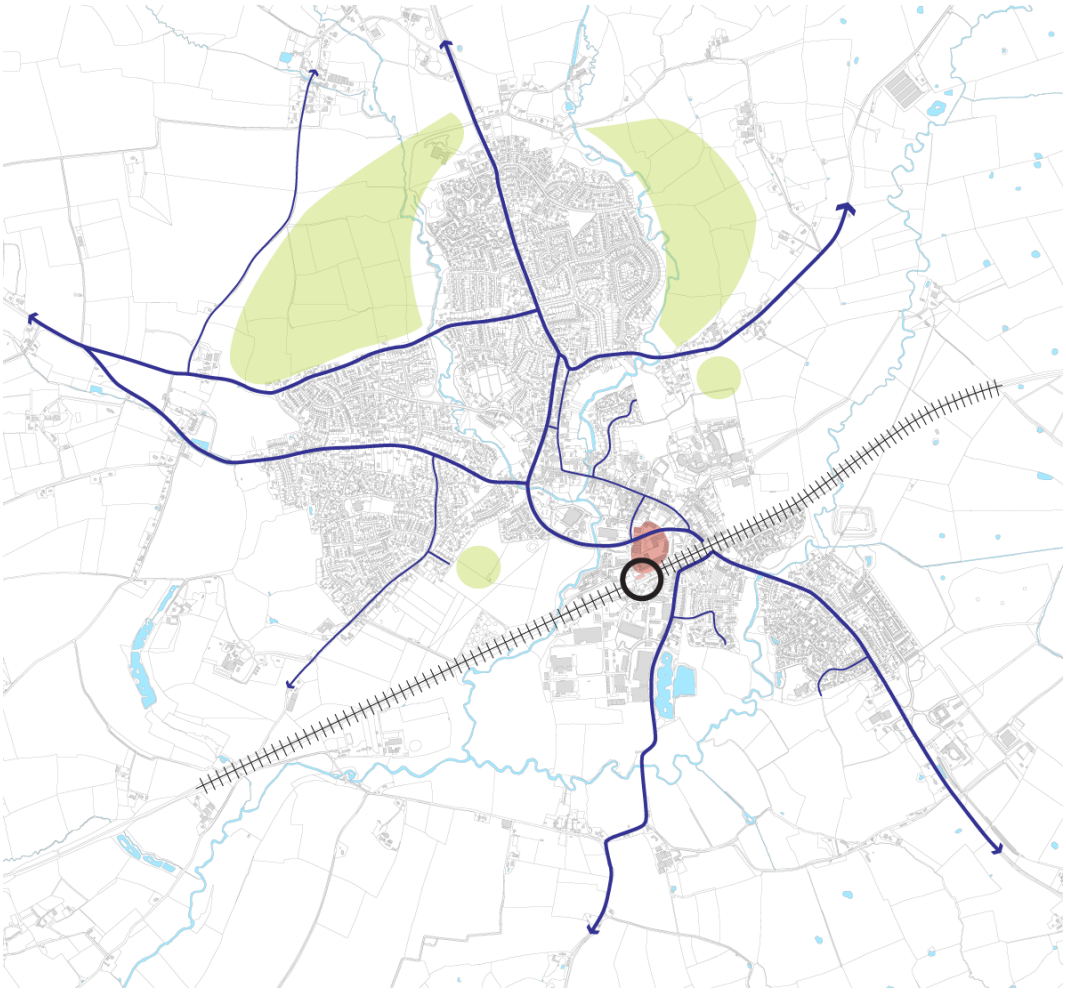
4.30 This scenario concentrates growth to the north of the town, it excludes: land to the west of Wyke and the southern sites but includes some growth to the north east of town and Chantry fields as well as growth at Station Road. The potential dwellings and population from this scenario are:

- Potential dwellings - 2,529
- Potential population - 5,488

4.31 The northern focus growth scenario would require:

- 2.5 forms of entry for primary school;
- Secondary school requirements accommodated at existing secondary school;
- Accommodation for 3 new GPs; and
- 13.44 hectares of open space.

Figure 4.3 – Scenario 3 Northern focus



Scenario 4 – Incremental Growth

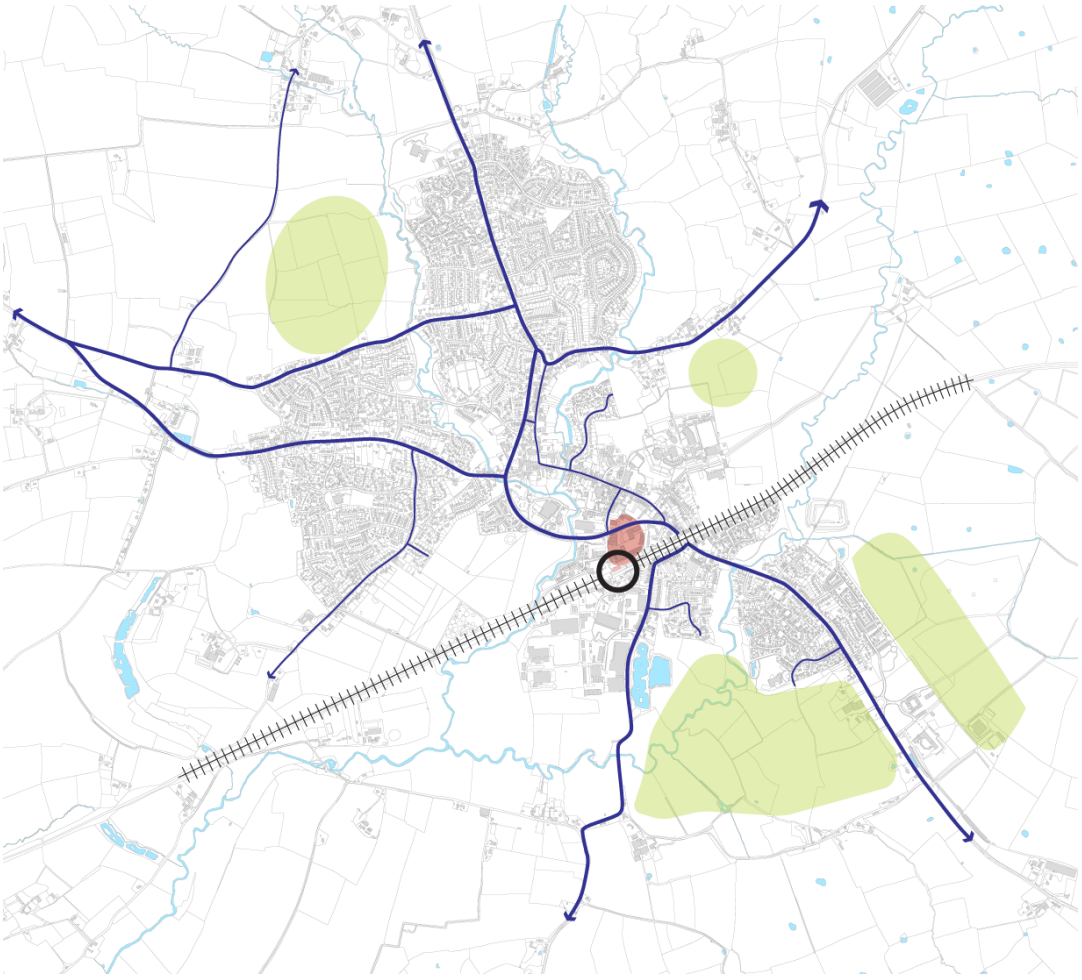
4.32 This scenario sees growth happening incrementally and to a lesser extent in both the southern sites and the North West site, it also includes town centre sites (at Station Road), and part of the site at Windybridge Farm. The potential dwellings and population from this scenario are:

- Potential dwellings – 2,242
- Potential population – 4,865

4.33 The Incremental growth scenario would require:

- 2 forms of entry for primary school;
- Secondary school requirements accommodated at existing secondary school;
- Accommodation for 3 new GPs; and
- 11.92 hectares of open space.

Figure 4.4 – Scenario 4: Incremental Growth



Step 2 – Establish infrastructure needs and supporting amenities required to support growth

4.34 For all of the scenarios an overall assessment was made of supporting infrastructure required to accompany the overall level of growth in order that capacities and constraints on the overall level

of growth could be established. This work has been summarised in the following sections of the report:

4.35 Section 5 explores possible economic growth trajectories for the Gillingham economy including consideration of how different levels of growth may be achieved. This section indicates the overall level of employment which may be achievable and has informed "self containment" parameters and the overall level of housing which may be supported within the capacities of the existing transport infrastructure (by catering for growth within the town to discourage out-commuting by road in the peak period).

4.36 Section 6 explores the impact of growth scenarios on strategic transport networks as well as the capacity of key junctions within the town. Access to each land parcel and the accessibility of parcels is also considered (findings in Appendix F).

4.37 Section 7 identifies the additional retail and other town centre facilities which would be required to accompany growth, and supporting environmental improvements required to improve accessibility and image and attractiveness of the town centre for an enlarged population and a potential strategy for addressing these needs.

4.38 Section 8 identifies the green infrastructure sport and recreation facilities needed to support growth.

4.39 Section 9 considers requirements for other social and community facilities including primary, secondary and further education provision; health facilities and other community facilities required to accompany growth.

4.40 Section 10 considers the additional pressures growth may place on utilities infrastructure and how any shortfalls in capacity may be addressed.

4.41 The issues and pressures arising from this assessment were taken into consideration in the evaluation of the initial growth scenarios and their refinement. The evaluation of the growth scenarios is described in the next section.

Step 3 – Compare performance of initial growth scenarios against sustainability criteria to establish town wide growth potential

4.42 This section provides an evaluation of the initial growth scenarios and an assessment of individual development sites that make up the growth scenarios. The information to inform the evaluation process has been drawn from information and assessment described in other sections of the report.

4.43 The site evaluation and transport testing have enabled the selection of refined growth scenarios which have been subsequently used to confirm the infrastructure requirements to support growth, the costs and delivery implications.

4.44 The process of refining growth scenarios has necessarily been iterative in order to manage the multiple issues and criteria affecting the overall level of growth and the extent to which it may be accommodated sustainably.

Sustainability Principles

4.45 In evaluating the individual sites, the Consultants first established a set of sustainability principles that should apply to the future growth of Gillingham. The sustainability principles were agreed following consultation with NDDC and DCC.

4.46 Principles were drawn from Development Policy B of the Proposed Changes RSS, the Draft Eco Towns PPS and North Dorset District Council's Core Strategy Sustainability Appraisal Scoping

Report. From these documents a series of objectives and criteria were developed to evaluate future growth options and potential development sites.

Draft RSS Proposed Changes Development Policy B

Development at Market and Coastal Towns

At Market and Coastal Towns that meet all of the following criteria:

- There is an existing concentration of business and employment and realistic potential for employment opportunities to be enhanced
- There are shopping, cultural faith, educational, health and public services that meet the needs of the settlement and the surrounding area
- There are sustainable transport nodes that can be maintained or developed to meet the needs of the settlement and the surrounding area

Provision will be made for housing, employment, shopping and other services that increase their self containment and enhance their roles as service centres.

4.47 The Council's Sustainability Appraisal Scoping report groups objectives into five broad themes. These have been translated into a series of Sustainability Principles to guide growth in Gillingham:

- **Economic growth and town centre:**
  - Diversify Gillingham's economic base, to include a greater proportion of service uses;
  - Maintain housing and employment balance in Gillingham;
  - Increase the level of self containment in Gillingham;
  - Improve the economic competitiveness of Gillingham's economy through provision of the necessary infrastructure for a more sustainable economy;
  - Encourage innovation, improve productivity and regenerate the town, creating a business environment in which new businesses start and existing businesses grow;
  - Improve skills and incomes of the lowest paid and provide satisfying work opportunities for all so that people can realise their full potential;
  - Provide a mix and range of town centre uses in Gillingham that is commensurate with the level of growth envisaged, and ensure that the Gillingham town centre serves the needs of the growth locations;
  - Create a high quality public realm that enhances the image and desirability of Gillingham as a place to work and visit;
- **Transport:**
  - Provision of more sustainable forms of travel.
  - Encouraging walking and cycling.
  - Improved inter and intra settlement public transport.
- **Environmental Protection:**
  - Reduce the impact of climate change, including flood risk and make best use of the opportunities that arise;
  - Protect and where opportunities arise, enhance habitats and biodiversity;
  - Protection of existing open space and provision of new open space to serve the needs of Gillingham's existing and future population;

- Enhancement in green networks and green corridors;
- Improve the quality of the built environment, protecting the town's heritage assets and distinct townscape and enabling the integration of existing and new development in Gillingham.

- **Social Progress**
  - Provide housing that is affordable and that meets the needs of the community;
  - Create balanced communities where housing, employment and community facilities are delivered to meet needs, improving access to essential services;
  - Provide a range of supporting service and community facilities including (education, health, leisure etc);
  - Reduce barriers to individuals participating fully in their community promoting a strong, vibrant and inclusive way of life;
  - Improve quality of life through well designed developments.
- **Prudent Use of Resources:**
  - Reduce the impact that new development in Gillingham has on the environment;
  - Promote energy and resource efficiency, encouraging clean energy production;
  - Reduce pressure on the districts natural resources, reducing waste and promoting the efficient use of land, reuse and recycling of resources.

Assessment of Initial Growth Scenarios

4.48 A qualitative assessment of the initial growth scenarios was initially undertaken at town wide scale in order to establish the overall level of growth which could be supported at Gillingham taking into account of the Draft RSS Proposed Changes Development Policy B criteria and Sustainability Principles developed from the NDDC Core Strategy Sustainability Appraisal Scoping Report. This was followed by a more detailed appraisal of individual land parcels capable of supporting growth in order to identify those which had the greatest suitability to accommodate development against a range of sustainable development criteria.

Summary of assessment findings

4.49 Figure 4.5 provides a summary of the assessment of the Initial Growth Scenarios. It shows that overall Scenario 2 (Southern Focus) performed the best compared with the other 3 Scenarios and that there were key limitations within the other scenarios affecting the overall level of growth which could be accommodated. Scenarios 1 had the greatest number of limitations. These are explained further below.

Figure 4.5 – Assessment Summary: Initial Growth Scenarios

Evaluation Criteria	Scenario 1 Maximum Development	Scenario 2 Southern Focus	Scenario 3 Northern Focus	Scenario 4 Growth North and South
Economic development and employment opportunities				
Service centre functions and social infrastructure				
Potential to increase self containment and enable sustainable transport				
Environmental capacity				

Green = no constraint on development

Amber = significant constraint on development requiring mitigation to make it acceptable

Red = absolute constraint on development. Appropriate mitigation either not possible, viable or deliverable.

Explanation of key limits to development

Economic development and potential for employment opportunities to be developed and enhanced

4.50 Section 5 of the report establishes 3 economic development scenarios which capture the type and scale of economic growth which could be achieved in Gilllingham. There is potential for between 2,500 and 3,250 new jobs to be accommodated within the Gillingham economy. The key drivers to facilitating these jobs are:

- The size of the economically active population able to access employment opportunities. This is affected by the following factors:
  - Gillingham has a relatively local labour market catchment with a low level of in-commuting.
  - The potential for the economy and employment to grow is linked to the level of new housing development as well as the demographic structure of the resident population;
  - There needs to be a good fit between skill levels of the workforce and the type of local employment opportunities.
- The ability for the Gillingham economy to diversify to accommodate a greater proportion of service sector jobs and key growth sectors. This is linked to:
  - the provision of appropriate infrastructure in terms of available land and premises of the appropriate size, type and quality to meet the needs of firms with potential to expand or locate in the town;
  - the success of stimulating development of the small business sector. This may be aided by the provision of business support services and provision of accommodation on terms attractive to small and medium sized enterprises (SMEs);
  - provision of additional services and facilities to stimulate employment growth in retail, other business services and public sector employment;

- provision of further education and training opportunities possibly through the establishment of a specialist facility linked to one of the key sectors identified for the A303 Corridor within the RSS.

4.51 All four initial development scenarios have the potential to deliver increased employment opportunity within the town. However, Scenario 1 has the greatest potential as the scale of employment growth would enable a greater degree of diversification in the economy linked to provision of additional infrastructure which would be less likely to be delivered under the other scenarios. In addition the higher population of the town would underpin demand and the rationale for higher levels of provision within the local service sector.

Potential to develop service centre functions[2] to meet the needs of the town and surrounding area whilst minimising car dependence

4.52 In terms of the scale of growth Scenario 1 provides the largest increase in population whilst Scenarios 2, 3 and 4 have similar levels of population growth.

4.53 Section 7 considers the potential for additional retail development within the town. All of the growth scenarios could enable an extension in the size and range of retail and other service provision accommodated within Gillingham town centre. Scenario 1 would provide the greatest opportunities in terms of the scale of additional floorspace. Under this scenario the likelihood that town centre environmental improvements and a community facility venue could be delivered would be greater.

4.54 Scenarios 2, 3 and 4 would all generate additional demand for local centre facilities and provision of additional primary healthcare facilities, primary school provision and sports hall provision. Scenarios 2 and 3 could successfully accommodate these facilities within a comprehensive development of the land identified for development within these options. Under scenario 4 this would prove much more difficult as each of the land parcels identified is smaller and would not provide critical mass in their own right to require a developer to deliver provision on site. Service providers would need to take action to acquire land to deliver appropriate facilities using developer contributions from individual developments as they come forward. It would be less likely that increased provision of public services could be scaled up in a timely manner as demand grows. In addition, it would be more difficult to achieve appropriate accessibility to local services with a more fragmented and incremental approach to development. Scenarios 1, 2 and 3 provide opportunities to establish new community hubs within larger urban extensions to the north and south of Gillingham. Therefore Scenario 4 has been identified with an “amber light” in terms of the assessment.

4.55 Scenario 1 has also been identified with an amber light as the overall scale of development would exceed the capacity of Gillingham School (the only Secondary School in the town) taking account of the upper size appropriate for a secondary school and its potential to expand within its existing site or onto adjacent land. Scenario 1 would not provide a sufficient secondary age population to provide two viable secondary schools within the town. It may be possible for additional secondary age pupils to travel to other Secondary schools in Shaftesbury subject to available capacity. However, this would not be desirable in terms of social cohesion or the additional travel demand which would be generated.

Potential to increase self containment and maintain and develop sustainable transport modes, including accessible local public transport

4.56 Section 5 has established the potential scale of employment opportunities which could be established in Gillingham to accompany each of the 4 initial growth scenarios. If the strategy is realised then there is potential to increase its overall level of self containment. Taking the additional resident population there is potential for self containment to be up to 70-75% compared

[2] shopping and cultural, religious and faith, educational, health and public services

with 54% among the existing economically active population at the time of the 2001 Census. This would represent a favourable rate of additional jobs per additional resident compared with present.

4.57 The potential for increased self containment to be achieved is dependent on success in increasing the range and type of jobs available in Gillingham to discourage out-commuting and the range of other service functions in the town.

4.58 It is also necessary that the scale of growth can be accommodated by existing transport networks and their potential for improvement. The Highways Agency has identified that the A303 has no additional capacity and that growth in Gillingham should not place additional trips onto this route, without achieving a corresponding reduction by demand management measures.

4.59 Section 6 has identified potential for the package of transport of transport measures which could accompany growth. The scale of growth in Scenario 1 would place additional trips onto the A303 on the basis of growth being located in the north of the town and of sufficient scale that capacities of routes to the south of Gillingham may be exceeded.

4.60 Under Scenario 1 there would be a need to address north-south linkages within the town as key junctions including the New Road junction would become congested. In addition, the capacity of the B3081 towards Shaftesbury would require improvement to accommodate additional trips. This may be remedied by implementation of the Enmore Link road improvement if this project is deliverable. There is no potential for rail services serving Gillingham to be improved significantly beyond a 1 train an hour service other than provision of additional carriages (although there are no such plans at present).

4.61 Enhancement of public bus services may be an option but would not have a significant effect on levels of self containment. Increasing service frequencies would need to be funded by public subsidies (as at present) possibly with a financial contribution from commercial and residential development in the town. There may be a need for larger scale employment developments to provide employee transport as part of a green travel plan. For these reasons Scenario 1 has been attributed an “amber light” within the assessment.

Environmental capacity, integration and green infrastructure

4.62 Section 3 discussed the landscape character and other environmental constraints within Gillingham. Both Scenario 1 and Scenario 3 would include development of land parcels to the north east of the town including land adjoining the Shreen Water flood plain and Bowridge Hill which define and contain the existing urban area. Development on the hill extending towards the ridgeline would be prominent and both scenarios would have a significant landscape and visual impact both on local landscape character and on views from Gillingham towards Bowridge Hill. For this reason Scenarios 1 and 3 have been attributed an “Amber light”.

4.63 Scenarios 1, 3 and 4 have also been attributed an amber light for a second reason. Section 8 of this report provides a commentary of green infrastructure needs relating both to Gillingham as a whole and to make individual developments acceptable. There is a deficiency in the amount and accessibility of public open space in Gillingham. Scenario 4 would provide fewer opportunities to provide appropriate greenspace in connection with development, due to the scale of development at each location and the potential for appropriate greenspace to be provided on site. In addition, there would be less of an opportunity to address town wide deficiencies in public open space provision and to deliver projects linked to the “Green Ring” which would improve green corridors to integrate the town in terms of walking and cycling connectivity and in terms of their recreational and ecological role.

4.64 Scenarios 1 and 3 include land which is not well located in the context of the existing settlement as demonstrated by the accessibility assessment in Appendix F. Land at the north east and south westerly fringes of Gillingham is located at greater distances from the town centre and without

direct or safe connections to the town centre (provision of roads which are lit and provided with footways). This makes adequate and accessible local service provision difficult to achieve.

4.65 In addition, development of land at the north east and south westerly fringes of Gillingham would not easily be able to deliver improvements in accessibility to local service provision (schools, local retail health etc.) which could be achieved by development to the south of Gillingham and to the north west of the existing urban area.

4.66 Taking into account the findings of the initial assessment the scenarios were refined. Scenario 2 was taken forward. In addition, a refined Scenario 1 was developed which reduced the overall scale of development to be accommodated and encompassing some land previously included within Scenarios 3 and 4. Scenarios 3 and 4 were not taken forward.

4.67 To establish which parcels of land should be included within the refined scenarios, an assessment was made of the sustainability of individual land parcels.

Step 4 - Assess sustainability of individual land parcels

Site Evaluation Criteria

4.68 The site evaluation criteria are based on the sustainability principles identified above. However, more detailed sub indicators were established which could provide an adequate basis for assessing the effect of developing individual land parcels in terms of sustainability.

4.69 The purpose of scoring the sites is to identify sites that score poorly against the sustainability evaluation criteria (see paragraph 4.43 above) and therefore should not be pursued in the 'refined growth scenarios' for Gillingham. In addition the scoring system provides a consistent basis to rank individual land parcels in terms of their merits.

4.70 Evaluation criteria were grouped under four headings as set out below. Each of the criteria were scored on a scale of 1-5 with 5 = very good, 4 = good, 3 = neutral, 2 = poor and 1 = very poor.

4.71 The evaluation was made on the basis of visits to each of the sites and a desk top review of existing constraints and consideration of the results of other technical assessment work and the Council's LDF evidence base described elsewhere in this report.

Economic Growth

4.72 In order to asses the impact of sites on economic growth access to existing or potential employment opportunities was assessed. The criteria enables the impact of the site on self containment (i.e. people living and working in Gillingham) to be assessed. The information contained within Section 5 of this report was used to undertake the assessment which reflected the scale of economic opportunities and employment.

Transport

4.73 Four transport related criteria were identified. These criteria aim to assess how accessible the sites are and whether they can help to support sustainable modes of transport.

4.74 The first is the potential to enhance existing sustainable transport links or create new links; this might mean the site could potentially help to support a local bus stop/service or would help to promote walking or cycling. The second criterion is whether the site would improve existing walking and cycling routes. The third criterion is whether the site has potential to be within 10 minutes of the town centre and the final criterion is whether the site has potential to be within walking distance of a primary school.

4.75 Information from the assessment of potential site accesses and existing accessibility to local services (contained in Appendix F) along with potential for opportunities to improve access to services and local connectivity were considered.

4.76 In assessing accessibility it was assumed that a 10 minute walking distance is acceptable. This is converted to a distance of 800 metres, which has been measured as an on the ground distance (rather than straight line), to take account of road layout and likely access issues.

Environmental Protection

4.77 There are five environmental protection criteria. These criteria assess the likely impact of the site on the natural and built environment in and around Gillingham.

4.78 The first criterion assesses the potential impact of the site on existing important open or wooded areas (IOWA) or other open space. Impact could either be loss of open space or potential harm to setting. The second criterion assesses the potential of the open space to improve recreational opportunities (e.g. potential to provide open space or enhance the existing green network). The third criterion is impact on conservation areas, local character areas or archaeological areas. The fourth criterion is the level of integration with the existing urban fabric, where sites have the potential to link with the existing settlement either via existing highways, pedestrian or cycle links. The fifth criterion is the impact that the site would have on the landscape setting.

Prudent Use of Resources

4.79 All development should seek to use natural resources prudently. However, when considering large scale new development there can be potential for linking sites to a decentralised energy network, which has significant energy efficiency benefits. This has therefore been included as criteria for assessing the sites.

Site assessment findings

4.80 The assessment included only those land parcels located on the edge of the existing urban area. Those urban infill sites identified in the SHLAA and which form part of the Council's 5 year land supply are already deemed appropriate for development in terms of their suitability, availability and achievability.

4.81 The outcome of the evaluation is set out in Table 4.3 below. The sites in the table have been ranked according to their overall sustainability score. The maximum score that a site could score is 55. The top scoring sites are all located in the south of the town, in particular sites at Ham Farm, and the sites around the railway station. The sites scoring poorly are those to the north east and east of town (ATK5 – 7, ATK8, ATK15) and those to the west at Wyke (ATK9, ATK11, ATK12, ATK25). These sites all score under 30 in total. This is under 51% of the total available points.

4.82 As a result the sites that were ranked lowest in terms of their suitability were discounted from being incorporated within refined Scenarios 1 and 2.

Table 4.3 – Evaluation of Major Sites

Site Reference	Location	Economic Growth	Transport				Environmental Protection					Prudent Use of Resources	Total Score
		Access to Existing and Potential Employment	Potential to enhance / create sustainable transport links	Potential to Improve walking and cycling routes	10 minute walk of town centre	Walking distance of a primary school	Potential to impact on existing important or wooded areas or other open space	Potential to Improve Recreational Opportunities	Impact on Conservation areas / local character areas / archaeological areas	Level of potential integration with existing settlement	Impact on landscape setting	Potential for Decentralised Energy Networks	
ATK17	Land Adj Lodden Lakes	5	5	5	3	5	5	5	5	3	5	4	50
ATK19	Land off Shaftesbury Road	5	5	5	3	5	4	5	5	4	5	4	50
ATK18	Land at Ham Farm	5	5	5	2	5	3	5	5	4	5	5	49
ATK20	Land South of Meadows	5	5	4	4	5	3	5	5	3	5	4	48
ATK52	Focus / Car Show Room	5	4	3	5	5	5	1	5	5	5	1	44
ATK53	Site Corner Station Rd/Le Neubourg Way	5	4	3	5	5	5	1	5	5	5	1	44
ATK54	Station Road land to north of station	5	4	3	5	5	5	1	5	5	5	1	44
ATK55	Car Sales forecourt station road	5	4	3	5	5	5	1	5	5	5	1	44
ATK56	Station car park and storage sheds (station Road)	5	4	3	5	5	5	1	5	5	5	1	44
ATK16	Park Farm	5	1	4	3	3	3	2	4	5	4	4	38
ATK22	Field at Wavering Lane	1	2	5	1	4	5	5	5	2	2	5	37
ATK51	Chantry Fields	5	5	4	5	1	1	2	5	3	2	1	34
ATK21	between Barnaby Mead and Bay Lane	4	1	3	5	5	1	1	4	3	5	1	33
ATK24	Land between Milton on Stour and Wavering Lane	2	2	5	1	2	3	5	4	2	2	5	33
ATK23	Land North of Wavering Lane West	2	2	5	1	1	2	5	5	2	2	5	32
ATK8	Land off B3095	5	3	2	1	5	5	1	3	1	1	1	28
ATK11	Wyke land east of Culvers Lane	2	3	1	1	5	5	3	5	1	1	1	28
ATK25	Site Adj pound Lane	1	2	2	1	5	5	2	5	3	1	1	28
ATK15	Windyridge Farm	3	1	3	5	4	2	3	1	1	2	2	27
ATK9	Land to the North of Common Mead Lane	2	3	1	1	5	1	2	5	2	1	1	24
ATK12	Wyke land east of Dry Lane	2	3	1	1	4	5	3	2	1	1	1	24
ATK7	Land at Bay Bridge	1	1	2	4	1	2	2	1	1	1	2	18
ATK5	Land Rear Chubbs Meadow	1	1	2	3	1	2	1	1	1	1	2	16
ATK6	Land at Bowridge Hill Farm	1	1	2	1	1	2	2	2	1	1	2	16

Step 5- Refined growth scenarios

4.83 The next step was to refine the initial growth scenarios to reflect the scale of growth which can be accommodated sustainably at settlement scale and the suitability of individual land parcels capable of development. The refined scenarios take account of an updated assessment of the supporting infrastructure, functions and amenities required to accompany growth. The refined scenarios are set out in Figures 4.6 and 4.7.

Scenario 1 – Growth South and North

4.84 Refined scenario 1 seeks to maximise the potential growth at Gillingham. It would accommodate some 3,366 additional dwellings with a population of some 7,304. Following evaluation of the sites, sites to the north east of Gillingham and the area around Wyke have been excluded as sites for residential development. Growth would initially (2007-2011) take place at sites within the urban area as well as the site near Lodden Lakes (ATK17) and at Lodbourne (ATK21). The next phase of growth (2012-2026) would be concentrated in the South of the town at Park Farm (ATK16) and Ham Farm (ATK18 and 19), as well as at Chantry Fields (ATK51). Mixed use development close to the railway station could also take place within this period (ATK53 – 56). Development post 2026 would be concentrated to the North West of the town at Peacemarsh (ATK22 – 24).

4.85 Employment development would include expansion of Brickfields Business Park, building out the remaining allocated land at Park Farm, and provision of a new employment site at Wyke. There would also be potential for further development linked to the intensification of development at Neal's Yard Remedies. The existing employment area north of the station would be redeveloped including provision of office space and retail development.

4.86 Retail development would be concentrated in the mixed use scheme at Station Road/Le Neubourg Way and there would be some small scale neighbourhood retail provided within the southern and north west urban extensions as part of local centres (each approximately 0.35ha in size). A 2ha site for a diagnostic centre would be provided at Ham Farm to satisfy the Primary Care Trust's (PCT) requirement.

4.87 Additional primary education, indoor sports and greenspace would be provided described further in Section 8 and 9.

Scenario 2 - Southern Focus

4.88 This scenario concentrates growth to the south of the town providing an additional 2,295 dwellings with a population of some 4,748. It excludes: land to the west of Wyke (ATK9, ATK11, ATK12, ATK25); the north west site; north east Sites (ATK5 - 8), and the eastern site (ATK15). It also includes Chantry Fields (ATK51), and 4 sites within the town centre (ATK52 – 56).

4.89 Employment development would include expansion of Brickfields Business Park, building out the remaining allocated land at Park Farm, and further expansion of Park Farm (5ha) and a new employment site at Wyke. The existing employment area north of the station would be redeveloped including provision of office accommodation or workshops and retail.

4.90 Retail development would be concentrated in the mixed use scheme at Station Road and there would be some small scale retail in the southern urban extension in the form of a local centre (approx 0.35 ha in size). A 2ha site for a diagnostic centre would be provided at Ham Farm to satisfy the PCT's requirement.

4.91 Additional primary education, indoor sports and greenspace would be provided described further in Section 8 and 9.

Phasing of Development

4.92 Figure 4.6 and 4.7 set out the potential phasing of development in Gillingham for both refined scenarios 1 and 2.

4.93 In order to assess broad infrastructure packages and delivery of those infrastructure packages, broad assumptions about the level of housing delivered in each 5 year period up to 2026 have been identified. Based on consideration of the structure of the local housing market and historic rates of housing completions in Gillingham it was considered unlikely that more than 150 units per annum could be achieved in Gillingham. Potential development phasing by 5 year period is set out in Table 4.4.

4.94 It may be possible to increase the rate of completions if the structure of the local housing market changes and if the pace of infrastructure delivery can be increased. Diversification of the local economy and delivery of a wider range of local services and facilities have the potential to attract increased numbers of people to the area. The delivery of strategic transport improvements will be necessary for growth to be accommodated sustainably (refer to Section 6 and 11 of this report).

The early years

4.95 Under both scenarios the first phase of development (in the period 2007 – 2011) would occur on the 10 sites in Gillingham identified within the Council's 5 year land supply with a likely dwelling yield of 173 units. The majority of these sites are in the existing urban area, although two larger sites are on the edge of the town to the south and to the east.

Post 2012

4.96 The NDDC SHLAA identifies that most sites in Gillingham have the potential to come forward in the period 2012 - 2026. Phasing of development will depend on a number of factors including availability of sites and deliverability. It will also be important to ensure that development is phased to ensure that appropriate infrastructure can come forward at the right time and in the right location, Section 11 deals with implementation and deliver of growth and supporting infrastructure. Urban extensions to the south of the town in both Scenarios 1 and 2 are identified as the most sustainable and have the potential to deliver onsite community and social infrastructure. It is therefore considered that these would begin to be built out first along with urban infill sites.

4.97 The potential redevelopment of the Station Road area could take place in the period 2012 – 2026 however, given the potential issues with site assembly, finding suitable alternative locations for existing businesses and site preparation (clearance and potential remediation works), the site is unlikely to come forward until towards the end of this period.

4.98 Development in the northern urban extension identified within Scenario 1 would take place entirely post 2026 unless significant changes were made to the provision of strategic infrastructure, a future revision to the RSS and Regional Transport Strategy.

Table 4.4 – Development Phasing

Period	Scenario 1	Scenario 2
2007 - 2011	175	175
2012 - 2016	710	710
2017 - 2021	710	710
2022 - 2026	700	700
Total 2007 – 2026	2,295	2,295
Post 2026*	1071	-

*For the purposes of economic and transport modelling it has been assumed that growth identified for the post 2026 period could take place in the period up to 2026.

4.99 There is potential for either refined development scenario to be taken forward as future development options for Gillingham. Supporting strategies to deliver appropriate economic and town centre functions along with supporting infrastructure and facilities reflecting both levels of growth are described in the following sections of the report.

Figure 4.6 – Refined Scenario1

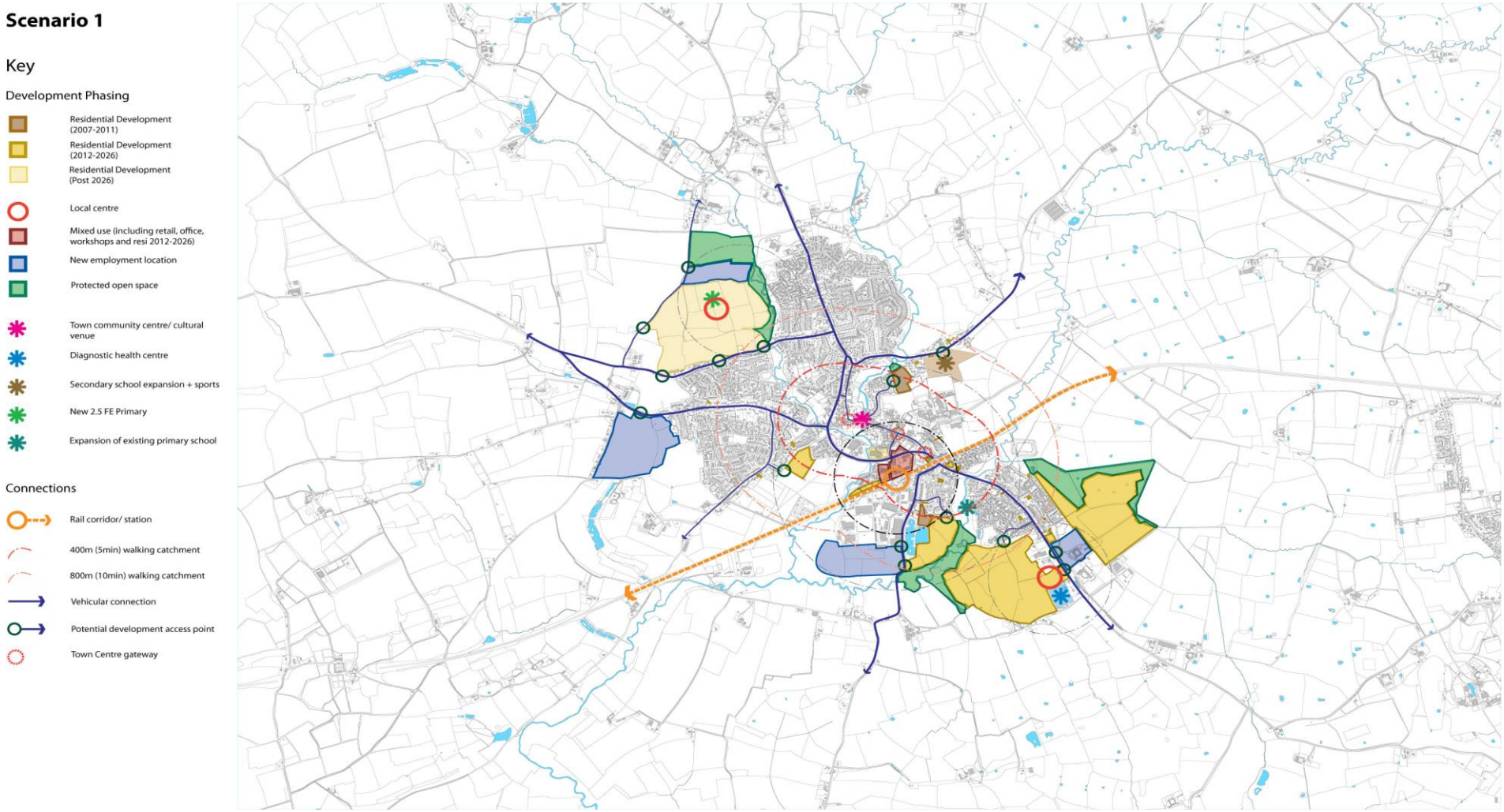
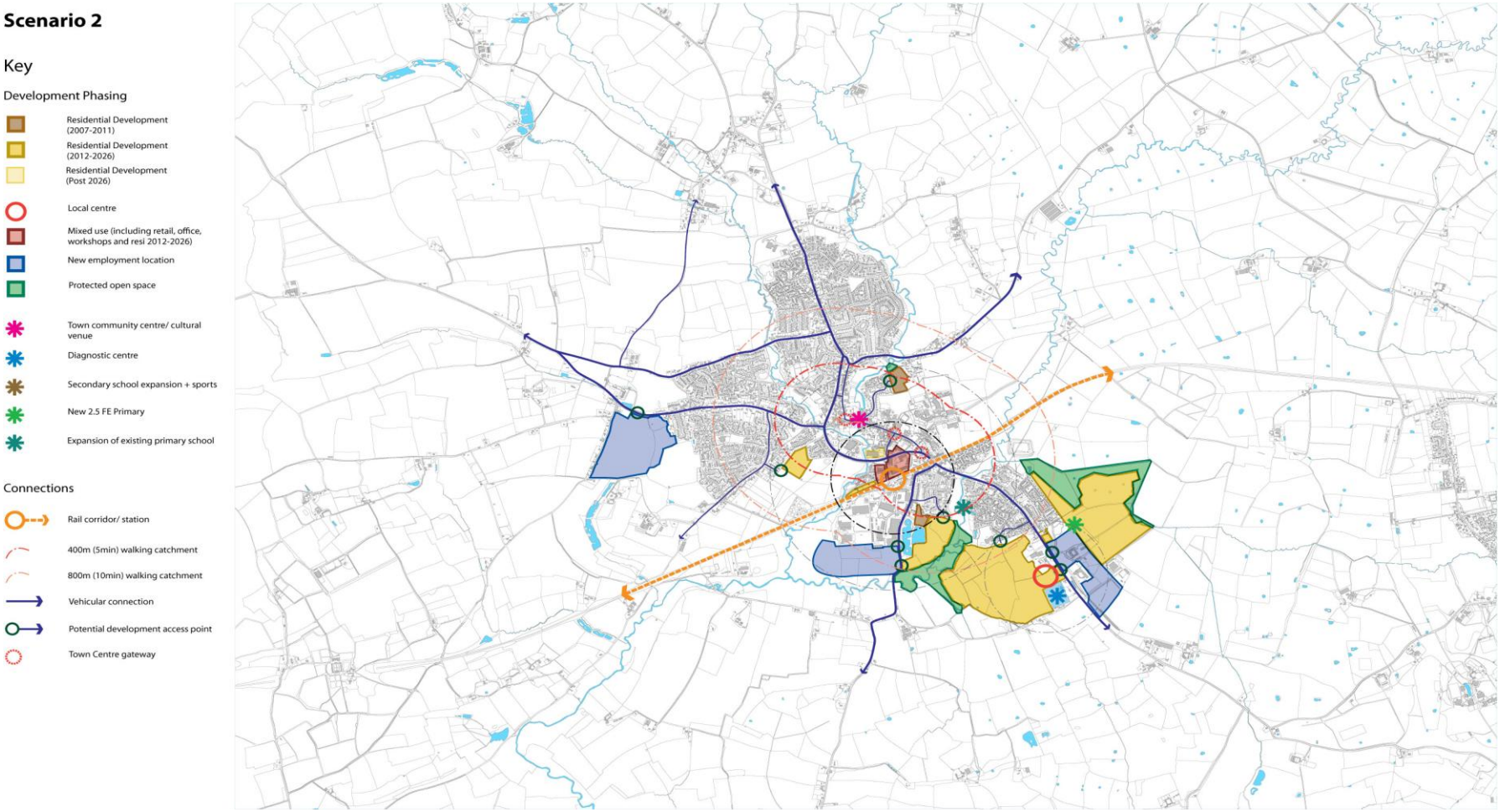


Figure 4.7 – Refined Scenario 2



5. Economic Development

Introduction

5.1 Proposals for growth at Gillingham should aim to create a settlement capable of sustaining the range of services and facilities associated with a fully functioning, highly self-contained town. As part of this, there is a need to assess the opportunities for significant and sustained economic growth and productivity within the town, to ensure that population growth can be accompanied by a diverse economy that serves the needs of local residents wherever possible and reduces the need for unsustainable levels of out-commuting from the town.

5.2 The Section takes a top down approach to analysing the potential for economic growth within the town and the wider region. It looks at patterns of growth experienced by the town during the last 20 years and identifies sectors that may have the potential to grow and generate employment land and space requirements.

5.3 This Section takes the following approach to analysing the potential economic capacity of the town:

- An analysis of the current economic baseline of Gillingham, including economic activity, levels of skills and the structure of the economy;
- An analysis of past levels of growth, including analysis of particular sectors;
- The development of a number of growth scenarios based upon the existing economic context and past performance of the town's economy;
- Analysis of the land required to support economic growth and identification of potential locations which may be suitable to support this growth.

Current Baseline Position

5.4 This section highlights the existing economic baseline within Gillingham and sets the context for the analysis of the capacity for economic growth within the town. The section highlights the key findings from the socio-economic data analysis and the economic policy appraisal, details of which can be found within Appendices A and B.

Population and Demographics

5.5 Gillingham is the largest town in North Dorset. The 2001 Census identified that the town had a population of 8,630, with recent population estimates suggesting that Gillingham now has a population of over 11,000. The population of the town has grown at the fastest rate of any urban area in Dorset.

5.6 The working age population of the town is relatively low. The 2001 Census identified that just 56.3% of the population was aged between 16 and 64, whilst 64% of the population in England are within this age group. The relatively small proportion of the population that are of working age, and therefore able to participate in the labour market, could have the potential to constrain the level of economic growth in the short term.

5.7 However, population projections for North Dorset and Gillingham identified that the demographic profile of the town is expected to change, relative to the District as a whole. By 2026 it is expected that just fewer than 56% of the population (7,415 people) will be aged between 16 and 64, whilst just 52% of the District as a whole (37,940 people) will fall within this age cohort. This is also the case for Dorset and the region as a whole, where an ageing population is seen as a considerable potential constraint to economic growth.

5.8 This may represent a significant opportunity for Gillingham. If the town can maintain its current share of the working population by providing a choice of residential units that can attract skilled young people and families, it will be considered to be a more attractive destination for potential employers that are constrained by the size of the labour force in other locations.

Economic Activity

5.9 Despite the relatively low level of the population of working age in Gillingham (68.3% of the population are aged 16 to 74 compared to 72.3% of the population in England), the proportion of the town's population considered to be economically active is relatively high and is above the regional average (68.4% of those aged 16 to 74 in Gillingham are economically active, compared to 67.5% in the South West). Furthermore, the level of unemployment is low, although it is slightly higher in Gillingham than in the surrounding area and has started to increase sharply in recent months. As of April 2009, the unemployment rate for Gillingham stood at 2.3%, compared to 1.7% in North Dorset and 3.1% in the South West.

5.10 Gillingham also has a relatively high level of self-employment (15.5% of the labour force compared to 12.4% in England), a proportion of which is likely to be a result of sole-traders that do not require specific premises or locations and that choose to locate in Gillingham and Dorset as a result of its high quality of life. The high proportion of people that are self-employed indicates a degree of latent demand for starter premises.

5.11 Job density (the ratio of the number of jobs to the total population in a particular area) is relatively low in Gillingham at the moment, although the number of jobs available relative to the population has been improving as the town has grown. This indicates that employment growth has been faster than population growth and that the economic role of the town has been growing. This is reinforced by the Council's employment land monitoring statistics which demonstrate that the rate of employment land growth has been much faster in Gillingham than any other town in the District.

Structure of Economy

5.12 The Gillingham economy is dominated by the manufacturing and wholesale and distribution sectors[3], which are over-represented by about 50% compared to the District and the region as a whole. Conversely, the financial intermediation (banking, insurance and mortgages) and real estate, renting and business activities sectors are under-represented compared to the region.

5.13 As the town grows, it will be important for the economy to diversify in order to support employment that provides higher incomes and spending in order to support and attract further retail and services. A broader range of employment types will also be attractive to potential skilled migrants which will further reinforce the economic potential of the town.

5.14 Although around a quarter of the labour force are employed in the public administration, education, health and other community activity sectors, this is a lower proportion than within North Dorset and the wider region. As the town grows it is expected that the proportion of people employed in these sectors will increase as the town becomes an important service centre for its wider hinterland.

Migration

5.15 The level of out-migration from Gillingham, North Dorset and the South West region as a whole for young people is high. The general lack of diverse employment types coupled with poor levels of house-price affordability mean that many skilled young people leave the town, and the wider region, to look for suitable employment. Although this is a significant constraint to employment

[3] In Gillingham, these sectors include the manufacture of lighting equipment, the manufacture of paper products, food processing, the wholesale of chemical products, the wholesale of perfume and cosmetics, freight transport by road, plus a range of smaller firms operating within the manufacturing and distribution sectors

growth for the whole of the region, it is particularly pronounced in North Dorset and Gillingham where the diversity of employment is poor.

Education and Skills

5.16 In terms of the labour market, the region is seeing a decline in employment in traditional manufacturing and an increase in service based employment. It is likely, therefore, that there will be a demand for employment towards the higher end of the occupational structure in Gillingham as the structure of the economy alters over time. It is in the best interest of the town's economy as a whole to help perpetuate the change towards higher value activities by helping to improve the skill base of the work force.

5.17 Gillingham is already at a relative disadvantage with poorer skills than the District and the County as a whole. It will be important to both focus on the upskilling of the local workforce and providing a range of employment opportunities that will improve the attractiveness of the local employment offer.

Commuting

5.18 Nearly half of all those employed in Gillingham commute outside of the town to work. Many commute to Shaftesbury whilst a very high proportion of those employed in higher-value and professional occupations commute to Salisbury, which is a reflection on the lack of diverse and higher-value jobs currently available within Gillingham. As a result, the average distance travelled to work in Gillingham is higher than in many other towns within the region, with the majority of trips made by car. These unsustainable commuting patterns can be alleviated by increasing the number and range of employment opportunities within Gillingham in order to increase the town's level of self-sufficiency.

5.19 The analysis also illustrates that the growth of the town also needs to be carefully balanced so as not to encourage unsustainable levels of commuting between Shaftesbury and Gillingham.

Quality of Life

5.20 Quality of life is another driver (although less direct) of economic growth. The strength of an area to attract people to live in it will have an impact on its local labour force and thus its ability to attract businesses. North Dorset as a whole has an attractive natural environment as does the Gillingham hinterland. These are major assets and a positive driver for planned growth.

5.21 Furthermore, although house price affordability is still very poor in Dorset and the South West as a whole, property prices are slightly cheaper in Gillingham than the surrounding area. This makes the town more attractive to potential migrants, including young families and those with higher skills, which the town needs to attract in order to improve its economic prospects.

5.22 However, average earnings within the town are relatively low compared with earnings in the sub-region, largely as a result of the structure of the economy being made up of a high proportion of lower-paid manufacturing and distribution jobs. This is likely to act as a potential barrier to attracting young, skilled professionals which will be vital to the future diversification of the town.

Transport/Infrastructure

5.23 Gillingham is within the central core of a rectangular network of strategic roads, with the A303 east-west a trunk road link lying 6km to the north, the A30 east–west link lying 4 km to the south, the A350 north-south link lying 5km to the east and the A357 north-south link lying 11km to the west.

5.24 Gillingham also lies upon the West of England mainline rail link which strategically serves Exeter and London Waterloo and locally Salisbury and Yeovil. However, the service is currently limited with a very small percentage of all trips to work by rail.

5.25 Gillingham does not currently have the transportation infrastructure to support growth in industries that rely on accessibly to key motor, rail or air hubs. With a lack of strategic accessibility Gillingham will not be able to compete with other medium sized towns in the region. In order to attract the higher value added industries infrastructure will need to be in place and links will need to be improved (this includes new highway infrastructure as well as ICT infrastructure).

5.26 Finally, there is the business infrastructure that business needs in order to trade and compete. Physical infrastructure includes availability and quality of land and premises, and the availability of business support services (accountancy, legal etc). In order to compete with other locations to attract employment to the area, Gillingham will need to provide an improved business infrastructure.

Premises

5.27 Gillingham does not have a significant amount of office floorspace within the town. Other towns in North Dorset, including Shaftesbury and Blandford Forum have a larger proportion of office floorspace. Gillingham has far higher proportions of factory and warehousing floorspace, which is a reflection of the structure of the Gillingham economy being geared towards manufacturing and distribution uses.

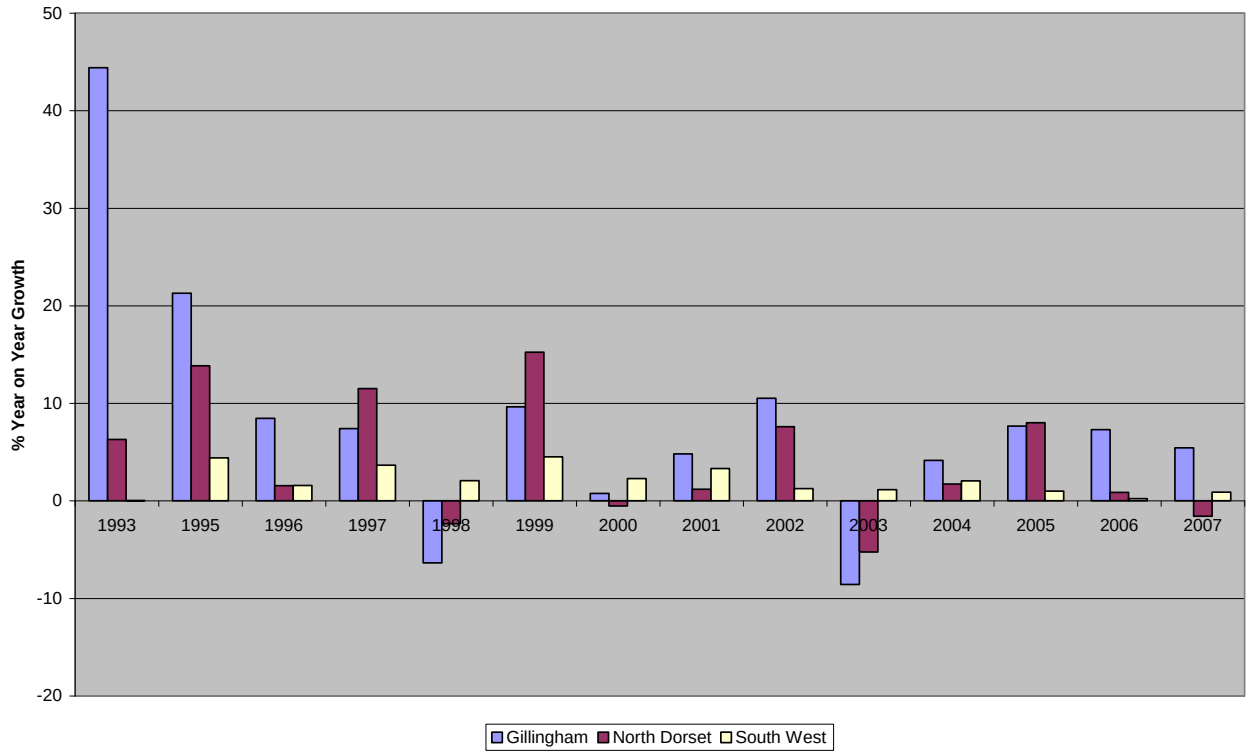
Employment Growth Analysis

5.28 This section looks at past levels of employment growth (i.e full-time and part-time jobs growth) within Gillingham and the wider region in order to provide a context for employment growth projections.

Year on Year Employment Growth

5.29 Figure 5.1 illustrates that Gillingham has seen positive levels of employment growth every year since 1993 except in 1998 and 2003. Furthermore, year on year growth has been over 4% for every year except 1998, 2000 and 2003. Gillingham has also experienced employment growth at a faster rate than North Dorset in 9 of the 14 years analysed since 1993.

Figure 5.1 – Total Employment Growth per Year (% Year on Year Growth)



5.30 Table 5.1 illustrates the annualised level of growth at Gillingham, North Dorset and the South West between 1991 and 2007. The table demonstrates that Gillingham has seen annual employment growth of 6.7% for this period, compared to growth of 3.5% in North Dorset and 1.8% in the South West. The rate of growth has slowed in recent years (2003-2007), although this is to be expected as the size of the town grows

Table 5.1 – Annualised Growth 1991-2007 (%)

	Gillingham	North Dorset	South West
Growth 1991-2002	8.47	4.77	2.09
Growth 2003-2007	6.13	2.19	1.03
Growth 1991-2007	6.73	3.47	1.77

5.31 Tables 5.2 and 5.3 demonstrate the rate of annualised growth in Gillingham and the wider region by sector. The tables demonstrate that the rate of manufacturing growth has been particularly strong compared to the decline in this sector in North Dorset and the South West. The Construction sector has also experienced strong growth in recent years, with public sector activities seeing very strong growth as a result of the growth of the population of the town.

5.32 Although the financial intermediation and real estate, renting and business activities sectors have experienced growth above that of the district and the region in the period to 2002, Gillingham has experienced negative growth in the period 2003-2007, although the District experienced a faster rate of negative growth in the same period.

Table 5.2 – Annualised Growth by Sector 1991-2002 (%)

	Gillingham	North Dorset	South West
Agriculture, hunting and forestry	N/A	17.0	6.1
Fishing	N/A	-10.8	5.8
Mining and quarrying	N/A	-6.1	-1.3
Manufacturing	7.3	2.3	-0.5
Electricity, gas and water supply	-9.5	-9.3	-5.9
Construction	3.3	3.1	3.5
Wholesale/retail trade; repair, etc	10.6	6.1	3.1
Hotels and restaurants	33.8	4.5	2.3
Transport, storage and communication	-4.3	-1.0	1.9
Financial intermediation	2.1	-2.4	0.0
Real estate, renting, business activities	13.3	11.8	4.3
Public admin/defence; social security	9.7	5.6	-0.5
Education	7.9	4.1	3.4
Health and social work	12.0	4.3	2.6
Other community, social/personal service	6.8	9.0	4.1

Table 5.3 – Annualised Growth by Sector 2003-2007 (%)

	Gillingham	North Dorset	South West
Agriculture, hunting and forestry	0.0	7.6	2.3
Fishing	N/A	3.0	-6.7
Mining and quarrying	N/A	-13.1	-3.7
Manufacturing	6.5	-6.0	-1.4
Electricity, gas and water supply	N/A	1.1	4.6
Construction	5.6	2.7	3.1
Wholesale/retail trade; repair, etc	0.8	0.2	-1.5
Hotels and restaurants	-0.7	-1.8	0.3
Transport, storage and communication	8.9	6.5	3.1
Financial intermediation	-1.1	-3.7	-0.8
Real estate, renting, business activities	7.1	10.9	4.5
Public admin/defence; social security	29.5	8.1	-1.4
Education	12.8	3.1	1.6
Health and social work	20.8	0.8	3.2
Other community, social/personal service	1.1	13.9	1.4

5.33 Table 5.4 illustrates the level of employment growth in sectors that traditionally occupy B use class land. The tables illustrate that Gillingham has experienced growth in all B use class sectors with the exception of the transport, storage and communication sector.

Table 5.4 – B Use Class Employment Growth by Sector – Gillingham (%)

	1991-2002	2003-2007	1991-2007
Manufacturing	7.3	6.5	6.1
Construction	3.3	5.6	6.4
Wholesale	15.7	8.2	12.2
Transport Storage and Communication	-4.2	8.9	-1.1
Financial Intermediation	2.1	-1.1	1.4
Real Estate and renting	18.5	3.6	11.7
Computer Related Activities	N/A	-3.2	N/A
Other Business Activities	10.8	11.1	8.6
Other Service Activities	14.6	13.2	2.9
Total	7.8	6.9	6.0

5.34 Table 5.5 illustrates the rate of take-up of employment land in North Dorset since 1994. The table demonstrates that 31% of all employment land developed in the District has taken place at Gillingham, which is more than any other location in the District. Coupled with the strong employment growth, this is an indication that the economy has been growing strongly within this period.

5.35 The availability of employment land in Gillingham is likely to have been a key driver in the rate of employment growth experienced by the town. Land has been made available at the right time and in the right places to capitalise on the growth of the wider economy and the growth of the population of the town. The availability of land was identified as a key factor in choosing to locate at Gillingham by the North Dorset Employment Land Review.

Table 5.5 – Employment Land Take-up in North Dorset (ha)

	Blandford Forum	Gillingham	Shaftesbury	Sturminster Newton	Rural	Total	Gillingham %
1994/95	0.4	**0.07**	0.79	0	0.18	1.44	4.9
1995/96	0.26	**0**	0.66	0.02	1.8	2.74	0.0
1996/97	0.42	**3.92**	0	0	0.67	5.01	78.2
1997/98	0.55	**0.45**	0	0	2.24	3.24	13.9
1998/99	0.5	**0**	0.85	0	0.29	1.64	0.0
1999/00	0.25	**1.3**	0.96	0	1.23	3.74	34.8
2000/01	0.65	**0.93**	0.61	0	1.54	3.73	24.9
2001/02	0	**0**	0.34	0.18	2.08	2.6	0.0
2002/03	0	**1.04**	0.44	0	0.05	1.53	68.0
2003/04	0	**0.55**	0.08	0.46	2.15	3.24	17.0
2004/05	0	**0.28**	0	0.36	1.52	2.16	13.0
2005/06	0	**2.5**	0.02	0	2.24	4.76	52.5
Total	3.05	**11.04**	4.75	1.02	15.99	35.85	30.8

Summary of Growth Analysis

- Gillingham has experienced strong employment growth in the period 1991-2007, with the number of people employed in the town growing by an average of 6.7% per year, compared to 3.5% in North Dorset and 1.8% in the South West region as a whole.
- Although it appears that the rate of growth has slowed in recent years, this is largely a statistical quirk in the way that growth rates are calculated (growth rates are often very large when starting from a small base). The level of absolute employment growth has remained strong at an average of around 140 additional jobs created in the town per year
- It appears that the two main drivers for employment growth have been the availability of good quality employment land, which has been relatively constrained in other parts of the District, as well as the increase in population, which has provided a readily available workforce to enable businesses to grow.
- Gillingham has seen much stronger growth in the manufacturing and distribution sectors than North Dorset as a whole, whilst growth in the real estate and other business activities sectors has not been on the same level as the district despite strong population growth in the town. This is likely to be a result of the type of land and premises that has been made available

within the town, which is more suitable for manufacturing and general industrial premises than for office-based businesses.

Existing Growth Projections

5.36 This section analyses the growth projections that already exist for the region and the county which help to set the context for the growth capacity of Gillingham.

South West Regional Economic Strategy

5.37 Table 5.6 illustrates the employment growth projections as set out in the Regional Economic Strategy (RES). The RES analyses the potential growth of the region according to three scenarios:

- GVA growth of 2.4%;
- GVA growth of 2.8%; and
- GVA growth of 3.2%.

5.38 For each scenario, the RES converts GVA growth into an estimated level of employment growth, for the period 2006 to 2026, which has been translated into annual employment growth in Table 5.6.

5.39 The RES has also undertaken work which looks at the potential growth in employment at specific economic centres, including Salisbury and Yeovil.

5.40 Table 5.6 illustrates that, in all five projections, employment growth is not expected to reach more than 1% per annum.

Table 5.6 – RES Growth Projections

Economic Growth Scenario	Estimated Employment Growth (2006-2026)[4]	Total Employment Growth % per annum
RES 2.4%	210,000	0.46
RES 2.8%	360,000	0.76
RES 3.2%	430,000	0.90
Yeovil	9,100	0.74
Salisbury	13,600	0.99

Bournemouth, Dorset and Poole Workspace Strategy

5.41 The Bournemouth, Dorset and Poole Workspace Strategy takes these forecasts one step further by translating them into specific sectors that may have the potential to grow within the sub-region, rather than the wider South West. Table 5.7 illustrates that the work undertaken forecasts that employment growth is likely to be in the region of 0.7% per annum, with growth specifically outside of the main urban areas of Bournemouth, Poole and Dorchester/Weymouth – which includes Gillingham, at 0.7%

5.42 The report estimates that there will be strong growth in financial services, distribution and retail and hotels and catering, as well as public services, whilst the primary sectors and manufacturing will experience a significant contraction in employment.

[4] Includes all jobs growth including part-time employment

Table 5.7 – Employment Growth by TTWA 2006-2026[5]

	1986-2006			2006-2026		
	No.	%	% pa	No.	%	% pa
Bournemouth TTWA	30,152	25.7	1.2	22,738	15.4	0.7
Poole TTWA	21,808	30.1	1.3	15,435	16.4	0.8
Dorchester and Weymouth TTWA	5,505	10.6	0.5	9,491	16.5	0.8
Non TTWA	10,135	28.6	1.3	7,136	15.7	0.7
Total	67,600	24.4	1.1	54,800	15.9	0.7

Source: Cambridge Econometrics

Table 5.8 – Employment Projections by Sector and TTWA 2006-2026[6]

	BDP		Bournemouth TTWA		Poole TTWA		Dorchester and Weymouth		Non TTWA	
	No.	%	No.	%	No.	%	No.	%	No.	%
Primary Sectors and Utilities	-2,700	-33.3	-582	-27.8	-903	-33	-522	-33	-693	-40.8
Manufacturing	-10,200	-27.3	-4332	-32.9	-3119	-21.4	-893	-21.4	-1857	-25.3
Construction	2900	11.4	1315	12.4	349	10.7	385	10.7	851	18.7
Distribution and Retail	15700	25.3	5734	20.7	4602	38.7	3379	38.7	1986	23.6
Hotel and Catering	5300	17.8	1593	11.3	1943	18.8	1000	18.8	763	23.1
Transport and Communications	1300	10	972	14.3	27	14	200	14	101	8.3
Financial and Business Services	16400	25.5	7140	20.5	5712	24.8	1938	24.8	1610	34.9
Public Admin and Defence	-200	-1.1	-108	-3.3	-130	-0.8	-77	-0.8	115	6
Education and Health	22900	33.8	9966	35.5	6149	26.9	3427	26.9	3358	34.2
Misc Services	3400	18.4	1040	15.2	805	23.3	652	23.3	903	33.3
Total	54800	15.9	22738	15.4	15435	16.5	9491	16.5	7136	15.7

Source: Cambridge Econometrics

5.43 The BDP Strategy estimates that just 20% of all employment growth will be accommodated on B Class land. This is a very small proportion of all employment growth, especially considering 54% of all employment in North Dorset is currently accommodated within typical non B class accommodation, as illustrated in Table 5.9. The comparatively weak growth in industries that require B use class accommodation is largely due to the projected contraction in the manufacturing sector (which requires B class land), as well as strong growth projected in the education and health sector (which do not typically require B class land).

5.44 This is significant in terms of the future allocation of land within Gillingham specifically for employment uses.

[5] Includes all jobs growth including part-time employment
[6] Includes all jobs growth including part-time employment

Table 5.9 – Employment by Land Use [7]

	Gillingham		North Dorset		South west		England	
	No.	%	No.	%	No.	%	No.	%
Office	599	16.9	4,952	22.2	597,807	27.0	7,100,365	31.1
Other Business Space	867	24.4	4,112	18.4	343,446	15.5	3,454,773	15.1
Warehouse	332	9.3	1,153	5.2	108,301	4.9	1,310,892	5.7
Non B Class	1,756	49.4	12,095	54.2	1,164,248	52.6	11,000,716	48.1
Total	3,554	100.0	22,312	100.0	2,213,802	100.0	22,866,746	100.0

5.45 The BDP Workspace Strategy issues a word of caution regarding the employment forecasts for two reasons:

- An economic growth of 3.2% GVA pa seems fairly ambitious in the current economic climate. However, the Workspace strategy has a time horizon of 2026 and this is a rate of growth that has been achieved in the past and, therefore, must be considered as an important potential outcome. Although the current economic slowdown is undoubtedly having a significant impact on existing levels of growth, it is likely that this impact will become less severe than felt at present. It is most likely that the growth will be slower in the next few years and pick up again in the medium to long term, reducing short term demand but having a lesser effect on the long term demand.
- The assumed economic growth of 3.2% GVA increase pa results in an increase in employment of about 54,800 between 2006 and 2026. The Strategy also identifies that the working age population is projected to grow by 32,000 in the most advantageous scenario. Even with potential labour supply from outside of the region, supply might therefore be a constraining factor to employment growth and to the employment land demand. Furthermore, the sub-region is in competition with surrounding areas with regards to labour supply. In South Hampshire for example there are plans for the provision of approximately 2 million sq.m of new employment space. This level of growth could have a significant impact on the labour supply available in South East Dorset, although it is not likely to have as significant an impact on the labour supply in North Dorset.

5.46 The second factor is especially important in the context of Gillingham's economic growth. If the economy is expected to grow at a level above that which can be sustained by the local labour force, economic growth is likely to be constrained in those areas where migration cannot fill the gap. Gillingham is expected to increase the size of its labour force during the next 20 years as a result of migration, furthermore, it is expected to have a greater proportion of people of working age compared to the rest of the region. This presents an opportunity for Gillingham to capitalise on the wider demographic shift to enable economic growth within the town.

Application of Existing Growth Scenarios to Gillingham

5.47 Figure 5.2 illustrates how total employment would grow in Gillingham from 2007 to 2026 if the rate of employment growth projected as part of the RES and the BDP Workspace Strategy was applied to the existing level of employment in the town. The figure also illustrates total employment in the

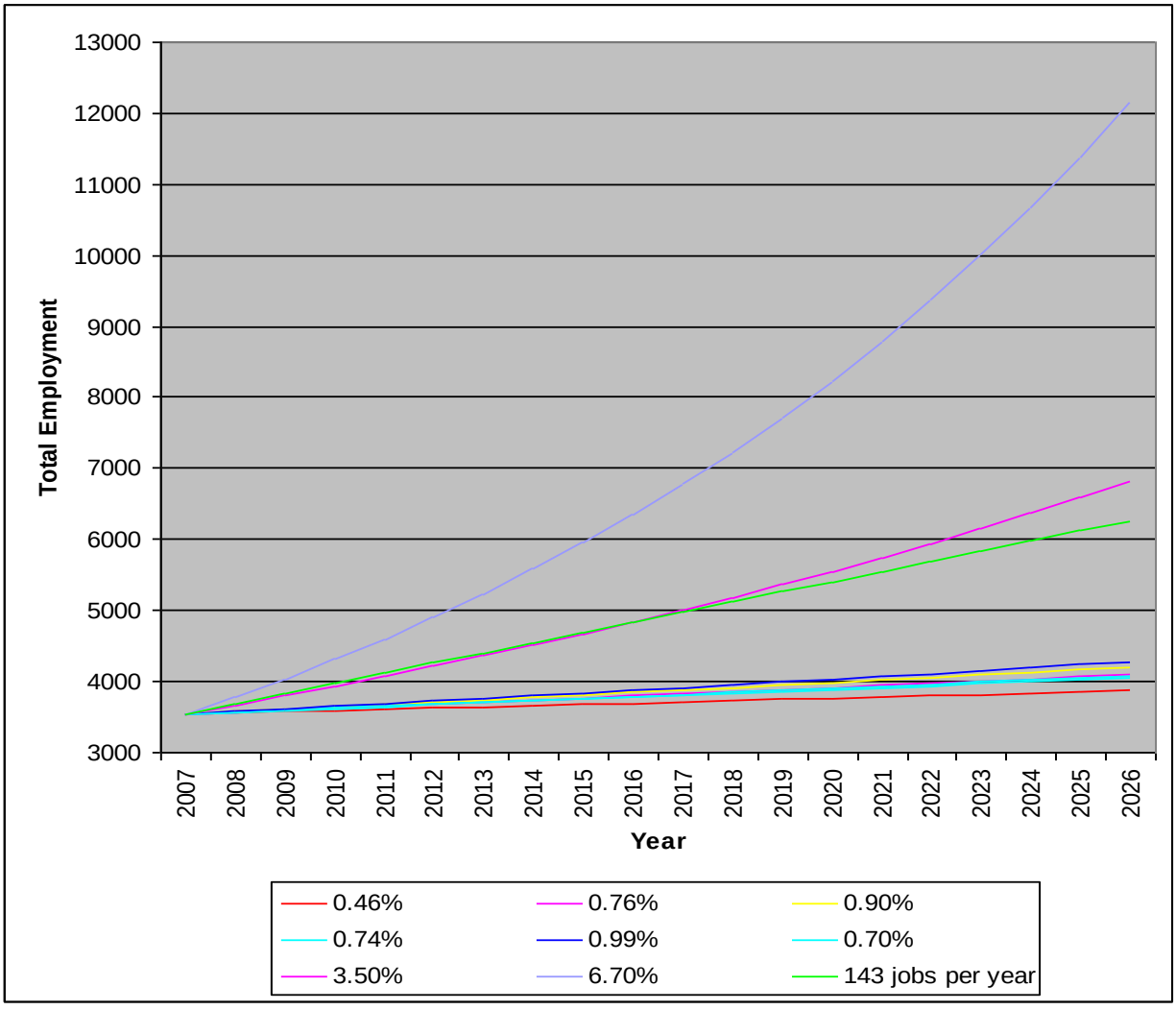
[7] Includes all jobs growth including part-time employment

town if growth rates experienced by Gillingham and North Dorset district from 1991-2007 were maintained to 2026, as well as a growth trajectory based upon the creation of 143 jobs per year, which is the average level of jobs created in the town between 1991 and 2007.

5.48 In summary, the growth rates applied in Figure 5.2 are:

- RES 2.4% GVA growth – Employment growth of 0.46% per annum
- RES 2.8% GVA growth – Employment growth of 0.76% per annum
- RES 3.2% GVA growth – Employment growth of 0.90% per annum
- Forecast RES Job Growth for Yeovil – Employment growth of 0.74% per annum
- Forecast RES Job Growth for Salisbury – Employment growth of 0.99% per annum
- BDP Workspace Strategy Forecast for Non-Rural Areas – Employment growth of 0.7% per annum
- Employment Growth between 1991 and 2007 for North Dorset – Employment Growth of 3.5% per annum
- Employment Growth between 1991 and 2007 for Gillingham – Employment Growth of 6.7% per annum
- Employment Growth between 1991 and 2007 for Gillingham of 143 jobs per annum

Figure 5.2 – Employment Growth Scenarios



5.49 The figure illustrates that, if wider regional growth rates (of between 0.46% and 0.99%) were achieved, the town may only be able to support a total of around 4,000 jobs by 2026 – an increase of around 500 jobs. However, this low level of growth is highly unlikely given the central objective to grow both the population of the town and its level of self-containment.

5.50 If the town could continue to grow at the level seen during the period 1991-2007 (6.7% per annum), then it could expect to have a total of around 12,000 jobs by 2026 – an increase of around 8,500 jobs on the present level. However, again, this is unrealistic given that the town has seen these high levels of growth as a result of it starting from a low base - this level of growth would be very hard to sustain as the town increases in size.

5.51 It is not unreasonable to expect that the town could sustain an absolute level of growth of around 140 jobs per year, which is the average level of growth seen during the period 1991 – 2007. At this level of growth, the town could expect to have nearly 6,300 jobs, an increase of around 2,700 jobs from present levels. This is a more likely scenario if the town can sustain past levels of population growth.

5.52 It should be noted that Figure 5.2 represents only a theoretical exercise to illustrate how varying growth rates would affect the total level of employment in 2026 and does not represent any forecast on the potential capacity for growth in the town. The figure is useful in setting the potential economic growth of the town into context against what has been happening during the past 16 years, as well as against projections for the wider region.

Summary of Drivers of Growth

5.53 Figure 5.3 demonstrates the potential drivers and constraints to growth. The drivers and constraints have been identified following the analysis of the socio-economic context and a comprehensive review of existing policy and economic documents, as set out in Appendix A.

5.54 These drivers and constraints have been used to inform the development of economic growth scenarios as set out below.

Figure 5.3 – Analysis of Potential Drivers and Constraints to Growth

Potential Growth Drivers	Potential Constraints to Growth
Growth of the wider Dorset, South West and South East Economies	Currently low existing proportion of population of working age
Population growth planned for the town	Low skills and qualifications levels compared to wider region
High quality of life	Road transport links are currently relatively poor
Relatively cheap property prices	Rail station enables easy commute to other towns with larger, more diverse economies
Constrained growth in the labour market elsewhere in the BDP region	Poor broadband infrastructure
Employment growth has been very strong in Gillingham in recent years –suggests that demand exists as long as sufficient quality premises and land are made available	Low wage and low productivity economy
Logistics sector is under-represented	Over reliance on manufacturing sector (which is in decline elsewhere in the country) and retail
Salisbury is constrained in terms of availability of land for employment development	Migration of skilled graduates to other areas with better employment prospects
Rail station enables better public transport accessibility than most other locations in the local area	Ratio of house prices to earnings is still very high in North Dorset as a whole
Much employment land has been released in rural areas – there is potential to push this demand towards Gillingham if land is purposely constrained	Little evidence of higher value businesses taking root within Dorset and Gillingham

in rural locations	over recent years Lack of support for business start-ups and small businesses Lack of provision for Further Education and training

Development of Economic Growth Scenarios for Gillingham

5.55 This section presents the findings of the work analysing the potential future capacity of the economy in Gillingham. The development of growth projections has been informed by the past levels of growth in particular sectors, in addition to the potential drivers and constraints to growth identified above and the wider socio-economic and policy analysis.

5.56 This work therefore represents a top-down analysis of the potential of the economy to accommodate growth. However, it should be recognised that there are a very wide range of variables that will impact on the potential level of growth achievable in Gillingham. Perhaps the most significant of these is the level of population growth that can be achieved. The scenarios set out below represent estimates of job growth that are based upon past levels of population growth (i.e around 210 people per year). If Gillingham can achieve population growth over and above these past levels, it is likely it can achieve economic growth above those estimates set out below.

5.57 It should be noted that forecasts based upon what is a relatively small scale economy can be unreliable and should not be taken as a definitive assessment on the likely level of employment growth. Each scenario has been developed to show the potential level of growth based upon the information available and should be seen as one indicator of the potential economic capacity of the town.

Economic Scenarios

5.58 Three key scenarios have been developed as set out below:

Scenario 1 – Trend Based Scenario

5.59 This scenario estimates future employment change that is likely to occur without significant policy interventions. Forecasts are based upon existing industrial structures and historical trends. It assumes that land will be made available at a similar rate to that seen during the past 15 years, and that much of this will accommodate general industrial businesses.

Scenario 2 – Diversification of Economy

5.60 The socio-economic analysis of Gillingham has identified that, in order to re-balance the economy towards higher-skilled, higher productivity businesses, there is a need for North Dorset Council, Dorset County Council, the South West Regional Development Agency and other stakeholders to take action which supports the growth and development of appropriate new knowledge-based business from three sources:

- existing business (organic growth);
- new business formation; and
- realistic inward investment opportunities from within the UK and internationally

5.61 As a result, Scenarios 2 and 3 are based upon the assumption that policy interventions will enable some degree of diversification within the economy. General industrial sectors will still develop as per Scenario 1, although additional jobs would be created in high-value sectors such as business services.

5.62 Scenario 2 assumes that, in addition to the land made available for general industrial employment uses in Scenario 1, there would be policy interventions which could include:

- provision for SME and seedbed space for small workshop and office-based uses;
- targeted promotion of inward investment for higher-value sectors;
- upgrading of broadband infrastructure;
- Upgrade of road links to Strategic Road Network, including A303;
- increased levels of business support; and
- provision of good quality office accommodation within the town centre

Scenario 3 – Further Diversification of Economy

5.63 Scenario 3 assumes a greater degree of diversification of the economy as a result of policy interventions above and beyond those identified in Scenario 2. It assumes that all of those policy interventions outlined in Scenario 2 would be actioned in addition to the following:

- Targeted promotion of inward investment of financial services, business support services, creative industries, software consultancy;
- Provision of hi-tech and/or business park land and premises;
- Provision of specialist further education/vocational/training facility (e.g in engineering, design or enterprise)

Application of Scenarios

5.64 Figure 5.4 illustrates the estimated level of employment that could be achieved in Gillingham to 2026, based upon the three scenarios set out above. Table 5.10 shows the estimated levels of employment growth as per each Scenario compared to the growth in the period 1991-2007. It should be noted that the projections do not reflect wider macro-economic or land-supply issues.

Figure 5.4 – Projected Employment Growth 2007 - 2026

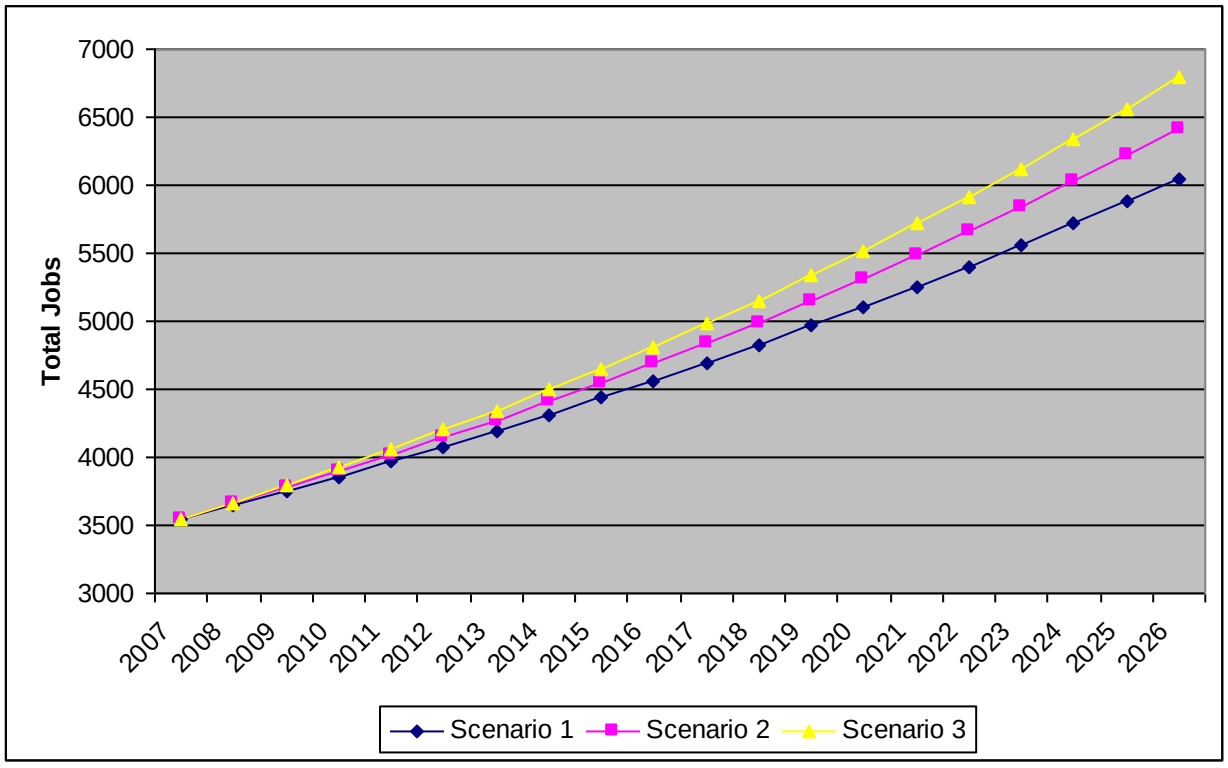


Table 5.10 – Summary of Scenarios

	Annual Growth	Average jobs created per year	Total jobs 2026	Total Additional Jobs 2007-2026
1991-2007	6.7%	143	N/A	N/A
Scenario 1	2.8%	131	6,045	2,498
Scenario 2	3.2%	151	6,414	2,867
Scenario 3	3.5%	171	6,796	3,249

5.65 Table 5.10 illustrates that, compared to average annual employment growth of 6.7% in Gillingham between 1991 and 2007, each Scenario assumes a considerably lower level of growth to 2026 at between 2.8 and 3.5% per annum. This is because the annual level of growth between 1991 and 2007 was particularly high given Gillingham's low base in 1991.

5.66 Scenario 1 assumes an average level of job creation per year slightly below that seen in the town between 1991 and 2007. Both Scenario 2 and Scenario 3 assume an average level of job creation per year above that seen between 1991 and 2007 as a result of the policy interventions assumed as part of these scenarios.

5.67 Even with Scenario 1, which assumes a continuation of past trends with limited interventions required, the town could generate an additional 2,500 jobs in the period 2007-2026. Scenario 3 estimates that around 3,250 jobs could be generated in the same period, although it is quite possible that job creation could go above and beyond this figure if population growth accelerates on past trends and is coupled with sufficient investment in infrastructure.

Alignment with Development Scenarios

5.68 This section considers the top-down analysis of economic capacity against the potential labour supply generated by the two refined scenarios for growth identified in Section 4.

5.69 Table 5.11 demonstrates the size of the potential labour force generated from the two housing growth scenarios according to the potential level of out-commuting. This has created six different scenarios on the potential size of the labour force. The table shows that, if refined scenario 1 was implemented, there could be a potential labour supply of between 1,842 and 3,411. If growth refined scenario 2 was implemented, there could be a potential labour supply of between 1,256 and 2,326.

Table 5.11 – Comparison of Economic and Housing Growth Scenarios

Development Scenarios	Refined SC1	Refined SC2
New resident population	7304	4980
New resident population who are economically active	3411	2326
Potential Labour Supply		
Current Commuting Pattern (54% Gillingham Residents stay for work)	*1842*	*1256*
Eco towns (1 job per household)	*3366*	*2295*
Reduced Out-commuting (all new people work in Gillingham)	*3411*	*2326*
Economic Growth Scenarios		
Scenario 1 - Additional Jobs Created to 2026	2498	

Scenario 2 - Additional Jobs Created to 2026	2867
Scenario 3 - Additional Jobs Created to 2026	3249

5.70 Refined Scenario 2 assumes that housing development will mostly be concentrated in the south of the town and will mostly take place before 2026. If this Scenario was to take place, there would be a need to supply between 1,256 and 2,326 jobs up to 2026. The economic growth scenarios illustrate that this should be achievable, with an estimated economic capacity of between 2,498 and 3,249 jobs to 2026. This may mean that the growth of the labour force may not be sufficient to support the levels of employment growth projected within the three economic scenarios, unless a greater proportion of existing residents decide to work locally instead of outside of the town, or if people commute in to Gillingham to take up employment.

5.71 Refined Scenario 1 assumes that, again, most housing development would take place in the south of the town up to 2026, but then after this date further development would occur in the north west of the town. In this scenario, there would be sufficient jobs to serve the new population up to 2026, as per refined Scenario 2, as well as beyond 2026 as long as the rate of housing growth does not accelerate post 2026.

5.72 If, however, refined scenario 1 was to be implemented in its entirety before 2026, this would require a total of around 3,400 jobs (assuming that the town aims to deliver sufficient jobs for all new residents), which is slightly above even economic growth Scenario 3.

Summary

5.73 In summary, there appears to be sufficient economic capacity to provide jobs for all new residents if refined scenario 2 is implemented, even if the town was to follow a 'business-as-usual' approach to future economic development as per economic scenario 1. Despite this, it is recommended that the town does attempt to diversify its economy, as considered later in this Section.

5.74 The town would also have sufficient economic capacity to provide jobs for all new residents if refined scenario 1 is implemented, assuming that growth in the north of the town takes place post 2026 and if Economic Scenarios 2 or 3 were followed. If refined scenario 1 was to be developed in it's entirety by 2026, the town would need to ensure that there were effective policy interventions that attract jobs more quickly than has taken place between 1991-2007, at a level slightly above that estimated in Economic Scenario 3.

Benchmarking

5.75 Table 5.12 compares the potential future ratio of population to employment in Gillingham (in 2026) with the existing ratio of population to employment in similar sized towns. This ratio provides an indicator as to the degree of self-containment within each town. This forms part of a wider benchmarking exercise described in Appendix C.

5.76 The table illustrates that the ratio of jobs to population in Gillingham is expected to be at a level similar to Uckfield, in East Sussex or Stowmarket, in Suffolk. The ratio is not expected to be quite as high as towns such as Alton or Oswestry, largely because Gillingham has started from a lower employment base than these towns. Other towns also have a higher degree of self-containment, and therefore more jobs per population, for other reasons including:

- Their proximity to other employment centres;
- Transport links to other centres;
- The proliferation of large-scale local employers and specialist industries; and
- The historical economic context.

Table 5.12 – Employment – Population Benchmarking (Selected Towns)

Settlement	Total Population[8]	Total Employment[9]	Ratio of Population to Employment
Wantage	17,913	5,098	0.28
Warminster	17,486	5,563	0.32
Gillingham - SC1, Economic Scenario 1	16,994	6,045	0.36
Gillingham - SC1, Economic Scenario 2	16,994	6,414	0.38
Uckfield	15,374	6,100	0.40
Gillingham - SC1, Economic Scenario 3	16,994	6,796	0.40
Gillingham - SC2, Economic Scenario 1	14,670	6,045	0.41
Gillingham - SC2, Economic Scenario 2	14,670	6,414	0.44
Gillingham - SC2, Economic Scenario 3	14,670	6,796	0.46
Stowmarket	15,059	7,116	0.47
Oswestry	16,660	7,955	0.48
Romsey	17,386	8,639	0.50
Sleaford	15,219	8,774	0.58
Alton	16,051	9,605	0.60
Cirencester	15,861	14,142	0.89

Translating Economic Forecasts into Land Use Requirements

5.77 In order to plan for the future development of employment uses, it is necessary to estimate the amount of land which will be required to accommodate employment growth. This section only considers the amount of land required to support B class employment uses (office, general industrial and distribution).

5.78 We have taken a four step methodology to estimating land use requirements:

- Step 1: Estimate the types of employment generated, as a proportion of total employment;
- Step 2: Apply typical employment densities to calculate the total premises requirement by type;
- Step 3: Apply typical plot ratios, in addition to an allowance for internal roads and non-plot landscaping, to calculate the amount of land required to support employment premises; an
- Stage 4: Consider the need for market choice and for 'churn' within the market.

5.79 It should be noted that this exercise does not replace the employment land demand forecasts produced as part of the Bournemouth, Dorset and Poole Workspace Strategy in 2008. The Workspace Strategy looks at employment land requirements on a sub-regional level, based upon

[8] 2001 Population as defined by aggregating wards to urban area boundaries, except Gillingham Scenarios which are existing population plus additional population generated by development
[9] 2007 Annual Business Inquiry data by ward aggregated to urban area boundaries

regional growth assumptions, and do not specifically look at growth aspirations within relatively small economies such as Gillingham.

5.80 The estimates of employment land demand presented below represent the findings of our assessment to support the growth options identified within this study, including the need for sites to support specific sectors and land to support diversification of the economy. As a result, the approach presented below is more relevant to the context of growth, and what is needed to achieve it, within Gillingham.

Stage 1: Estimate of Employment Generated by Type

5.81 The estimated levels of employment growth for each Scenario have been split according to the types of accommodation required to support the growth in each sector. Table 5.13 demonstrates that Scenario 3 is likely to require a greater degree of office accommodation, largely as a result of the greater degree of diversification towards higher-value office-based jobs.

Table 5.13 – Employment Generated by Type (No. of Jobs – part-time and full-time)

	Economic Scenario 1		Economic Scenario 2		Economic Scenario 3	
	No. of jobs	*%*	No. of jobs	*%*	No. of jobs	%
Office	438	*17.5*	591	*20.6*	774	*23.8*
General Industrial	661	*26.4*	690	*24.1*	700	*21.5*
Distribution	237	*9.5*	288	*10.0*	342	*10.5*
Non B Class	1,163	*46.5*	1,297	*45.3*	1,433	*44.1*
Total	2,498	*100.0*	2,867	*100.0*	3,249	*100.0*

Stage 2: Estimated Floorspace Requirement

5.82 Table 5.14 illustrates the total floorspace requirement to support the mix of jobs illustrated in Table 5.13. In order to calculate the floorspace, the following employment densities (as identified from 'Employment Densities: A Full Guide', published by English Partnership in 2001) have been applied:

- Office Floorspace – 19sq.m
- General Industrial – 34sq.m
- Warehouse – 40sq.m

Table 5.14 – Total Gross Floorspace (sq.m) Requirement

	Economic Scenario 1	Economic Scenario 2	Economic Scenario 3
Office	8,319	11,235	14,700
General Industrial	22,458	23,475	23,804
Warehouse	9,498	11,501	13,686
Total	40,275	46,211	52,190

Stage 3: Estimated Land Required to Support Floorspace

5.83 Table 5.15 illustrates the total land requirement to support the floorspace illustrated in Table 5.14. The following assumptions have been applied to calculate the floorpsace requirement:

- Floorspace Area Ratio of 30% for office floorspace
- Floorspace Area Ratio of 40% for general industrial floorspace
- Floorspace Area Ratio of 40% for warehouse floorspace
- An allowance of 25% for non-plot landscaping and roads

Table 5.15 – Total Land Requirement (ha)

	Scenario 1	Scenario 2	Scenario 3
Office	3.5	4.7	6.1
General Industrial	7.0	7.3	7.4
Warehouse	3.0	3.6	4.3
Total	13.5	15.6	17.8

Stage 4: Allowance for Churn and Market Choice

5.84 As shown in Table 5.5, the total take-up of land in Gillingham over the 12 year period between 1994-2006 is 11.04ha. This means that the annual average take up of employment land in Gillingham has been 0.92ha. Assuming that it takes on average 2 years from the moment a site is vacated till it is demolished, rebuilt and ready for re-occupation, the average annual take up has to be multiplied by two. This results in an allowance for churn demand of 1.84ha. This allowance also allows for decanting of employment generating uses which are identified within the area identified for re-development for mixed use development at Station Road.

5.85 Employment Land Review Guidance produced by DCLG recognises that it is important that prospective occupiers of employment premises have a choice of sites or premises that meet their requirements within a particular area, especially where there are a limited number of land owners or developers who control much of the employment site supply.

5.86 As a result, we have applied an uplift of 25% of the total land requirement to allow for a choice of sites, including the need for a portfolio of sites which can support a range of diverse employment types and therefore assist with the objective to diversify the economy.

Table 5.16 – Total Land Requirement (ha) including Churn and Market Choice

	Scenario 1	Scenario 2	Scenario 3
Total Demand (ha)	13.5	15.6	17.8
Allowance for Churn (ha)	1.84	1.84	1.84
Total Demand (including Churn)	15.3	17.5	19.7
Allowance for Choice of Sites	25%	25%	25%
Total Land Demand (ha)	19.1	21.8	24.6

Total Land Required for B Class Employment Uses

5.87 Table 5.16 illustrates that a total of 19.1ha would be required to support B class employment growth up to 2026 if the economy were to develop as per Scenario 1. A total of 24.6ha would be required if the economy were to be developed as per Scenario 3.

Comparison with Other Forecasts

5.88 The Bournemouth, Dorset and Poole Workspace Strategy, published in October 2008, provides forecasts of employment land for the region up to 2026. The Strategy estimates that a total of 25.3ha would be required to support B use class employment development in North Dorset, of which 7.2ha would be for office premises and 18.2ha for industrial and warehousing premises.

5.89 This figure of 25.3ha for the whole North Dorset District is only slightly higher than the estimated 24.6ha of the land required to support employment growth in Gillingham (assuming the town can achieve the levels of growth associated with Scenario 3), although Gillingham only has 15% of the District's existing employment. The estimated B class land requirement for Gillingham would therefore be expected to be lower in the BDP Workspace Strategy than the forecasts provided above.

5.90 There are a number of reasons why the forecasts set out in this report are larger than those within the BDP Workspace Strategy:

- The BDP Workspace Strategy assumes an employment growth level of 0.8% per annum for rural areas (of which North Dorset is included within), which is in line with the growth rate for the wider South West region. However, as Gillingham has a clear objective for growth, the town can expect to achieve levels of growth above that of the sub-region. Furthermore, the forecasts in this study go beyond the extrapolation of past trends to consider what may be possible if there is a more active economic strategy which encourages diversification.
- The BDP Workspace Strategy assumes that only 20% of all employment growth to 2026 will require B class accommodation, which results in a relatively small requirement for B use land. A major factor in this estimate is the projected decline in manufacturing employment in the sub-region. Given Gillingham's strong manufacturing base and the fact that the sector has grown by around 7% per annum whilst contracting in the sub-region, the forecasts in this report assume that a greater proportion of future growth (around 45%) will require B use class land. This does not mean that we expect manufacturing to continue growing at the rate seen during the past 15 years, but that it is reasonable to expect some growth as a result of the strong manufacturing base. When combined with Gillingham's strengths in the distribution sector, it is unlikely that the vast majority of future employment growth will be in non B-class sectors in Gillingham (as projected by the Workspace Strategy).
- The BDP Workspace Strategy does not consider the need for a choice of sites to provide for flexibility in the market. If Gillingham is to successfully diversify its economy, it needs to provide a number of different sites for different occupier types. The forecasts in this report therefore assume an uplift on the amount of land required for B class premises to accommodate the need for choice.

5.91 In addition to the above, the projected take-up of land for B class uses is expected to be between 0.71ha and 0.94ha per year up to 2026 (Table 5.17). This compares with past take-up rates of around 0.92ha per year between 1994 and 2006 (see Table 5.5).

Table 5.17 – Average B Class take-up per year

	Total Land Required (ha)	Average Take-up (ha) 2007-2026
Economic Scenario 1	13.5	0.71
Economic Scenario 2	15.6	0.82
Economic Scenario 3	17.8	0.94

5.92 Furthermore, benchmark analysis of other towns of a similar size illustrates that most have levels of employment similar to that predicted by our economic forecasting work.

Locations for Growth

5.93 This section considers the potential locations to support the levels of B class employment growth set out in Table 5.17.

5.94 The starting point for identifying suitable locations for employment growth is the North Dorset Employment Land Review 2007, which assessed a range of sites according to their suitability to support employment development.

5.95 Table 5.18 demonstrates the amount of land identified for employment uses in the Employment Land Review as per April 2007, as well as the amount of land now left at each site as per June 2009. The table demonstrates that there is a total of about 18.5ha of land now available, including the land at Station Road. This is an insufficient amount to accommodate even the 19.1ha of land required to support Scenario 1. As a result, it will be necessary to identify and allocate an additional site for B class employment uses within the town.

Table 5.18 – Employment Sites Identified by Employment Land Review 2007

	Size of Plot (ha)	Land left as at June 09 (ha)
Sites to be Retained		
Southern Plot Brickfields Business Park	11.7	11.7
Peacemarsh	2.66	1
Park Farm	4.16	1.5
Sites Requiring Further Consideration		
Station Road	4.28	4.28
Total	22.8	18.48

5.96 At present, most of the Gillingham's employment land is located towards the south and south east of the town and accommodates largely general industrial and distribution buildings.

5.97 In order to offer a real alternative which could support a greater degree of diversification of the economy, it is proposed that a site towards the west of the town, at Wyke, should be allocated. This site is illustrated in Figure 4.6.

5.98 Our discussions with agents have revealed that it is important for an appropriate site environment to encourage a developer to provide higher quality sites and premises and a sufficient mix of sizes and types to cater for different sectors such as the target growth industries for the A303 corridor and accommodation for Small and Medium-sized Enterprises (SMEs).

5.99 It may be difficult to provide a sufficient range of sites and premises at existing employment land allocations at Brickfields Business Park, Park Farm and at land at Peacemarsh alone. However, the site at Wyke has the potential to offer a higher level of quality of site and is of sufficient size for an occupier to establish a high quality site suitable for a larger occupier within target growth sector/s. The site has potential to create a business park style environment with provision of sufficient areas for landscaping and supporting amenities to create a new business hub for Gillingham.

5.100 The site at Wyke was identified following consideration of other locations around Gillingham, the advantages are that it is located away from existing concentrations of employment land (and so

offers an alternative location within the town and helps to distribute the traffic impact of employment uses) in the town and has suitable access to the local road network.

5.101 If the additional site at Wyke, which is 10.4ha, were added to the existing portfolio of land identified in Table 5.18, Gillingham would have 29.8ha of land to support a range of employment types to 2026. This would be sufficient to meet the estimated land requirement for all scenarios (Table 5.16).

5.102 The combination of the existing industrial land at Brickfields Business Park, which would cater for the growth of general industrial and small scale distribution uses, the land available at Park Farm for smaller workshops, the development of Station Road, which would provide a range of office units within a mixed-use environment within close proximity to the town centre, and the proposed new allocation at Wyke, which would cater for high value businesses within business services, advanced engineering and other key sectors, would provide a suitable portfolio of land to enable the town to diversify its economy.

5.103 Furthermore, the scale of supply, if all of these sites were to be made available for employment uses, would have the potential to generate a degree of supply-led demand. Analysis has shown that one of the biggest reasons for businesses choosing to locate in Gillingham in the past has been the availability of land. As a result, the Consultants consider that if land of a sufficient quality, located in the right place, which targets specific sectors, is made available then this is likely to act as a catalyst for the growth and diversification of the town's economy.

Summary

5.104 This analysis has identified that the potential capacity for economic growth within Gillingham should not be seen as a serious constraint to the potential level of housing growth proposed for the town. The town has seen strong levels of employment growth during the past 15 years which can be expected to continue if past levels of population growth are sustained and sufficient infrastructure is put in place to support economic growth.

5.105 However, the continued growth of general industrial businesses combined with the under-representation of higher-value businesses, such as that seen during the past 15 years, should not be seen as viable option for future growth. Gillingham needs to improve its position relative to other towns in the region, so it has to address the key drivers of competitiveness and demonstrate how it can improve its performance on them. Gillingham has an economy which is focused on manufacturing and distribution and which generates lower-value employment as well as lower income levels and requires lower levels of skills. As a result, Gillingham needs to diversify its economy and encourage the creation and retention of knowledge-based industries.

5.106 A range of measures and infrastructure will need to be put in place to attract the desired businesses. For instance, the creation and marketing of an attractive environment for businesses will be paramount. Knowledge-based industries, including advanced manufacturing, advanced engineering and environmental technology, are typically attracted to places that have highly sophisticated telecommunications infrastructure, an outstanding transport system, a well educated and skilled labour force, first-rate community and leisure services and an image of being an enjoyable place to live, work and visit. In light of growth in knowledge-intensive sectors, as well as the necessary increase in services and retail to accompany an increase in population, there will be greater demand for more office sites.

5.107 Economic performance, employment growth, labour supply and learning and skills are inextricably linked. Without high-value added, knowledge-intensive businesses located in the area a highly skilled workforce is not going to be attracted or retained, while without the correct labour supply the area is not so attractive as a business location. shift in market share from manufacturing to business services means that service-sector employment will increase at the expense of industrial positions. Appropriately skilled individuals will be required as a result. Further and higher education, lifelong learning and workforce training will need to be encouraged.

5.108 There will also need to be continued business support for established sectors such as manufacturing, freight and logistics, which will still form a major part of the towns economy and which generally have a larger land-take than offices.

5.109 The town will need to ensure that it fosters the development of existing businesses through suitable business support. There will be a need to encourage new business formation through the provision of SME and seedbed ‘move on’ space for small workshop and office-based uses, whilst encouraging inward investment opportunities from within the UK and internationally through targeted marketing. There is also a need to upgrade highways and broadband infrastructure in the longer term.

5.110 The expansion and intensification of the town centre is also an important component in delivering growth for Gillingham. Delivering a key proportion of the employment floorspace required to support growth in this area will be important not only for achieving job numbers and greater job density, but also in achieving economic restructuring in the town and an increasing move away from existing logistics and manufacturing to more office based activity.

5.111 There needs to be a step-change in the quality of employment land and premises available to secure a change in the quality of employment in Gillingham. This means the availability of a choice of sites for different sectors rather than more of the same. Whilst the town has sufficient employment land to support general industrial and distribution premises requirements in the medium term, there will be a need to provide sufficient choice and flexibility in the provision of sites to support the diversification strategy, especially if it takes time to deliver office space in the town centre.

5.112 This study has identified that, as well as providing a sufficient quantity of land to support future employment growth, there is also a need to provide sites of sufficient quality. Our discussions with agents have revealed that it is important for an appropriate site environment to encourage a developer of higher quality "business park style" premises. This may be more difficult to realise if a site is added on to the existing allocated sites, which are largely focused on providing accommodation for general industrial businesses. As a result, this study identifies a potential future location for a business park at Wyke, as well as other locations for future employment growth. Depending upon the speed of growth within the town, this site may not be needed until after 2026, however it is considered that there is merit in including this site or a similar site within the employment land portfolio so that a different type/quality of provision can be delivered.

6. Transport

Introduction

6.1 This section has been compiled by Buro Happold to inform the transport implications arising from prospective development, in Gillingham up to 2026.

6.2 The work incorporated within this section follows on from a wider strategic analysis carried out to inform the North and north East Dorset Transport Study (NnEDTS). The NnEDTS was prepared in response to the draft Regional Spatial Strategy (RSS) and RSS proposed changes and will inform the Local Development Framework (LDFs) for the District Councils. This strategic analysis, commissioned by Dorset County Council (DCC) as the Highway Authority, incorporates a County wide strategic traffic model to test the implications of development options on Dorset's strategic highway network.

6.3 This model is a straight forward strategic traffic assignment tool, used to compare volumetric increases in traffic along the County's roads. A series of evaluation assessments have been made with this model. These focus on Gillingham and provide strategic level information about the relative impacts of various amounts of development considered by the study. This work enabled advice to be given as to whether (link) capacity of the two principle highways running through the town, the B3081 and B3092, was predicted to be exceeded as a result of the proposed growth.

6.4 The strategic traffic model, however effective in determining the wider impacts of development, is too 'strategic' to enable it to provide a detailed assessment of the impact on Gillingham's local roads. With consideration for this, a further stage of analysis has been undertaken to look in more detail at the implications for travel of the various development scenarios. This focuses on the implications for the 3 principal signalised junctions within Gillingham. This further study incorporates the development of a manual assignment tool, utilising existing traffic flow data to determine distribution of traffic on the network following development.

6.5 Through the use of the manual assignment tool, the effects of increased containment, varied housing scenarios and access strategy for each of the sites, is reflected on the local road network for various years to 2026. From these modelling outputs, assumptions may be drawn upon the level of development that may be accommodated on the local network and what potential highway improvements may be required to mitigate the implications of intensified housing provision in the town.

6.6 Further to the vehicular capacity analysis carried out, each potential housing site was tested for its accessibility to existing amenity and community facilities. The analysis informed the evaluation of housing sites in Section 4 of this report. This analysis is set out in Appendix F. Movement corridors accommodating pedestrian and cyclist flows have been established enabling analysis of gaps and proposals for improvement.

Geographical positioning

6.7 Gillingham is not served by an A road; however, it is in the central core of a rectangular network of strategic roads, with the A303 east-west a trunk road link lying 6km to the north, the A30 east–west link lying 4 km to the south, the A350 north-south link lying 5km to the east and the A357 north-south link lying 11km to the west. Further to the strategic road network Gillingham also lies upon the West of England mainline rail link which strategically serves Exeter and London Waterloo and locally Salisbury and Yeovil.

Data

6.8 The 2001 Census is used for analysing the existing population characteristics. While it is appreciated that the data is eight years old there is no more recent complete data set that is as

robust or includes the level of detail required for the traffic analysis. The Development Zones used are set out in Appendix F.

6.9 The transport assessment has tested the two preferred growth scenarios (the refined scenarios 1 and 2 identified in section 4 and for each scenario has tested different levels of self containment:

- 54% self containment is based upon the economically active aged population aged 16 – 74 in the four Gillingham Wards based on the 2001 Census (anonymity assumed all single trips are counted as 3 trips; if 1 trip is used containment is 49%);
- 75% self containment (this assumes 1 job per household is provided in Gillingham); and
- 95% self containment (assumes an equal number of jobs provided to the number of economically active population).

6.10 The different levels of self containment include the existing level of self containment (54%) and an increased level of self containment that the town should strive for if the town is to develop in a sustainable way. 75% self containment was tested as this represents a realistic level of self containment that could be achieved in the town (achieving 1 job per household is an Eco Town PPS target). 95% self containment is unlikely to be achieved, however it is important to test the impact of this 'maximum level' of self containment as a 'sensitivity' test.

6.11 This section is structured to accommodate the modelling, accessibility and mitigation requirements, as follows:

6.12 Stage 1 Strategic

- Existing strategic Issues;
- Programmed Improvements;
- Origin/Destination, journey to work diagram;
- Existing Mode Split;
- Strategic Modelling; and
- Suggested Improvements.

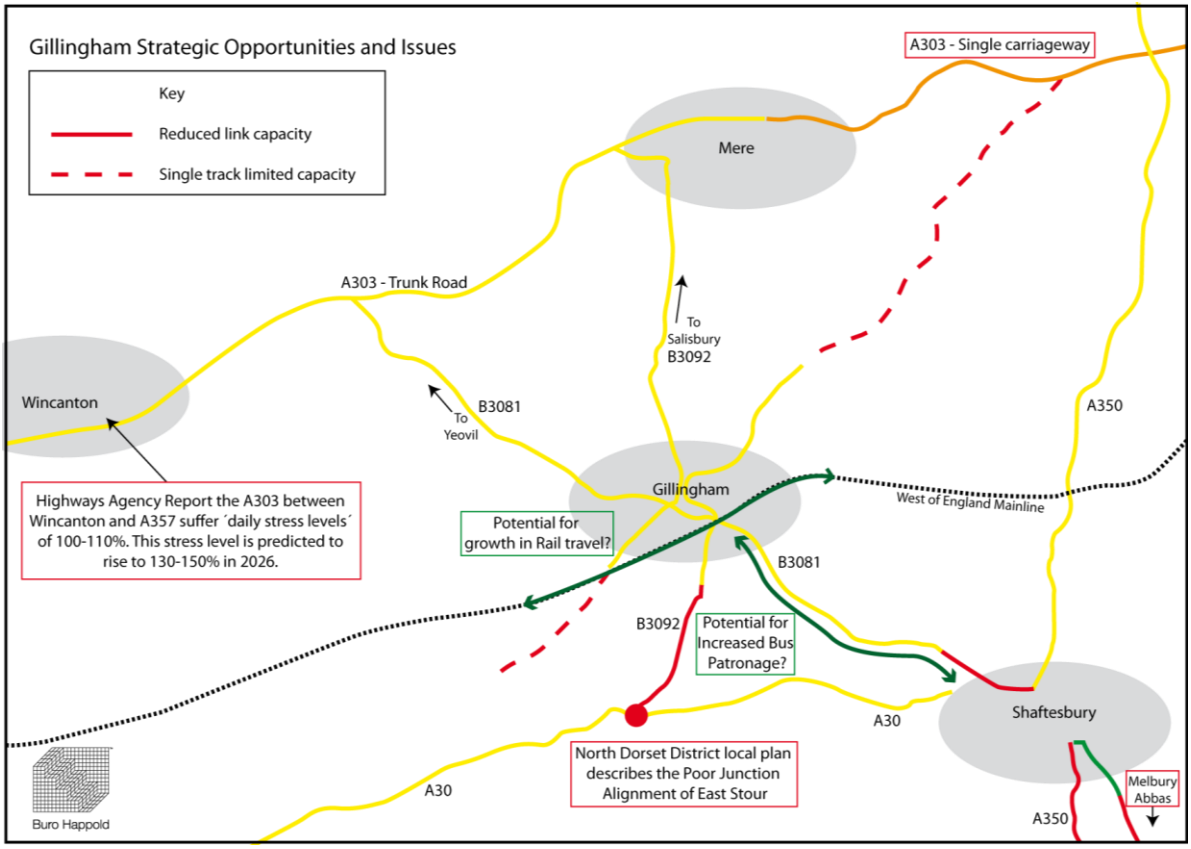
6.13 Stage 2 Micro

- Existing town Issues;
- Programmed Improvements;
- Access Assessment;
- Micro Modelling;
- Walking accessibility assessment; and
- Suggested Improvements.

Strategic Assessment

6.14 The existing strategic issues which are summarised in Figure 6-1 are described below.

Figure 6.1 - Existing Strategic Issues and Opportunities



Existing Strategic Issues: A303

6.15 As a strategic document, the RSS concerns itself predominantly with broad development with the next tier 'down' of policy documentation considering in more detail specific sites. Of interest to Gillingham is policy RTS1, summarised below:

Policy RTS1 sees corridor management of the A303 between Exeter and London in order to improve reliability and resilience of journey times to manage the demand for long distance journeys and reduce the impact of local trips on the network. Measures include:

- local transport network improvements to walking, cycling and public transport;
- developers managing the impact of their development on the network;
- access control measures; and
- improved use of existing infrastructure.

Gillingham has direct access to the A303 via the B3081 (Wyke Road). The A303 is a trunk road and therefore under the jurisdiction of the Highways Agency which is an executive agency of the Department for Transport. It is the Highways Agency's stated role to '*ensure that the Strategic Road Network supports the delivery of sustainable development whilst maintaining the safe and efficient movement of longer distance traffic*.'[10]

[10] Regional Network Report for South West 2008

Analysis of the key issues facing the trunk road in the south west.

6.16 Within the Regional Network Report (RNR) it is reported for both 2016 and 2026 that the single carriageway sections of the A303 though the region will be 'highly stressed'. The Highways Agency defines stress, in the 'simplest terms', as being the daily flow on a road divided by the daily capacity of that road. It is reported that a value of over 100% means that the road is busy during more than just the morning and evening peak hours. This does not necessarily concur with the 'simplest terms' explanation.

6.17 The data sets which the growth forecast are based is contained in Appendix F.

6.18 Yeovil and Salisbury are reported within the Census 2001 as being key employment destinations for residents of Gillingham, attracting 9% and 13% of trips respectively. Both these destinations could involve a car based trip along the A303 which would be classed by the Highways Agency as a short trip and therefore not one that should be encouraged on the trunk road network.

Existing Strategic Issues: Rail

6.19 As a strategic document, the RSS concerns itself predominantly with broad development with the next tier 'down' of policy documentation. Particularly relevant to Gillingham is policy RTS1, summarised below:

Policy RTS1 sees corridor management of the A303 between Exeter and London in order to improve reliability and resilience of journey times to manage the demand for long distance journeys and reduce the impact of local trips on the network. This will include the following:

- Improvements to information provision, including timetabling of rail services;
- Engineering measures to enable increasing frequency of rail services; and
- Capacity enhancements to the corridors, including rail passenger services.

Programmed Improvements A303

6.20 According to the Highways Agency there are no major infrastructure improvements planned for the A303. It is recognised as a regionally important corridor and therefore funding for schemes is secured through the Regional Funding Allocation (RFA). No schemes on the A303 in the latest RFA covering the period to 2019 have received funding.

6.21 It is understood, however, that the Highways Agency is likely to be implementing a programme of installing Variable Message Signs (VMS) along the A303 that will include the section influenced by the study area. The Highways Agency describes the main purpose of VMS on its network being to communicate information and advice to drivers about emergencies, incidents and network management, aimed at improving safety and minimising the impact of congestion

6.22 The following schemes are identified along the length of the A303 as programmed works:

- A303/ A358 South Petherton to M5 Taunton: The proposed route would create a new dual carriageway between the end of the existing A303 dual carriageway to the east of Hayes End Roundabout near South Petherton, along the A303 to Southfields roundabout near Ilminster then along the A358 to the M5 motorway at Taunton. Further work on the scheme is currently on hold while the implications of the decision to cancel the A303 Stonehenge Improvement Scheme are considered by the Department for Transport and the South West Region in the context of the wider strategy for improving the A303/A358 route corridor.
- A303 Willoughby Hedge to Mere Carriageway Reconstruction, Resurfacing and Drainage.

Corridor Infrastructure

A30/ B3092 East Stour Crossroads

6.23 This scheme has been prioritised by Dorset County Council and is included in the North Dorset District-Wide Local Plan under policy 5.28. It involves the realignment of the A30/B3092 cross road at East Stour. This scheme will be completed by 2016.

A30/ C21 West Stour Crossroads

6.24 This scheme involves improvement works to the A30/C21 crossroad in West Stour. It will address road safety concerns on the A30 corridor west of Shaftesbury. These improvements will be of benefit to those travelling between Gillingham, Shaftesbury, Sherborne and Yeovil on the A30.

A30/ B3081/ B3092 Shaftesbury, Gillingham and East Stour Route Management

6.25 This scheme has already been prioritised by Dorset County Council. A traffic safety and maintenance management study will be carried out to identify suitable measures. An approach involving a combination of enforcement, engineering and education measures is needed to make sure that the B3081 is able to accommodate the forecasted increase in travel demand between Gillingham and Shaftesbury as a result of Gillingham's potential growth proposals.

Enmore Green Road Link

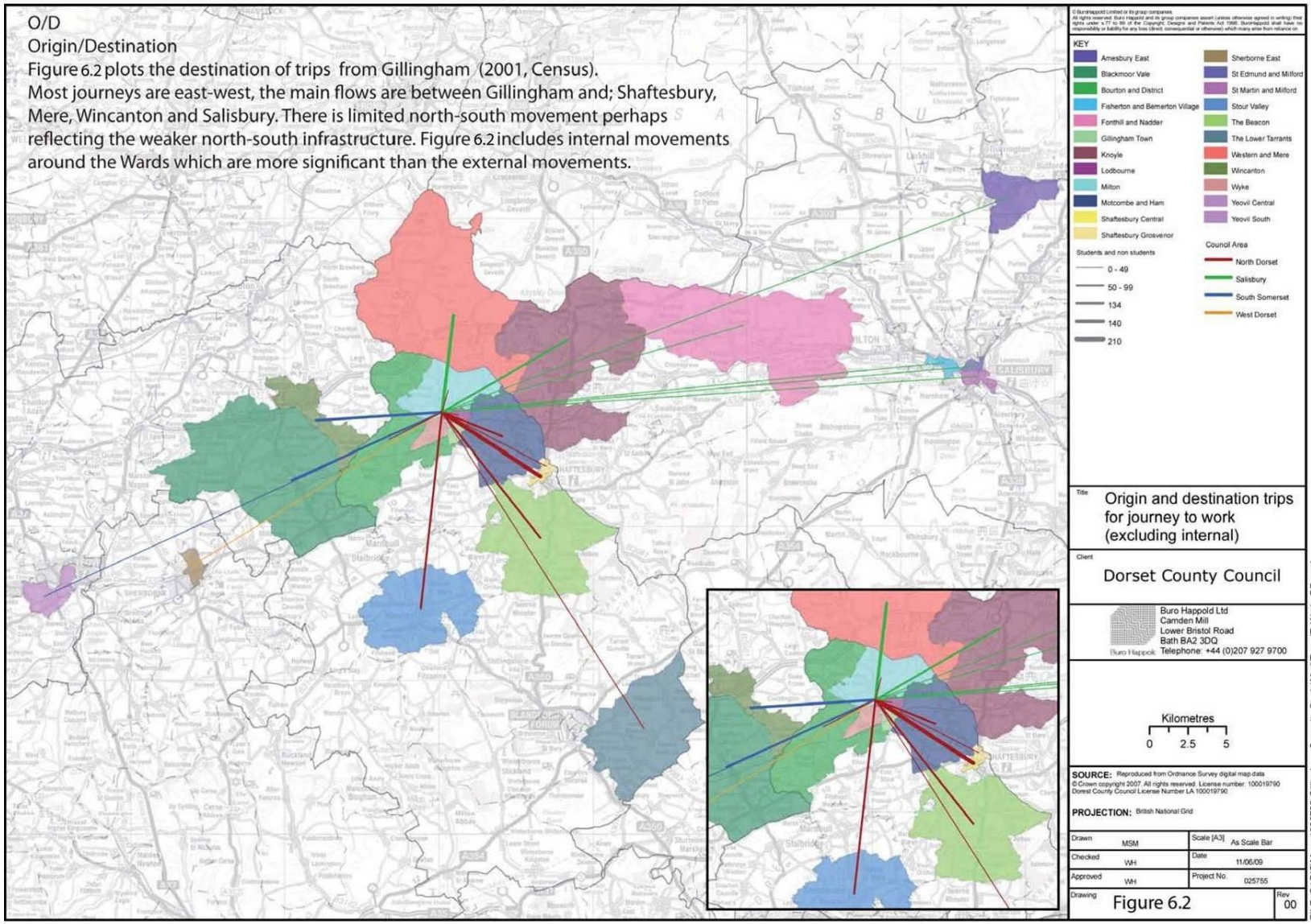
6.26 This scheme is identified in the North Dorset District wide Local Plan under Policy SB17. It involves the construction of a link road between the B3081 and the A30. A feasibility study was carried out on the link in 2005 on an alignment and concluded that there were some inherent problems with the proposal due to the existing topography. It was recommended that proposals were revisited and alternatives explored to reduce the amount of earthworks required from a environmental and cost perspective. No funding is currently secured for the scheme.

Origin/Destination journey to work diagram.

6.27 Figure 6.2 shows destination of journeys from Gillingham (combined Wards) to all destinations with more than 10 trips.

6.28 Figure 6.2 shows most journeys are east-west. The main flows are between Gillingham and Shaftesbury, Mere, Wincanton and Salisbury. There is limited north-south movement perhaps reflecting the weaker north-south infrastructure. The benchmarking exercise set out in Appendix C compares the containment at other similar market towns across the country.

Figure 6.2 Journey to Work Destinations from Gillingham



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Existing Public Transport: Bus

6.29 There are a number of existing bus services that provide transport links with Yeovil, Salisbury and Shaftesbury (see Table 6.1). There is one service (No. 59) that operates solely between Gillingham and Shaftesbury, which also calls at Motcombe in the morning peak (school). The other services pass through Gillingham as part of a longer journey, summarised as follows (only services that operate throughout the week are shown in Table 6.1).

Table 6.1 - Existing Scheduled Bus Services In Gillingham (Operating minimum every weekday)

Service Number	Route Summary	Stops in Gillingham before 09:00
59	Shaftesbury – Gillingham	Yes
58/58 (A)	Yeovil – Wincanton – Shaftesbury	Yes
309	Bournemouth – Poole – Sturminster Newton – Gillingham - Shaftesbury	Yes

Existing Public Transport: Rail

6.30 Gillingham rail station is a significant transport hub in the local area, with the only mainline rail station in North Dorset. It is situated 10 minutes walk south of Gillingham town centre on Station Road.

6.31 The station is on the West of England main line between Tisbury and Templecombe stations, running from Exeter St David's to London Waterloo. The station has two platforms of sufficient length to accommodate full length, 10 carriage trains. South West Trains operates the London bound service with a half hourly frequency in peak times and hourly during the off peak. There are two services to Yeovil before 9:00, and only one of these continues on to Exeter. In the interpeak periods there is an hourly service to Yeovil; the evening peak period services run half hourly.

6.32 There are bus services connecting with the station, although integration between bus and rail timetables could be improved. There are car parking facilities at the station but these are frequently oversubscribed during the week. Demand for spaces is very high. Currently the car park operates as pay and display with a £2.30 charge for all day parking. There are issues with overspill parking onto the surrounding streets.

6.33 There are programmed Improvements West of England main line. There is currently a high demand for peak commuter services to London on the West of England main line and this is expected to continue. To enable increased frequency and to accommodate a new station at Cranbrook a three mile passing loop is currently being constructed at Axminster. This passing loop will open in December and will enable South West Trains to run an hourly frequency service between Waterloo and Exeter, providing more frequent connections to important local destinations such as Salisbury and Yeovil. At present, on the single track sections of the line, any delay to a service also affects following trains as there is no provision for them to pass each other. The new passing loop will reduce the frequency of delays of this nature.

6.34 Whilst an increased rail service will have a benefit for residents of Gillingham and make public transport more attractive, there is limited scope for increased passenger demand due to the proposed high containment scenarios.

Strategic Cycling Issues

6.35 Given the strong commuter movement from Gillingham to Shaftesbury and their close proximity, it would follow that there is scope for improving cycle connections. There are, however, two significant barriers. Firstly, Shaftesbury is 7.5km from Gillingham which is considered too far for a large proportion of people to consider cycling. Secondly, there are significant gradients up to Shaftesbury only suitable for cyclists in the higher fitness category. However there may be a

justification for improving links for leisure use and to access public services which the two towns share. There may be scope for an off line improvement linked with the Enmore Green Road Link.

Multimodal Transport Assessment

6.36 The vehicular traffic assessment has been undertaken using TRICs data as this is consistent with the ongoing work being undertaken by Buro Happold in its NnEDTS[11]. However, it has been decided not to use TRICs for the multimodal assessment as it is considered that other databases provide more useable data. In this instance the Department for Transport's TEMPRO[12] dataset has been interrogated to give data on travel characteristics for future residents of Gillingham.

6.37 Utilising the 2016 and 2026 data it is possible to estimate the number of additional public transport trips generated. This exercise was undertaken for the 54% and 75% containment scenarios as the 99% containment scenario will not generate significant additional bus patronage.

6.38 The impact of the levels of self containment on external public transport trips shows that, as would be expected, the higher the level of self containment, the lower the level of public transport patronage.

6.39 The key employment based movement corridors are linked to the destinations of Salisbury and Shaftesbury. An assessment has been undertaken for the scenarios that estimate, using TEMPRO, the volume of bus passenger movement between these destinations. The predicted number of bus trips (for the journey to work) without the additional development is shown in Table 6.2.

Table 6.2 – Bus Patronage for Gillingham Residents without Additional Development

Scenario	2008	2016	2026
TEMPRO population	8,978	9,622	10,322
Salisbury	18	17	17
Shaftesbury	16	15	15

6.40 A sensitivity test has also been undertaken to estimate the likely impact of a mode transfer (from private car driver) to bus; 10% and 20% mode transfers have been assumed for all residents.

6.41 In general, it can be seen that number of people predicted to travel by public transport are not significant. This is in part due to the high containment factors but also to the dispersed nature of travel patterns in rural areas. However, Salisbury and Yeovil remain the nearest SSCTs; they provide comparison retail, leisure and services not available in North Dorset. Each destination is considered in more detail below.

6.42 Salisbury is serviced by a good train service from Gillingham, weekday services are summarised in the following table:

Table 6.3 - Existing Gillingham to Salisbury Rail Timetable

	Outbound			Inbound		
Depart	07:44	08:12	08:42	16:48	17:23	17:53
Arrive	08:09	08:37	09:15	17:12	17:47	18:17

[11] North and north East Dorset Transport Study
[12] Trip End Model Projections of growth in travel demand.

6.43 Weekday off peak and weekend services are hourly.

6.44 Rail is the most effective way of moving people between Gillingham and Salisbury, it is not considered that improved bus services between the two settlements will capture a significant amount of public transport trips. However, the demand for bus travel by elderly travellers needs to be acknowledged as free travel (through the bus pass system) is not applicable to rail networks.

6.45 There is a good rail service between Gillingham and Yeovil Junction Station, although Yeovil Junction Station is some 2km from Yeovil town centre. The Network Rail, Rail Utilisation Strategy (2006) indicates that the level of passenger demand has increased on this line in the last six years by 22% with commuter flows increasing by 20%. There is no breakdown for specific stations, though.

6.46 There are a number of options available to enhance the viability of Yeovil Junction Station for future residents of Gillingham including:

- Enhancing existing bus/ rail integration (PLUSBUS already in operation)
- Provision of a safe direct cycle link between the station and the town
- Development around the station
- Major realignment of the rail lines and station

6.47 It is debatable as to whether these measures can be directly attributable to development at Gillingham and should form part of a wider infrastructure package across the area to encourage use of the link.

6.48 Bus travel between Yeovil and Gillingham is not well provided for at present. It is considered that the optimum method for encouraging additional public transport trips between Gillingham and Yeovil would be to provide a better linkage with Yeovil Junction rail station. This is a long term measure in keeping with the programme for the growth of Gillingham. Shorter term measures could consider improving the bus link by making public transport more attractive by increasing bus frequency, providing journey time savings compared to the private car and considering reducing the availability or increasing in the cost of long term car parking within Yeovil.

6.49 There are a number of bus services that currently link Gillingham to Shaftesbury but it is understood that these (along with the majority of services within Dorset) are currently subsidised (to a greater or lesser extent) which could indicate that the demand is not enough to financially sustain the service. An increase in population alone is unlikely to transform the bus routes into financially viable services particularly given the proposed levels of containment.

6.50 Gillingham rail station would appear to offer a good opportunity to capture existing and future (relatively) short trips that would otherwise be using the A303. The opportunities to enhance the ability of Gillingham rail station to act as a public transport interchange serving the area, however, are limited in scale for a number of reasons:

- For existing residents of Gillingham, who live to the north of the station, the perception is likely to be that access to the A303 is more efficient than travelling southwards to pick up a train.
- There are no obvious, significant conurbations surrounding Gillingham that would be well served by a park and rail-type facility.

6.51 Notwithstanding the above, car parking capacity at Gillingham station is acknowledged to be in need of improvement. Although there are no significant towns that would justify a bespoke park and rail service, there is Shaftesbury and a rural hinterland catchment that would benefit from the provision of improvements to the station. The future growth of Gillingham could be an the opportunity to provide additional areas around the station for:

- Increased car/ cycle parking

- Environmental enhancements
- Better pedestrian/ cycle access
- Better legibility of the station

6.52 Opportunities have been considered in Section 7 whereby some of the existing industrial uses surrounding the station are relocated, releasing space for transport infrastructure and more dense mixed use development, appropriate to the station location.

6.53 It should be noted that the previous assessment on likely demand utilises a database that does not necessarily take into account that impact on people's choice of place of residence in response to improved transport corridors. For example, a family looking to settle within the area with work in Shaftesbury may be more inclined to live in Gillingham if a high quality public transport corridor is provided between the two. If Gillingham is seen to be an area that can accommodate growth to offset over committing development to other areas, such as Shaftesbury, this factor needs to be considered. The proactive implementation of public transport corridors as an incentive to influence people's residential choices should be considered.

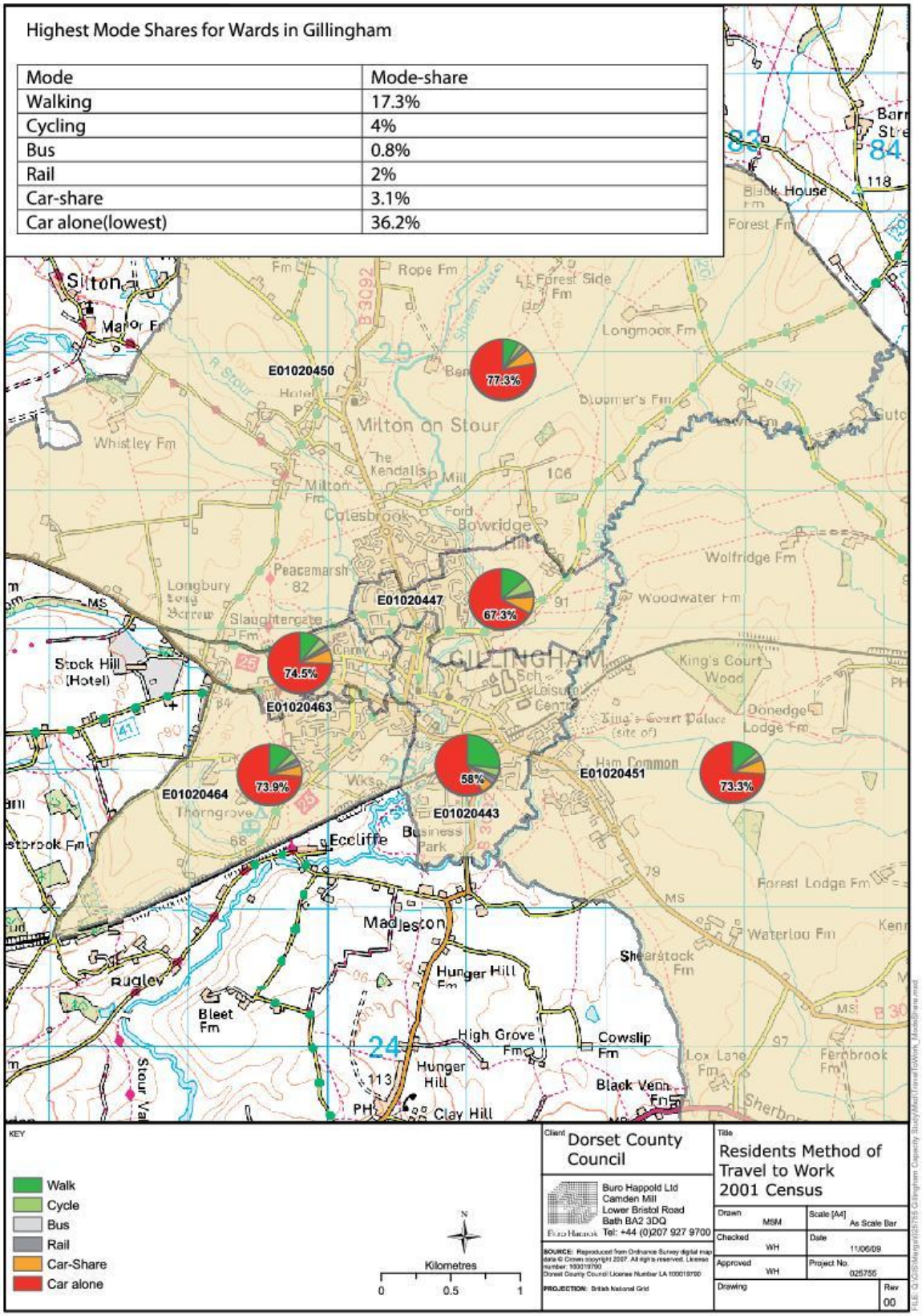
6.54 If Gillingham is to be a focal point for growth then consideration will need to be given to aligning bus services that pass through Gillingham to an extent that they provide a peak period service towards the key destinations of Yeovil and Shaftesbury.

6.55 To complement sustainable transport measures at Gillingham it is important that this is pursued in tandem with policies that seek to balance the cost of public transport (time and ticket) with the private car (time and car parking). This will require the consideration of measures within the main destinations of Salisbury, Yeovil and Shaftesbury such as:

- Bus priority measures
- Car parking restraint
- Car parking charges

6.56 Figure 6.4 shows the mode splits for the different Wards in Gillingham taken from the 2001 Census. All Wards mode splits are predominately car alone journeys. The town centre Ward unsurprisingly has the most sustainable car alone mode split with 58%. The surrounding Wards have higher values for car alone between 67% and 74%.

Figure 6.3 - Ward Mode Split in Gillingham



Strategic Traffic Impact

6.57 The Refined Growth Scenarios shown in Section 4 have been tested for their strategic traffic impact using the following methodology:

- **Step 1 Trip Generation**: Calculates the vehicle trip generation based on the housing scenarios.
- **Step 2 Containment:** Calculates trip containment based on the employment scenarios.
- **Step 3 Traffic Assignment:** Uses the traffic model to assign the traffic to the network
- **Step 4 Traffic Impact:** Compares the traffic impact on the four access roads into Gillingham against the theoretical capacity of the highway

6.58 These steps are now described in more detail.

Step 1 Trip Generation

6.59 By multiplying the trip rates by the number of dwellings to be constructed in each scenario, the total numbers of trips (arrivals and departures for AM and PM peaks) that will be generated has been calculated. The transport plots are aggregated and are explained in terms of the identified development sites in Appendix F.

Table 6.4 – Total Vehicle Trips Scenario 1 AM 2026

Plot	Arrivals	Departures
A	398	235
B	13	8
C	149	88
D	169	100
E	17	10
F	239	141
G	279	165
H	92	55
I	14	8
J	3	2
Total	510	1,478

Table 6.5 - Total Vehicle Trips Scenario 1 PM 2026

Plot	Arrivals	Departures
A	148	429
B	5	14
C	55	160
D	63	181
E	6	19
F	89	257
G	104	300
H	34	99
I	5	15
J	1	3
Total	1374	872

6.60 The modelling assumes that all trips contained in Gillingham will be pedestrian and walking trips and will have no vehicular impact.

Step 2 Containment

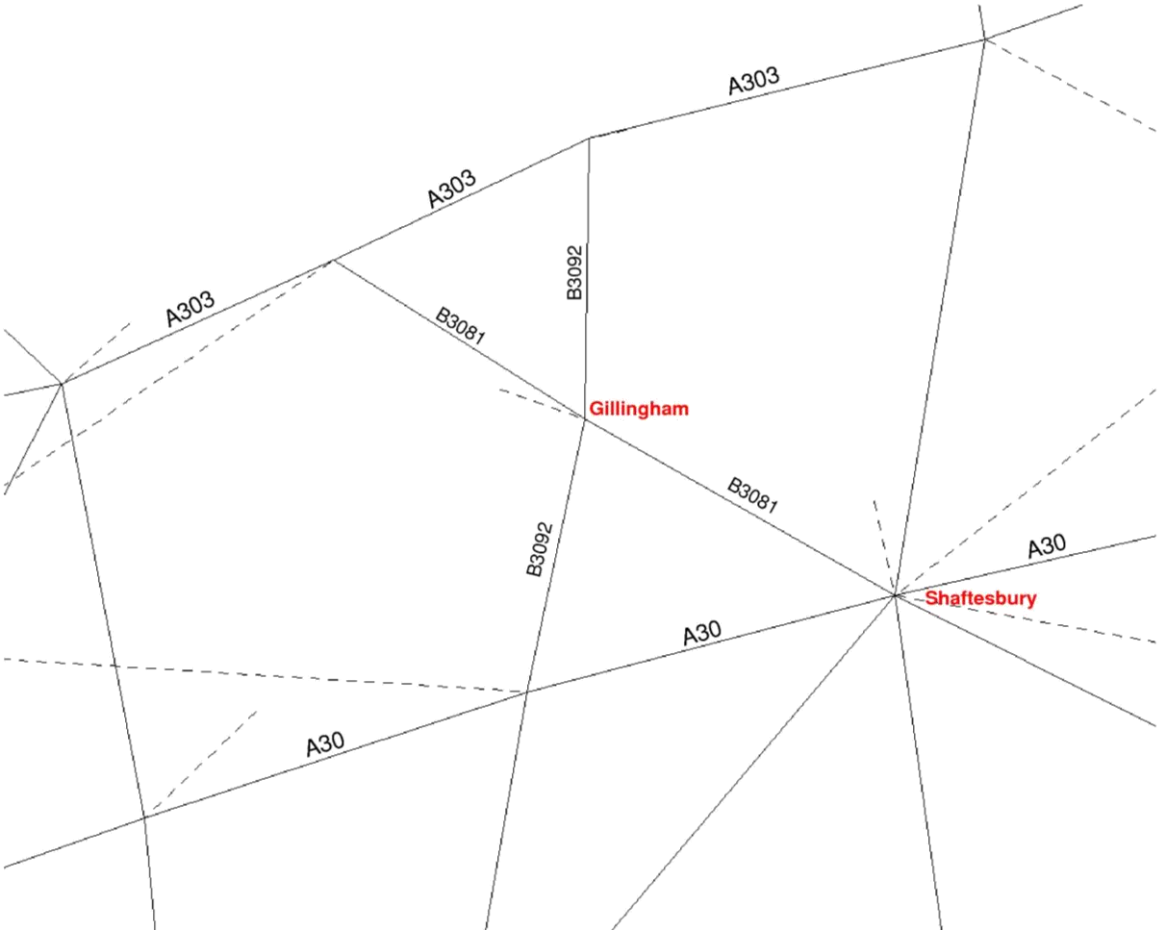
6.61 The level of containment assumed in each Scenario is given Table F.2 Appendix F. This containment factor is proportionally removed from the total trips shown in Table 6.4 or Table 6.5. These vehicle trips were used in the traffic modelling.

6.62 Contained vehicle trips are excluded from the modelling as they would not be using any of the static links present in the traffic model.

Step 3 Traffic Modelling

6.63 The SATURN traffic model covers Dorset (see Figure 6.4) and locations around the county's boundary, including Yeovil (within Somerset) and Ringwood (within Hampshire).

Figure 6.4 Section of the SATURN Model around Gillingham



Step 4: Traffic Impact

6.64 The new trip matrices, including the additional development flows, were assigned to the traffic model network, and the resultant flows on the B3081 and B3092 were examined. The larger of the two directions of flow were recorded, and reported. The flows were compared against the 'pinch point' capacities of the network. To provide a basis for the analysis of the impact of strategic development the routes carrying the highest volumes of traffic have been identified. The technical capacity is defined according to the guidance contained in the Design Manual for Roads and Bridges (DMRB) TA 46/97, measured in vehicles per hour. The capacity of each route is defined as the maximum hourly lane throughput. Characteristics such as topography, bendiness and road

width vary along the length of a road, therefore so too does capacity. In recognition of this, the capacity of each corridor at the highest and lowest quality section of road has been estimated

6.65 These values have been derived from the Design Manual for Roads and Bridges (DMRB) and agreed by DCC. The pinch point capacities are shown in Table 6.6.

Table 6.6 - Agreed Pinch Point Capacities

Link	Pinch Point Capacity
B3081 (A303)	1,020
B3092 (A303)	882
B3092 (A30)	744
B3081 (Shaftesbury)	744

6.66 The results of the traffic modelling are shown in Figure 6.5 to Figure 6.8 for Scenario 1 and for Scenario 2 Figure 6.9 to Figure 6.12. These figures show the 2008 base, and the different levels of self containment including 54% self containment (S1C54, S2C54) 75% self containment (S1C75, S2C75) and 99% self containment (S1C99, S2C99).The full strategic modelling report is shown in Appendix F.

Figure 6.5 – Scenario 1 B3081 to A303

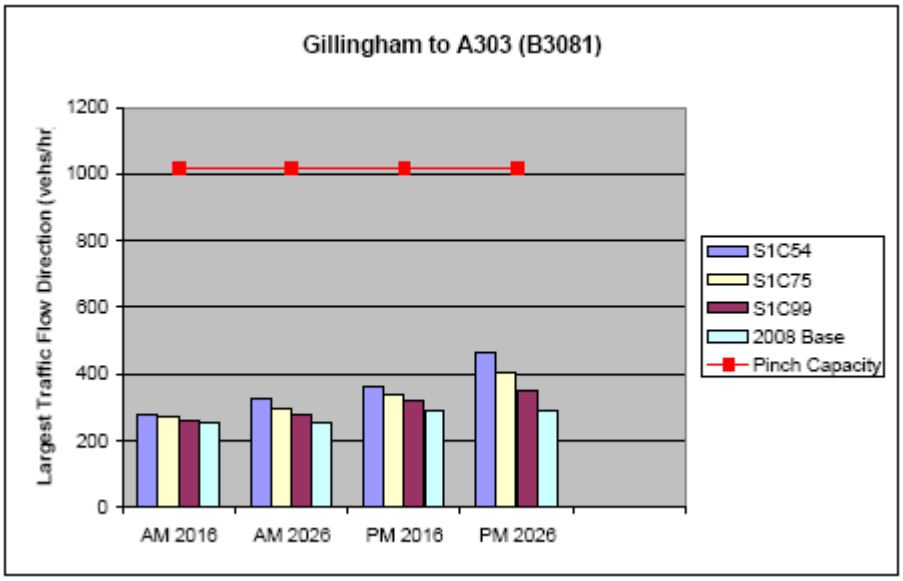


Figure 6.6 – Scenario 1 B3092 to A303

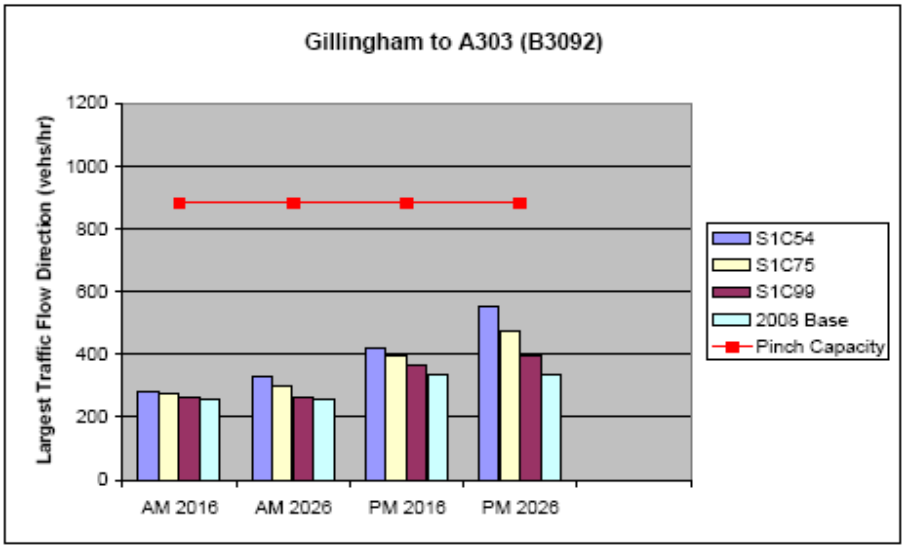


Figure 6.7 – Scenario 1 B3092 to A30

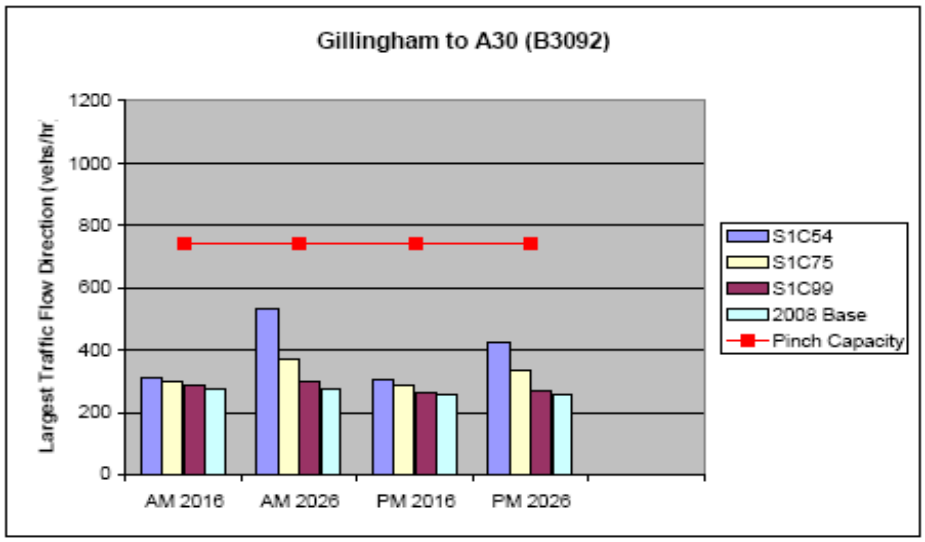
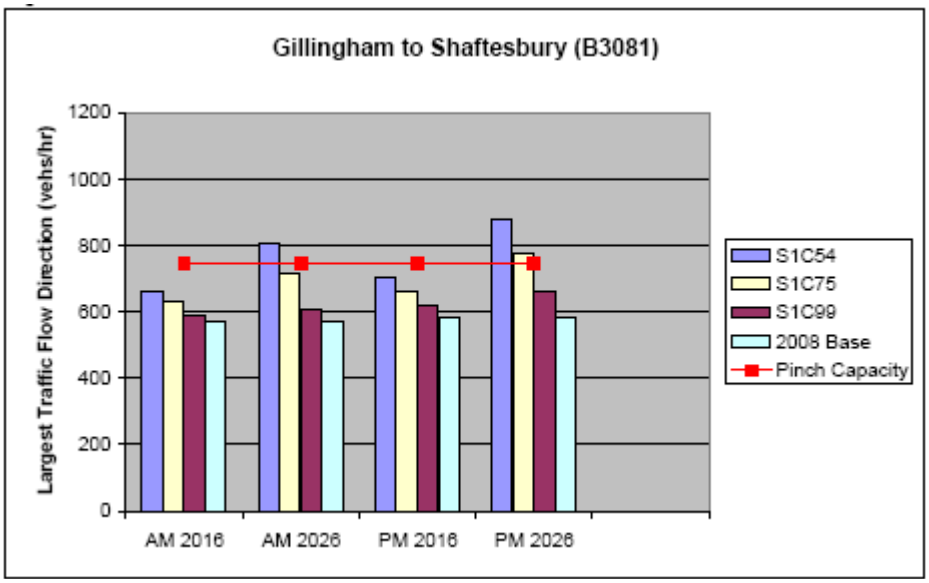


Figure 6.8 – Scenario B3081 to Shaftesbury



Scenario 1[13]

6.67 Figure 6.5, 6.6 and Figure 6.7 show the theoretical capacity of the northern links (the B3081 and B3092) are not exceeded. In the lowest containment Scenario S1C54 (Figure 6.8) there is considerably more traffic on the link by 2026 when compared to the 2008 base.

6.68 Links to the south of Gillingham have lower theoretical capacities. The traffic impact on these links is shown in Figure 6.7 and Figure 6.8. The B3092 from Gillingham to the A30 is approaching capacity in the AM period in 2026 and is carrying 258 more vehicles, almost double the base year traffic. There is also a significant increase in the PM peak by 2026 (168 more vehicles). S1C75 (while not approaching the theoretical capacity) is shown to have around 50% more traffic (118 more vehicles).

[13] Assumes full build out by 2026 to generate different results for the two Scenarios.

6.69 The B3081 to Shaftesbury Figure 6.9 is close to theoretical capacity in all scenarios in both peak periods by 2016. In 2016 the AM peak is within 85 vehicles an hour of the capacity. In 2026 the capacity is exceeded in S1C54 in the AM and PM peaks by 61 vehicles and 135 vehicles respectively. This suggests improvements to the link would be required. In S1C75 the capacity is only exceeded in the 2026 PM peak (30). Even in S1C99, by 2026, the link is close to capacity (within 86 vehicles an hour) which indicates that this is due to general growth and not directly attributable to Gillingham.

Figure 6.9 – Scenario 2 B3081 to A303

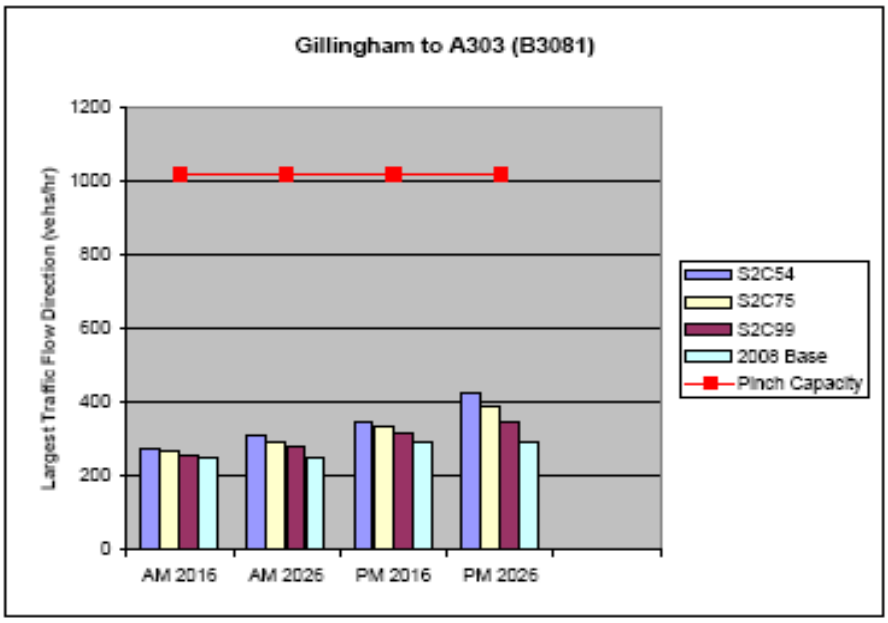


Figure 6.10 Scenario 2 B3092 to A303

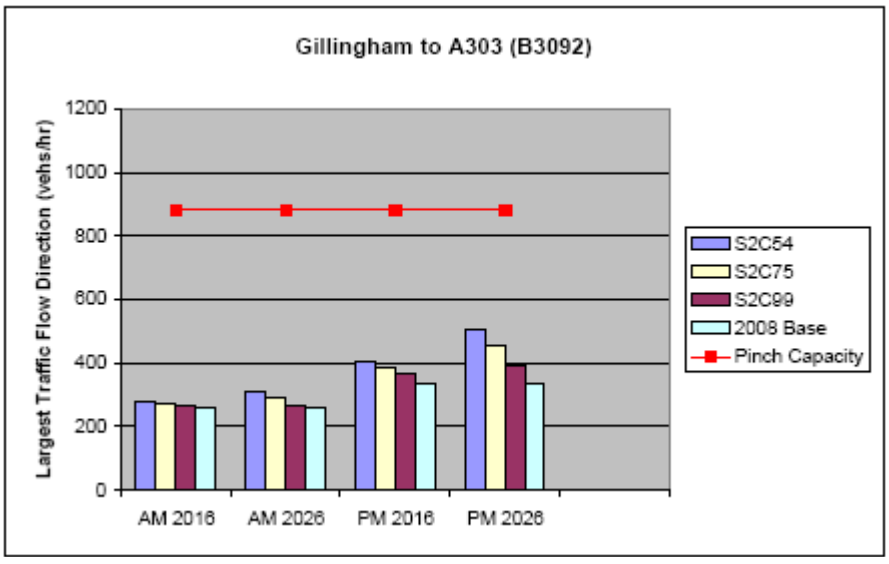


Figure 6.11 Scenario 2 B3092 to A30

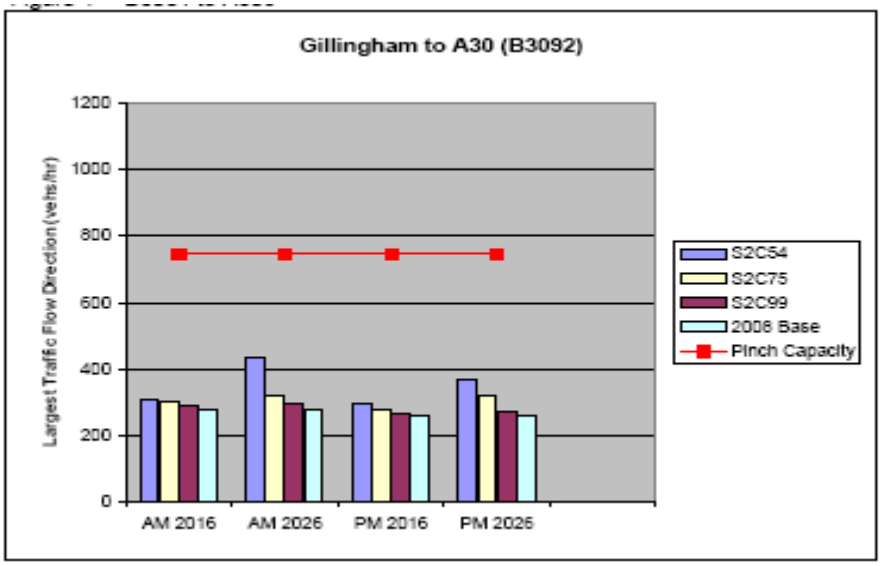
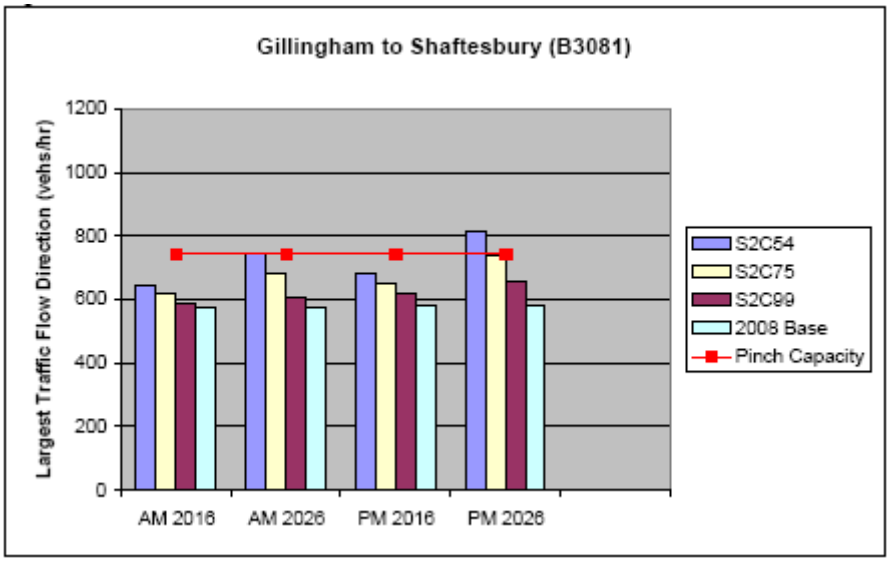


Figure 6.12 Scenario 2 B3081 to Shaftesbury



Scenario 2

6.70 Scenario 2 has a more limited impact on the strategic highway network due to the lower quantum of development. The links to the north of Gillingham are shown in Figure 6.9 and Figure 6.10. Whilst there is no evidence of the roads reaching capacity by 2026 in S2C54 there are over 100 more vehicles in the PM peak hour using the B3092.

6.71 The B3092 to the south of Gillingham shows less traffic impact (Figure 6.12). The busiest period is the AM peak. The Shaftesbury Road again seems to be approaching its theoretical capacity in all Scenarios by 2016 and it exceeds it by 2026 in PM peak in S2C54 and S2C75 (Figure 6.13). This suggests that improvements need to be made to the B3081 to Shaftesbury prior to 2026 if the lower containment Scenarios are to be accommodated.

Strategic Infrastructure Proposals

Potential Eastern Route

6.72 Development to the north and east of Gillingham can be accessed individually or an opportunity exists to link the development areas with a new road referred to as the 'Eastern Route'. This route would encompass zones C, D and F providing compressive access to the combined areas from the B3092 in the north, the B3081 to the south and to a lesser extent Bay Road for local east and west movements. The route concept is shown on Figure F1 in Appendix F.

6.73 A new Eastern Route would provide wider infrastructure benefits. It would provide an additional road crossing of the rail line that will increase the north-south link capacity in the general area. This, in itself, will provide relief to the existing route through Gillingham which is constrained, in particular at the New Road junction which is immediately adjacent to the railway bridge; the combination of the constraint of the rail bridge and the junction presents a significant 'bottleneck' to north-south traffic. The relief of traffic to the existing route through Gillingham will enable its form and function to be reconsidered. The provision of two links through Gillingham could enable the traffic volumes on each to be better managed and dispersed providing opportunity for reducing their 'severance' impact.

6.74 The Eastern Route is, however, potentially an expensive piece of infrastructure:

- there are a number of bridges required, including one across the mainline rail line (the estimated cost does not, for example, include an allowance for the administrative and regulatory cost involved with providing a crossing of the rail line)
- the road traverses a flood plain
- long lengths of the road do not have development adjacent to them.

6.75 The benefits of being able to facilitate the growth in the area by providing the additional road capacity need to be considered in context. Although the link is not, in the traditional sense, a by-pass, it could be deemed to be providing a similar function. The provision of significant highway infrastructure is not entirely aligned to the current policy climate. Additionally, as well as providing a means of access for the potential residents, it is likely that an improvement to the north-south link capacity could encourage traffic onto the A303 and other roads via Gillingham.

6.76 The estimated cost of such a scheme is £25.5m (A full breakdown of costs can be found in Appendix F).

Potential Shaftesbury Improvement

6.77 The highway link capacity between Gillingham and Shaftesbury (the B3081) has been identified as a constraint to increased development in the area; in particular, the section starting on the periphery of north Shaftesbury where New Road meets the B3081 into Shaftesbury. There is a very tight bend which effectively reduces the overall capacity of the whole link.

6.78 There is an existing Local Plan scheme for a link between the B3081 and the A30 referred to as the Enmore Link. The link concept is shown in Figure F2 (Appendix F). It crosses a piece of land and joins directly onto the A30. This would improve the link capacity between the two centres and provide the opportunity to 'downgrade' elements of the B3081, as it enters Shaftesbury.

6.79 This would increase traffic on the Ivy Cross roundabout which may need further consideration as this is an important junction along the strategic A350/ A30.

6.80 The estimated cost of such a scheme is £8.6m (A full breakdown of costs can be found in Appendix F).

Potential Southern Link

6.81 Development areas G and H can be accessed either individually or the areas could be linked via a new 'Southern Link' road. The potential link would join the B3081 (Shaftesbury Road) and the B3092 in an east – west direction. There is a (relatively) new large roundabout on the B3081 in the location of the possible link which presents an opportunity for the main access from this direction. An arm already exists that could have the ability to accommodate the Southern Link. A new junction would need to be provided to access the B3092 and a variety of opportunities exits. The route concept is shown on Figure F3 (Appendix F).

6.82 The Southern Relief road provides to opportunity to address on of the main 'bottlenecks' to traffic through Gillingham; the New Road/ B3081 junction. This is currently signalised and optimised to the extent that there is no opportunity to increase capacity of the junction. The Southern Link provides an opportunity to relieve traffic at this junction by providing an alternative means of access to the employment and industrial areas located along New Road (the B3092). The existing access along New Road could be stopped up to minimise access to a defined area, possibly up to and including Prospect Close, for example. This approach would reduce the volume of traffic using New Road from the B3081. This may enable the current signalised junction of New Road/ B3081 to be reverted to a priority give-way (subject to capacity and safety considerations) which would remove the 'bottleneck'. The main point of access for the other developments currently located along the B3092 would be from the new Southern Link road.

6.83 The estimated cost of such a scheme is £12m (A breakdown of costs can be found in Appendix F).

6.84 Table 6.7 summarise when and how critical the Shaftesbury improvement would be made to each Scenario.

Table 6.7 – Southern Link

Shaftesbury Improvement	Year	
	2016	2026
S1C54	Desirable	Essential
S1C75	Desirable	Essential
S2C54	Desirable	Essential
S2C75	Desirable	Essential
S1C54	Desirable	Essential

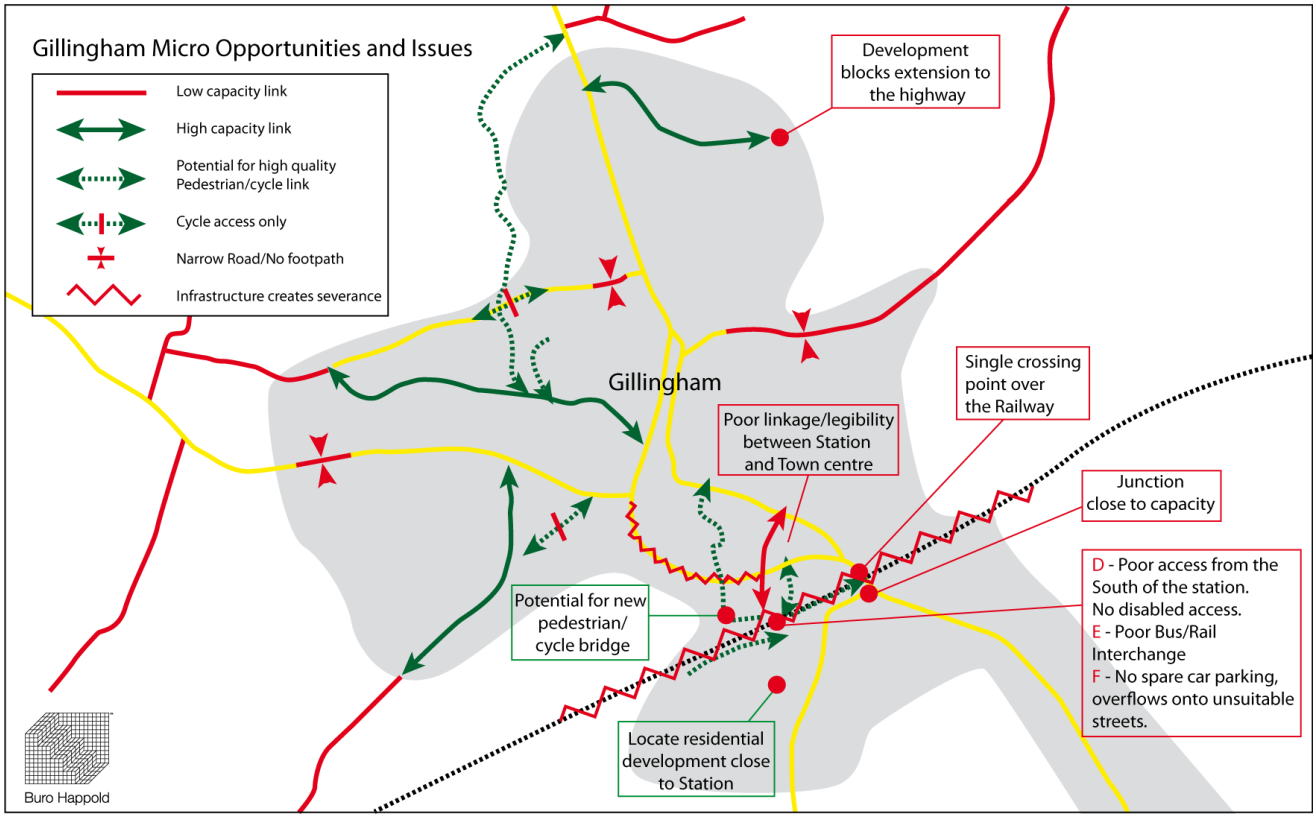
6.85 The Southern Link would be essential to the delivery of development in both Scenarios post 2016 (dependent on which land parcels come forward first). Scenario 1 has more development to the north of the railway line and therefore has more potential for trips moving through the New Road/B3081 junction (the major bottleneck) on route to Shaftesbury. This would make the improvement critical to Scenario 1.

6.86 The Eastern Route would be a very costly but would potentially better alleviate congestion in the town centre. The absence of development to the east of Gillingham means the scheme would be particularly difficult to deliver. The scheme would, however, be desirable to all development Scenarios.

Micro Traffic Impact Assessment

6.87 This section will describe the existing issues and model the impacts of the development on Gillingham at a local level. The identified issues and opportunities are summarised in Figure 6.13.

Figure 6.13 Existing Micro Scale Issues and Opportunities



Road Network

6.88 There are currently three key signalised junctions within Gillingham located at the following junctions:

- Wyke Road/ Le Neubourg Way (B3081)
- New Road/ Shaftesbury Road (B3081)
- Hine Close/ Rookery Close/ Shaftesbury Road (B3081)

6.89 These junctions will be the focus of the micro assessment highway appraisal as they provide the main constraints on the road network in Gillingham.

6.90 It is understood from consultation with DCC and observation that the main 'bottleneck' along the B3081 is its junction with New Road. This junction operates under MOVA[14] traffic signal control which maximises the efficiency of the junction. MOVA is a system within the traffic signals that enables them to be adaptive to the prevailing traffic conditions. As these traffic signals are currently operating under the most efficient regime the only way of achieving additional capacity is to increase the number of traffic lanes on the approaches to the junction. The location of the junction next to a railway bridge and the close proximity of existing property mean that providing additional traffic lanes would require a major scheme.

6.91 DCC has advised that the remaining traffic signal control junctions (excluding New Road/ B3081) within Gillingham will be upgraded to MOVA operation. This forms part of the works to accommodate the A303 Willoughby Hedge to Mere Carriageway Reconstruction, Resurfacing and Drainage scheme in 2010.

[14] Microprocessor Optimised Vehicle Actuation

Manual Assignment Analysis

6.92 The following looks at the micro level impact of development in Gillingham on the refined Scenario 1 and Scenario 2. The three most heavily trafficked signalised junctions in the town centre will be assessed to demonstrate the % traffic flow increases. The impact of development was tested on some additional intermediate increments (5 yearly). The three key signalised junctions are:

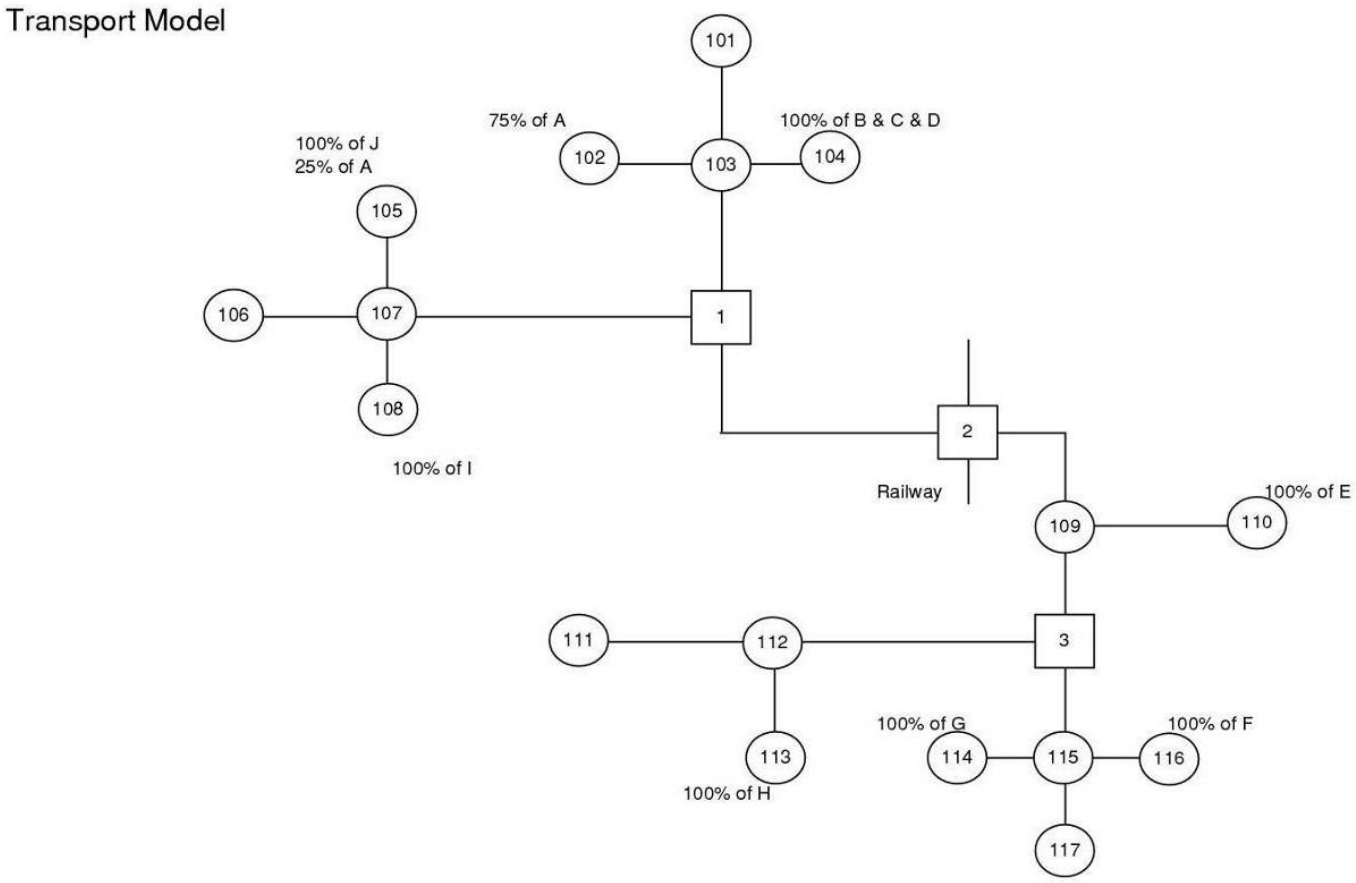
- Junction 1 – Wyke Road (east/west) with Le Neubourg Way (north/south)
- Junction 2 – Le Neubourg Way (east/west) with Station Road (north/south)
- Junction 3 – Shaftesbury Road (north/south) with New Road (west)

6.93 To investigate this a static assignment model was constructed this involved the following five steps. The full methodology for the static assignment and calculation are provided in Appendix F.

- **Step 1 Base traffic**: Base traffic flows were derived using Automatic Traffic Count (ATCs) and Manual Turning Counts (MTCs)
- **Step 2 Development Sites**: Development sites were split up based on the available highway infrastructure.
- **Step 3 Trip Generation:** Trip generation has been estimated based on the number of units at each location.
- **Step 4 Containment:** Calculates trip containment based on the employment scenarios.
- **Step 5 Highway Access:** The access for a land parcel on to the highway network is confirmed
- **Step 6 Assignment:** Manually assigns total vehicle trips(less contained trips) to the base network (Step1). Directional bias of the existing ATC traffic flows is used to determine distribution.

6.94 The above steps are now explained in detail. Figure 6.14 shows the static assignment model. Figure 3 shows the model, with circles indicating junctions and zones; and the squares indicating the most important, signalised, junctions, labelled 1, 2, and 3.

Figure 6.14 - Static Assignment Transport Model



Results

6.95 A full breakdown of results is shown in Appendix F.

6.96 There are no longer any prescribed thresholds to indicate what percentage increase in traffic constitutes a material impact. The latest guidance on Transport Assessments (DfT, 2007) states that if a development will have a material impact on the highway network in an already congested area the percentage traffic considered significant or detrimental to the network maybe low. The previous thresholds defined in the 1995 guidance are obsolete since they create an incentive to favour locations where high levels of background traffic already exist.

6.97 Figures 6.15 – 6.18 show the results of the Micro Assessment. The results are discussed as follows:

- Scenario with the most significant impact
- Year where significant impact is reached;
- Sensitivity of individual junctions; and
- Impact of containment.

6.98 Scenario 1 has the biggest traffic impact in all years and at all three junctions. By 2026 Scenario 1 has experienced up to a 22% increase in traffic, compared to around 16% for Scenario 2.

6.99 In all sub Scenarios there is a negligible percentage increase in traffic at all junctions up to 2011. By 2016 the % increase is 5% or less in Scenario 2, compared to, between a 5-10% increase in traffic in Scenario 1.

6.100 Scenario 1 has the biggest impact on junction 1 which has been identified as being at capacity by DCC. In Scenario 2 the biggest impact is on junction 3. Scenario 1 shows no difference between the impact on junctions 2 and 3.

6.101 When the 54% level of containment is compared to the 75% level, the increase in traffic in C54 is approximately double that in C75. In terms of years this translates as under a C54 sub Scenario the % increase in 2016 is comparable to C75 in 2021.

6.102 S1C54 demonstrates a negligible impact on all junctions in 2011 but with a increase in traffic by 2016 (up to 9%). In S2C54 again there is limited impact in 2011 and 2016 but by 2021 the impact is at 10%. S1C75 has an impact similar to S2C54 in 2016, in terms of the total % impact but a difference in which junction experience the major increase.

Figure 6.15 – Traffic Impact Scenario 1 AM Peak

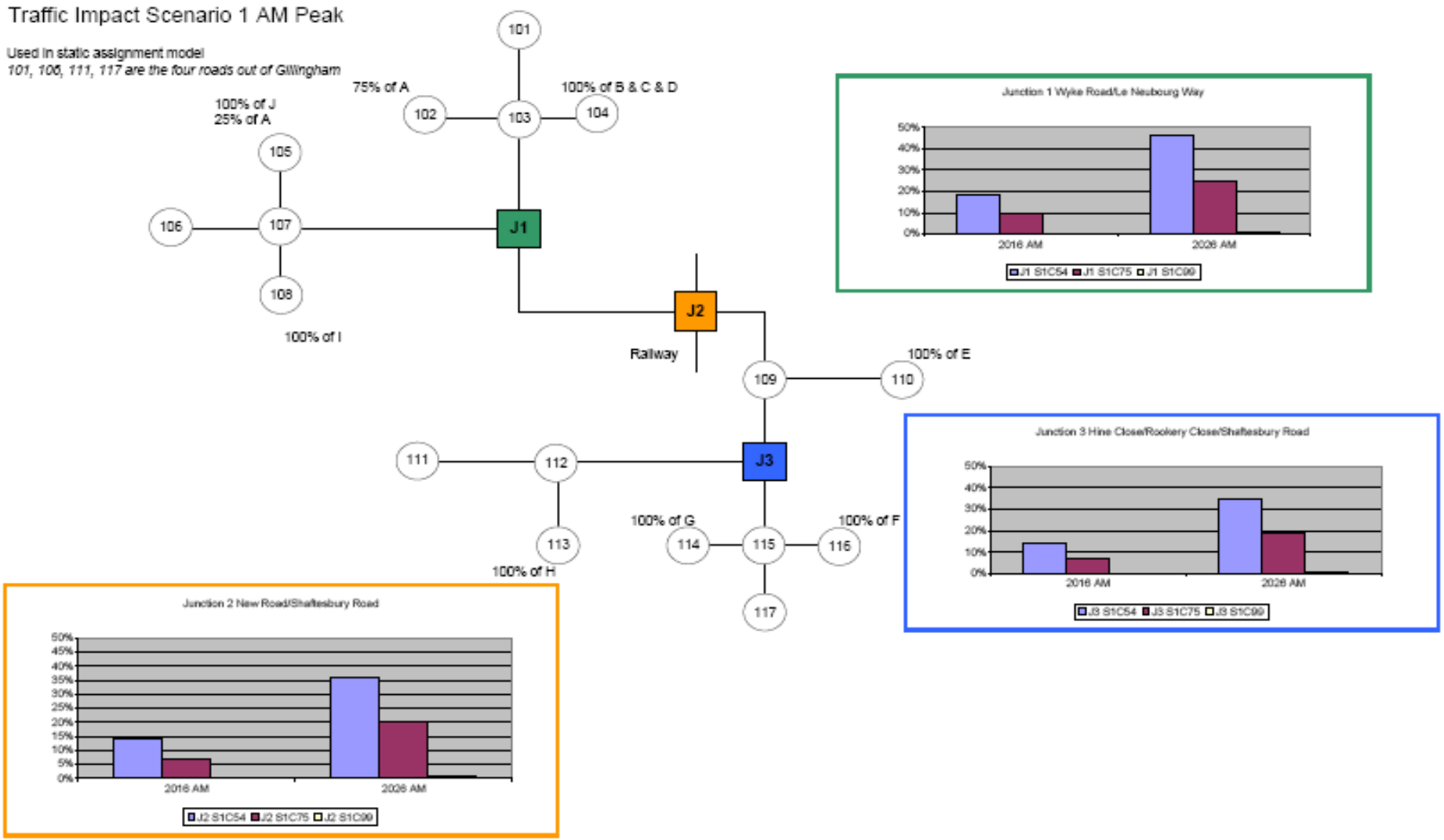


Figure 6.16 – Traffic Impact Scenario 2 AM Peak

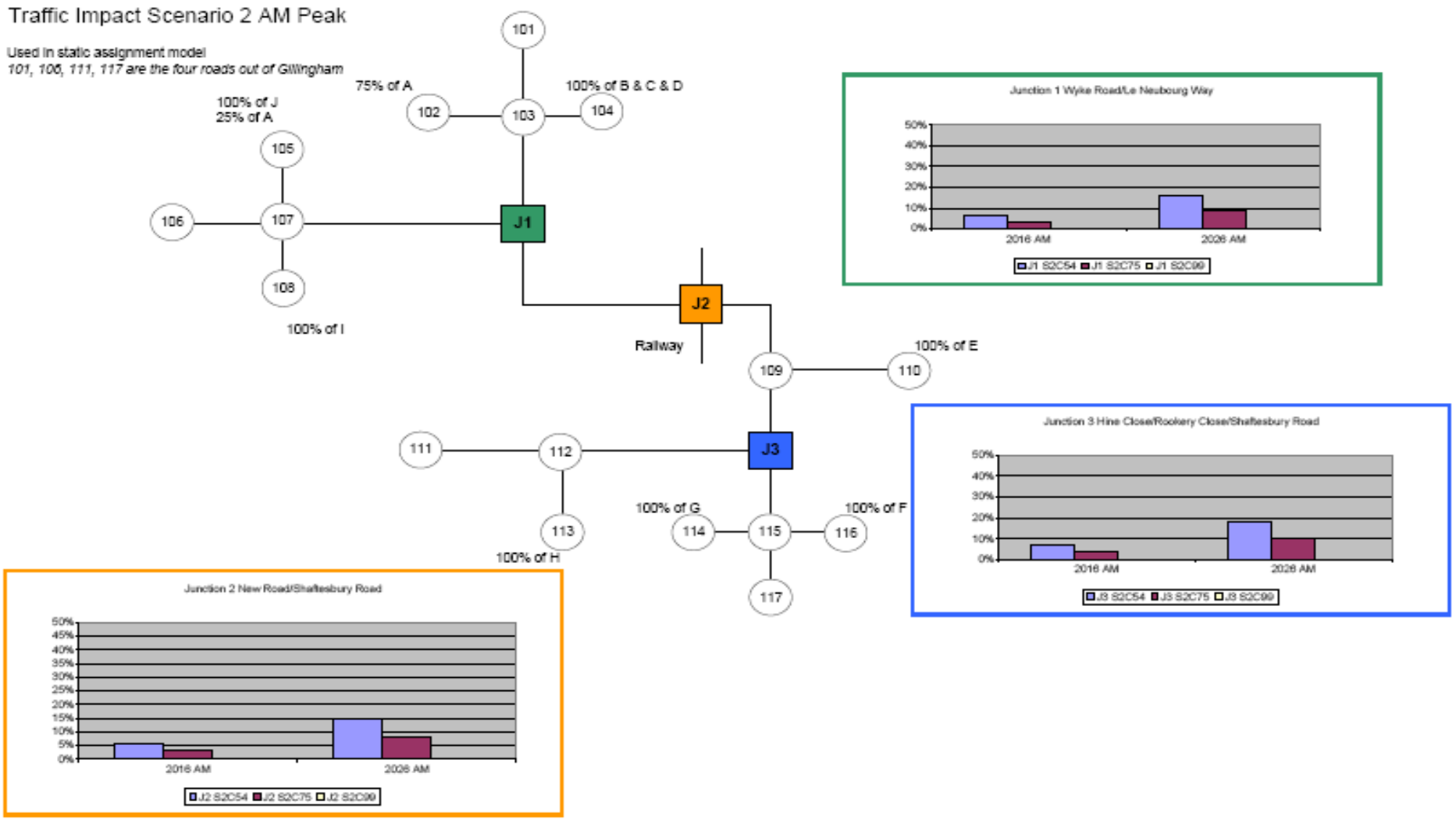


Figure 6.17 – Traffic Scenario 1 PM Peak

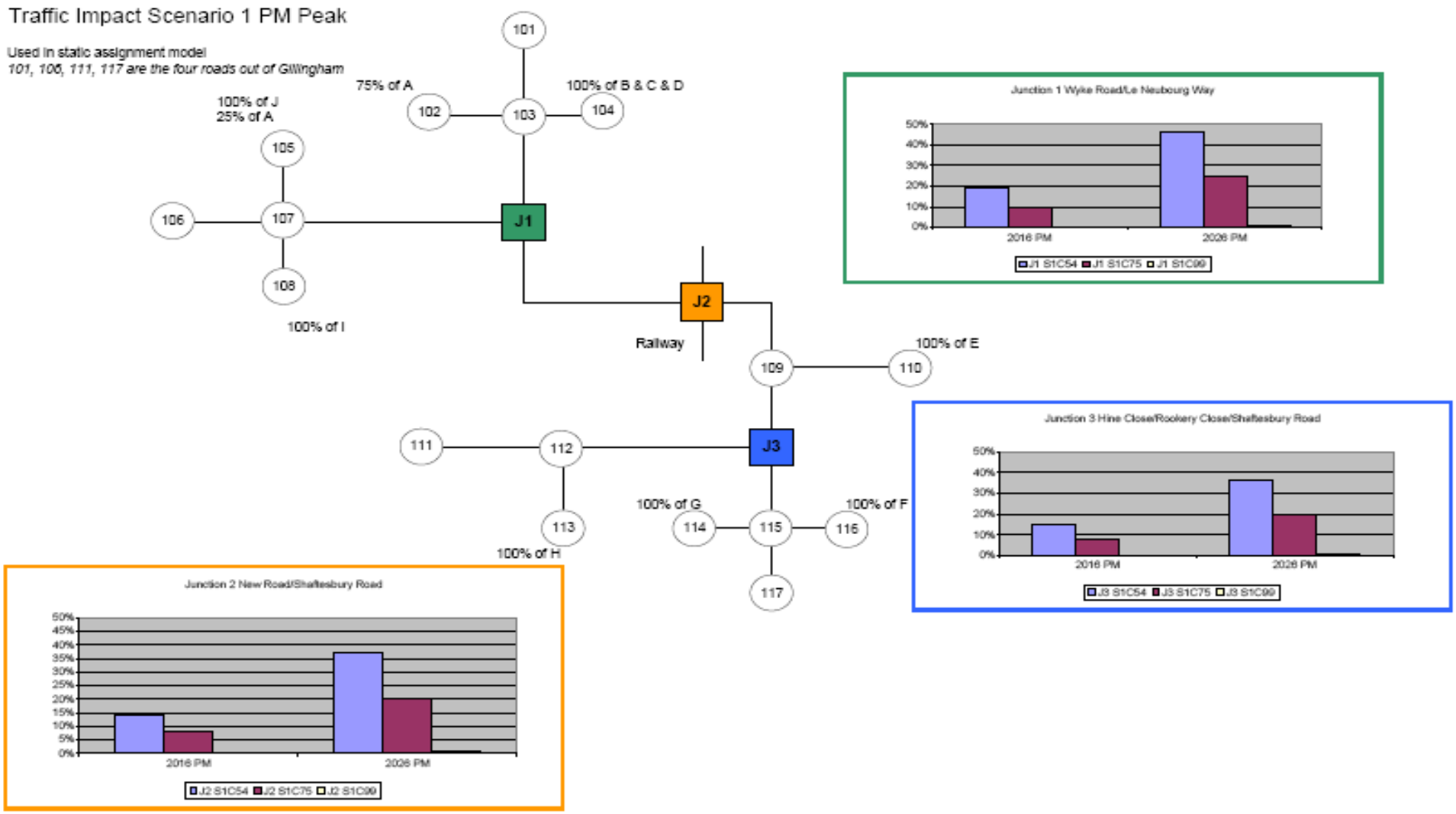
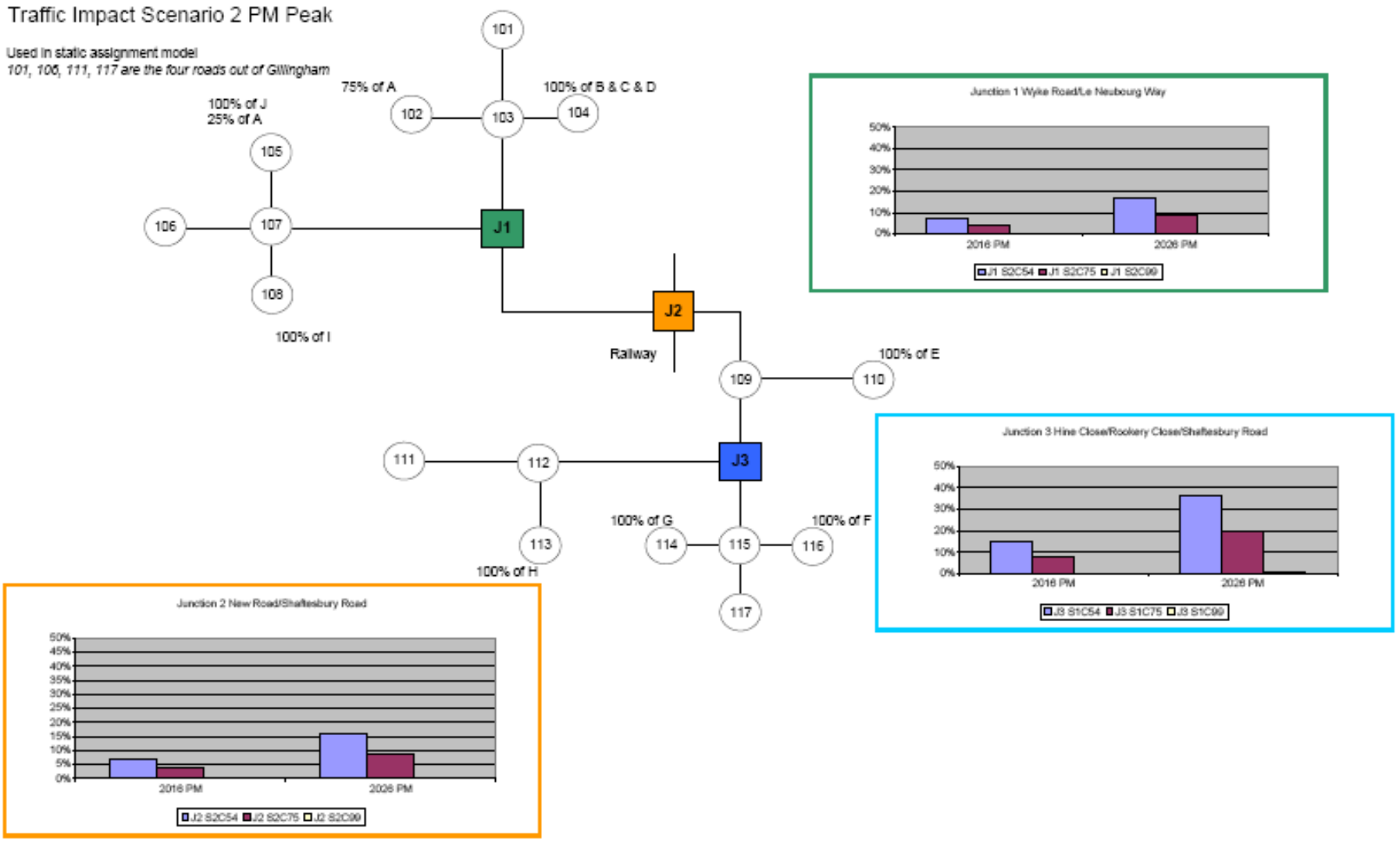


Figure 6.18 - Traffic Impact Scenario 2 PM Peak



Suggested Improvements

6.103 Development needs to be permeable, link to and enhance the existing pedestrian and cycle network.

6.104 Improvements identified in the NnEDTS are shown in Appendix F. These improvements would be key to the delivery of a number of the development sites. Other major improvements might include a number of pedestrian/cycle bridges or Toucan crossings.

Summary

6.105 In summary, the major transport issues associated with the growth of Gillingham are the impact on the New Road/Shaftesbury Road junction which is already operating close to capacity and the link capacity of the B3081 between Gillingham and Shaftesbury.

6.106 At a strategic level there is limited difference between the two Scenarios. The impact of containment is significant with improvements being essential to the B3081 by 2026 in both C54 and C75 Scenarios.

6.107 The Southern Route would be essential to delivery of either Scenario post 2016.

6.108 At a micro level Scenario 1 has the biggest impact, most notably on junction 1. Junction 3 is most impacted upon in Scenario 2.

6.109 The C75 containment Scenarios displays the same level of traffic impact at junctions five years after C54.

7. Town Centre and Retail

Introduction

7.1 This section assesses the potential of the town centre to accommodate further growth of the town. It includes an analysis of the current town centre offer and characteristics, an assessment of the potential demand for retail and other supporting uses under the different scenarios explored in Section 3 and 4, and identifies opportunities for accommodating these needs through extending the boundary of the town centre and through redevelopment of opportunity sites.

Gillingham Town Centre

7.2 Gillingham Town Centre is 'polycentric' in nature with several 'hubs' that accommodate different functions these include: the main shopping area at the eastern end of the High Street; the historic centre at the western end of the high street; the education and leisure hub to the north of the High Street on Hardings Lane and the transport hub at Gillingham Station. As the town grows it will be important to maintain and enhance these elements of the town centre and improve linkages between them to ensure that the town centre is a vibrant place offering a range of shops, services and facilities.

7.3 The primary retail frontage in Gillingham Town Centre is situated on the High Street. There are also some retail units on Station Road, The Square and Queens Street. The town centre includes three large convenience shops: Lidl, Somerfield and Waitrose. Waitrose is a relatively new addition to the town centre, located south of the High Street, it is accessed from Le Neubourg Way. Other convenience shops include a bakers and green grocers.

7.4 The number of comparison retail units in the town centre is currently below the national average (refer to Table 7.1), the comparison retail offer in the town centre mostly consists of independent retailers with a limited number of national retail chains. Services include banks, estate agents and other professional services, and the entertainment / night time economy is limited to a couple of pubs and restaurants. Vacancy in the town centre is slightly above the national average at 11.1%. In terms of quality of retail offer there is scope for improvement.

Table 7.1 – Gillingham Use Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Gillingham	GB Average
Comparison Retail	30	30.3	48.3
Convenience Retail	5	7.1	9.4
Services / Misc	51	51.5	31.6
Vacant / Under Comparison	11	11.1	10.7
Total	97	100	100

Source: Joint Retail Assessment 2008

7.5 With the exception of the supermarkets and the Focus DIY centre on Station Road, most of the shop units are fairly small and this is likely to be one of the factors that limits Gillingham as an attraction for national retailers.

7.6 There is a considerable amount of parking in the town centre, with parking available at each of the supermarkets, a council owned car park and on street parking along the High Street.

7.7 The High Street has some buildings of architectural merit, but there are examples of unsympathetic modern developments. Links between the High Street and the station and with surrounding residential areas are poor and to some extent Le Neubourg Way causes severance. The quality of streetscape and environment would benefit from some enhancements.

7.8 The proximity of Shaftesbury to Gillingham does have an impact on shopping behaviour in the town. Shaftesbury has a number of good quality specialist independent retailers and does draw some shoppers from Gillingham for comparison retail. A larger proportion of those in the Gillingham catchment area travel to Yeovil for comparison shopping.

Assessment of Retail Needs

7.9 An assessment of existing and potential demand for comparison and convenience retail in Gillingham was undertaken in order to establish the existing and potential retail floorspace requirements for the town.

Methodology

7.10 The retail assessment takes account of the Joint Retail Assessment (2008), and uses the key assumptions set out in the Joint Retail Assessment to assess the retail needs for the base year (2007) and for 2026 (assuming RSS growth levels) and for each of the growth scenarios at 2026. However it is town wide (Gillingham) rather than Borough wide.

7.11 The stages of the assessment and its outcome are described and summarised below and illustrated in Appendix D.

Stage 1: Calculation of Annual Retail Expenditure in Gillingham

7.12 Annual spend for convenience and comparison retail was calculated for the baseline (2007), and for 2026 by applying the estimated per capita spend (accounting for special forms of retail and forecast growth rates) to the projected population for RSS growth and for each of the growth scenarios.

7.13 The Joint Retail Assessment identifies the Gillingham catchment area as the ND1 postcode. Therefore the population for 2007 is the population for the ND1 postcode identified in the Joint Retail Assessment, although the Assessment identifies a figure for 2026, the forecasts were based on previous RSS growth assumptions (which have now increased). The Consultants have therefore made assumptions about the proportion of the projected population[15] for North Dorset in 2026 that will be in ND1. The population for each scenario includes the projected RSS growth rate plus the additional population that will be expected from dwellings over and above those required in the RSS reflecting development in scenarios 1 and 2 identified in section 4.

7.14 The annual rate of expenditure in Gillingham for 2007 takes account of existing penetration rates in the town (as identified in the Joint Retail Assessment). In calculating the projected retail expenditure for Gillingham in 2026 the Consultants have assumed that improved penetration rates (market share) may be achieved if the retail and town centre offer in Gillingham is improved. A 60% penetration rate for convenience retail and 30% rate for comparison have been applied compared with 57% and 18% respectively at present. These market shares are comparable with other Dorset market towns with a 15,000- 20,000 population as evidenced by the Dorset retail study.

[15] 2007 based projections, DCC

Stage 2: Application of sales Densities and Floorspace Efficiency Forecasts

7.15 The next stage of the assessment was to convert potential annual expenditure into floorspace requirements. The mechanism for deriving these estimates are sales densities which can by used to derive the level of expenditure/retail turnover required to support 1 sq.m of retail sales space.

7.16 The Joint Retail Assessment identified the average net sales (£/sqm) for comparison retail (£3,020/sqm), along with the three main convenience shops in Gillingham (Waitrose, Somerfield and Lidl) and an average figure for other Gillingham convenience retailers. An average of the four convenience figures was used (£5,724/sqm) for the purposes of calculating a net retail floorspace requirement.

7.17 Floorspace Efficiency Forecasts provided in the Joint Retail Assessment were applied to the net sales per square metre which indicate potential growth in sales densities to give a net floorspace requirement for comparison (0.3% pa) and convenience retail (1.5% pa) for 2007 and 2026.

7.18 The overall net floorspace requirement was converted to a gross using English Partnerships assumptions (net floorspace is 80% of gross).

Summary of Floorspace Requirements

Table 7.2 – Gillingham Retail Floorspace Requirements (gross sqm)

Floorspace Requirements	2007 (Baseline)	2026		
		RSS Growth*	Refined Scenario 1	Refined Scenario 2
Existing floorspace (convenience) 2007	4,239	4,239	4,239	4,239
Existing floorspace (comparison) 2007	7,056	7,056	7,056	7,056
Convenience floorspace requirements	2,770	3,219	3,957	3,417
Comparison floorspace requirements	2,897	7,773	9,076	7,838
Lower Level Requirement				
Net Requirements Convenience (lower level)	None	None	None	None
Net Requirements Comparison (lower level)	None	717	2,020	822
Allowance Service floorspace requirements (lower level)[1]	None	179	505	195
Total lower level requirement (Gross sq.m)	None	896	2,525	1,017
Upper Level Requirement				
Net Requirements Convenience (upper level)	N/A	449	1,187	647
Net Requirements Comparison (upper level)	N/A	4,876	6,179	4,941
Allowance Service floorspace requirements (upper level)[1]		1,131	1,841	1,397
Total upper level requirement (gross sqm)		6,456	9,207	6,985

* RSS Growth assuming increased penetration rates described above.

[1] net convenience and comparison requirements will generate a need for a further 25% additional floorspace for services.

7.19 The findings from the needs assessment are shown in Table 7.2. To identify future retail requirements to support growth we have considered additional provision requirements using two measures to provide a range of likely future requirements.

- The lower level requirement has taken into account any existing under/overprovision of floorspace to indicate the minimum additional floorspace which may be required. This assumption assumes that "spare" capacity in the form of under trading stores and vacant floorspace is taken up and that all existing floorspace is suitable to accommodate growth in terms of location, size and quality of provision.
- The upper level requirement takes the additional retail floorspace requirements linked with the increased population and adds this directly to existing floorspace. This approach is justified on the basis that there is a relatively low rate of vacancy consistent with the national average in Gillingham (despite the presence of some vacant units in the High Street). It also takes account of the issue that there is a no provision of larger size units within Gillingham Town Centre and that a potential extension to the south may lead to a temporary loss of floorspace until it is re-provided.

7.20 A 25% top up allowance has been made to account for provision of premises for local services which would comprise of non A1 occupiers occupying A Class space (A2-A6 uses). These uses nationally account for some 20-25% of retail provision within secondary centres[16] and this level of provision is comparable to other Dorset towns within the Retail study. This allowance has been added to the total additional convenience and comparison floorspace requirement.

Convenience retail

7.21 The forecasts from the assessment indicate that there is an existing convenience floorspace requirement for 2,770 sq.m (2007) gross. This compares with an actual floorspace within the town of 4,239 sqm which indicates that Gillingham currently has more convenience floorspace than its current population suggests is required. However, there are a number of factors that mean that looking strictly at needs on this basis may not be appropriate. The town has an affluent rural catchment area and it has provided for several competing supermarkets catering for different sectors of the market. At present it is possible that convenience may be under-trading (i.e. sales densities may be lower than the benchmarks set out in the retail study suggest).

7.22 The assessment shows that under RSS growth assumptions convenience retail needs will increase to 3,219 sq.m by 2026. Under Scenario 2 requirements would reach 3,417 sq.m and under Scenario 1, 3,957 sq.m.

7.23 If the lower level requirement is taken into account there would be no need for additional convenience floorspace under any of the growth scenarios as existing provision would be adequate. However, if provision were provided equivalent to the increased population there would be a requirement for between 449 and 1,187 sq.m of convenience provision. It is recommended that a significant proportion of any additional convenience floorspace which is provided is located within the new local centres within urban extensions in order to provide accessibility to neighbourhood convenience retail.

Comparison retail

7.24 The assessment indicates that there is an existing comparison floorspace requirement for 2,897sq.m gross. This compares with an actual provision of 7,056 sqm (including bulky good retailing and retail units located outside of the town centre). In quantitative terms it indicates that Gillingham is currently providing for its forecast comparison shopping needs.

[16] "Viability and Vitality of Secondary Retail Centres" Nation Retail Planing Forum (2006).

7.25 The assessment shows that under RSS growth assumptions comparison retail needs would increase to 7,773 sq.m by 2026. Under Scenario 2 requirements would reach 7,838 sq.m and under Scenario 1, 9,076 sq.m.

7.26 The assessment shows that the increased population and assumed increased penetration rates for Gillingham would mean that additional comparison retail floorspace would be required under all 3 scenarios.

7.27 The lower level requirement would require between 717 sqm and 2,020 sq.m of additional retail floorspace. Whilst the upper level requirement indicates potential for between 4,876 and 6,179 sq.m of additional retail floorspace depending on the growth scenario.

Provision for non A1 retail units

7.28 It is assumed that along with the additional comparison and convenience floorspace a commensurate increase in supporting services would be generated by the additional population. Lower level requirements for Service floorspace needs by 2026 range from 179 sq.m to 505 sq.m and upper level requirements from 1,131 sq.m and 1,841 sq.m depending on the growth scenario.

7.29 Taking account of convenience, comparison and services the overall level of additional retail floorspace which should be provided for to support the growth options would be:

- Scenario 1 – from 2,525 – 9,207 sqm;
- Scenario 2 – from 1,017 – 6,985 sqm.

Implications of requirements for Gillingham

7.30 The retail needs assessment above has identified that Gillingham may require a small increase in convenience retail provision to cater for the additional growth scenarios to 2026. However, there is a greater requirement for comparison retail floorspace and provision for non A1 retail uses.

7.31 The floorspace requirements are one aspect of the future requirements that will result from growth. As identified above, the retail offer in Gillingham has scope for improvement in terms of its quality in particular in the range of comparison retailing where there is low representation from national multiples and better range of supporting services including evening economy uses.

7.32 There is also a need to address the accessibility of the town centre to the station and adjoining and outlying residential areas which are currently separated by the Le Neubourg Way relief road. It would also benefit from increasing the range of non retail functions and activities and improvement in the quality of public realm and provision of focal public spaces which could provide a focus for community life.

7.33 Improvements to the town centre would need to be accompanied by a strategy to address appropriate provision for car parking and non car borne visitors.

7.34 The section below identifies the opportunities within the town centre for meeting these needs and improving the town centre offer and environment.

Opportunities for Meeting Retail Needs and Improving the Town Centre

7.35 The key opportunity areas within the town centre are primarily located along Station Road. At present the retail frontage along Station Road has a reasonably unified character at the northern end. However at the southern end of the road and the two prominent corner sites where Station Road meets Le Neubourg Way are occupied by large retail warehouses with large amounts of parking, to the South of Le Neubourg Way is a car sales yard and another warehouse retail unit. These prominent sites are to some extent underutilised and in design terms add little to this part of the town centre.

7.36 There is an opportunity for a comprehensive mixed use redevelopment of Station Road between the Station and Buckingham Road, which could included new retail units, cafés / restaurants, office space, workshops and residential along with an improved public realm, public square, a new bus and vehicle access to the station and increased capacity at the station car park. This could include up to 7,452sqm of retail floorspace and 7,000 sqm of office floorspace. A scheme in this area would entail some loss of existing retail and sui generis occupiers although there would be a significant net increase in provision overall and address issues relating to representation of national multiples and the quality of the town centre environment.

7.37 Figures 7.1 – 7.4 sets out an indicative plan for town centre improvements. The potential land uses[17] for the five opportunity sites on Station Road are:

- ATK52 – Retail Frontage along Station Road (1,341 sqm) flats including open space;
- ATK53 – Retail Frontage (1,451 sqm) wrapping around station road and Le Neubourg way with flats above including open space;
- ATK54 – ground floor retail along Station Road and Le Neubourg Way with flats above, retail units (including café/restaurants) around a new public square fronting the station. The former hotel building would be retained and used as a café/restaurant (approx 3,000 sqm total retail), two storey courtyard office units (7,000sqm), 7,000sqm decked parking;
- ATK55 - town houses accessed from Oak Woods with 2 storey retail frontage along Station Road including approximately 850 sqm of floorspace;
- ATK56 - flats and town houses, retail frontage along Station Road including approximately 660 sqm retail floorspace.

7.38 The development at the sites in Station Road could potentially yield approximately 210 residential units.

7.39 The existing High Street has limited opportunities at the moment, existing vacant units are small and consolidation is unlikely to be possible. The existing shopping focus on the eastern end of the high street would require some public realm improvements and improved linkages (through planting and signage) to redeveloped Station Road area.

7.40 The other major opportunity sites in the town centre are car parks located to the north of the High Street adjacent to the River Stour, and Red Lion Corner located adjacent to the River Stour between the High Street and Waitrose. This site provides an important opportunity as potential developments here could help to link the 'historic hub' with the existing core shopping frontage.

7.41 The car park site offers an opportunity to provide a new public open space on the High Street that could potentially at times be used for a farmers market or for public events. Part of the site could accommodate community / cultural venue that could be used for performing arts, meetings etc.

7.42 Red Lion Corner would primarily be retained as open space; however, there may be some potential to create a café / restaurant use along the western side of this space, which could also include improvements to public realm along the High Street.

7.43 Both the above sites are in the floodplain and would require further detailed assessment to assess the implications of the development for flooding. However, there are limited suitable locations in the town centre to accommodate a cultural facility. It is beyond the scope of this study to recommend detailed design guidance for managing flood risk in this area. Planning Policy Statement 25 Practice Guidance (2008) provides guidance on how to manage flood risk through the design of development. This includes guidance on site layout, raising floor levels, modification of ground levels, floodwalls and embankments, upstream flood storage and building design.

[17] The floorspace and residential units are indicative and for the purposes of this study only

7.44 An enlarged population would have a requirement for an improved range of cultural and community amenities including community meeting space for different groups. At present, the library and museum, along with the youth service and the schools are the only formal cultural venues in the town. The scheme to refurbish and improve the leisure centre at Hardings Lane will include a community hall; however, an additional town centre venue will be required.

7.45 To cater for this need, a requirement for space equivalent to a notional multi-purpose hall has been identified as there is current a lack of community meeting space and there is a need for a community focus for the town. Section 9 of this report assesses indoor sports requirements that would be generated from future growth of the town, the community hall envisaged in the town centre would be in addition to the needs identified in Section 9 and the community hall that is planned at the leisure centre at Hardings Lane.

7.46 There is no fixed standard for provision of community centres, the consultants have identified in other places a range of 0.2 sq.m to 1 sq.m per dwelling. The new development at Gillingham would therefore create a need for approximately 995 to 4,976 sq.m of community space under Scenario 1 and 498 to 2,490 sqm under Scenario 2. Assuming the lower end of this level of provision, at least an additional community hall over and above the new provision identified at the leisure centre would be required to meet the needs of the growth.

7.47 Based on Sport England's design guidance on dual purpose 'Village and Community Halls'[18], it is assumed the size of such a facility could be some 570 sqm in size. The average cost for a community centre / cultural venue has been calculated using construction costs from the Building Cost Information Service (BCIS)[19] for community centres, an average cost of £1,129 per sqm would mean that a community hall / cultural centre could cost approximately £643,530.

[18] Village and Community Halls, Design Guidance Note, *Sport England, 2001*
[19] Dorset Average 3rd Quarter 2009

Figure 7.1 – Potential Town Centre Character Areas

Public realm improvements

7.48 The quality of the town centre environment is important to the vitality and viability of the town centre town for a number of reasons:

- It can help create a sense of place and identify;
- It can help improve the image of the town;
- It can help improve footfall;
- It can help boost the night time economy; and
- It could help to attract visitors / tourism.

7.49 The redevelopment of Station Road area would include public realm improvements, including new surface treatments, tree planting, and new street furniture. Carrying out public realm improvements in the wider area (including the northern end of Station Road and the High Street) would ensure a consistent approach to the public realm and would help to link together the existing town centre hubs (historic hub, shopping core and education / leisure hub). Gateway developments at the station, eastern and northern entrances to the town centre would help to create a sense of arrival for the town centre.

7.50 In order to cost up the potential public realm improvements the consultants have used experience from various benchmark public realm improvements schemes to provide an approximate pounds per metre figure for the town centre public realm improvements. It is assumed public realm improvements will cost £160 per metre. In order to improve Station Road and High Street this would total approximately £202,000[20].

7.51 Section 11 identifies how the town centre and public realm improvements could be implemented.

[20] No allowance for Preliminaries

Figure 7.2 – Proposed Town Centre uses (Ground Floor)

Town Centre Improvements

- New community venue/arts centre
- Red Lion open space riverside walk
- Potential space for a small weekend market.
- Station Road transformed into a shopping street with space for larger units
- New business cluster providing office space
- New decked car park and station interchange
- Additional residential development towards the west
- Le Neubourg Way made more pedestrian friendly with focal space at Station Road Junction
- Improved links between existing town centre 'hubs'
- 'Gateway' developments

Figure 7.3 – Proposed Town Centre Uses (Upper Floor)

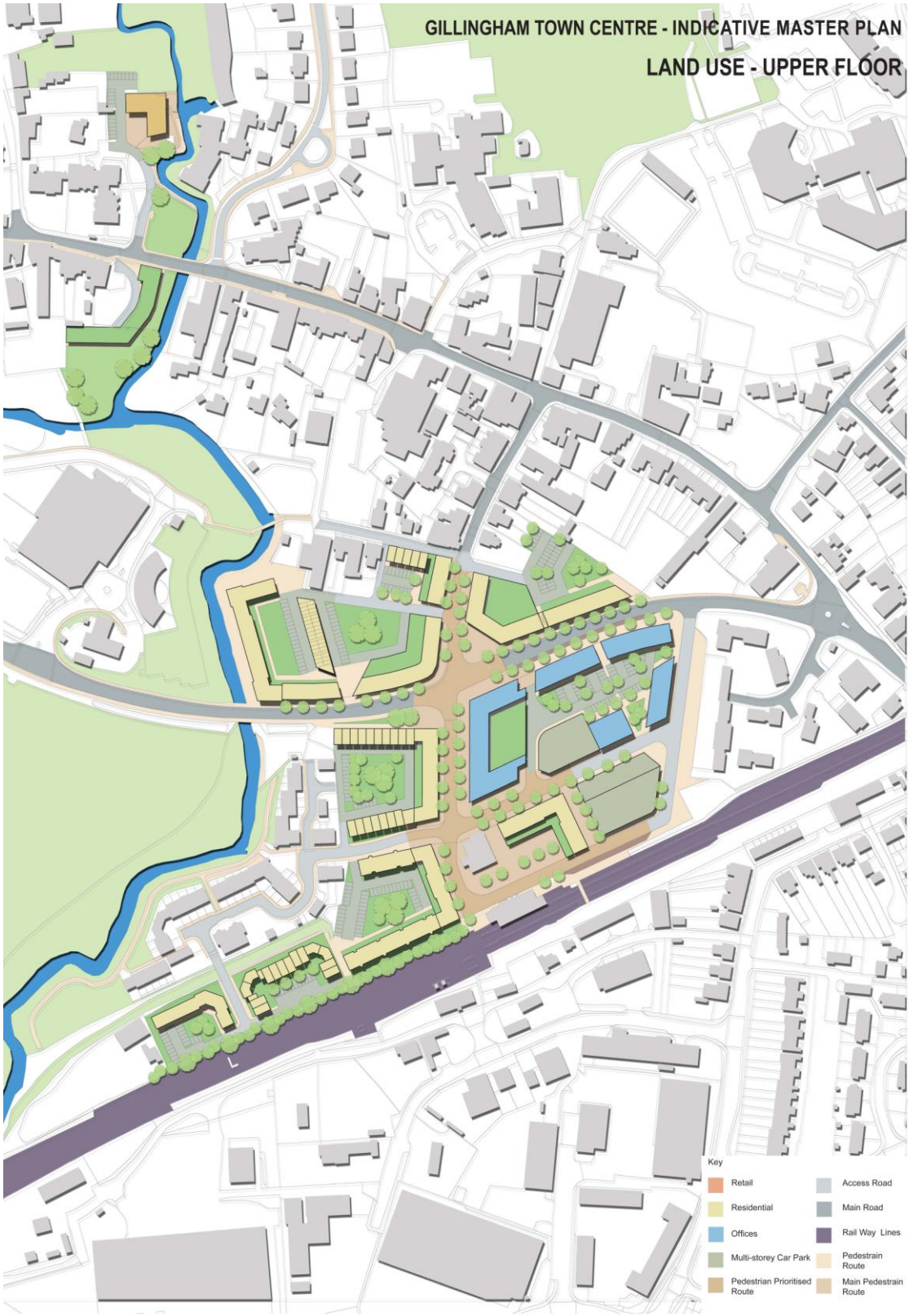


Figure 7.4 – Potential Building Heights (New development)

8. Green Infrastructure

Introduction

8.1 This section identifies the green infrastructure that will be required to support the new development at Gillingham. Green infrastructure is a network of protected sites, nature reserves, green spaces, waterways and green linkages. By providing for multi-functional uses, i.e. landscape, wildlife, recreational and cultural experience, green infrastructure contributes to liveability, whilst delivering biodiversity and other benefits including, potentially, flood relief. There is also potential for green infrastructure to integrate residential neighbourhoods with the town centre. Retaining existing green infrastructure along with the provision of new green infrastructure alongside development will be crucial to the growth of Gillingham.

Green Infrastructure Needs

8.2 The NDDC Open Space Audit and Assessment of Local Need (2006) has identified that there is a total of 125.46 hectares in Gillingham, this includes 20.4 hectares of 'formal space', 96 hectares of natural and semi natural greenspace, 4.14 hectares of green corridors, 0.33 hectares of provision for young people, and 4.59 hectares of cemeteries and churchyards.

8.3 PPG17 identifies that provision of green infrastructure should be provided at a quantity that meets the needs of residents. The current NDDC local plan standard, includes a standard for based on the Fields in Trust (FIT – formerly NPFA) 6 acre standard. The standard of provision in the local plan assumes that there is a need for:

- Provision of 1.6ha – 1.8ha per 1000 population of outdoor sports pitches and other recreational open space;
- Provision of 0.4ha – 0.5ha per 1000 population of casual children's play space; and
- Provision of 0.2ha – 0.3ha per 1000 population of equipped children's play areas.

8.4 The only types of provision in Gillingham that would meet this standard for formal recreational provision are the 'formal' open space and provision for children and young people. There is currently a total 20.73 hectares of this type of open space within Gillingham. The quantity of provision in the town at present[21] equates to 2.08 ha / 1000. Therefore the town at present has a quantitative deficiency of recreational open space. By applying the local plan open space standard of 2.45 ha / 1000 to the current population of Gillingham there is a requirement for 24.43 hectares of open space, meaning there is a requirement for at least another 3.69 hectares of formal open space in the town.

8.5 The future growth of the town will generate a need for further open space in the town. Table 8.1 sets out the requirements for new open space for the refined growth scenarios, it assumes a total open space requirement of 2.45ha per 1000 population. Under scenario 1 there would be a requirement for a further 17.90 hectares of open space, and under scenario 2 there would be a need for a further 12.20 hectares of recreational open space.

Table 8.1 – Open space requirements

Scenario	Open Space (ha)
Refined Scenario 1	17.90
Refined Scenario 2	12.20

[21] 2007 based ward population projections for 2009 Gillingham wards

8.6 Quantity of provision is only one factor that needs to be considered in creating new open space. Factors such as accessibility and quality are also key considerations. In terms of providing new open space as part of new development the presumption is that the new open space should be provided on site so that residents can easily access open space. It is assumed that the following on site provision will be provided:

- ATK16 – Park Farm: 3.53 hectares recreational space including 2.47 hectares in the developable area and 1.06 hectares within the part of the site considered undevelopable;
- ATK17/ 18/ 19/ 20 – Ham Farm and Lodden Lakes - 5.89 hectares of recreational space including 4.12 hectares within the developable area and 1.77 hectares in the undevelopable area;
- ATK 22 / 23/ 24 – Peacemarsh – 5.69 hectares of recreational open space including 3.99 hectares in the developable area and 1.71 hectares.

8.7 The above onsite provision would provide a total of 15.11 hectares of recreational open space provision under scenario 1 and 9.42 hectares of recreational open space under scenario 2. This is below what would be required to meet the overall needs of the growth in the town, and therefore there would be a requirement for further additional open space in the town. It is assumed that financial contributions (commuted payment) towards wider open space provision will be required to make up for this shortfall, the opportunities for how this open space could be provided are described below.

8.8 The quality of open space is one of the key reasons why people choose to visit an open space. Quality open spaces are those that are well managed and maintained, provide a good range of facilities and functions, have interesting and varied landscapes and link into a wider network of green spaces. It will be important that new open spaces provided within the new developments meet local needs and are of high quality.

Opportunities for New Green Infrastructure

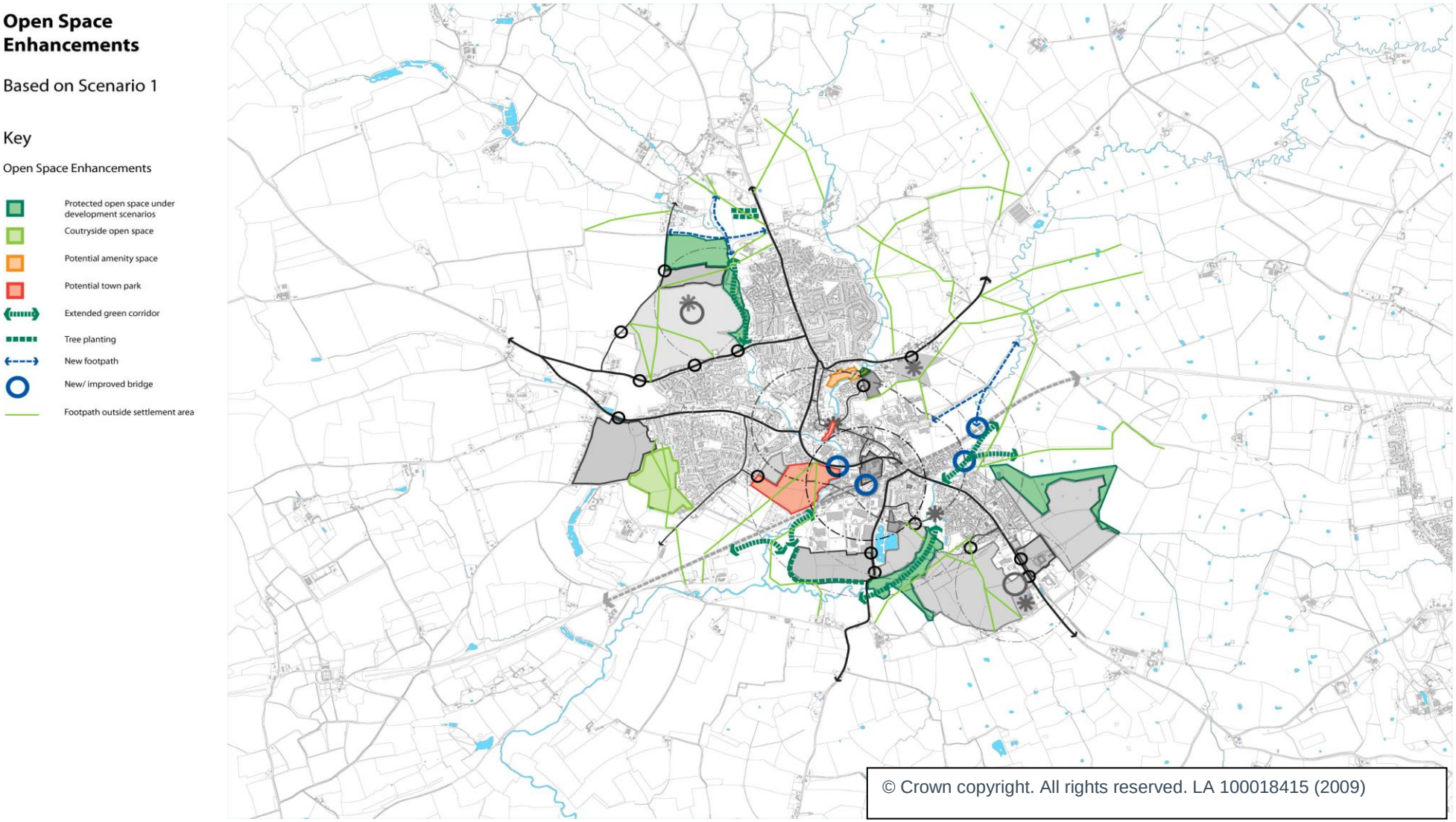
8.9 The Three Rivers Community Partnership carried out an assessment of open space in Gillingham in 2005, this identifies potential opportunities for enlarging and enhancing open space and the possibility of new open spaces. Some of these opportunities will need to be brought forward in order to meet local plan open space standards. In particular one or two of the potential new parks would be required to meet the needs of the future growth of the town under both Scenarios 1 and 2.

8.10 The Three Rivers Partnership identifies various proposals for enhancing existing open spaces and creating new open space. As the town grows the opportunities for achieving these proposals will arise. New development in the town will either provide an opportunity to incorporate the Three Rivers Partnership proposals into the development sites, or could through financial contributions provide funds towards those proposals that are within the catchment of a proposed development site.

8.11 Although the local plan has a recreational open space standard, there are no other open space standards relating to other types of open space provision, therefore it is not possible to determine the exact amount of ‘green corridors’ or ‘natural and semi natural green space’ etc that would be required to meet the needs of development. The Council should undertake further work to assess the need for green corridor improvements and open space serving the town as a whole and establish appropriate local standards.

8.12 The opportunities for open space improvements are identified on Figure 8.1 and described below.

Figure 8.1 – Proposed Open Space Provision



Formal Town Park

8.13 The Red Lion site and the Council owned car park to the north would provide a good opportunity for a centrally located town park of approximately 0.5 hectares. This could be enabled by some small scale on site development for restaurant/café and a community hall. The park could accommodate civic events and market days. Some works may be required to mitigate the risk of flooding to allow development to proceed.

8.14 Other potential sites for a town park include Chantry Fields and the site at Lodbourne. Chantry Fields is a good location for a town park, being close to the town centre, however pedestrian links across the Le Neubourg Way would need to be improved to link the site with the town centre, Chantry Fields could potentially provide a town park of some 5 hectares.

8.15 The sites in Lodbourne are difficult to access, so this is unlikely to be a preferred location for a town park, however the site should be retained as open space and potentially could be a valuable amenity space.

Accessible Countryside site

8.16 Land north of Common Mead Lane in Wyke potentially could be set aside as an accessible countryside park / natural greenspace of approximately 5 hectares. If land to the north is developed as a business park this could help to deliver this site.

Extension and improvements to green corridors

8.17 The existing green corridor network could be extended in several places where adjacent development adjacent would enable land to be set aside for open space. This is not only important for recreational use, but also for flood attenuation and ecology. Potential locations for extensions to the green corridor include:

- Along the River Lodden adjacent to the potential development sites ATK17, ATK18 and ATK20 (approximately 7.4ha);
- Along the River Stour adjacent to potential development sites ATK23 and ATK24 (approximately 2.3ha);
- Southern bank of the River Stour to the east of Brickfields Business Park, potentially this extension could be linked to expansion of Brickfields (approximately 3.5 hectares); and
- Along the Lodden adjacent to the potential development site ATK16 (approximately 5.4 ha).

8.18 In some cases the above extensions to the green corridors could form part of a residential development site. Where this is the case the open space could be transferred into public ownership. Where the land is not part of a development site, green corridors could be extended by seeking public access to sites and improving the links through these sites.

8.19 There are several locations where access to the green corridors could be improved by adding new bridges this includes a bridge over the Lodden at Kings Court, a bridge over the Fernbrook at Kings Court, bridge over the Lodden under the railway ach, and a bridge over the Stour at Chantry Fields.

Woodland Planting

8.20 There would be a need for new woodland planting to screen further expansion of Brickfields business park and also in the area between Milton and Neal's Yard, the woodland planting would need to be facilitated by the expansion of the existing employment sites.

Open Space Costs

8.21 In order to cost up the potential public realm improvements the consultants have used experience from various open space / landscape design schemes to provide an approximate pounds per

hectare costs for different types of open space. The following pounds per hectare amounts have been assumed:

- Town Park – £434,000 per hectare. Assumes a large park with a range of facilities including some children's play, courts sports, natural / informal areas as well as formally planted areas.
- Town Park (small) – £451,000 per hectare. Assumes a small park with formally planted areas, amenity grassland, and sitting out areas.
- Countryside park / green corridors – £154,000 per hectare. Assumes woodland planting, grasslands, benches, bins and signage.

8.22 The total cost of schemes identified in this section is set out in the delivery plan in Section 11. The total price includes land costs at agricultural prices[22].

[22] Agricultural Land Market Survey 2009, Savills

9. Social and Community Infrastructure

Introduction

9.1 This section identifies the social and community infrastructure that would be required to support growth at Gillingham. Social and community infrastructure includes education and health care facilities.

Education

9.2 Dorset County Council was consulted on the education requirements arising from the proposed growth at Gillingham, and issues on the capacity of and location of existing school provision in the area.

Primary Education

9.3 The immediate Gillingham area is currently served by four primary schools that include: to the west Wyke Primary which is a one form entry school (1 FE), it has no real potential for further expansion; Gillingham Primary (2FE) serves the centre of the town it adjoins the secondary school and is not capable of further expansion; to the north is Milton Primary (0.5FE), it is capable of some further limited expansion; and to the south is St Mary the Virgin (1 FE) which is capable of further expansion to 2FE.

9.4 In order to calculate future education requirements arising from the future growth of Gillingham, the County Council currently assumes that the occupancy levels for future growth will be similar to the existing rate of occupancy (2001 census), the occupancy levels are then used to calculate a child yield (this is for North Dorset generally). The calculation assumes 28 pupils per age group per 1,000 dwellings, which essentially equates to one form of entry per 1,000 dwellings.

9.5 For scenario 2, there would be a requirement for between 2 and 2.5 forms of entry schools. Dorset County Council advises that this could be accommodated by the expansion of St Mary's to 2FE, and there would be a need for a new 1.5 - 2FE school (420 pupils). Based on DCFS model a new school would require a 1.75ha site (including buildings, play areas etc).

9.6 Taking each scenario in turn the following issues arise:

- Refined Scenario 1 would need 3.5 forms of entry, this may be difficult to achieve as although there may be scope to provide a new 2FE school, expansion of some existing primaries is not possible. Expansion of Wyke Primary at the existing site is not possible and as it is a relatively new building (only 20yrs old) relocation to expand school is not an ideal option. As mentioned above there is some potential to expand St Mary's but only by 1FE.
- Refined Scenario 2 – Southern Focus: St Mary's could expand, but only by 1FE, so would need a further 1.5 - 2FE somewhere else in the south of the town.

Secondary Education

9.7 There would be a requirement for new places under scenario 2, however Gillingham School could expand at the existing site to accommodate the likely levels of growth in this scenario. However, the unrefined Scenario 1 (max 4,976 dwellings) would cause major problems for secondary education as it is, as the level of growth could not be accommodated at the existing secondary school. Under refined scenario 1 there would be a need to expand the secondary school site to enable more pupils to be accommodated, the site at Windybridge Farm is suitable for expansion of the secondary school (this would require some reconfiguration of school playing fields).

9.8 Costs (based on DCFS figures from 2007) are £12,500 per pupil for primary places, while secondary pupils will be £19,500 per pupil (costs are build costs only, and don't include site acquisition). As a whole the cost per dwelling for education would be about £6,000.

Primary Health Care Facilities

9.9 The Dorset Primary Care Trust has been contacted to determine the level of health care provision which would be required to support the population growth at Gillingham. The PCT have previously responded to North Dorset District Council on the healthcare requirements from RSS growth. Their response identified that there are no problems with the capacity at existing GP surgeries within Gillingham.

9.10 Based on the standard of 1 GP per 1,800 population the following would be required for each scenario

- Refined Scenario 1 – four Whole Time Equivalent (WTE) GPs;
- Refined Scenario 2 – three WTE GPs;

9.11 For Scenario 1 it is assumed that the existing surgery in the north of town can be expanded to accommodate an additional GP and that a new surgery would be provided within the local centre in the southern urban extension.

9.12 For scenario 2 a new surgery would be provided within the local centre in the southern urban extension.

9.13 To identify the costs for health provision the consultants have used the Healthy Urban Development Unit (HUDU) model assumptions on amount of surgery space per GP (165 sq.m per GP) and the cost of surgery space per square metre £2,596 per square metre. The total space needs for scenario 1 are 670 sq.m which equates to a total cost of approximately £1.7m. The total space needs for scenario 2 are 457 sq.m which equates to a total cost of approximately £1.1m.

9.14 The cost per dwelling for health provision would therefore be £516 per dwelling under both scenarios.

Sports Provision

9.15 The town is currently served by publicly available indoor recreational facilities which include; the Gillingham Leisure Centre, Hardings Lane, Shaftesbury School Sports Hall and Shaftesbury Community Swimming Pool. The existing Gillingham Leisure Centre is currently undergoing refurbishment which includes enlarging the swimming pool, and extensions to the centre that will incorporate a four court sports hall, squash court and community hall. The refurbishment of leisure facilities is expected to be complete early in 2010.

9.16 The consultants have used the Sport England Facilities Planning Model (FPM) approach to assess the existing need for Indoor Sports Halls and Swimming pools and to assess what needs will arise from the two refined Scenarios (1 and 2).

9.17 The FPM models demand for facilities and their capacity using population information, catchment areas and travel times and not usage data. The demand assumptions used within the model are derived from a survey of sports hall and swimming pool usage and management conducted by Sport England (Review of Model Parameters for Community Sports Halls and Swimming Pools, February 2004).

Swimming pools

9.18 The two swimming pools that serve Gillingham and the surrounding area provide a total of 502sq.m of water space.

9.19 Capacity of large pools within the area has been calculated following assumptions in the facilities planning model.

- Estimation of one time capacity = total water space (including ancillary pools) x 0.1666 sq.m per person;
- Assessment of total no. of hours per week the facility is usually open;
- Assessment of the total hours per week the facility is open during peak periods defined as Mon-Fri 12.00 to 1pm and 4pm to 10pm, Sat 9am to 4pm, Sun 9am-4.30pm; and
- Estimation of visits per week assuming average visit of 64 minutes.

9.20 At the existing pools within the study area currently there is a weekly capacity for 2,352 visits per week.

9.21 The assessment of current demand for swimming pools within the area was prepared using 2007 based ward population projections information for the wards in Gillingham and Shaftesbury which includes: Gillingham Town; Lodbourne; Milton; Wyke; Motcombe and Ham; Shaftesbury Central; Shaftesbury Christy's Shaftesbury Grosvenor; Shaftesbury Underhill; and The Beacon. The information related to 5-year age cohorts. The stages of the demand assessment were;

- Derivation of estimates of male and female population;
- Aggregation of age cohorts into 5 year age groups and by gender;
- Estimation of demand for each age/gender based upon national estimates of demand and no. visits per week; and
- Application of % demand rates census data into 5 broad age ranges.

9.22 Demand was calculated for Gillingham and Shaftesbury as a whole. The current demand within the two towns in terms of peak visits per week is estimated to be 1,938 swimming pool visits per week.

9.23 For the purposes of this assessment it is assumed that all residents within these areas can access one of the swimming pools either by car, foot or other means of transport.

9.24 The information on capacity and demand of swimming pools was used to derive the existing and future needs of the area. At present it is estimated demand during the peak period for swimming is 1,938 visits per week. When the additional demand created by the new population from Scenario 1 is included the demand will increase to 2,505, whilst under Scenario 2 the additional population would increase demand to 2,487 by 2026.

9.25 Table 9.1 indicates that at present there is sufficient capacity at all of the pools to meet demand. There would also be sufficient capacity to meet the additional demand created through scenario 2. However under scenario 1, demand created by the additional population would result in unmet demand of 153 visits per week. This unmet demand equates to only 5% of future demand.

Table 9.1 - Swimming Pool Supply/Demand

Scenario	Demand (VPW)	Existing Capacity (VPW)	Unmet Demand (VPW)
Current Population	1,938	2,352	- 414
Current population + additional needs Scenario 1	2,487	2,352	135
Current population + additional needs Scenario 2	2,314	2,352	- 57

9.26 Demand has been translated into pool space needs by taking account of the parameters in the FPM including the amount of pool space required per person, average time per visit and the average hours that facilities in the area are open per week (30 hours are assumed for Gillingham Leisure Centre). Table 9.2 shows the total swimming pool space that will be needed to meet the area's swimming needs at present amounts to 357sq.m. Under Scenarios 1 and 2 this will increase to 531sq.m, and 490sq.m respectively, when existing pool space is taken into account there is only a need for an additional 29 sq.m of pool space under scenario 1. Generally pools are 12.5 x 25 metres (312 sq.m) and therefore the additional demand created by scenario 1 is not great enough to generate a need for a new swimming pool, once the construction of the new pool has been completed.

Table 9.2 – Existing and Future Swimming pool Needs

Scenario	Total Pool Space Requirement (sqm)	Total Pool Space in Study Area (sqm)	Additional pool space required (sqm)
Current Population	413	502	-89
Current population + additional needs Scenario 1	531	502	29
Current population + additional needs Scenario 2	490	502	-12

Sports Halls

9.27 At present there are only two sports halls in the Gillingham and Shaftesbury area that are publicly available, this includes a four court sports hall at Shaftesbury School and a four court sports hall at Gillingham Leisure Centre (currently being refurbished). The sports hall requirements identified below are the additional requirements that would be need to meet the needs of the population in future once the existing provision is taken into account (including the refurbished Gillingham Leisure Centre).

9.28 Capacity of the sports halls in the study area was calculated following the assumptions recommended within the facilities planning model. The stages of the capacity assessment are as follows;

- Estimation of one time capacity = assumes 20 people per 4 court hall;
- Assessment of the total no. hours per week the facility is usually open (for public use);

- Assessment of the total hours per week the facility is open during peak periods defined as Mon-Fri 5-11pm, Sat and Sun 10am-5pm; and
- Estimation of visits per week assuming average visit of hour.

9.29 Within the facilities in the study area that meet the Sport England criteria there is a potential weekly peak capacity for 1,100 visits per week.

9.30 Demand for sports halls within the Gillingham and Shaftesbury in 2009 was prepared using 2007 based ward population projections for the wards in Gillingham and Shaftesbury for each 5-year age cohort. The stages of the assessment were as follows;

- Derivation of estimates of the male and female population;
- Aggregation of age cohorts into 10 broad age/gender groups to enable the model to be applied;
- Estimation of demand for each age/gender group for each super output area based on national estimates for demand and the number of visits per week for each group;
- Application of % demand rates census data into broad age ranges.

9.31 The current demand within the Gillingham, Shaftesbury and the surrounding area in terms of peak visits per week is estimated to be for 1,564 sports hall visits per week during peak period. The FPM findings indicate that demand in the area currently exceeds supply by 464 visits per week.

9.32 When the additional demand created by the new population from Scenario 1 is included the demand will increase to 1,968 visits per week, whilst under Scenario 2 the additional population would increase demand to 1,828 by 2026. This increases the unmet demand to 868 visits per week under scenario 1 and 728 visits per week under scenario 2.

Table 9.3 - Existing and future demand for sports halls

Scenario	Demand (VPW)	Existing Capacity (VPW)	Unmet Demand (VPW)
Current Population	1,564	1,100	-464
Current population + additional needs Scenario 1	1,968	1,100	-868
Current population + additional needs Scenario 2	1,828	1,100	-728

9.33 Demand has been translated into sports hall space needs by taking account of the parameters in the FPM including the number of people per one court hall and the average hours that facilities in the area are open per week (40 hours are assumed for Gillingham Leisure Centre). Table 9.4 shows the total sports hall space that will be needed to meet the area's sports hall needs at present amounts to 1,689 sq.m. Under Scenarios 1 and 2 this will increase to 2,125 sq.m, and 1,974 sq.m respectively. When existing sports hall space is taken into account there is a need for an additional 1,025 sq.m of sports hall space under scenario 1 and 874 sq.m under Scenario 2.

Table 9.4 – Existing and Future Sports Hall Needs

Scenario	Total Sports Hall Requirement (sqm)	Total Sports Hall Space in Study Area (sqm)	Additional Sports Hall space required (sqm)
Current Population	1,689	1,100	589
Current population + additional needs Scenario 1	2,125	1,100	1,025
Current population + additional needs Scenario 2	1,974	1,100	874

9.34 The sports hall requirements identified in Table 9.4 equate to 70.29 sq.m of sports hall space per 1,000 people under scenario 1 and 71.32 per 1,000 people under scenario 2 (0.07 sq.m per person).

9.35 In order to establish the proportion of the cost of new sports facilities that the new growth should fund, a cost per dwelling was calculated. The latest version[23] of the Sport England Kitbag identifies a cost of £2,750,000 for a four court sports hall, as the average size of such facility is 594 sq.m this equates to £4,630 per square metre. By applying the above square metre per person standard (0.07 sq.m per person) the cost per person to fund the amount of provision required would be £325 for scenario 1 and £330 for scenario 2. Assuming an average household size of 2.17 people the cost per dwelling is £706 (for scenario 1) and £716 for scenario 2.

[23] Sport England Facilities Costs 2nd Quarter 2009

10. Utilities

Introduction

10.1 This section identifies the key utilities issues that arise under the refined scenarios 1 and 2. Each of the key utilities companies serving Gillingham were contacted and asked about the possible implications of the future growth at Gillingham.

Gas

10.2 The gas distribution operator for the area is Southern Gas Networks. Southern Gas Networks advise that in general they can provide gas to any location that is required, be it through reinforcing an existing network or creating a new network by extending their medium/intermediate pressure tiers. Urban Extensions, such as the sites in the growth scenarios, would be able to link into existing supplies relatively easily. This may require network reinforcement work or adding an additional governor to boost pressures/capacity.

10.3 There is a low pressure network in the area of the southern developments in Refined Scenario 1. There is also a medium pressure main running beneath both sites. As a result, there would be various options available for the connection of these sites, therefore at this stage Southern Gas Networks are unable to advise whether reinforcement would be required. The site to the north of the town has no medium pressure mains in the immediate vicinity so this site would probably be connected to the low pressure network and is likely therefore to require reinforcement.

10.4 Specific sites have to be assessed individually through Southern Gas Networks connections process to determine who bears the cost of reinforcement. Each project is analysed and costed on an individual basis, and each of them can have various connotations (such as reinforcement, both chargeable and non-chargeable) that will be dependant on the scale and location of the project / site. When the connection is applied for, if reinforcement is required an economic test is carried out to establish who covers the cost or what percentage of the cost is covered by Southern Gas Networks and this depends on, among other things, site location, site size and the proximity of a viable connection point.

Electricity

10.5 Scottish Southern Electricity have indicated that although there are historically capacity issues in Gillingham due to the recent growth in the town, they are in the process of putting in a new 33kv sub station (located east of the sewage works). The new sub station will have enough spare capacity to accommodate the levels of growth envisaged in the town up to 2026.

Potable Water and Waste Water

10.6 Wessex Water have indicated that:

- On site water supply and sewer networks are normally provided by the developer and these generally follow sequential phasing arrangements. Separate systems of drainage will be required to serve new development proposals.
- Off site connecting sewers and supply mains can be provided through requisition arrangements with Wessex Water.

10.7 Wessex Water identified the following issues at the potential development sites:

- ATK16 – An existing foul sewer crosses the site and limited capacity is available to serve a development of this size. Additional sewer capacity will be required with a financial

contribution to downstream improvements to the twin siphon arrangement at the River Lodden and the terminal pumping station at Brickyard Lane

- ATK17- ATK20 - An existing foul sewer crosses the site – previous investigations indicate that extensive capacity improvements will be required to serve this site. 0.9km of new connecting sewer with a new siphon arrangement at the River Lodden would be required. Brickyard Lane pumping station would need to be upgraded.
- ATK51 – An existing public sewer was previously diverted around this site and limited capacity is available. A satisfactory point of connection will need to be agreed with Wessex Water. Additional storage capacity will be required at Buckingham Road SPS - a financial contribution to these works can be agreed where cumulative development within the catchment occurs. Further appraisal work may be necessary to confirm the scope of downstream improvements.
- ATK51 – A local connection to the public sewer at the southern site boundary can be agreed with Wessex Water. This sewer gravitates directly to Gillingham STW.
- ATK 21 - The nearest point of connection to the public sewer is located at the eastern boundary though an existing development. A satisfactory point of connection and connecting sewer will need to be agreed with Wessex Water. This development will drain through Barnaby Mead SPS and a detailed appraisal may be required if the demand from development increases at this location.
- ATK 22 - 24 - Existing public sewers are located at the south of this site and there is insufficient capacity available to serve a development of this scale. A full detailed engineering appraisal will be required to confirm the scope and extent of the required capacity improvements.
- ATK 53 – 56 – An existing foul sewer crosses the site and limited capacity is available to serve a development of this size. Additional sewer capacity will be required with a financial contribution to downstream improvements. A local connection may be agreed with Wessex Water to serve a nominal number of dwellings in the first phase of development. A pumped discharge may be required to serve this site. Additional storage capacity will be required at Buckingham Road SPS - a financial contribution to these works can be agreed where cumulative development within the catchment occurs.

10.8 At the time of writing Wessex Water were in the process of assessing whether improvements to the Sewage Treatment Works would require improvements to accommodate the level of growth in the development scenarios. It is likely that additional capacity will be required at the Works. Wessex Water will need to work closely with the Local Planning Authority to ensure that the rate of development does not proceed ahead of planned investment.

11. Implementation and Delivery

Introduction

11.1 The Revised PPS12 (June 2008) states that core strategies should be supported by evidence of what physical, social and green infrastructure is needed to enable the amount of development proposed for the area, taking account of its type and distributions. This should include evidence of who will provide infrastructure and when it will be provided. Furthermore, PPS12 also states that, in order to be 'sound', core strategies should be deliverable, including the consideration of sound infrastructure delivery planning. Adequate consideration therefore needs to be given to the issues relating to the implementation of growth in Gillingham.

11.2 This section therefore sets out the implementation framework for accommodating future growth in the town. It includes a delivery strategy and delivery plan for the implementation of growth and support infrastructure at Gillingham.

11.3 Sections 5 to 10 identify what infrastructure will be required to support the growth identified in the refined Scenarios 1 and 2, where the infrastructure will be required and how much it will cost. This section deals with when the infrastructure will be required, and who will be responsible for providing the infrastructure and how it will be provided.

11.4 The consultants have tested the viability and deliverability of the growth scenarios and assessed the likely funding gap in delivering infrastructure required to support growth.

Assessment of Viability and Deliverability

11.5 Viability testing of the growth scenarios was undertaken in broad terms to assess the scale of infrastructure costs that development could bear and to enable the infrastructure funding gap to be identified.

11.6 The location of growth has an impact on viability, as infrastructure requirements vary depending on which land parcels are developed. Therefore, new growth was grouped into four broad areas; 'north' which includes all sites at Peacemarsh; 'south' sites at Park Farm and Ham Common; 'Station Road' and 'urban infill and other sites' which are all the remaining sites. These sites can be added together to consider the implications for individual development scenarios.

11.7 The viability testing includes several steps and the Consultants have made various assumptions which are described in our approach below. A detailed viability assessment table is included in Appendix E.

Step 1: Calculate Revenue

11.8 The first step was to estimate the revenue secured from growth. This requires assumptions about dwelling type and size and the price of units. The NDDC Affordable Housing Provision and Developer Contributions in Dorset Draft Final Report tested the viability of various development mix assumptions including an assumption for development at 30 dwellings per hectare and typical unit sizes.

11.9 At 30 dph the study assumed the following mix of residential development. 10% 2 bed terraces; 20% 3 bed terraces; 15% 3 bed semi detached houses; 30% 3 bed detached houses and 25% 4 bed detached houses. This study therefore uses assumptions about the mix of housing (size and type of units) in each of land parcels to fit broadly with the % mix identified in the 30dph development mix in the affordable housing study. It was assumed that some of the units would be provided in the form of apartments such as at Station Road and around local centres within urban extension areas (refer to Appendix E).

11.10 Assumptions on unit price are derived from the NDDC Affordable Housing Provision and Developer Contributions in Dorset Draft Final Report, these are set out in Table 11.1.

Table 11.1 – Market Prices 2009

Housing Sub Market	Houses				Flats
	4 bed	3 bed D	3 bed SD	3 bed T	2 bed T
Gillingham	£300,000	£255,000	£195,000	£190,000	£160,000

Source: NDDC Affordable Housing Provision and Developer Contributions in Dorset (Draft Final Report)

11.11 Assumptions about office and retail revenues located within the urban extension sites (£ per sqm) were derived from the Bournemouth Dorset Poole Workspace Strategy rental levels for major towns and by checking property agent websites.

11.12 To calculate revenues the total number of units for each type and size identified and the total estimated floorspace for office and retail floorspace is multiplied by the relevant market price. For the north total revenues are £271.6m, for the south total revenues are £429.3m for Station Road total revenues are £34.5m and for the urban infill and other sites total revenues are £71.5m. Total revenues for all growth in Gillingham (scenario 1 level growth) would be £806.88m.

Step 2: Derive Land Cost Assumptions

11.13 Land cost assumptions were derived from the NDDC Affordable Housing Provision and Developer Contributions in Dorset Draft Final Report. The affordable housing report refers to Greenfield land values of around £1.5m per acre (£3.75m per hectare); however, there is no source for this data. Therefore, the Consultants have the residential building land index[24] to identify an average land cost of £2m per hectare in the South West over the last 10 years.

11.14 For the Station Road site industrial land values were assumed. The NDDC Affordable Housing Provision and Developer Contributions in Dorset Draft Final Report states that there is no direct data for North Dorset and therefore a typical value for industrial land has been assumed of £650,000 per hectare which is comparable to values in Weymouth.

Step 3: Infrastructure Costs

11.15 Sections 5 to 10 identify the costs for each type of infrastructure. Other on/off site infrastructure costs are assumed to be 5% of overall construction costs which would cover external and civil works. Costs for each broad area have been identified, taking account of the requirements needed to deliver growth. Costs by infrastructure type and location are set out in Table 11.2. The costs of town wide infrastructure and community facilities have been apportioned between development areas on a per dwelling basis.

11.16 For Station Road it has been assumed that there may be a need for some remediation of land contamination (assuming a low level of contamination based on previous uses of the site). This has not been established and would require further investigation by the landowner.

[24] http://www.voa.gov.uk/publications/property_market_report/pmr-jan-09/residential.htm#residential_land_index

Table 11.2 – Infrastructure Costs Summary Table

Infrastructure Types	Location				
	North (£)	South (£)	Station Road (£)	Urban Infill / others (£)	Total (£)
Education	6,426,000	10,632,000	1,260,000	1,878,000	20,196,000
Open Space - off site provision	2,020,977	3,343,764	396,270	590,631	6,351,642
Sports facilities	756,126	1,251,032	148,260	220,978	2,376,396
Community Hall	204,764	338,789	40,150	59,846	643,549
Health Care	552,636	914,352	108,360	161,508	1,736,856
Public Realm Improvements	-		202,000	-	
Strategic Transport Improvements	6,554,520	10,844,640	1,285,200	1,915,560	20,599,920
Local junction improvements	280,000	1,380,000	-	-	1,660,000
Other On/Off Site Infrastructure	4,953,011	7,813,541	1,461,777	1,294,356	15,522,684
Total Infrastructure Costs	21,748,034	36,518,117	4,902,017	6,120,878	69,947,447

11.17 The total cost for infrastructure for the north is £21.75m, for the south it would be £36.5m for Station Road £4.9m and for Urban Infill and other sites £6.12m. This equates to total infrastructure costs of £69.95m for the whole of Gillingham (under scenario 1 growth levels). Total infrastructure costs identified in Table 11.2 would be equivalent to approximately £20,781 per unit.

Step 4: Calculate Construction and Development Costs

11.18 Construction costs per square metre for the different types of floorspace (houses, flats, retail etc) have been derived from BCIS 3rd Quarter 2009 (adjusted for the Dorset Average). The figures include a per square metre allowance for achieving Code for Sustainable Homes `Level 4.

11.19 The Consultants have also assumed the following development costs:

- Detailed design 3.5% of construction costs;
- Supervision of construction 3% of construction costs;
- Other legal and professional fees 4.5% of construction costs;
- Logistics 0.5% of construction costs;
- Insurance 1% of construction costs;
- Price Contingency 5% of construction costs;

11.20 In addition to the above construction and development costs, some allowance for selling and marketing has been assumed:

- Selling and Legals 1% of revenue
- Marketing 0.5% of revenue

11.21 We have also accounted for financing costs at 7.5% of overall project costs.

11.22 Total construction costs for the north would be £99.06m, for the south it would be £156.27m, for Station Road £29.23m and for Urban Infill and other sites £25.88m. This equates to total costs of £310.45m for the whole of Gillingham (under scenario 1 growth levels).

Step 5: Calculate Developer Margin

11.23 Developer margin is calculated in order to assess the viability of a scheme. The developer margin is calculated by subtracting total project costs (identified in Steps 2 – 4) from project revenue identified in Step 1.

11.24 It is assumed that in the current market developers will require a return on investment of 20% (due to current lending practices of financial institutions) rather than the 15% minimum return which has traditionally been satisfactory to reflect the perceived level of risk associated with development. The return on investment is calculated by dividing the margin by total project costs.

11.25 Table 11.3 sets out a summary of the viability assessment. It shows that the return on investment for each of the growth areas identified above. The average return on investment (17%) is just below the rate acceptable to project funders. However, there are significant variations in returns between different growth areas. Urban infill site have returns which exceed 20%, whilst the southern and northern growth areas have lower returns.

11.26 The Station Road mixed use area would not provide an adequate return on investment if the full costs of infrastructure were borne by the developer.

Table 11.3 - Viability Assessment Summary

	North	South	Station Road	Urban Infill and Other Sites	Total
Total Project Revenue £	271,995,000	429,720,000	36,457,800	71,500,000	809,672,800
Total Project Costs £	230,143,710	364,702,125	43,768,042	48,850,732	652,061,359
Finance Costs £	16,110,060	25,529,149	3,063,763	3,419,551	45,644,295
Margin £	25,741,230	39,488,726	- 10,374,005	19,229,716	111,967,145
Return on Investment	11%	11%	-24%	39%	17%

11.27 The above analysis does not take into account the Impact of affordable housing. The NDDC Affordable Housing Provision and Developer Contributions in Dorset Draft Final Report, assesses scheme viability under a range of different of affordable housing scenarios (different proportions and types of affordable housing).

11.28 The study made the assumption that with a 'S106 Planning Gain Package' of £15,000 per dwelling then up to 40% affordable housing could be achieved without Housing Corporation Grant. However, the study did not give consideration to site development and infrastructure costs which are greater for urban extension sites or account for existing use values which are significant for brownfield and urban infill sites.

11.29 The study identified that infrastructure costs for greenfield sites would be in the order of £100,000 - £600,000 per ha which is supported by the findings of this study although costs are towards the upper end of this range at over £500,000 per ha accounting for the significant package of infrastructure which is required to support growth at Gillingham.

11.30 Furthermore, the package of infrastructure required to bring forward the Station Road area is likely to exceed £1.2m per ha which has a significant impact on viability. The viability of this site is affected by the value of existing uses on the site and reduced further by the costs of demolition not accounted for above.

11.31 Therefore, it is likely that a lower affordable housing target would be achievable in Gillingham as whole perhaps in the order of 30-35% or even lower in the current market conditions. It is unlikely that the Station Road site could deliver any affordable housing without grant unless the infrastructure costs which were borne by the developer were significantly reduced.

11.32 The North Development area is also not currently deliverable on the assumptions included within the viability assessment. However, it is possible with refinement to the development mix or a recovery in land values between now and when the site is delivered then it could be delivered. Furthermore, a reduction in the cost of infrastructure borne by the developer would also enable delivery.

Implications

11.33 The outcome of the viability assessment has several implications. The first is that as it stands the development in certain locations is not viable at present with the assumptions identified within the viability assessment, as the return on investment is too low to facilitate development.

11.34 However, the viability analysis assumes that all infrastructure costs will be funded by the developer. This may be unrealistic and as it can be seen makes the development in certain locations becomes unviable. It is therefore necessary to assess the scale of infrastructure costs that can be borne by a developer whilst allowing the scheme to be viable.

11.35 To take account of the issues identified above, sensitivity analysis was undertaken which reduced infrastructure costs to identify the point where development would be viable. The North growth area becomes viable by reducing infrastructure costs by approximately £15.2m (to £6.5m), and the South growth area becomes viable by reducing infrastructure costs by £23.9m (to £12.6m) however even when £4.9m of infrastructure costs are reduced to zero at Station Road, the site is still not viable. The combined total funding gap to cover the cost of infrastructure is therefore at least £44m. Funding to achieve the required infrastructure could come from Government through the Homes and Communities Agency or through the Regional Infrastructure Fund although Gillingham is not currently eligible for funding as it is not located within a Growth Point or SSCT.

11.36 In addition to this infrastructure funding gap, the Station Road site is currently unviable assuming the assumptions regarding the quantum and mix of uses. There may be a need to change the scale of development or mix of uses at this site to increase revenue or to require developers to make a contribution towards meeting some of the infrastructure costs (for example for transport and public realm works).

11.37 Given the need to assemble land to deliver this scheme it may be appropriate for the HCA or another public sector body to lead on bringing forward this site which is essential for growth to be delivered sustainably.

Delivery plan

11.38 The delivery plan is set out below in Table 11.4, it sets out the infrastructure packages / projects for each of the major growth locations as well as the town wide infrastructure improvements that will be required to support growth. The delivery plan identifies where and when infrastructure required, the responsibilities for provision and the funding of the infrastructure.

Phasing

11.39 The phasing programme shown in Table 11.5 should be set within the context of the timescales for other planning and delivery frameworks. The timeframe of the growth strategy is long term and covers at least the period to 2026.

11.40 A key aim of the growth strategy is to prioritise the improvement of Gillingham's town centre and this is reflected in the phasing strategy. However, it is recognised that the key town centre sites at Station Road may take some time to deliver due to ownership and other constraints. Whilst it is important to secure the delivery of the development in the town centre, it is equally important that

quality is not compromised in order to achieve the required level of development. Commitment to delivery must therefore be matched by commitment to seeing new development of the highest standards of design and sustainability.

11.41 In order to ensure its delivery, the rate of development will require careful supervision through Annual Monitoring Reports, in order that appropriate modifications and changes to policy or strategy can be implemented to reflect registered successes and failures in the delivery of development in the urban area.

11.42 Where development is delayed or frustrated, it may be necessary to forward fund or 'pump-prime' infrastructure costs or adopt a system of incentives to encourage potential investors to come forward, including environmental and public realm improvements.

11.43 Delivery of Gillingham's growth aspirations for the town will depend on strong buy-in, investment and cooperation between North Dorset Council, Dorset County Council and relevant public sector service providers.

11.44 The coordination of key social infrastructure with housing development is vital. This particularly applies to education and health facilities, which are important ingredients of quality of life for migrants to the area and occupiers of new developments. Their planning must take into account the planned growth in housing and its population implications and location. Planning and funding cycles and assumptions about growth of other (or even within) agencies may not correspond. Plans may involve disposal of sites for short term financial reasons which would be required for planned growth. Replacement sites may not be well located, resulting in wasteful travel patterns. It is also essential that the key social facilities are provided in advance of the full needs so that they are available for new communities from the start. Failure to provide these would damage the image of Gillingham and discourage growth.

Funding

11.45 The sources of funding could include:

- Mainstream programmes for transport and community infrastructure from Dorset County Council, North Dorset District Council, the LEA, Primary Health Care Trust, Police and Fire and Rescue Service etc.
- Community Infrastructure Levy (CIL) will allow a broader based levy on development to fund infrastructure development over a wider area. Whatever final form it takes, inevitably infrastructure funding, beyond that covered by mainstream public sector funding sources and special national programmes for growth areas, have to come from the uplift in values of land granted planning permission and developed by the private sector or from other sources of finance such as bonds or PFI.
- Section 106 planning obligations will fund specific site related requirements for non-market community infrastructure, off site infrastructure and contribute to affordable housing. North Dorset's Planning Obligations Guidance Note, Supplementary Planning Guidance currently provides non-statutory guidance on the approach to S106 planning obligations and takes funds towards current infrastructure needs.
- Private sector development will fund market housing, affordable housing, employment space and commercial services and associated internal site transport, utilities and environmental infrastructure, and will also contribute to off-site utilities infrastructure.
- The Homes and Communities Agency may be able to fund some larger housing schemes, including the delivery of the Station Road site
- Other sources of public funding include SWRDA, European Regional Development Fund (ERDF) and the Lottery would be directed mainly towards special projects or sectors that

would not be feasible without gap funding, and preparatory work in economic development, such as cultural and environmental projects.

Delivery Mechanisms

11.46 The majority of development at Gillingham will be located on greenfield urban extensions. Delivery of these urban extensions is likely to be less problematic than the Station Road site and the town centre improvement packages.

11.47 One of the key issues to consider in delivering growth at Gillingham will be the need to establish an appropriate delivery mechanism to implement growth. There is a need for a public sector (or other) champion to co-ordinate growth in the town. There are various options for this:

- Local Council led;
- Local Strategic Partnership led; or
- Town Centre Regeneration Company.

11.48 North Dorset does not have a single LSP covering the District, it has the four area Community Partnerships which include the Three Rivers Partnership that covers Gillingham.

11.49 There may be a need for a number of delivery partners able to:

- Co-ordinate facilitation of development including issues such as Compulsory Purchase Orders (CPO), demolition and decanting existing uses;
- Co-ordination of public sector funding applications;
- Co-ordination of delivery of strategic and social infrastructure and collection of any developer contributions tariff (whether this is CIL or S106 standard charges); and
- Liaising with public sector stakeholders.

11.50 The benefits of having a delivery body in place are that decision making can be co-ordinated, there is potential to add momentum to delivery of growth and infrastructure; the body can help to develop a shared understanding of vision and objectives between key stakeholders; and roles and responsibilities for delivery can clearly be identified.

11.51 The partnership should work closely with landowners and other stakeholders such as service providers. It may be appropriate to establish a Major Land Owners Forum to help facilitate development.

Land Release

11.52 The Calcutt review recommends dividing land into smaller parcels, in order to avoid the situation where a small number of developers control supply and may limit delivery to maintain prices. Also development concentrated in one area will constrain the variety of housing and location combinations available

11.53 Public sector ownerships will also be important to catalyse new developments, and should be used in partnership with developers to steer development to the locations and the character to meet growth objectives. This would apply particularly to mixed use development at the Station Road site.

Promotion

11.54 Achieving the Growth Scenarios set out in this report will depend mainly on inward migration, attraction of inward investment by businesses to create new jobs, and investment by developers in the housing and industrial and commercial space. This will depend on outside perceptions. Promoting Gillingham will be important to raise its attraction to the target economic activities, such as environmental goods and services and the skills that are needed to work in these activities.

Both the business and residential/quality of life aspects have to be promoted in parallel. Perceptions may not be accurate and will not reflect the planned transformation of the town.

11.55 It may be necessary to develop a marketing strategy to deal with both the general promotion of Gillingham to potential migrants, employers and investors, and also the more specific promotion of particular projects to attract investment. General promotion will aim to boost migration and inward investment of the desired kinds, and as a part of this, to define the image that Gillingham will promote to achieve this aim.

11.56 To be effective there needs to be visible change to provide a credible new story to tell, rather than simply an expression of aspirations. The timing of marketing therefore should follow the start of transformation on the ground and at a point where the more detailed plans, e.g. for the town centre are firmer.

Monitoring

11.57 Establishing an appropriate monitoring mechanism will be an important part of the delivery strategy. Monitoring will be required on a number of levels, most importantly it will be crucial to ensure that the programme of infrastructure is being delivered to keep pace with requirements arising from development.

11.58 It will be important to carry out regular updates of the infrastructure requirements that are being generated to take account of changing circumstances and areas of uncertainty regarding delivery of sites and or specific infrastructure projects.

11.59 There will also be a role in monitoring funding both mainstream public sector funding, and the receipts from S106 contributions.

Table 11.4 – Delivery Plan

Location	Project		Responsibility		Funding			Timescale for Delivery
		Status	Delivery Organisation	Management Organisation	Costs	Budget Provision / Funding	Possible Funding Gap	
South	Expansion of St Mary's Primary school (by 1 FE)	Critical	DCC	DCC	£4.7m	Mainstream DCC funding and Developer contributions	No	2012-2016
	New Primary School (1.5 FE)	Critical	DCC	DCC	£7.1m	Mainstream DCC funding and Developer contributions	No	2022-2026
	New health centre (space for 3 GPs)	Critical	Dorset PCT		£1.86m	Mainstream PCT funding and Developer contributions	No	2017-2021
	Woodland planting (0.5 ha adjacent to Brickfields)	Essential	Developers / owners of Brickfields	Owners Brickfields	£69,000	Landowner/Developer Developer contributions from other sites Other sources	No	Dependent on date of brickfields expansion
	Green Corridor expansion – River Lodden (adjacent ATK17-19)	Essential		NDDC	£1.22m	Landowner/Developer Developer contributions from other sites Other public sector sources (match funding)	Yes	2012 – 2016
	Green Corridor expansion – River Lodden (adjacent ATK16)	Essential		NDDC	£379,700	Landowner/Developer Developer contributions from other sites Other public sector sources (match funding)	Yes	2017 - 2021
	Priority Junction (@ 2 Junctions on B3081)	Critical		HA	£260,000	Landowner/Developer	No	2012 - 2016
	Signals (@ 2 junctions on B3081 and Cole St Lane)	Critical		HA	£560,000	Landowner/Developer	No	2012 - 2016
	Signals (@ 2 Junctions on the B3092)	Critical		HA	£560,000	Landowner/Developer	No	2012 - 2016
North	New Primary School (1 FE)	Critical	DCC		£5.2m	Mainstream DCC funding and Developer contributions	No	Post 2026
	Expansion of health centre (to accommodate 1 GP)	Essential	Dorset PCT		£428,000	Mainstream PCT funding and Developer contributions	No	Post 2026
	Green Corridor expansion - River	Essential			£577,900	Landowner/Developer	Yes	Post 2026

Location	Project		Responsibility		Funding			Timescale for Delivery
		Status	Delivery Organisation	Management Organisation	Costs	Budget Provision / Funding	Possible Funding Gap	
	Stour (adjacent ATK23, ATk24)					Developer contributions from other sites Other public sector sources (match funding)		
	Woodland planting (between Milton and Neal's Yard)	Essential	Developers / owners of Neal's Yard	Owners Neal's Yard	£69,000	Landowner/Developer Developer contributions from other sites Other public sector sources (match funding)	No	Dependent on further expansion of Neal's Yard
	Signals (@ 1 junction on Wavering Lane)	Critical		HA	£280,000	Landowner/Developer	No	Post 2026
Town wide	New 4 court sports hall	Critical			£2.75m	Sport England Funding x % S106 x %	Yes	2012 - 2016
	New 4 court sports hall	Essential			£2.75m	Sport England Funding x % S106 x %	Yes	Post 2026
	Community Hall	Essential			£643,530	Developer Contributions + public sector match funding	Yes	Post 2026
	Town park (Chantry Fields)	Desirable		NDDC	£2.22m	Developer Contributions + public sector match funding	Yes	2012 - 2016
	Town Park (Red Lion / Car Park site)	Essential		NDDC	£231,000	NDDC (Land) Developer Contributions + public sector match funding	Yes	2017 - 2021
	Accessible countryside open space (Wyke)	Desirable		NDDC	£825,500	Developer of Wyke Employment site + developer contributions from other sources	Yes	2017 - 2021
	Green Corridor expansion -Southern bank of River Stour	Essential		NDDC	£891,600	Landowner/Developer Developer contributions from other sites Other public sector sources (match funding)	Yes	2022 - 2026
	Extension/Expansion of Gillingham School	Essential		DCC	TBC		No	Post 2026
	Provision of Business Support Services	Essential		DCC	TBC		Yes	2012 - 2016

Location	Project		Responsibility		Funding			Timescale for Delivery
		Status	Delivery Organisation	Management Organisation	Costs	Budget Provision / Funding	Possible Funding Gap	
	Establishment of enterprise hub incorporating FE/Training facilities	Essential		SWRDA/DCC/LSC Private Sector	TBC		Yes	2017 - 2021
	Town Centre public realm improvements	Essential	NDDC	NDDC	£202,000	Landowner/Developer DCC through LTP	Yes	2017 - 2021
	Transport Infrastructure - Eastern Route	Desirable	DCC	DCC	£25.5m	DCC through LTP + Developer Contributions	Yes	2022 - 2026
	Transport Infrastructure - Shaftesbury Improvement	Essential	DCC/HA	DCC/HA	£8.6m	HA/DCC + Developer Contributions	Yes	2022 - 2026
	Transport Infrastructure - Southern Link	Essential	DCC	DCC	£12m	Landowner/Developer	No	2022 - 2026
	Other transport improvements inc. public transport	Essential				DCC through LTP + Developer Contributions	Yes	2017 - 2026

Table 11.5 – Phasing of Infrastructure

Development Location	Infrastructure Item	Phasing			
		2012 - 2016	2017 - 2021	2022 - 2026	Post 2026
South	Green Corridor Expansion River Lodden (Adajcent ATK17 - 19)				
South	Expansion of St Mary's School				
Town wide	New 4 court sports hall				
Town wide	Town park (Chantry Fields)				
Town wide	Provision of Business Support Services				
South	Priority Junction (@ 2 Junctions on B3081)				
South	Signals (@ 2 junctions on B3081 and Cole St Lane)				
South	Signals (@ 2Junctions on the B3092)				
South	Green Corridor Expansion River Lodden (Adajcent ATK17 - 19)				
South	New Health Centre				
Town wide	Town Park (Red Lion / Car Park site)				
Town wide	Accessible countryside open space (Wyke)				
Town wide	Establishment of enterprise hub incorporating FE/Training facilities				
Town wide	Town Centre public realm improvements				
Town wide	Transport Infrastructure - Southern Link				
Town wide	Other transport improvements inc. public transport				

Development Location	Infrastructure Item	Phasing			
		2012 - 2016	2017 - 2021	2022 - 2026	Post 2026
Town wide	Green Corridor expansion -Southern bank of River Stour				
South	New Primary School (1.5 FE)				
North	New Primary School (1 FE)				
Town wide	Transport Infrastructure - Eastern Route				
Town wide	Transport Infrastructure - Shaftesbury Improvement				
Town wide	Transport Infrastructure - Eastern Route				
North	Expansion of health centre (to accommodate 1 GP)				
North	Green Corridor expansion - River Stour (adjacent ATK23, ATk24)				
North	Signals (@ 1 junction on Wavering Lane)				
Town wide	New 4 court sports hall				
Town wide	Community Hall				
Town wide	Extension/Expansion of Gillingham School				

Appendix A
Economic Policy Context

Economic Policy Context

A.1.1 This Appendix provides a summary of the key messages from the existing economic policy context at the regional, sub-regional and local level.

Regional Economic Strategy

A.1.2 In terms of productivity, in 2003, output per head in Dorset remained 7% below the UK average. Dorset is below the UK average (UK=100, Dorset=81).

A.1.3 On other measures of competitiveness and entrepreneurship, the South West ranks quite highly, with good rates of business creation and research and development

A.1.4 The regions natural and cultural assets help the comparatively high quality of life and contribute to wider prosperity

A.1.5 The South West's basic skills need to be improved and the region does not invest enough in its physical and human capital which makes is hard to compete in the global economy

A.1.6 Economic connections between cities and towns and their rural hinterlands need to be stronger. As well as better transport and communications, this reflects the need for wider networking between the regions businesses and key markets for labour, goods and services nationally, in Europe and around the world.

A.1.7 At 2.4% growth, the South West would get an additional 90,000 jobs between 2006-2016 and 160,000 jobs between 2006 and 2026. The three scenarios for real growth are 2.4, 2.8 and 3.2% - these could be applied to sectoral growth within Gillingham.

A.1.8 The employment to population ratio, at 2.8% and 3.2% growth rates are expected to be 41% and 42% respectively. The ratio between 1995 and 2005 has been 41%.

A.1.9 The region needs to address the following issues:

- Population growth, ageing and distribution;
- Business creation and retention;
- Rapidly changing industrial and employment mix;
- Technological and other knowledge dissemination;
- Energy, use of resources and climate change

Spatial Implications – Place Matters (Annex to the RES 2006 – 2015)

A.1.10 The A303 Corridor zone contains about 10% of the region's population. Key towns include Salisbury in the east of the zone and Yeovil in the centre. Taunton is included in the western end of the zone, overlapping with the M5 Corridor zone. Other towns in the zone include Shaftesbury, Gillingham, Sherborne, Crewkerne, Chard, Axminster and Honiton.

A.1.11 The A303 Corridor is not a particularly distinct or economically coherent zone. Its defining features are the A303, the Exeter/Waterloo rail corridor and the activity in and around key market towns near the A303 and A30. The potential exists to further develop the role of this corridor through the growth of the strategic settlements. A good understanding of the issues and policy responses in other 'non-coastal' settlements in the region will be important to the economic success of this zone. As with those other zones, the way in which growth of the strategic settlements links with smaller scale growth in other settlements and in rural areas will be critical to success.

A.1.12 Business formation rates range from average to low but employment and economic activity rates are relatively high. Employment in the knowledge economy is higher in the east of the zone than it is in the west. Skills and qualification levels are high, house prices are high and rural disadvantage includes service related (e.g. GPs, libraries) exclusion. The zone has witnessed strong GVA per employee growth, particularly in SMEs.

A.1.13 A number of priority sectors are represented in the zone, including Advanced Engineering, Food and Drink, Biotechnology and Environmental Technology. Advanced Manufacturing, the primary industry sector and traditional manufacturing also stand out as key sectors in the zone. There is also a valuable MoD presence in this zone, with strong links to research establishments.

A.1.14 Yeovil is expected to grow from 57,400 jobs by 5,100 jobs by 2016. It is expected to add a total of 9,100 jobs by 2026.

A.1.15 Yeovil is located four miles to the south of the A303 and serves a wide rural catchment area. The Yeovil Vision sets an ambitious future for the town. The economic structure is similar to a number of towns in the region but the strong concentration in the aerospace sector, centred on helicopter manufacture (GKN Westland), sets it apart. The economic structure is heavily reliant on advanced engineering and food processing, employing over 30% of the workforce. There is a need for ongoing diversification, utilising existing high qualifications and skills in the labour force and capitalising on the role of the Yeovil Innovation Centre. Yeovil's share of total regional employment and GVA is 2.2% and 2.3% respectively. Steps towards a more knowledge driven economy have already been taken. There are a number of challenges for Yeovil, in achieving its full economic potential. These are outlined in the table below:

- Reducing the reliance on the Aerospace sector through the restructuring and diversification of the local economy. This will require a cohesive strategy covering business support, skills and new enterprise
- Ensuring the remaining manufacturing businesses are more competitive in an increasingly global market place. Innovation will be a key driver in achieving this
- Supporting the University Centre Yeovil (with its teaching and composites/advanced engineering specialisms) and its links to Salisbury College, Bournemouth University and the University of Exeter
- Delivering the Yeovil Vision including employment land and premises
- Contributing to the development of a more coherent A303 Corridor Zone

A.1.16 Salisbury is expected to grow from 62,200 jobs by 7,700 in 2016 and 13,600 in 2026.

A.1.17 Salisbury is a large free standing centre performing a traditional role serving a wider hinterland of smaller towns and villages. Its contribution to total regional employment and GVA is around 2.4%. It has good connections with London and the South East. It has seen relatively strong economic growth and has a high quality environment. It is relatively specialised in sectors which have high growth potential in the future, including tourism and biotechnology. There are further strengths in terms of the MoD (e.g. Defence Science Technology Centre), financial services and its retail function. It is also within close proximity of the Porton Down research establishment. Key issues for Salisbury include the tight labour market, lack of employment land and a lack of affordable housing. There are a number of challenges for Salisbury, in achieving its full economic potential. These are outlined in the table below:

- Realising the opportunities presented by the presence of Porton Down, for example the establishment of knowledge-based companies in the Biotechnology sector, and further links with Higher Education establishments in Bournemouth and Yeovil
- The high quality environment may limit opportunities for futher expansion
- Contributing, in partnership with other places, to the development of a more coherent A303 Corridor zone

A.1.18 Other towns and rural areas: The A303 corridor encompasses a large number of smaller towns between the east and south of the region. To the west, Axminster and Honiton are important local service centres with historical strengths in manufacturing. Proposed development to the east of

Exeter (including the new community, strategic employment sites and ongoing development of Exeter International Airport), will accommodate significant growth.

A.1.19 Gillingham and Sherborne are located on the Exeter-Waterloo rail link and close to the A303 itself. Both settlements are important local centres. Gillingham is the fastest growing town in the County (in terms of housing and population), though employment growth has been slow. It has close links with Shaftesbury which is an important tourism and service centre. Sherborne has close links with Yeovil and is itself an important historic centre with a very attractive environment. It has a diverse economy with a significant share of tourism. There is a need to balance growth of employment, shops, local services and community facilities between the two settlements to support sustainable communities.

A.1.20 Crewkerne and Chard are also sizeable local settlements with strong local employment and service centre functions.

A.1.21 Amesbury and Tidworth/Ludgershall are all located towards the eastern end of the A303. The topographical features of Salisbury Plain (including Stonehenge) and the military presence around this area are very important influences on the local economy. There is a need for targeted initiatives to diversify the local economies and develop labour market potential in these settlements. The largest urban settlements with relationships with these towns are Salisbury, Andover and Basingstoke (the latter in the south east region), and there are significant economic connections to these two towns.

Summary of Key Points for North Dorset

A.1.22 The towns of Shaftesbury, Gillingham and Sherborne are included within the defined A303 Corridor Functional Zone which runs from Salisbury in the east, through to Yeovil and Taunton in the West. In summary the RES finds that the A303 Corridor is not particularly distinct or economically coherent. Business formation rates range from average to low but employment and economic activity rates are relatively high. Employment in the knowledge economy is higher in the east than the west with skills and qualifications high across the zone. The RES reports the zone having experienced strong GVA per employee growth, particularly in SMEs.

A.1.23 Within the A303 Corridor Functional Zone the RES priority sectors present include Advanced Engineering, Food and Drink, Biotechnology and Environmental Technology. Key sectors include Advanced Manufacturing, the primary industry sector and traditional manufacturing. Gillingham is recognised as the fastest growing town in the County (in terms of housing and population) but employment growth is slow. Shaftesbury is seen as an important tourism and service centre and Sherborne is considered to have a diverse economy with a significant share of tourism.

SW RDA : Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

Commercial Property Market Review

A.1.24 There appears to be a reasonable level of availability across the Districts with agents and the Property Pilot also reporting steady increase in B8 enquiries and recent slight increase in B2 space enquires. However, whilst there is considered to be a reasonable supply of land, agents report that it is not readily available, and there is a perceived shortage from agents of large sites capable of accommodating large inward investment enquires or major local expansions. In terms of tenure, agents also indicate that traditionally demand has predominantly been for freehold premises however this is now reverting to leasehold in light of difficulties in obtaining finance. The general consensus is also one of high levels of occupancy within existing industrial estates across the study area.

Socio Economic Context

A.1.25 Overall the sub-region compares relatively well in labour market terms with regional and national averages:

- The sub-region has a lower proportion of working age residents (20 to 64 age group) than the Region as a whole.
- Economic activity levels in the sub-regions are in line with the national and regional average.
- Unemployment rate in the sub-region is slightly above the regional average but well below the national level.
- Occupational and skills levels in the sub-region are in line with the regional average. The skills levels in the sub-region and the Region compare positively to the national average.

A.1.26 However, the performance within the sub-region across the different labour market indicators is quite varied. Only North Dorset performs above average in all four selected labour market indicators (working age population growth, economic activity rate, higher level occupation and skills). West Dorset over performs the sub-regional average in two of the four labour market indicators. East Dorset and Weymouth and Portland perform in two of the four indicators below the sub-regional average. The remaining local authorities (Bournemouth, Christchurch, Poole and Purbeck) perform similar to the sub-regional average with one indicator being above and/or below the sub-regional average.

A.1.27 Overall the sub-region has a well balanced sector distribution. Whilst there are still significant manufacturing and employment strengths, the economy in the sub-region has successfully transformed into a service economy to offset the decline in employment in the Manufacturing and the Primary and Utilities sectors and an increase in Health and Education, Financial and Business Services and Distribution and Retail between 1981 and 2006. This trend is projected to continue to 2026.

Employment Land Demand

A.1.28 The document estimates that there is a gross demand of around 184 ha of employment land between 2006 and 2026 in the sub-region which is almost evenly split between land demand for office uses (94 ha) and for industrial uses (90 ha). The overall demand is mainly driven by demand for office uses and for warehousing. Traditional industrial employment is projected to decline, leaving a demand for renewal and replacement of existing industrial employment sites where these are no longer fit for purpose.

Balancing Demand and Supply

A.1.29 Rural Dorset has an adequate supply of available employment land. However, the area faces challenges regarding the delivery of employment premises due to the local market conditions and the somewhat remote location of many of the employment sites.

A.1.30 A significant part of the employment land supply in the sub-region is afflicted with uncertainties regarding the likelihood of these sites coming forward. If large parts of the assumed supply do not come forward, this will leave the sub-region with a supply shortage most likely having a negative affect on the performance of the local economy.

A.1.31 North Dorset: Lowest office floorspace of all districts (joint with Weymouth and Portland) with floorspace largely dominated by factory accommodation. However, the district has a high number of offices units, resulting in a small average suite size.

A.1.32 In terms of enquiries received by agents, one of the main local agents spoken to has witnessed demand over the past 5 years from the B8 sector steadily increasing so that now this sector accounts for nearly 50% of all their enquiries. The agents also highlight the historic perception that B8 use has always been associated with low employment levels, however, many of the current B8 uses are employment creating such as the employment of drivers rather than staff within the properties.

A.1.33 One of the key local agents spoken to also reported that they have noticed of late a slight increase in the demand for B2 premises indicating that the number of manufacturing companies has shown

modest growth. Another agent confirmed demand was reasonable for B2 and in fact felt there was a good split within the BDP area for all B use class requirements.

A.1.34 In terms of tenure, feedback from local agents has indicated that over the past 5 years demand has been predominantly for freehold, however of late with the difficulties in obtaining finance and the peaking of freehold prices, they are now experiencing a greater demand for leaseholds and this is helping to increase rental levels. One local agent highlights recent demand for pre-let design and builds for 15 year leases with 10 year tenant break options for units of between 10,000 and 30,000 sq ft.

A.1.35 A key finding of the labour market analysis is the labour market constraints with modest growth projections of 3,800 of working age (20 to 64 age group) residents in the sub-region between 2006 and 2026. This indicates that economic growth (in GVA terms) has to be driven by an increase in value added rather than pure employment growth – this could mean that, with other areas constrained by the size of the working age labour market, Gillingham has potential to grow.

Projected Employment Changes

A.1.36 Employment in the sub-region has grown by 67,600 employees between 1986 and 2006, which equates to an increase by 24% or 1.1% per annum. The growth has not been distributed equally across the sub-region with the Dorchester and Weymouth TTWA falling well below the average with a growth rate of 0.5% per annum as shown in Table 10.

A.1.37 South West RDA has assumed in its Regional Economic Strategy the regional economy to grow by 3.2% per annum in terms of Gross Value Added (GVA). Under this assumption employment is projected to grow by 54,800 between 2006 and 2026 in the sub-region. This equates to an increase by 15.9% or 0.7% per annum. The future employment growth is projected to be proportionally distributed across all TTWAs with growth rates between 0.7% and 0.8% in all the TTWAs and in North Dorset (Non TTWA).

Table A.1 - Employment Growth by TTWA 2006-2026

	1986-2006			2006-2026		
	No.	%	% pa	No.	%	% pa
Bournemouth TTWA	30,152	25.7	1.2	22,738	15.4	0.7
Poole TTWA	21,808	30.1	1.3	15,435	16.4	0.8
Dorchester and Weymouth TTWA	5,505	10.6	0.5	9,491	16.5	0.8
Non TTWA	10,135	28.6	1.3	7,136	15.7	0.7
Total	67,600	24.4	1.1	54,800	15.9	0.7

Source: Cambridge Econometrics

Table A.2 - Employment Projections by Sector and TTWA 2006-2026

	BDP		Bournemouth TTWA		Poole TTWA		Dorchester and Weymouth		Non TTWA	
	No.	%	No.	%	No.	%	No.	%	No.	%
Primary Sectors and Utilities	-2,700	-33.3	-582	-27.8	-903	-33	-522	-33	-693	-40.8
Manufacturing	-10,200	-27.3	-4332	-32.9	-3119	-21.4	-893	-21.4	-1857	-25.3
Construction	2900	11.4	1315	12.4	349	10.7	385	10.7	851	18.7
Distribution and Retail	15700	25.3	5734	20.7	4602	38.7	3379	38.7	1986	23.6
Hotel and Catering	5300	17.8	1593	11.3	1943	18.8	1000	18.8	763	23.1
Transport and Communications	1300	10	972	14.3	27	14	200	14	101	8.3
Financial and Business Services	16400	25.5	7140	20.5	5712	24.8	1938	24.8	1610	34.9
Public Admin and Defence	-200	-1.1	-108	-3.3	-130	-0.8	-77	-0.8	115	6
Education and Health	22900	33.8	9966	35.5	6149	26.9	3427	26.9	3358	34.2
Misc Services	3400	18.4	1040	15.2	805	23.3	652	23.3	903	33.3
Total	54800	15.9	22738	15.4	15435	16.5	9491	16.5	7136	15.7

Source: Cambridge Econometrics

A.1.38 Much of the employment growth in Rural Dorset is expected to come in Non-B-Class uses.

A.1.39 The following shows the Cambridge Econometrics forecast for 2006-2026.

Table A.1 - Employment Land Demand from Economic Growth 2006-2026

	BDP	Bournemouth TTWA	Poole TTWA	Dorchester and Weymouth TTWA	Rural Dorset TTWA
Office	70.9	28.8	24.4	9.3	8.5
Other Business Space	-40.7	-6.7	-24.4	-2.7	-6.8
Warehouse	40.1	17.2	13	5.1	4.9
Industrial	70.3	39.2	12.9	11.7	6.5

Source: GVA Grimley and Cambridge Econometrics

A.1.40 When an allowance for windfall losses and churn is taken into consideration, the forecasts look like this:

Table A.3 - Total demand (ha) by TTWA and Source

	BDP	Bournemouth TTWA	Poole TTWA	Dorchester and Weymouth TTWA	Rural Dorset
Office	70.9	28.8	24.4	9.3	8.5
Industrial	-0.6	10.5	-11.5	2.4	-2
Windfall Losses	79	22.2	21.6	20.1	15
Churn	34.9	5.3	11.3	10.3	8
Total	184.2	66.8	45.9	42.1	29.4

A.1.41 In the demand for windfall losses and churn have been assigned proportionally to the two use types office and industrial. This is a more helpful way of aggregating demand in planning terms.

Table A.4 - Total Demand by TTWA and UseTypes

	BDP	Bournemouth TTWA	Poole TTWA	Dorchester and Weymouth TTWA	Rural Dorset
Office	93.8	36.7	31.5	14.9	10.7
Industrial	90.5	30.1	14.4	27.2	18.8
Total	184.2	66.8	45.9	42.1	29.4

Source: GVA Grimley

A.1.42 At this stage a word of caution regarding the employment forecast and the resulting employment land demand seems appropriate. The employment forecast is based on an assumed 3.2% GVA increase pa in line with the Economic Strategy for the South West. There are two main aspects which have to be considered with regards to the employment projections: 1) the current economic slowdown and 2) the labour supply.

A.1.43 An economic growth of 3.2% GVA pa seems fairly ambitious in the current economic climate. However, the Workspace strategy has a time horizon of 2026 and this is a rate of growth that has been achieved in the past and, therefore, must be considered as an important potential outcome. Over this time period the current slowdown in the economy will most likely have a less drastic effect as it is felt in the present. It is most likely that the growth will be slower in the next few years and pick up again in the medium to long term; reducing short term demand but having a lesser effect on the long term demand.

A.1.44 The assumed economic growth of 3.2% GVA increase pa results in an increase in employment of about 57,000 between 2006 and 2026. As discussed in Section 4 the working age population is projected to grow by 32,000 in the most advantageous scenario. Even with potential labour supply from outside of the region, supply might therefore be a constraining factor to employment growth and to the employment land demand.

A.1.45 Furthermore, the sub-region is in competition with surrounding areas with regards to labour supply. In South Hampshire for example there are planes for the provision of approximately 2 million sq.m of new employment space[16]. This level of growth could have a significant impact on the labour supply available in South East Dorset.

A.1.46 The forecasts have also been broken down into the district level as follows:

Table A.5 - Total Demand for North Dorset by Component and Year (ha)

	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
Office	1.9	1.1	1	1	5
Industrial	0.7	-0.9	-1.7	-0.7	-2.6
Windfall Losses	3.6	3.6	3.6	4.2	15
Churn	-5.8	3.6	8.3	1.9	8
Total	0.4	7.4	11.1	6.5	25.3

Table A.6 - Total Demand for North Dorset by Land Use and Year (ha)

	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
Office	1.7	1.8	2.1	1.6	7.2
Industrial	-1.3	5.6	9	4.9	18.2
Total	0.4	7.4	11.1	6.5	25.3

Raising the Game : Building a more competitive economy in Bournemouth, Dorset and Poole

A.1.47 The Bournemouth, Dorset and Poole Economic Partnership have published an Economic Development Strategy covering the period 2005 – 2016, published in 2005 and titled Raising the Game: Economic Development Strategy 2005-2016. The document provides a shared vision for the sub-region in the context of economic development being; “to 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”. The document identifies a number of socio-economic issues that need to be addressed within the whole subregion:

- not sufficiently recognised by regional agencies as a driver for economic growth;
- not as productive as we should be;
- a relatively low wage economy;
- experiencing significant skills gaps and shortages that may be made worse by a rapidly ageing population and out-migration of young people;
- one of the least affordable sub-regions in England in terms of the ratio of house prices to incomes;
- coming under increasing pressure from the business community to enhance the subregion’s infrastructure, facilities and services so that it remains an attractive location for investment;
- Striving to tackle the causes of multiple deprivation in both urban and rural areas.

A.1.48 The report states that there are six factors which largely determine the potential investability of an area:

- Diversity – how does Gillingham’s economy compare to the region and national economies?
- Skilled Workforce – what are the skill levels – do lots of skilled people leave the region?

- Physical Infrastructure and Transport Connectivity – what are the key constraints and opportunities? Availability of land, business development incubators, strategic transport links
- The Knowledge Base and Innovation levels – high value jobs in sectors characterised by a high level of know-how and innovation.
- Quality of life – house prices, availability of affordable housing.
- Strategic Decision Making Capacity – the ability to send a message of being 'up for it'.

Bournemouth, Dorset and Poole Economic Action Plan

A.1.49 The "Economic Strategy Action Plan for Bournemouth Dorset and Poole", produced in June 2008, aims to build a more competitive and sustainable economy for the sub-region. The strategy is the economic background document for the Multi Area Agreement of the subregion and builds on the earlier Economic Development Strategy "Raising the Game". The evidence base behind this work suggests that the economy has grown significantly in recent decades especially in the Bournemouth and Poole conurbation, with low unemployment and high economic activity rates. However, it is accepted that the sub-region is:

- not as productive as it should be;
- a relatively low wage economy.

A.1.50 The aim therefore is to 'raise the game' through a 'quest for quality' in terms of the business environment and local employment that will deliver better economic performance and a better quality of life.

Summary of the sub-region and future challenges

A.1.51 The sub-region is located within the South West region of England, and with the exception of the South East Dorset conurbation[7] and a number of market towns is predominately rural.

A.1.52 There are differences between the urban and rural areas of the sub-region, although equally there are important inter-linkages between the main South East Dorset conurbation and its surrounding rural hinterland. As a general statement, there is a tendency for economic prosperity within the sub-region to decline as the travelling time from the South East Dorset conurbation increases.

A.1.53 Whilst strong functional links exist with the adjacent South East region, there is no evidence that the area's competitive advantage would be enhanced by being in a different region. Existing regional boundaries are unlikely to change and strategically the area has the opportunity of positioning itself as offering the benefits of being located in the South West, whilst being accessible to London and the South East.

A.1.54 The indigenous industrial base for much of the area is orientated towards low-value land-based and tourism/leisure industries. The area contains few large businesses, and many of these, especially in manufacturing, have downsized over the last five years, with further job losses expected. There are a number of significant financial services companies located in the South East Dorset conurbation, but a significant proportion of the sector's employment is, for the sector, in lower value-added call-centre work or operations. Relatively few jobs are in the sector's higher value-added activities.

A.1.55 Few large companies have their headquarters in the area, leading to a risk of the operations of the larger companies being seen as 'branch' and therefore more susceptible to relocation or closure.

A.1.56 There are significant inhibitors to inward investment across the sub-region, and indeed differences within the sub-region as to the need for this type of investment.

A.1.57 The public sector is an important generator of economic activity across the sub-region, with concentrations of activity occurring both in the South East Dorset conurbation and in the Dorchester and Weymouth travel-to-work area.

A.1.58 The public sector brings important direct and indirect benefits to the economy. Direct benefits include offering a significant number of employment opportunities for professional/ graduate workers. Indirectly, good public services (e.g. health and education) are increasingly seen as factors in attracting and retaining professional and managerial workers in an area. Purchasing and supply chain links between the public and private sectors are also an important aspect of the economy.

A.1.59 In addition to the private and public sectors, the voluntary sector and the wider social economy play an important and growing economic role, both directly in terms of income and employment, and indirectly through, for example, working with socially excluded groups and individuals.

A.1.60 The area offers a high-quality natural environment, which despite poor transport links to most areas of the United Kingdom; many professional workers find it an attractive place to live. Inward migration has been a major influence on population growth and this is expected to continue for the future.

A.1.61 The net outward migration of young people in the 15-24 age group and particularly those with graduate skills from the area are concerns. The dominant factor driving the outward migration, at least at the graduate level, is the perception of poor employment prospects and the consequential difficulty of finding attractive employment and salary levels. Salary levels generally across the sub-region are low.

A.1.62 Relatively low salary levels are exacerbated by the high ratio of house prices to earnings, and lack of affordable housing.

A.1.63 Outside of the South East Dorset conurbation, lower productivity levels depress salary levels further, and the absence of broadband connectivity to many locations undermines business competitiveness.

A.1.64 Start-up rates show marked variation, with generally higher rates in the east of the subregion than the north or the west. Even where start-up rates tend to be high, failure rates are also high so that the net change in the business stock is at best only slightly positive. There is little evidence that amongst the start-ups there are sufficient numbers of high-growth knowledge-based businesses that nationally tend to be responsible for a disproportionate share of growth.

A.1.65 Economic decline in some industries has been masked by the diversified economic base avoiding high levels of general unemployment. The area currently enjoys full employment, although a daily net outward migration of mainly higher skilled labour employed from South East Dorset into adjoining regions (e.g. Southampton/Portsmouth) takes place.

A.1.66 One of the disadvantages of a diversified business base is fewer inter-firm sector networks, either formal or informal, exist and there is a lack of institutional structures to support the needs of specific sectors e.g. sector bodies, training provision, specialist research institutes, etc. Broadly based business clubs do exist and are an important feature particularly in the rural areas in providing networking opportunities.

A.1.67 The high-quality natural environment and continuing inward migration of population create major pressures on the already scarce supply of development land and risk the area having a population profile increasingly skewed to those of retirement age. A key economic challenge is thus to ensure the economic base is vibrant, and increases its ‘absorptive capacity’ in respect of higher skilled workers. At the same time, the profile of skills within the sub-region reveals a significant proportion of the workforce with at best basic skills. The skill base of these workers needs to be improved to ensure they can meet employers needs in the foreseeable future.

- **Looking to the future**

A.1.68 Although current levels of employment encourage a positive view of the sub-region’s economy, the daily net outflow of workers from the south eastern end of the sub-region and loss of graduates point to structural weaknesses.

A.1.69 Indeed, the sub-region would appear to be under-performing when compared to its potential.

A.1.70 Looking to the future, it is difficult to see any significant acceleration in the level of the subregion's trend rate of economic growth, given the present business structure and forecast growth patterns.

A.1.71 The most likely future scenario is that the subregion (with considerable intra-area variation) will continue to exhibit productivity levels which lag behind London and the South East and the more prosperous areas of the South West (e.g. Swindon, Bristol and Gloucestershire).

- **Policy choices: the 'do nothing' scenario**

A.1.72 Given the above scenario the questions are: (1) should something be done? And, if so, (2) what can be done?

A.1.73 On the first question there are risks to the future vibrancy of the sub-region if action is not taken.

A.1.74 Broadly the sub-region could become a largely retirement location, with productivity and GDP per head falling further behind other areas of the country, and employment prospects for many becoming even more limited. In these circumstances continued net outward migration of the better-qualified young people will take place. In these senses the area's sustainability is threatened.

A.1.75 On the second question, the contention of this paper is that something can be done, but that influencing the nature of the business base and the consequent growth of the area requires long term and consistent intervention. The starting point is to have a broad consensus to which all key stakeholders can agree.

A.1.76 This might begin by agreement on the following:

- A first step towards strengthening the business base could be to develop an image for the sub-region that reflects the area's natural environment (scenery, quality of life, climate, etc.), but equally provides a clear commitment to supporting the development of new and existing businesses.
- Recognition of the sub-region's role and importance within the South West region by key regional stakeholders should be strengthened.
- In order to improve the performance of the economic base and ensure sustainability the need is to re-balance the economy towards higher skilled, higher productivity businesses.
- For (3) to happen the need is to take action which supports the growth and development of appropriate new knowledge-based business from three sources: (a) existing business (organic growth), (b) new business formation and (c) realistic inward investment opportunities from within the UK and internationally.
- In order to focus resources and secure a greater chance of success there is a strong argument for building support around the development/strengthening of number of existing/potential business clusters. However whilst advocating the adoption of a sector focused approach this is not exclusive, and there is also a need to take a broader stance (see, for example, point 9 below) on a range of issues at the same time.
- Identifying which sectors to encourage and support should be informed by the extent to which they can be successfully developed; offer future growth prospects; and whether they can benefit from, and co-exist with, the area's environment. Indeed, if the sectors are chosen carefully there is less likelihood of major conflicts between economic growth and the natural environment in pursuit of the overall sustainability of the sub-region.
- Sector support might, for example, focus on the following:
  - Helping existing businesses move up the value chain by re-positioning existing sectors e.g. tourism and leisure linked to the Jurassic Coast; more generally placing emphasis on exceptional customer service and local cuisine.

- Further developing high quality recreational facilities to reflect current and emerging lifestyles.
- Looking to see if there are opportunities for existing concentrations of businesses – e.g. financial services – to be scaled up to become a nationally recognised business cluster.
- Supporting embryonic business clusters e.g. local food, creative industries/digital media which draw on local strengths, or relate to the area's higher and further education institutions, and have a low impact on the environment. Some aspects of the creative industries will also enhance the cultural dimension, which is a factor in attracting and retaining professional staff.

- New businesses will be crucial if the subregion's aspiration of becoming a knowledgebased economy is to be realised. Other types of new business formation also have important roles to play e.g. social enterprises. More generally, survival rates need to be improved.
- Whilst adopting a strong sector focus, improving the dynamics of the economy combined with a high-quality natural environment offers the prospect of attracting 'footloose' entrepreneurs working in a variety of industries. These businesses in turn will add 'weight' to the economic base.
- As well as the sector focused activities detailed above considerable effort will need to be aimed at improving the position in respect of a range of factors which have a broad impact on the sub-region. These include, for example, improving the transport infrastructure, broadband connectivity and usage, employment sites, and the availability of housing which is affordable both to rent and to buy.

North Dorset Local Policies

A.1.77 North Dorset District Wide Local Plan (First Review) 2011 was adopted by the Council in January 2003 and will run for the plan period up until 2011. The majority of the employment development will be concentrated in Blandford, Gillingham and Shaftesbury in line with the overall strategy of the Plan to encourage sustainable development.

A.1.78 Policy 3.3 of the Local Plan relates specifically to the protection of existing employment land and states that: 'to protect future employment prospects, permission for the change of use of a building or site from an employment to non-employment use will not be permitted'.

A.1.79 Work has begun on the Core Strategy and Development Management Policies DPD for North Dorset. The Core Strategy was subject to an Issues and Options consultation in June and July, 2007. Of note within the Core Strategy Issues and Options is the statement that "development of employment land has exceeded the rate given in the Structure Plan and has kept pace with the development of residential land. In spite of this, the District has a net commuting loss, with more people commuting out than in. This movement leads to perceived traffic congestion. Blandford Camp provides employment in the south-east of the District but its future is uncertain following the Defence Training Review".

Employment Land Review: Review of Existing Sites April 2007

Property market analysis

A.1.80 North Dorset is a predominantly rural district, with a relatively sparsely located population, based around a number of market towns and smaller local service centres.

A.1.81 Office/B1 market: North Dorset is not a well-established office location, and does not have a significant office market. The majority of offices are small in nature and often occupy space above shops in the main market towns, rather than being located on employment designated land. However, there are a small number of purpose built offices in the District, including those at Stour Park, Blandford and Wincombe Business Park, Shaftesbury. Other public sector office users are located mainly in Blandford, with the District

A.1.82 Council offices, the Dorset County Council Highways Authority, the Environment Agency and Signpost Housing Association all having offices within the town. The remaining and vast majority of office-type premises, greater than 0.25ha or 500sq.m floorspace, are ancillary to the industrial uses located throughout the District.

A.1.83 Industrial B1, B2, B8 market: The industrial and warehousing sector is far more significant with over 700 premises located within the District in 2005.

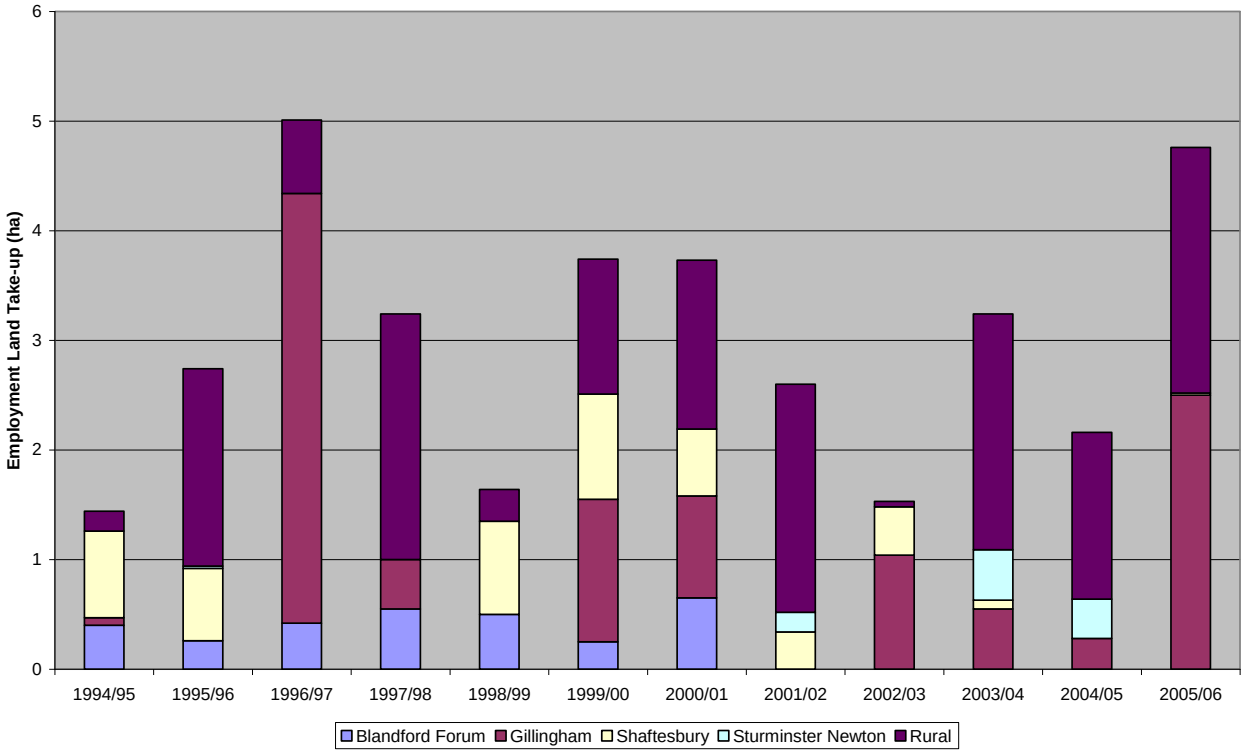
A.1.84 Vacancy rates in the majority of established locations are low and space that comes onto the market is generally occupied quickly.

Table A.7 - Employment Land Take-up in North Dorset

	Blandford Forum	Gillingham	Shaftesbury	Sturminster Newton	Rural	Total	Gillingham %
1994/95	0.4	0.07	0.79	0	0.18	1.44	4.9
1995/96	0.26	0	0.66	0.02	1.8	2.74	0.0
1996/97	0.42	3.92	0	0	0.67	5.01	78.2
1997/98	0.55	0.45	0	0	2.24	3.24	13.9
1998/99	0.5	0	0.85	0	0.29	1.64	0.0
1999/00	0.25	1.3	0.96	0	1.23	3.74	34.8
2000/01	0.65	0.93	0.61	0	1.54	3.73	24.9
2001/02	0	0	0.34	0.18	2.08	2.6	0.0
2002/03	0	1.04	0.44	0	0.05	1.53	68.0
2003/04	0	0.55	0.08	0.46	2.15	3.24	17.0
2004/05	0	0.28	0	0.36	1.52	2.16	13.0
2005/06	0	2.5	0.02	0	2.24	4.76	52.5
Total	3.05	11.04	4.75	1.02	15.99	35.85	30.8

Source: Dorset County Council Employment Monitoring

Figure A.1 - Employment Land Take-Up by Area (ha)



Source: Dorset County Council

A.1.85 Market demand by market segment is shown in Table A.8:

Table A.8 – Revealed Market Demand by Market Segment – Jan 2000 – Dec 2005

	Blandford Forum		Gillingham		Shaftesbury		Sturminster Newton		Total	
	Enquiries	Area	Enquiries	Area	Enquiries	Area	Enquiries	Area	Enquiries	Area
Craft / Studio / Workshop	46	24,621	41	11,011	41	10,185	48	13,636	176	59,453
Industrial	70	54,647	50	17,653	50	17,457	60	25,722	230	115,479
Land	2	1,394	0	-	2	1,022	1	465	5	2,881
Light Industrial	57	37,952	43	14,447	44	14,698	45	24,593	189	91,690
Office	41	21,431	31	6,944	35	12,885	27	11,998	134	53,258
Serviced Land	0	-	1	279	0	-	0	-	1	279
Serviced Office	6	1,022	9	2,584	7	2,100	7	3,252	29	8,958
Start-up	2	93	1	93	1	93	1	93	5	372
Storage Land	2	2,044	1	858	3	2,694	1	1,858	7	7,454
Warehousing	41	38,729	30	11,291	30	11,142	42	26,267	143	87,429
Total	267	181,933	207	65,160	213	72,276	232	107,884	919	427,253

Business Needs and Future Market Requirements

A.1.86 The North Dorset Profile published in November 2004 by Dorset County Council in association with North Dorset District Council identified that employment growth is forecast to be weaker in rural Dorset than in the Bournemouth/Poole conurbation over the next decade, with an average growth rate of 0.4%. High skill level occupations are forecast to increase strongly within the District, while low skill level occupations are set to fall, in line with national trends.

A.1.87 The Profile identified 11 sectors which are significant to the District in terms of employment, productivity, business stocks or local specialisms. Of the 22,100 employees in North Dorset, over 80% of people work in the sectors identified below.

Key sectors for employment in North Dorset

- Public Administration and Health: Growth is expected to continue in the future, with most growth amongst managers and professionals and personal and customer service occupations. One in three people in North Dorset work in the public sector
- Distribution: This is an important sector in terms of employment, with 17% of people in the District working in this sector, growth is expected to grow however productivity is low
- Tourism: The tourism sector is anticipated to fall slightly over the next five years. About one in 15 people in the district work directly in the tourism industry
- Food and Drink: Employment has steadily declined and is forecast to decline further, however, it continues to be an important sector for North Dorset
- Construction: This sector is vulnerable to cyclical economic changes. Over the next five years, overall development is expected to decline slightly. About 1 in 20 people in the District work in the construction industry
- This sector has steadily declined over the past decades and even faster decline is anticipated in the next five years. However, due to economic pressures relocation to lower-cost areas of the County is becoming increasingly attractive. North Dorset has over 800 people working in the engineering sector
- Agriculture and land based industries: Diversification into non-farming activities is a key growth sector while agricultural reforms continue to lead to job losses. North Dorset has over 2,000 people working in this sector
- Professional services: This sector includes real estate activities, rental and some research and development. The last decade has seen strong growth and this is expected to continue over the next 5 years. Currently 500 employees work in this sector
- Computing and related services: This sector has seen large growth over the past decade and strong growth is anticipated in the future. There are roughly 300 employees in this sector within the District
- Printing and publishing: Over the past decade employment has grown slightly and is expected to continue in the future. About 200 people currently work in this sector.
- Banking and Insurance: Modest growth is anticipated in the next five years with about 200 employees working in this sector

A.1.88 The Distribution, Food and Drink, Engineering, Professional Services, Computing and Printing sectors identified above are likely to be located primarily within employment premises. Where growth is predicted in market segments, the future requirements of these industries will need to be identified, in order to maintain suitable and adequate land for employment in the most sustainable locations.

A.1.89 The study titled *Sectoral change in the Bournemouth Dorset and Poole Sub- Regional Economy, 2000-2004* published in April 2006 by the BDPEP examined changes in employment and output within the County over the five year period up to December 2004.

A.1.90 The estimated level of employment growth in North Dorset was found to be higher than that of the overall Dorset CC Area. However, changes in employment are below the average for the South West region, where it was estimated that there was an 8% growth in jobs over the same period (Table 10). The report also estimated the change in GVA (Gross Value Added) over the same period, which identified that the economy of North Dorset grew faster than the overall growth of the Dorset CC Area and the sub region as a whole (Table 11).

Table A.9 - Changes in Employment by Authority (2000-2004)

Area	Change in Key Sectors (No.)	% Change in Key Sectors	Change in Whole Economy	% Change in Whole Economy
Christchurch	-199	-2	-955	-5
East Dorset	-455	-3	1786	7
North Dorset	552	5	1055	5
Purbeck	673	7	1137	7
West Dorset	1118	5	1819	5
Weymouth and Portland	-1207	-12	-1337	-7
Bournemouth	2758	7	2387	3
Poole	339	1	254	0
Dorset CC Area	182	0.2	3504	3
Total - Sub Region	3279	2	6145	2

Source: BDPEP

Table A.10 - Changes in GVA by Authority 200-2004

Area	GVA 2000 (£'000s)	GVA 2004 (£'000s)	Change	% Change
Christchurch	596,400	658,161	61,761	10
East Dorset	854,318	1,147,988	293,670	34
North Dorset	640,262	814,633	174,371	27
Purbeck	564,882	746,555	181,673	32
West Dorset	1,079,560	1,361,419	281,859	26
Weymouth and Portland	551,154	629,260	78,106	14
Bournemouth	2,240,608	2,281,076	40,468	2
Poole	2,163,151	2,553,095	389,944	18
Dorset CC Area	4,286,410	4,371,939	85,529	2
Total - Sub Region	8,690,366	10,732,351	2,041,985	23

Source: BDPEP

A.1.91 In terms of employment change, half of the key sectors showed a decrease in the number of people employed, however overall there was an increase of 1,055 jobs within North Dorset.

A.1.92 The greatest economic growth (GVA) has been in the ‘energy and water’ and ‘construction’ industries. ‘Agriculture and fishing’, ‘manufacturing and distribution’, and ‘hotels and restaurants’ sectors remained relatively static, while the ‘transport and communications’ sector fell by 9%.

Appendix B
Socio-Economic Analysis

B.1 Socio Economic Analysis

B.1.1 In assessing the potential capacity for growth in Gillingham, it is essential to provide a robust baseline analysis of the social and economic conditions in the town. This will provide the basis for estimating the potential economic capacity of the town as well as identifying particular socio-economic issues to be addressed as part of the strategy for growth.

B.1.2 For the purposes of this statistical analysis, Gillingham has been defined as including the following wards:

- Gillingham Town;
- Lodbourne;
- Milton; and
- Wyke

B.1.3 It should be noted that this section makes reference to Dorset as an administrative area which does not include Bournemouth or Poole, which are separate unitary areas.

Demographic Structure

Table B.1 - Working Age Population 2001

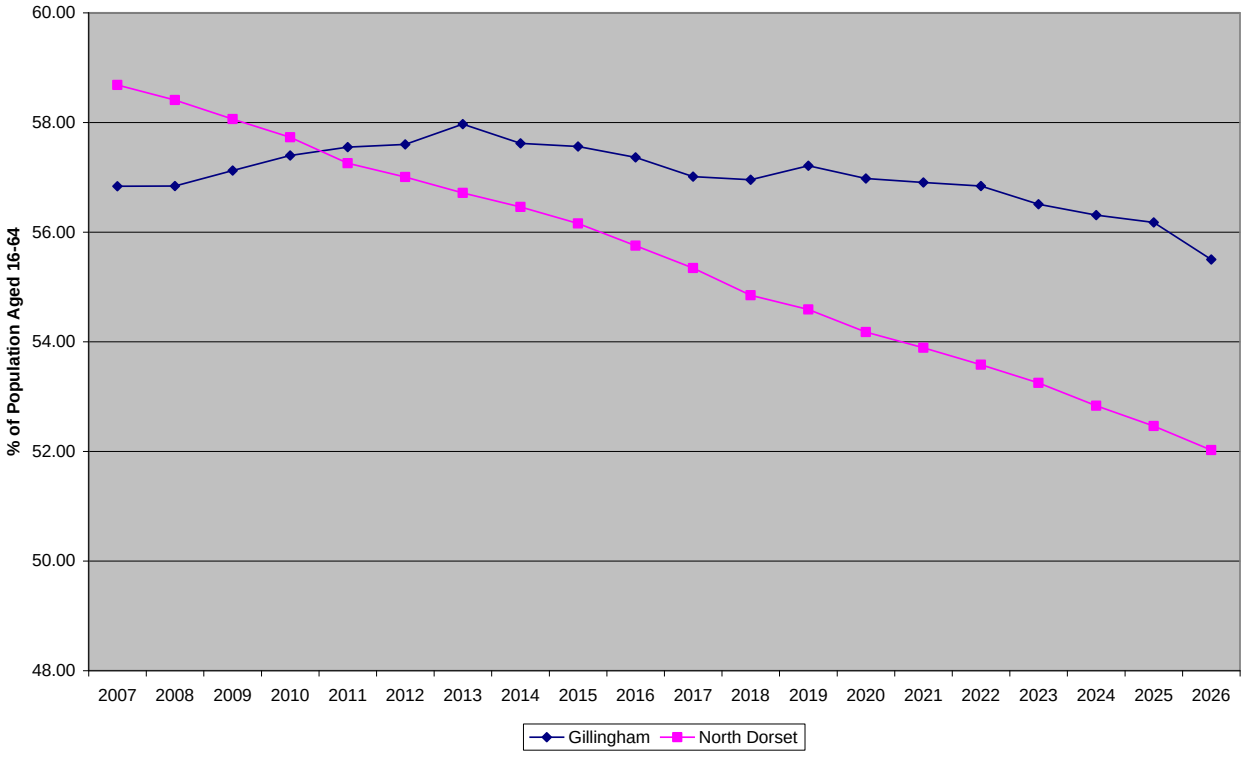
	Population aged 16-64		Population aged 16-74	
	No.	%	No.	%
Gillingham	**4808**	**56.3**	**8541**	**68.3**
Christchurch	24517	54.6	44865	68.6
East Dorset	48236	57.6	83786	70.3
North Dorset	37331	60.3	61905	70.4
North Dorset (2007 mid year estimate)	38,400	56.8	N/A	N/A
Purbeck	26628	60.0	44416	71.2
West Dorset	53406	57.8	92360	70.0
Weymouth and Portland	39568	62.2	63648	71.7
Cornwall and Isles of Scilly	307936	61.4	501267	71.8
Devon	429586	61.0	704493	71.4
Dorset	229686	58.7	390980	70.4
Gloucestershire	355088	62.9	564559	71.7
Somerset	304388	61.1	498093	71.0
Wiltshire	273098	63.1	432973	71.6
England	31429250	64.0	49138831	72.3
South West	3070749	62.3	4928434	71.7

Source: Census 2001

B.1.4 Gillingham has a relatively low proportion of the population of working age. This means that the size of the labour market is lower than in other areas and may constrain future growth.

Population Projections

Figure B.1 – Population Projections - % Aged 16-64

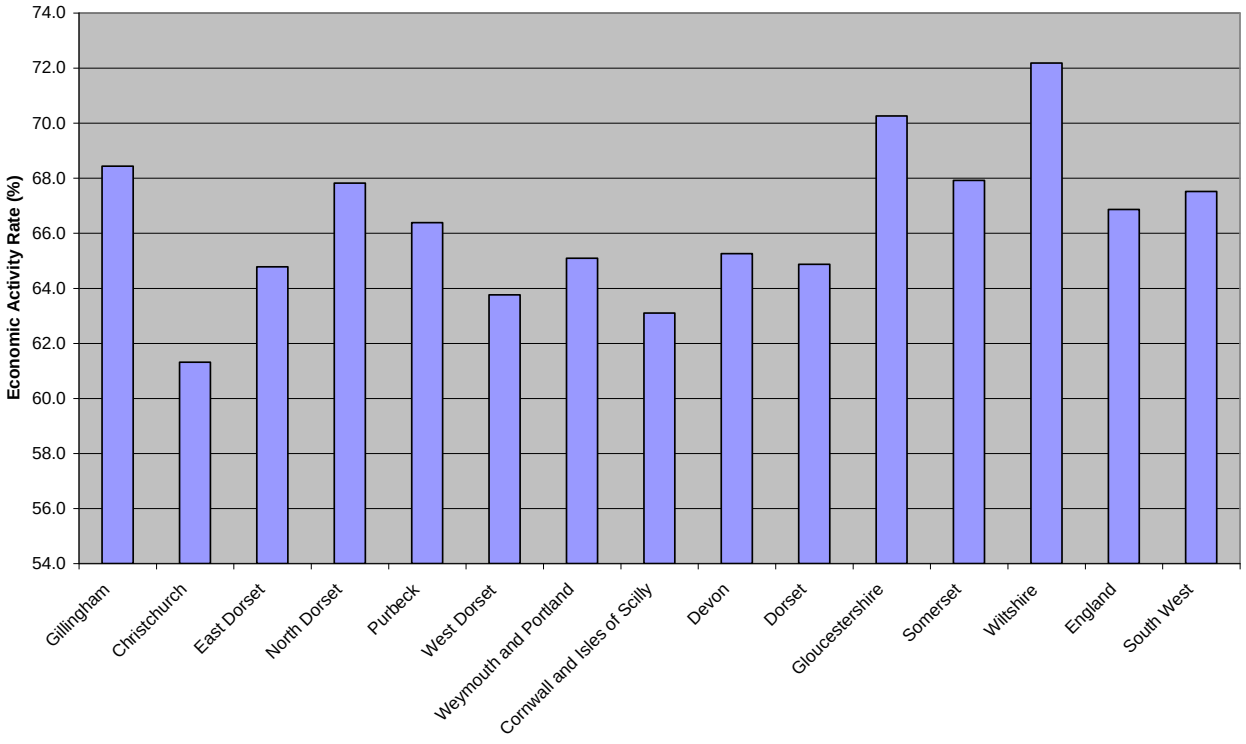


Source: Dorset County Council

B.1.5 The proportion of the population of working age (16-64) is expected to decrease further in Gillingham. However, the proportion of the population of working age in North Dorset is set to fall dramatically. The higher proportion of the population of working age in Gillingham relative to the wider area is likely to make the town more attractive to businesses looking to expand and to wider inward investment.

Economic Activity

Figure B.2 – Economic Activity Rate 2001



Source: Census 2001

B.1.6 The economic activity rate in Gillingham is relatively high compared to the District as a whole, although this is to be expected within a largely urban area.

Job Density

Table B.2 - Ratio of Population to Employment in Gillingham

	Population	Employment	Ratio
1991	6342	1250	0.20
2001	8541	2765	0.32
2007	9690	3545	0.37

Source: Census/ABI

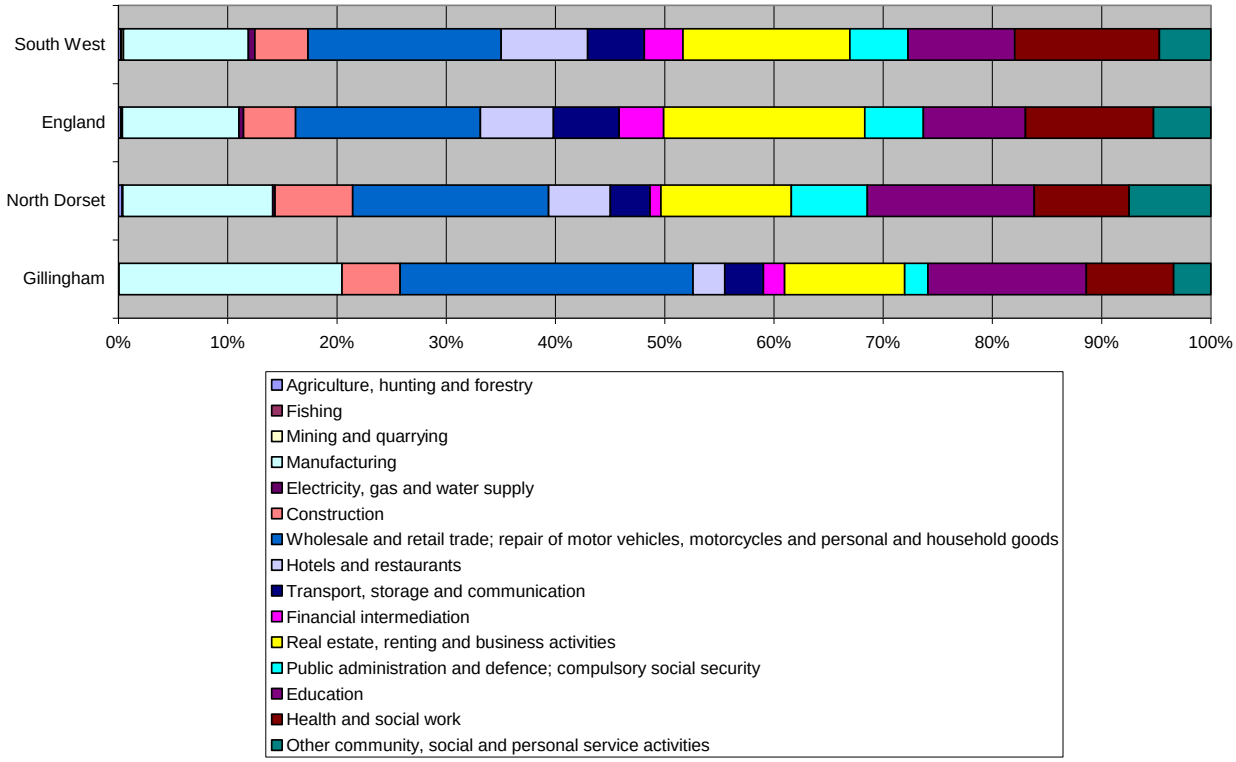
B.1.7 The ratio of the number of jobs available to the local population has improved between 1991 and 2007 which suggests that Gillingham is growing as an economic centre and has the potential to reduce out-commuting

Migration

B.1.8 Net outward migration of young people in the 15-24 age group and particularly those with graduate skills from the area is a key concern. This is driven by a perception of poor employment prospects and high house prices.

Sectoral Analysis

Figure B.3 – Structure of Gillingham Economy 2007



Source: ABI

B.1.9 Gillingham is over-reliant on the manufacturing, wholesale and retail sectors. Although Gillingham has a strong economic base within these sectors, which suggests further potential for growth, it will need to make attempts to diversify its economy as its population grows, to ensure it is not exposed to shocks in particular sectors.

Table B.3 - Employment Location Quotients

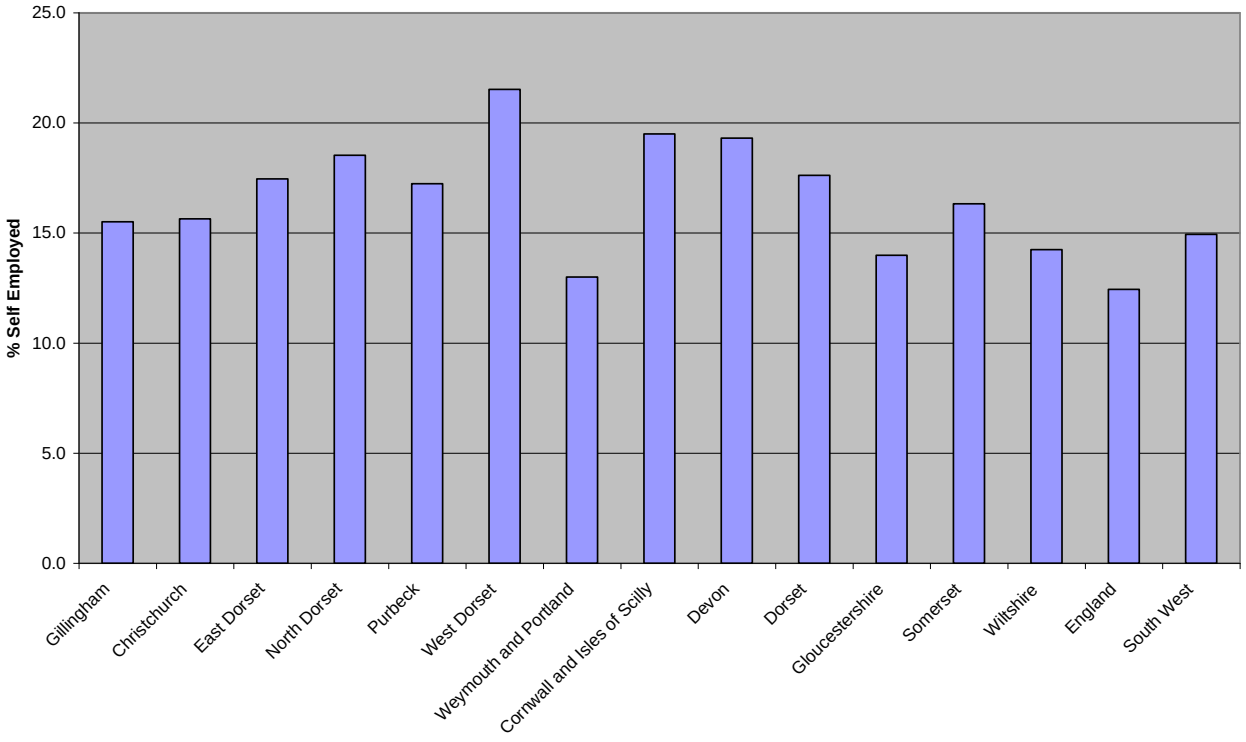
	Gillingham : North Dorset	Gillingham : South West	Gillingham : England
Agriculture, hunting and forestry	0.16	0.25	0.25
Fishing	0.00	0.00	0.00
Mining and quarrying	0.00	0.00	0.00
Manufacturing	1.49	1.79	1.91
Electricity, gas and water supply	0.00	0.00	0.00
Construction	0.75	1.10	1.11
Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	1.49	1.52	1.59
Hotels and restaurants	0.51	0.37	0.43
Transport, storage and communication	0.97	0.68	0.59
Financial intermediation	1.93	0.55	0.48
Real estate, renting and business activities	0.92	0.72	0.60
Public administration and defence; compulsory social security	0.31	0.40	0.40
Education	0.95	1.48	1.55
Health and social work	0.92	0.60	0.68
Other community, social and personal service activities	0.46	0.72	0.65

Source: ABI

B.1.10 Gillingham also has a number of pockets of office-based business services including software development, personnel and recruitment and architecture

Self Employment and Business Start-Ups

Figure B.4 - % of the Economically Active who are Self Employed 2001



Source: Census 2001

B.1.11 Self-employment in Gillingham is higher than the regional and national averages, although is not as high as most other areas in the South West. This is likely to be a result of sole traders, working from home, which are not tied to any one particular location and are attracted to Dorset by the high quality of life

Table B.4 - Proportion of Labour Force that work mainly at or from Home 2001

	% Works mainly at or from home
Gillingham Town	8.8
Lodbourne	9.0
Milton	15.7
Wyke	12.2
Gillingham Total	**11.5**
Christchurch	9.9
East Dorset	12.3
North Dorset	14.1
Purbeck	11.9
West Dorset	15.3
Weymouth and Portland	8.6
Cornwall and Isles of Scilly	14.0
Devon	14.2
Dorset	12.4
Gloucestershire	10.7
Somerset	12.2
Wiltshire	11.1
England	9.2
South West	11.0

Source: Census 2001

Table B.5 - Ratio of VAT Registrations to Size of Total Labour force

	Cornwall	Devon	Dorset	Gloucestershire	Somerset	Wiltshire	Christchurch	East Dorset	North Dorset	Purbeck	West Dorset	England	South West
1998	7.7	8.6	8.7	9.2	8.1	9.2	8.2	8.5	**10.5**	7.5	8.2	8.8	8.6
1999	7.6	8.3	8.3	8.8	7.8	8.3	7.7	8.1	**9.7**	8.1	8.7	8.2	8.2
2000	7.8	8.1	8.3	8.3	8.0	8.8	8.3	9.0	**8.6**	7.6	8.0	8.2	8.1
2001	7.2	7.7	8.1	7.8	7.1	8.0	8.2	8.2	**8.7**	6.3	8.7	7.8	7.5
2002	7.7	7.9	8.5	8.3	7.9	8.6	8.4	8.7	**8.8**	9.1	7.7	8.1	8.0
2003	8.0	9.1	8.6	8.2	8.0	8.6	9.8	9.4	**8.0**	8.2	8.1	8.6	8.4
2004	7.4	7.9	7.3	8.0	7.6	7.8	7.3	7.4	**7.9**	6.9	6.8	8.1	7.6
2005	6.9	7.1	6.9	7.4	7.0	7.6	7.0	7.9	**6.9**	5.7	6.9	7.8	7.2
2006	7.3	7.0	6.9	7.3	6.9	7.2	6.3	7.6	**7.2**	6.2	6.7	7.7	7.2
2007	7.1	7.1	7.0	7.7	7.4	8.2	6.2	7.5	**7.6**	7.6	6.5	8.5	7.7

Source: ABI / VAT Registrations and Stocks

B.1.12 The number of VAT registrations, as a proportion of the total workforce, has fallen in North Dorset in recent years. Dorset still has a greater proportion of VAT registrations than other areas in the South West but is not as high as England and the South West.

Business Size

Table B.6 - Business Size 1991 and 2007 (% of all businesses)

	Gillingham		North Dorset		South west		England	
	1991	2007	1991	2007	1991	2007	1991	2007
1-4	65.5	66.9	56.8	74.8	48.4	70.1	49.0	71.2
5-10	22.3	19.2	20.0	13.6	25.9	14.8	24.7	13.6
1-10	**87.9**	**86.1**	**76.9**	**88.4**	**74.4**	**84.9**	**73.8**	**84.8**
11-24	6.8	7.2	14.9	6.6	14.9	8.2	14.6	7.9
25-49	N/A*	3.6	4.5	2.7	5.9	3.8	6.3	3.8
11-49	N/A*	**10.9**	**19.4**	**9.3**	**20.9**	**12.0**	**20.8**	**11.7**
50-99	N/A*	1.9	2.2	1.3	2.7	1.8	3.0	1.9
100-199	0.0	0.3	1.1	0.5	1.2	0.8	1.4	0.9
200-299	0.0	N/A*	N/A*	N/A*	0.4	0.3	0.4	0.3
300-399	0.0	0.0	N/A*	0.0	0.2	0.1	0.2	0.1
400-499	0.0	N/A*	0.0	N/A*	0.1	0.1	0.1	0.1
500-749	0.0	0.0	0.0	0.0	N/A*	N/A*	N/A*	N/A*
750-999	0.0	0.0	0.0	0.0	0.0	0.0	N/A*	N/A*
50+	N/A*	**3.1**	**3.7**	**2.2**	**4.7**	**3.1**	**5.3**	**3.4**

*Data available but, due to small number of results, cannot be shown under 1947 Statistics of Trade Act

Source: ABI

B.1.13 The proportion of the economy made up of small businesses has increased across North Dorset and the rest of the country during the past 16 years. Gillingham already had a high proportion of small businesses in 1991 and has maintained this share.

Table B.7 - Sectoral Change by Business Size – Gillingham (No. of businesses)

	1-10		11-49		50+	
	1991	2007	1991	2007	1991	2007
Agriculture, hunting and forestry	0	N/A*	0	0	0	0
Fishing	0	0	0	0	0	0
Mining and quarrying	0	0	0	0	0	0
Manufacturing	18	26	N/A*	N/A*	N/A*	N/A*
Electricity, gas and water supply	N/A*	0	0	0	0	0
Construction	22	44	0	N/A*	0	0
Wholesale/retail trade; repair, etc	36	72	N/A*	N/A*	N/A*	N/A*
Hotels and restaurants	N/A*	17	0	N/A*	0	0
Transport, storage and communication	25	14	N/A*	N/A*	N/A*	0
Financial intermediation	N/A*	10	N/A*	N/A*	0	0
Real estate,renting,business activities	20	81	N/A*	N/A*	0	N/A*
Public admin/defence; social security	N/A*	N/A*	0	N/A*	0	0
Education	N/A*	N/A*	N/A*	N/A*	N/A*	N/A*
Health and social work	N/A*	N/A*	N/A*	N/A*	0	N/A*
Other community, social/personal service	46	29	0	N/A*	0	0
Private households with employees	0	0	0	0	0	0
Extra-territorial organisations/bodies	0	0	0	0	0	0
Total	181	309	21	39	N/A*	11

*Data available but, due to small number of results, cannot be shown under 1947 Statistics of Trade Act

Source: ABI

Quality of Life Factors

Table B.8 – Average House Prices 2009

	Average Selling Prices Feb 09
Gillingham	150,000-190,000
Blandford Forum	160,000-190,000
Bournemouth	250,000
Shaftesbury	200,000-240,000
Poole	250,000-320,000
Sturminster Newton	140,000-210,000
Yeovil	150,000-180,000
Salisbury	220,000-250,000
Andover	160,000-200,000
Dorset	196,000
South West	163,000
South East	187,000
England	153,000

Source: Home.co.uk for individual towns and Dorset. Land Registry for regions and England

B.1.14 House prices are relatively low within Gillingham compared to the County and other surrounding towns – this is likely to act as a potential 'pull' factor to increase the size of the labour force

Table B.9 - Quality of the Natural Environment

Area	Natural Environment Score	Rank	Percentile
Bournemouth	67.1	144	59
Christchurch	62	159	55
East Dorset	96.2	89	75
Poole	70.8	132	63
North Dorset	145.2	49	86
Purbeck	176.1	43	88
West Dorset	251	28	92
Weymouth and Portland	63.9	155	56
South West	337.9	1	-

Source: Natural England

B.1.15 Quality of life within the area as a whole is perceived to be high – another pull factor

Table B.10 - Average Weekly Household Income 2001/02

Area	Income (£)
Gillingham Town	390
Lodbourne	370
Milton	500
Wyke	460
Gillingham Average	430
North Dorset Average	486
South West	480

Source: Office National Statistics

B.1.16 However, average household incomes are relatively low – largely as a result of the lack of highly skilled jobs.

Travel to Work

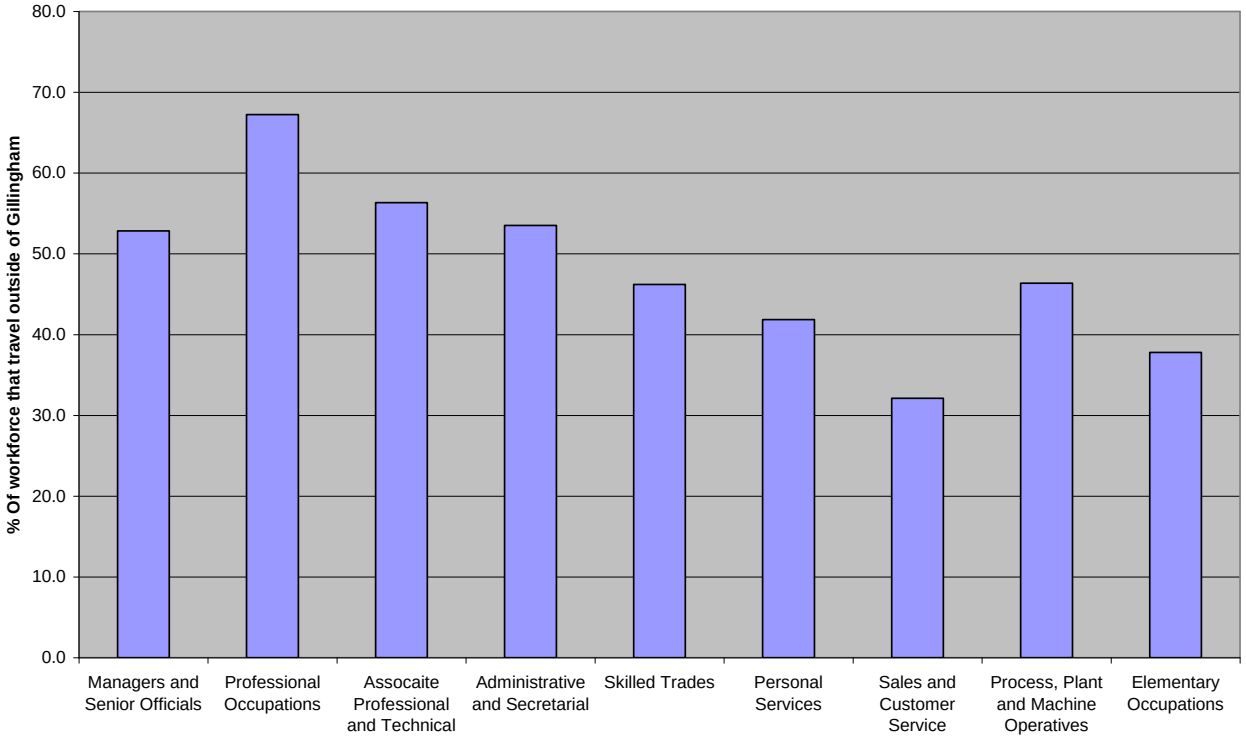
Table B.11 - Destination of Commuting Journeys from Gillingham 2001

	No.	%
Gillingham	1920	53.9
Salisbury	448	12.6
Shaftesbury	279	7.8
Wincanton	134	3.8
Yeovil	50	1.4
Blandford	32	0.9
The Lower Tarrants	20	0.6
Others	783	22.0
Total	3564	100.0

Source: Census 2001

B.1.17 Nearly 50% of the workforce travel out of Gillingham for employment – with those in higher value occupations out-commuting the most

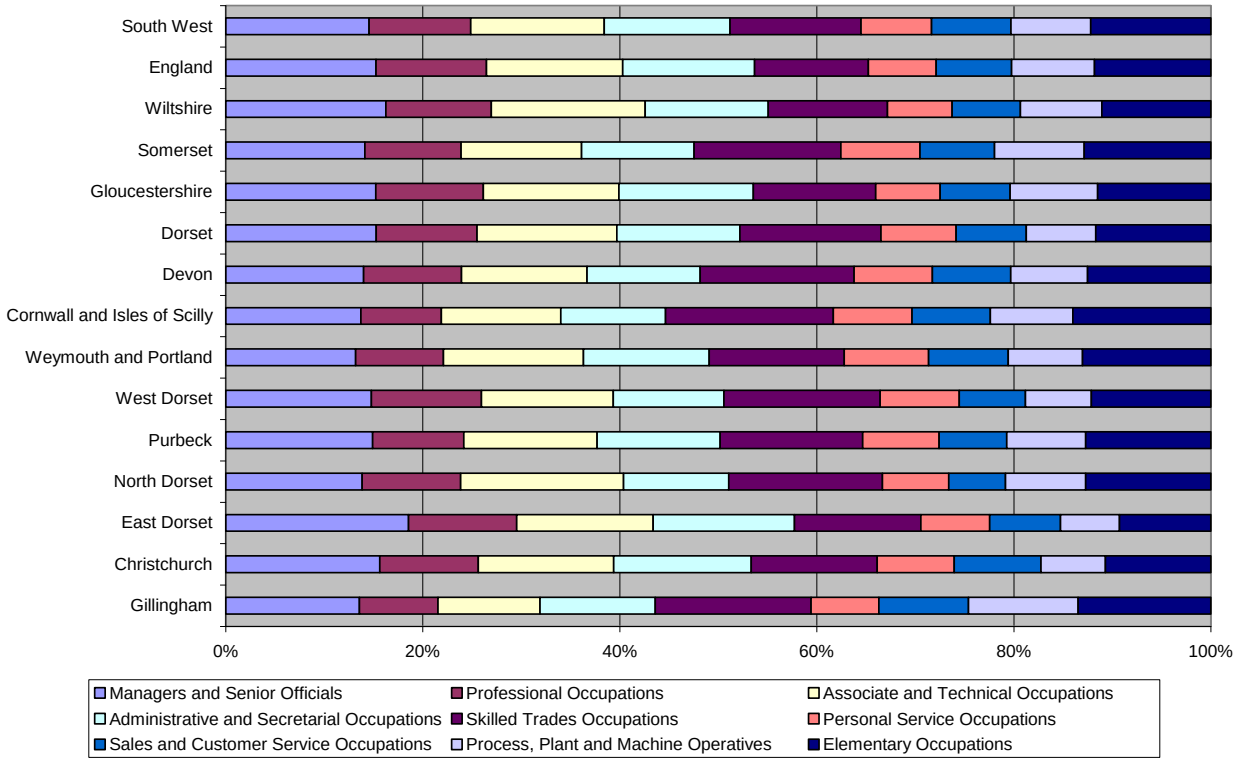
Figure B.5 - % of Workforce that Travel out of Gillingham by Occupations 2001



Source: 2001 Census

11.60 Skills and Occupation Types

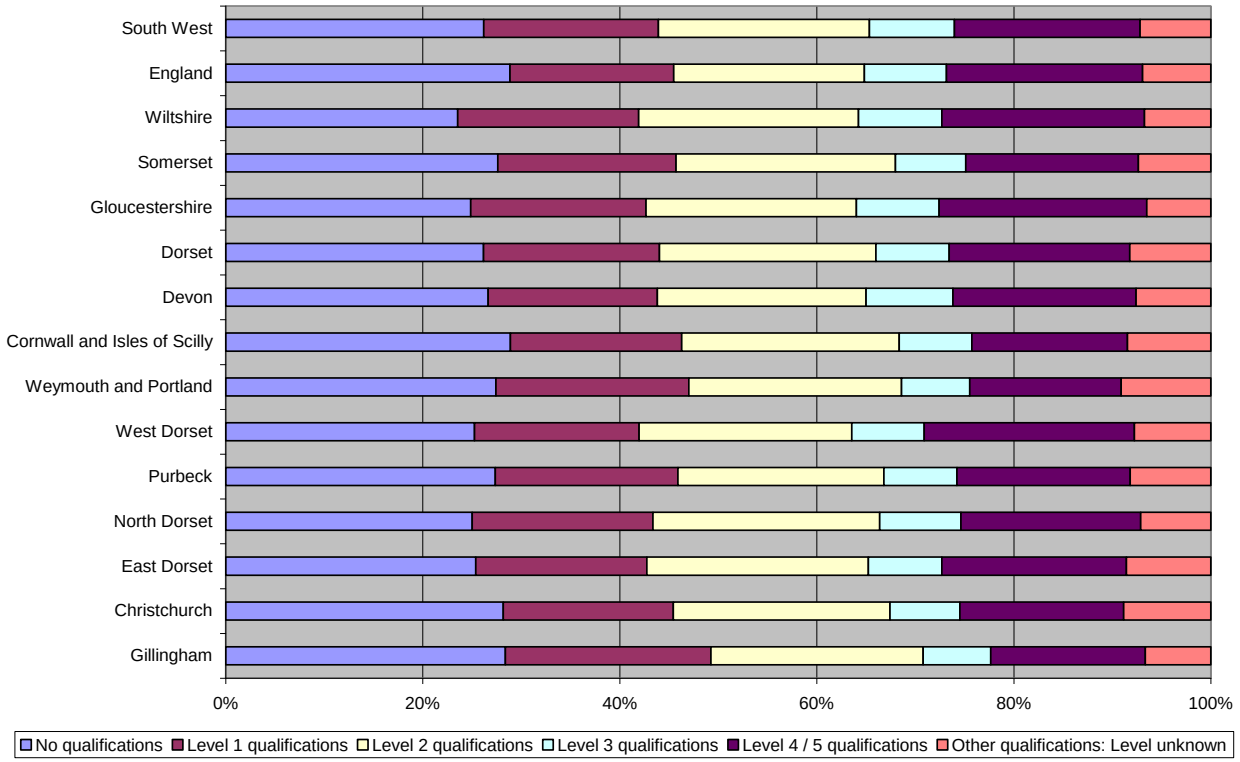
Figure B.6 – Occupation Types 2001



Source: 2001 Census

B.1.18 Gillingham has a very low proportion of people who are in higher-value occupations – lower than all other areas assessed.

Figure B.7 – Skills and Qualifications 2001



Source: 2001 Census

B.1.19 Gillingham also has a high proportion of the population with no qualifications and a very low proportion of people with high qualifications – this may act as a potential constraint to the type of jobs that could be developed within Gillingham. However, this may be a reflection of the fact that Gillingham has a slightly higher proportion of older people, which are less likely to have qualifications than younger people.

Floorspace

Table B.12 - Office Floorspace ('000s sq.m)

	2003	2004	2005	2006	2007	2008
Gillingham	4	5	5	5	5	5
Gillingham hinterland	x	x	x	2	2	3
Shaftesbury	8	8	8	8	8	8
Sturminster Newton and Environs	4	4	4	4	4	6
A350 Corridor / Rural Central	x	x	1	1	1	1
Blandford Forum hinterland	x	x	x	7	8	8
Blandford Forum	11	11	10	11	10	10
South West Rural	x	x	1	1	2	2

Source: Valuation Office DCLG Statistics

Table B.13 - Factory Floorspace ('000s sq.m)

	2003	2004	2005	2006	2007	2008
Gillingham	48	47	48	47	50	50
Gillingham hinterland	12	13	10	14	10	10
Shaftesbury	22	26	26	26	27	28
Sturminster Newton and Environs	38	40	38	40	39	40
A350 Corridor / Rural Central	14	13	13	13	14	14
Blandford Forum hinterland	46	45	44	44	46	46
Blandford Forum	55	54	53	53	53	53
South West Rural	29	29	29	29	26	28

Source: Valuation Office DCLG Statistics

Table B.14 - Warehousing Floorspace ('000s sq.m)

	2003	2004	2005	2006	2007	2008
Gillingham	10	10	10	10	9	8
Gillingham hinterland	6	7	6	6	9	8
Shaftesbury	10	9	7	7	6	7
Sturminster Newton and Environs	35	34	31	31	31	31
A350 Corridor / Rural Central	4	4	4	4	4	7
Blandford Forum hinterland	11	11	17	17	17	17
Blandford Forum	17	16	18	18	19	19
South West Rural	8	8	7	7	10	10

Source: Valuation Office DCLG Statistics

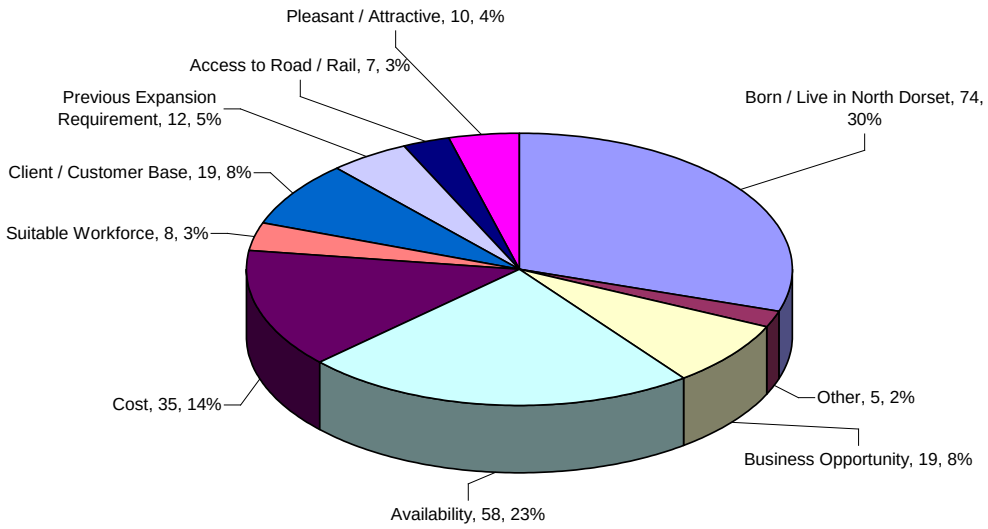
B.1.20 North Dorset is not a well-established office location. The majority of offices are small in nature and often occupy space above shops in the main towns

B.1.21 Office floorspace in Gillingham is particularly low – one of the lowest in the District

B.1.22 Warehousing floorspace also appears to be relatively low compared to other areas of the District

11.61 Reasons for Locating in Gillingham

Figure B.8 – Reasons for Locating to North Dorset

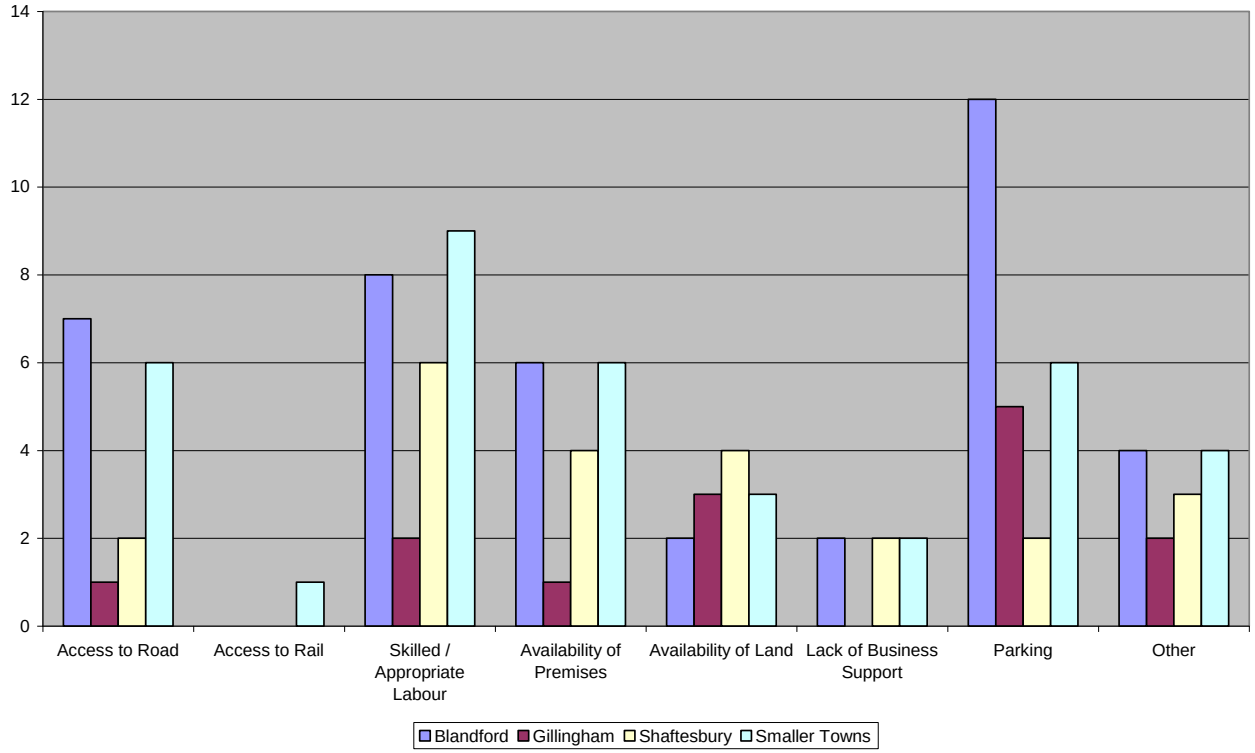


Source: North Dorset Employment Land Review 2007

B.1.23 Most people choose to locate in North Dorset because they are born there or live there – which demonstrates that the local economy is essentially a very local one

B.1.24 Availability of land, as well as costs, are also important reasons for choosing to locate to North Dorset

Figure B.9 – Current Business Constraints by Area



Source: North Dorset Employment Land Review 2007

B.1.25 Access to highways, the availability of skilled labour and the availability of premises and land are key factors which constrain business growth within Gillingham

Appendix C
Benchmarking Analysis

C.1 Benchmarking Analysis

C.1.1 In order to set the proposed level of growth and supporting infrastructure at Gillingham in context, the Consultants have identified a number of benchmark examples of small-medium size towns and their associated levels of employment, employment floorspace and retail floorspace which support the population of each settlement.

C.1.2 The purpose of this exercise is not to identify and set target levels of retail and employment floorspace to be achieved in Gillingham, but to provide an indicator as to the potential range of floorspace types that are typically associated with a range of other small-medium sized towns.

Selection of Benchmark Settlements

C.1.3 The benchmark settlements have been selected based upon the following criteria:

- Population size – Gillingham currently has a population of approximately 11,000, with this study considering a wide range of growth scenarios which will increase the population by up to 8,000. As a result, we have looked at a range of towns which have a residential population of between 10,000 and 30,000.
- Distance from nearest settlement – towns located close to a large settlement often have a strong economic functional relationship with that town/city. Gillingham is 22 miles from the nearest medium/large town at Yeovil. The benchmark towns have therefore been selected based upon similar proximity to other medium/large towns
- Distance from London – Gillingham is 111 miles from London and does not have a particularly strong economic functional relationship with the capital. As a result, benchmark towns have been selected based upon a similar lack of relationship with London
- Distance from nearest connection to the national highway network – The ease of which it is possible to connect to the national highway network can affect the number of easily accessible employment opportunities available in other towns and, therefore, the potential for out-commuting. Gillingham is not located on the A-road network but is just 4 miles from the A303 which is part of the Strategic Road Network (SRN). Other benchmark towns have been selected based upon a similar proximity to the SRN, Primary routes and A-roads.

C.1.4 Of course, there is a considerable degree of variation in the towns selected in terms of their relationship with other settlements, industrial heritage, access to public transport and a wide range of other criteria which will impact on the level of employment and retail floorspace associated with a town of a particular size. As a result, there is no ‘ideal’ level of employment or retail floorspace that should be provided for a town of a particular size. Instead, the exercise identifies a range of floorspace provision associated with small-medium sized towns which help to set the proposals for growth in Gillingham in context.

C.1.5 Tables C.1 – C.6 illustrate the results of the benchmarking exercise

Table C.1 – Benchmarking Towns – Distance to Highway Network

Town	LA	Population (2001 Census)	Distance to Strategic Road Network (miles)	Nearest Connection to SRN	Distance to nearest Primary Route	Nearest Connection to Primary Route	Distance to nearest A road	Nearest A Road
Gillingham	North Dorset	8,630	4	A303	4	A303	2	A30
Sherborne	West Dorset	9,350	7	A303	4	A37	0	On A30
Blandford Forum	North Dorset	9,854	6	A31	0	On A350	0	On A350
Stowmarket	Mid Suffolk	15,059	0	On A14	0	On A14	0	On A14
Sleaford	North Kesteven	15,219	18	A1 at Newark	0	On A15, A17	0	On A15, A17
Uckfield	Wealden	15,374	9	A27 at Lewes	0	On A22	0	On A22
Tadley	Basingstoke and Deane	15,642	18	M4 J12	3	A339	0	On A340
Cirencester	Cotswold	15,861	0	On A419	0	On A419	0	On A419
Alton	East Hampshire	16,051	8	A3 at Liss	0	On A31	0	On A31
Dorchester	West Dorset	16,171	0	On A35	0	On A35	0	On A35
Oswestry	Oswestry	16,660	0	On A5	0	On A5	0	On A5
Newmarket	Forest Heath	16,947	0	On A14	0	On A14	0	On A14
Romsey	Test Valley	17,386	3	M27 J3	3	A36/M27	0	On A27
Warminster	West Wiltshire	17,486	0	On A36	0	On A36	0	On A36
Wantage	Vale of White Horse	17,913	6	A34 at Didcot	6	A34 Didcot	0	On A417
Market Harborough	Harborough	20,127	0	On A6	0	On A6	0	On A6
Sudbury	Babergh	20,188	15	A12 at Colchester	0	On A131	0	On A131
Haverhill	St Edmundsbury	22,010	11	A11 at Great Abington	11	A11 at Great Abington	0	On A143
Spalding	South Holland	22,081	12	A47 at Eye	0	On A16	0	On A16
Evesham	Wychavon	22,179	0	On A46	0	On A46	0	On A46
Stratford-upon-Avon	Stratford-upon-Avon	22,187	0	On A46	0	On A46	0	On A46
Witney	West Oxfordshire	22,765	7	A34 at Oxford	0	On A40	0	On A40
Frome	Mendip	24,171	2	A36 at Beckington	0	On A361	0	On A361
Didcot	South Oxfordshire	25,231	1	A34	1	A34 Didcot	0	On A4130
Melton Mowbray	Melton	25,554	6	A46 nr Six Hills	0	On A606	0	On A606
East Grinstead	Mid Sussex	26,222	6	M23 J10	0	On A22	0	On A22
Haywards Heath	Mid Sussex	29,110	4	A23 nr Bolney	0	On A272	0	On A272
Burgess Hill	Mid Sussex	29,388	2	A23 at Hickstead	2	A23 at Hickstead	0	On A273

Table C.2 – Benchmarking Towns – Distance to other Settlements

Town	LA	Population (2001 Census)	Name	Population	Distance (miles)	Name	Population	Distance (miles)
Gillingham	North Dorset	8,630	Yeovil	41,871	22	Blandford Forum	9,854	18
Sherborne	West Dorset	9,350	Yeovil	41,871	5	Dorchester	16,171	20
Blandford Forum	North Dorset	9,854	Poole	144,800	15	Dorchester	16,171	19
Stowmarket	Mid Suffolk	15,059	Ipswich	138,718	13	Bury St Edmunds	36,218	17
Sleaford	North Kesteven	15,219	Grantham	34,592	14	Boston	35,124	19
Uckfield	Wealden	15,374	Lewes	15,988	9	Haywards Heath	29,110	13
Tadley	Basingstoke and Deane	15,642	Basingstoke	90,171	9	Newbury	32,675	12
Cirencester	Cotswold	15,861	Swindon	155,432	16	Stroud	47,348	13
Alton	East Hampshire	16,051	Basingstoke	90,171	14	Farnham	36,298	10
Dorchester	West Dorset	16,171	Weymouth	48,279	9	Yeovil	41,871	21
Oswestry	Oswestry	16,660	Wrexham	63,084	15	Shrewsbury	67,126	19
Newmarket	Forest Heath	16,947	Cambridge	131,465	15	Bury St Edmunds	36,218	16
Romsey	Test Valley	17,386	Southampton	234,224	9	Salisbury	43,355	19
Warminster	West Wiltshire	17,486	Frome	24,171	8	Trowbridge	34,401	11
Wantage	Vale of White Horse	17,913	Didcot	25,231	9	Abingdon	36,010	10
Market Harborough	Harborough	20,127	Corby	49,222	11	Kettering	51,063	13
Sudbury	Babergh	20,188	Colchester	104,390	16	Haverhill	22,010	17
Haverhill	St Edmundsbury	22,010	Saffron Walden	14,313	14	Cambridge	131,465	18
Spalding	South Holland	22,081	Peterborough	136,292	22	Wisbech	26,536	23
Evesham	Wychavon	22,179	Cheltenham	98,875	16	Stratford-upon-Avon	22,187	17
Stratford-upon-Avon	Stratford-upon-Avon	22,187	Warwick	23,350	9	Evesham	22,179	17
Witney	West Oxfordshire	22,765	Oxford	143,016	13	Cirencester	15,861	28
Frome	Mendip	24,171	Warminster	17,486	8	Trowbridge	34,401	11
Didcot	South Oxfordshire	25,231	Abingdon	36,010	9	Oxford	143,016	17
Melton Mowbray	Melton	25,554	Leicester	330,574	16	Loughborough	55,258	20
East Grinstead	Mid Sussex	26,222	Crawley	100,547	9	Haywards Heath	29,110	17
Haywards Heath	Mid Sussex	29,110	Burgess Hill	29,388	4	Crawley	100,547	14
Burgess Hill	Mid Sussex	29,388	Haywards Heath	29,110	4	Brighton	134,293	11

Table C.3 – Benchmarking Towns – Distance and Mode Travelled to Work

Town	LA	Population (2001 Census)	% of people that travel to work by car	Average Distance travelled to work (km)
Gillingham	North Dorset	8,630	66.8	16.9
Sherborne	West Dorset	9,350	60.3	14.2
Blandford Forum	North Dorset	9,854	64.6	12.8
Stowmarket	Mid Suffolk	15,059	65.5	13.7
Sleaford	North Kesteven	15,219	65.7	18.2
Uckfield	Wealden	15,374	70.5	17.8
Tadley	Basingstoke and Deane	15,642	73.9	13.7
Cirencester	Cotswold	15,861	63.8	12.3
Alton	East Hampshire	16,051	66.7	15.5
Dorchester	West Dorset	16,171	57.1	12.3
Oswestry	Oswestry	16,660	66.4	12.9
Newmarket	Forest Heath	16,947	64.8	13.5
Romsey	Test Valley	17,386	71.7	13.4
Warminster	West Wiltshire	17,486	63.7	13.7
Wantage	Vale of White Horse	17,913	70.6	14.8
Market Harborough	Harborough	20,127	63.5	16.0
Sudbury	Babergh	20,188	64.6	12.3
Haverhill	St Edmundsbury	22,010	70.4	14.4
Spalding	South Holland	22,081	66.7	11.3
Evesham	Wychavon	22,179	68.6	13.2
Stratford-upon-Avon	Stratford-upon-Avon	22,187	61.0	13.5
Witney	West Oxfordshire	22,765	67.4	13.0
Frome	Mendip	24,171	69.5	13.7
Didcot	South Oxfordshire	25,231	69.4	14.8
Melton Mowbray	Melton	25,554	66.6	12.1
East Grinstead	Mid Sussex	26,222	65.9	15.8
Haywards Heath	Mid Sussex	29,110	57.3	19.2
Burgess Hill	Mid Sussex	29,388	65.8	16.5

Table C.4 – Benchmarking Towns – Total Town Centre Floorspace 2004 (sq.m)

Town	LA	Population (2001 Census)	A1 - shops	A2 - financial and professional services	A3 - food and drink	Total Retail	Offices
Gillingham	North Dorset	8,630	4,300	1,400	-	5,700	1,600
Sherborne	West Dorset	9,350	14,500	1,900	700	17,100	2,200
Blandford Forum	North Dorset	9,854	22,000	5,400	700	28,100	7,700
Stowmarket	Mid Suffolk	15,059	23,200	4,000	900	28,100	6,700
Sleaford	North Kesteven	15,219	30,300	4,300	2,500	37,100	13,600
Uckfield	Wealden	15,374	21,200	3,400	1,400	26,000	9,300
Tadley	Basingstoke and Deane	15,642					
Cirencester	Cotswold	15,861	48,400	5,600	3,300	57,300	22,700
Alton	East Hampshire	16,051	38,300	3,400	1,600	43,300	18,900
Dorchester	West Dorset	16,171	53,700	7,300	4,200	65,200	41,900
Oswestry	Oswestry	16,660	46,700	4,300	3,300	54,300	12,700
Newmarket	Forest Heath	16,947	35,800	4,200	2,100	42,100	16,400
Romsey	Test Valley	17,386	21,900	2,600	1,200	25,700	15,900
Warminster	West Wiltshire	17,486	20,100	3,300	800	24,200	5,500
Wantage	Vale of White Horse	17,913	19,300	3,400	500	23,200	5,800
Market Harborough	Harborough	20,127	33,900	4,200	1,700	39,800	22,600
Sudbury	Babergh	20,188	39,100	5,200	2,200	46,500	12,700
Haverhill	St Edmundsbury	22,010	26,300	3,700	900	30,900	8,200
Spalding	South Holland	22,081	49,000	8,200	2,900	60,100	6,200
Evesham	Wychavon	22,179	41,900	7,700	3,600	53,200	11,600
Stratford-upon-Avon	Stratford-upon-Avon	22,187	88,400	9,600	11,200	109,200	40,100
Witney	West Oxfordshire	22,765	38,800	4,200	2,200	45,200	16,300
Frome	Mendip	24,171	23,300	3,600	1,200	28,100	6,600
Didcot	South Oxfordshire	25,231	12,600	1,300	-	13,900	3,700
Melton Mowbray	Melton	25,554	32,100	8,900	1,500	42,500	7,300
East Grinstead	Mid Sussex	26,222	38,000	5,200	4,700	47,900	49,600
Haywards Heath	Mid Sussex	29,110	36,100	5,100	4,700	45,900	49,000
Burgess Hill	Mid Sussex	29,388	30,300	4,300	2,200	36,800	11,400

Table C.5 – Benchmarking Towns – Total Floorspace within Urban Area by Type

Town	LA	Population (2001 Census)	Retail Floorspace	Office Floorspace	Factory Floorspace	Warehouse Floorpsace	Total Employment Floorspace
Gillingham	North Dorset	8,630	19000	5000	50000	8000	63000
Sherborne	West Dorset	9,350	23000	14000	33000	13000	60000
Blandford Forum	North Dorset	9,854	24000	10000	53000	19000	82000
Stowmarket	Mid Suffolk	15,059	38000	20000	135000	59000	214000
Sleaford	North Kesteven	15,219	38000	34000	60000	74000	168000
Uckfield	Wealden	15,374	34000	20000	25000	52000	97000
Tadley	Basingstoke and Deane	15,642	13000	37000	107000	195000	339000
Cirencester	Cotswold	15,861	58000	58000	55000	67000	180000
Alton	East Hampshire	16,051	25000	34000	69000	37000	140000
Dorchester	West Dorset	16,171	68000	62000	44000	44000	150000
Oswestry	Oswestry	16,660	66000	22000	105000	78000	205000
Newmarket	Forest Heath	16,947	64000	37000	73000	54000	164000
Romsey	Test Valley	17,386	30000	18000	36000	36000	90000
Warminster	West Wiltshire	17,486	34000	8000	43000	20000	71000
Wantage	Vale of White Horse	17,913	24000	11000	0	3000	14000
Market Harborough	Harborough	20,127	60000	40000	83000	67000	190000
Sudbury	Babergh	20,188	54000	25000	138000	68000	231000
Haverhill	St Edmundsbury	22,010	23000	15000	222000	76000	313000
Spalding	South Holland	22,081	88000	38000	250000	192000	480000
Evesham	Wychavon	22,179	53000	25000	30000	67000	122000
Stratford-upon-Avon	Stratford-upon-Avon	22,187	119000	83000	56000	80000	219000
Witney	West Oxfordshire	22,765	59000	47000	130000	74000	251000
Frome	Mendip	24,171	47000	12000	85000	48000	145000
Didcot	South Oxfordshire	25,231	47000	14000	35000	144000	193000
Melton Mowbray	Melton	25,554	61000	35000	182000	114000	331000
East Grinstead	Mid Sussex	26,222	51000	52000	58000	39000	149000
Haywards Heath	Mid Sussex	29,110	59000	83000	12000	22000	117000
Burgess Hill	Mid Sussex	29,388	53000	35000	137000	89000	261000

Table C.6 – Benchmarking Towns – Total Employment and Self Containment

Town	LA	Population (2001 Census)	Economically Active	Total Jobs	Jobs per Economically Active Population Ratio	Level of Self Containment
Gillingham	North Dorset	8,630	3,991	3,545	0.89	48.7%
Sherborne	West Dorset	9,350	3,493	4,772	1.37	53.6%
Blandford Forum	North Dorset	9,854	4,548	5,326	1.17	42.8%
Stowmarket	Mid Suffolk	15,059	7,506	7,116	0.95	45.7%
Sleaford	North Kesteven	15,219	8,619	8,774	1.02	53.4%
Uckfield	Wealden	15,374	7,273	6,100	0.84	41.7%
Tadley	Basingstoke and Deane	15,642	10,736	10,686	1.00	23.1%
Cirencester	Cotswold	15,861	12,140	14,142	1.16	39.6%
Alton	East Hampshire	16,051	9,143	9,605	1.05	52.4%
Dorchester	West Dorset	16,171	9,335	17,612	1.89	68.5%
Oswestry	Oswestry	16,660	8,795	7,955	0.90	55.0%
Newmarket	Forest Heath	16,947	9,312	11,524	1.24	53.8%
Romsey	Test Valley	17,386	9,220	8,639	0.94	41.6%
Warminster	West Wiltshire	17,486	8,872	5,563	0.63	55.4%
Wantage	Vale of White Horse	17,913	9,520	5,098	0.54	37.4%
Market Harborough	Harborough	20,127	10,610	10,580	1.00	55.5%
Sudbury	Babergh	20,188	9,966	8,891	0.89	60.8%
Haverhill	St Edmundsbury	22,010	11,932	8,009	0.67	51.3%
Spalding	South Holland	22,081	13,923	17,628	1.27	70.7%
Evesham	Wychavon	22,179	11,884	10,418	0.88	52.2%
Stratford-upon-Avon	Stratford-upon-Avon	22,187	11,658	18,612	1.60	62.7%
Witney	West Oxfordshire	22,765	13,670	14,359	1.05	50.1%
Frome	Mendip	24,171	13,652	9,240	0.68	53.3%
Didcot	South Oxfordshire	25,231	18,296	21,306	1.16	49.1%
Melton Mowbray	Melton	25,554	14,108	11,391	0.81	59.8%
East Grinstead	Mid Sussex	26,222	13,850	11,364	0.82	46.3%
Haywards Heath	Mid Sussex	29,110	14,946	14,952	1.00	43.8%
Burgess Hill	Mid Sussex	29,388	15,680	11,519	0.73	39.9%

Appendix D
Retail Assessment

D.1 Retail Assessment Stages

D.1.1 **Stage 1** calculation of annual retail expenditure

Table D.1 – Estimated Per capita Spend

Type of Spend and Year	£
Convenience - Estimated 2007 per capita spend (accounting for special forms of retail and forecast growth rates	1,645
Convenience - Estimated 2026 per capita spend (accounting for special forms of retail and forecast growth rates	1,877
Convenience - Estimated 2007 per capita spend (accounting for special forms of retail and forecast growth rates	2,874
Convenience - Estimated 2026 per capita spend (accounting for special forms of retail and forecast growth rates	5,695

Source: Dorset Joint Retail Assessment (2008). The Joint Retail Assessment assumes 2007 Penetration rates of 57% for convenience retail and 18% comparison retail. For 2026 the Consultants have assumed increased penetration rates of 60% for convenience retail and 30% comparison retail.

Table D.2 – Population Assumptions

Area	Total Population 2007	Total Population 2026
Gillingham RSS growth (ND1 postcode)[1]	13,530	14586
Gillingham including Scenario 1	-	17032
Gillingham including Scenario 2	-	14707

Notes: 1 catchment area derived in Dorset joint Retail Assessment. 2026 population derived from NDDC 2007 based ward population projections, for Scenarios 1 and 2 population assumptions from new growth applied.

D.1.2 Annual spend in D.1 applied to population in D.2.

Table D.3 – Annual Retail Expenditure in Gillingham

Area	Convenience 2007	Comparison 2007	Convenience 2026	Comparison 2026
Gillingham RSS growth (ND1 postcode)[1]	£12,686,405	£6,999,340	£15,605416*	£24,920,181*
Gillingham including Scenario 1	-	-	£19,180,960	£29,098,446
Gillingham including Scenario 2	-	-	£16,563,536	£25,127,687

Notes: * Assumes increased penetration rates

D.1.3 **Stage 2** application of sales densities and floorspace efficiency forecasts.

Table D.4 – Sales Densities and gross floorspace

Location	Net sales (£/sq.m)	Gross Floorspace (sq.m)
Waitrose Gillingham	10,659	2156
Somerfield Gillingham	5935	743

Location	Net sales (£/sq.m)	Gross Floorspace (sq.m)
Lidl Gillingham	2802	1000
Gillingham other	3500	340
Average convenience	**5724**	**4239**
Gillingham Comparison Shops	3020	7056

Table D.5 – Efficiency Growth Forecasts

Efficiency Growth	Rate Per annum (%)
Convenience	0.3
Comparison	1.5

D.1.4 Application of efficiency growth forecasts (Table D.5) to average net sales densities (Table D.4).

Table D.6 – Future net Sales densities

Year	Net Sales Density (convenience)	Net Sales Density (comparison)
2008	5,741	3,065
2009	5,758	3,111
2010	5,776	3,158
2011	5,793	3,205
2012	5,810	3,253
2013	5,828	3,302
2014	5,845	3,352
2015	5,863	3,402
2016	5,880	3,453
2017	5,898	3,505
2018	5,916	3,557
2019	5,933	3,611
2020	5,951	3,665
2021	5,969	3,720
2022	5,987	3,776
2023	6,005	3,832
2024	6,023	3,890
2025	6,041	3,948
2026	6,059	4,007

D.1.5 Calculation of net retail floorspace requirements, by applying annual spend identified in Stage 1 by the net sales densities in Table D4 and future sales densities in Table D6.

Table D.7 – Retail Floorspace Requirements

Area	Net Retail Floorspace (sq.m)	Gross Retail Floorspace (sq.m	Actual Retail Floorspace (sq.m	Difference
Convenience				
2007 Gillingham (ND1 postcode)[1]	2,216	2,770	4,239	1,469
2026 Gillingham RSS growth	2,575	3,219	4,239	1,020
2026 Gillingham including Scenario 1	3,166	3,957	4,239	282
2026 Gillingham including Scenario 2	2,734	3,417	4,239	822
Comparison				
2007 Gillingham (ND1 postcode)[1]	2,318	2,897	7,056	4,159
2026 Gillingham RSS growth	6,219	7,773	7,056	-717
2026 Gillingham including Scenario 1	7,261	9,076	7,056	-2,020
2026 Gillingham including Scenario 2	6,270	7,838	7,056	-782

Appendix E
Viability Assessment

E.1 Viability Assessment

Table E.1 – Viability Assessment

Assumptions	Unit	Location				Total
		North	South	Station Road	Urban Infill and Others	
PROJECT REVENUES						
Residential Revenues						
Houses Total	No.	1011	1692	30	283	3016
3 Bed Terrace	No.	0	370	30	70	470
3 Bed Semi	No.	100	225	0	100	425
3 Bed Detached	No.	685	595	0	0	1280
4 Bed Detached	No.	226	502	0	113	841
3 Bed Terrace	£/unit	190,000	190,000	190,000	190,000	190,000
3 Bed Semi	£/unit	195,000	195,000	195,000	195,000	195,000
3 Bed Detached	£/unit	255,000	255,000	255,000	255,000	255,000
4 Bed Detached	£/unit	300,000	300,000	300,000	300,000	300,000
House Revenues	£	261.98M	416.50M	5.70M	66.70M	751M
Apartments Total	No.	60	80	180	30	350
2 bed	No.	60	80	180	30	350
2 bed	£/unit	160,000	160,000	160,000	160,000	160,000
Apartment Revenue	£	9.60M	12.80M	28.80M	4.80M	56.00M
Residential Revenue	**£**	**271.58M**	**429.30M**	**34.50M**	**71.50M**	**806.88M**
Retail Revenue						
Retail GLA	sqm	2,800	2,800	7,452	-	13,052
Retail	£/sqm	15	15	15	15	15
Retail Revenue	**£**	**420,000**	**420,000**	**1,117,800**	**-**	**1,957,800**

Assumptions	Unit	Location				Total
		North	South	Station Road	Urban Infill and Others	
Office Revenue						
Managed Workspace/Courtyard Office GLA	sqm	-	-	7,000	-	7,000
Managed Workspace/Courtyard Office	£/sqm	12.00	12.00	12.00	12.00	12.00
Revenue	**£**	**-**	**-**	**840,000**	**-**	**840,000**
TOTAL REVENUE	**£**	**271.99M**	**429.72M**	**36.46M**	**71.50M**	**809.67M**
PROJECT COSTS						
Land Costs						
Land Area	ha	43.96	69.06	4.78	5.62	123.42
Land Cost	£ / ha	2,000,000	2,000,000	650,000	2,000,000	1,662,500
Land Cost	**£**	87,920,000	138,120,000	3,107,000	11,240,000	205,185,750
Infrastructure / other Costs						
Land Reclamation	£	-	-	860,400	-	860,400
Education	£	6,426,000	10,632,000	1,260,000	1,878,000	20,196,000
Open Space (off site)	£	2,020,977	3,343,764	396,270	590,631	6,351,642
Sports Facilities	£	756,126	1,251,032	148,260	220,978	2,376,396
Community Hall	£	204,764	338,789	40,150	59,846	643,549
Health Care	£	552,636	914,352	108,360	161,508	1,736,856
Public Realm Improvements	£			202,000		
Strategic Transport Improvements	£	6,554,520	10,844,640	1,285,200	1,915,560	20,599,920
Local Junction Improvements	£	280,000	1,380,000	-	-	1,660,000
Other On / off site Improvements	£	4,953,011	7,813,541	1,461,777	1,294,356	15,522,684
Total Infrastructure Costs	**£**	21,748,034	36,518,117	5,762,417	6,120,878	69,947,447

Assumptions	Unit	Location				Total
		North	South	Station Road	Urban Infill and Others	
DEVELOPMENT COSTS						
Development Costs						
Detailed Design	% of construction	3.5%	3.5%	3.5%	3.5%	3.5%
Supervision of Construction	% of construction	3.0%	3.0%	3.0%	3.0%	3.0%
Other Legal and Professional Fees	% of construction	4.5%	4.5%	4.5%	4.5%	4.5%
Logistics	% of construction	0.5%	0.5%	0.5%	0.5%	0.5%
Insurance	% of construction	1.0%	1.0%	1.0%	1.0%	1.0%
Price Contingency	% of construction	5.0%	5.0%	5.0%	5.0%	5.0%
Total Development Costs	£	17,335,537	27,347,393	5,116,219	4,530,244	54,329,394
Selling and Marketing						
Selling and Legals	% of Revenue	1.0%	1.0%	1.0%	1.0%	1.0%
Marketing	% of Revenue	0.5%	0.5%	0.5%	0.5%	0.5%
Total Marketing Costs	**£**	4,079,925	6,445,800	546,867	1,072,500	12,145,092
Construction Costs						
Residential 2 Storey House	GFA (sqm)	116,103	186,118	3,276	30,158	335,655
Residential 2 Storey House	£ / sqm	801	801	801	801	801
Residential 2 Storey House	£	**92,940,452**	**148,987,299**	**2,622,438**	**24,141,479**	**268,691,667**
Residential Apartments Built Area	GFA (sqm)	3,726	4,968	11,178	1,863	21,735
Residential Apartments Built Cost	£ / sqm	937	937	937	937	937
Residential Apartments Build Cost	£	**3,491,262**	**4,655,016**	**10,473,786**	**1,745,631**	**20,365,695**
Retail Built Area	GFA (sqm)	3,500	3,500	9,315	-	16,315
Retail Build Cost	£ / sqm	751	751	751	751	751

Assumptions	Unit	Location				Total
		North	South	Station Road	Urban Infill and Others	
Retail Build Cost	£	2,628,500	2,628,500	6,995,565	-	12,252,565
Managed Workspace/Court Yard Office Built Area	GFA (sqm)	-	-	8,750	-	8,750
Managed Workspace/Courtyard Office Build Cost	£ / sqm	1,045	1,045	1,045	1,045	1,045
TOTAL CONSTRUCTION COST	£	**99,060,214**	**156,270,815**	**29,235,539**	**25,887,110**	**310,453,677**

Table E.2 – Summary of Viability

	North	South	Station Road	Urban Infill and Others	Total
Total Project Revenue	271,995,000	429,720,000	36,457,800	71,500,000	809,672,800
Total Project Costs	230,143,710	364,702,125	43,768,042	48,850,732	652,061,359
Finance Cost	16,110,060	25,529,149	3,063,763	3,419,551	45,644,295
Margin (Earnings before tax, depreciation, interest)	25,741,230	39,488,726	- 10,374,005	19,229,716	111,967,145
Return on investment	11%	11%	-24%	39%	17%

Appendix F

Additional Transport Analysis and Information

F.1 Development Scenarios and Zones

F.1.1 The individual development sites have been aggregated for the purpose of the Transport assessment (Section 6). The zones are labeled A through J and their locations are shown on the Figures in F1 – F6. Zones A to J aggregation is described below.

Table F.1 – Aggregation of Sites

SHLAA Ref	BH Ref	Location	Dev Area (ha)	2007 - 2011	2012 - 2026
2/20/0221	CENTRE	St Martins Clinc	0.1401	8	0
2/20/0209	CENTRE	East of Station Road North	0.2694	0	20
2/20/0173	CENTRE	Land at School Lane	0.0143	2	0
2/20/0244	C	Adj Chubbs Meadow	0.083	0	1
2/20/0249	J	Adj Heron Lodge	0.0709	0	2
2/20/0242	D	Adj Primrose Cottage	0.0661	0	1
2/20/0372	F	Park Farm	22.153	0	665
2/20/0544	H	Land Adj Lodden Lakes	4.0212	0	90
2/20/0368	G	Land at Ham Farm	25.88	0	802
2/20/0389	G	Land off Shaftesbury Road	0.4739	0	15
2/20/002	G	Land South of Meadows	3.0196	75	125
2/20/0548	E	21	1.8486	54	0
2/20/0387	A	Field at Wavering Lane	4.0981	0	100
2/20/0547	A	Land North of Wavering Lane West	12.033	0	350
2/20/0530	A	Land between Milton on Stour and Wavering L	20.033	0	621
2/20/0247	CENTRE	Adj Henrietta Villa	0.0821	0	1
2/20/0220	CENTRE	Rear of Ferndale and Winmere	0.0716	0	1
2/20/0248	CENTRE	Adj Journey's End, Common Mead Ave	0.0712	1	0
2/20/0223	CENTRE	Rear of Dene Hollow	0.1913	0	3
2/20/0214	CENTRE	Adj Kentom House	0.0604	0	1
2/20/0229	CENTRE	Adj 9 Victoria Road	0.058	0	1
2/20/0245	CENTRE	Adj Wyke Barn	0.0575	0	1
2/20/0233	CENTRE	Adj Casa Mia	0.048	0	1
2/20/0219	CENTRE	Rear of Wyke House	0.0875	0	2
2/20/0237	CENTRE	Adj Shaftesbury View	0.0424	0	1
2/20/0210	CENTRE	Rear Fairview House	0.2315	0	6
2/20/0250	CENTRE	2 Park Villas	0.37	10	0
2/20/0216	CENTRE	Adj Lawrence Cottages	0.106	0	3
2/20/0428	CENTRE	Hine Villa	0.0682	2	0
2/20/0236	CENTRE	Adj 26 Lockwood Terrace	0.0292	0	1
2/20/0347	CENTRE	Lodden Farm	0.1385	0	5
2/20/0235	CENTRE	Adj 27 Lockwood Terrace	0.0588	0	3
2/20/0381	CENTRE	Land adj Vicotriana Army cadet Building	0.0978	6	0
2/20/0234	CENTRE	Adj 29 Lockwood Terrace	0.0295	0	2
2/20/0412	CENTRE	Addison Close	0.0774	6	0
2/20/0240	CENTRE	Churchbury House	0.0374	0	3
2/20/0212	CENTRE	The Elms	0.1	9	0
2/20/0218	CENTRE	Oakleigh Court	0.1547	0	18
2/20/0241	CENTRE	A303 Tyres	0.0675	0	8
2/20/0217	CENTRE	Talisman Antiques	0.0598	0	14
N/A	I	Chantry Fields	2.58	0	116
N/A	CENTRE	Focus / Car Show Room	0.98		73
N/A	CENTRE	Site Corner Station Rd/ Le Nourborg Way	0.46		30
N/A		Station Road Area			107

F.1.2 Traffic Impact was tested for the two preferred Scenarios and for all three containment sub options as shown in Table F.2.

Table F.2 – Development Scenarios

Containment	Scenario 1	Scenario 2
C54 (54% Containment)	S1C54	S2C54
C75 (75% Containment)	S1C75	S2C75
C99 (99% Containment)	S1C99	S2C99

Access Assessment

F.1.3 The following paragraphs consider the decisions, assumptions and findings that have determined the vehicle access strategy for each of the zones considered within the modelling process.

F.1.4 Determination of Vehicular Access Points

F.1.5 The methodology for determining appropriate vehicular access was defined by the following decisions and constraints:

- Grouping of SHLAA reference areas with conjoined boundary, enabling a combined access strategy;
- Determination of possible boundary with existing highway;
- Status of bounding road i.e. ability to accommodate increased flows
- Constraints of Undevelopable land; and
- Constraints of Compulsory Purchase.

Grouping of Areas

F.1.6 Table F.1 summarises the zones and the SHLAA reference sites that make up their total area. Zone names within the Table (A to J).

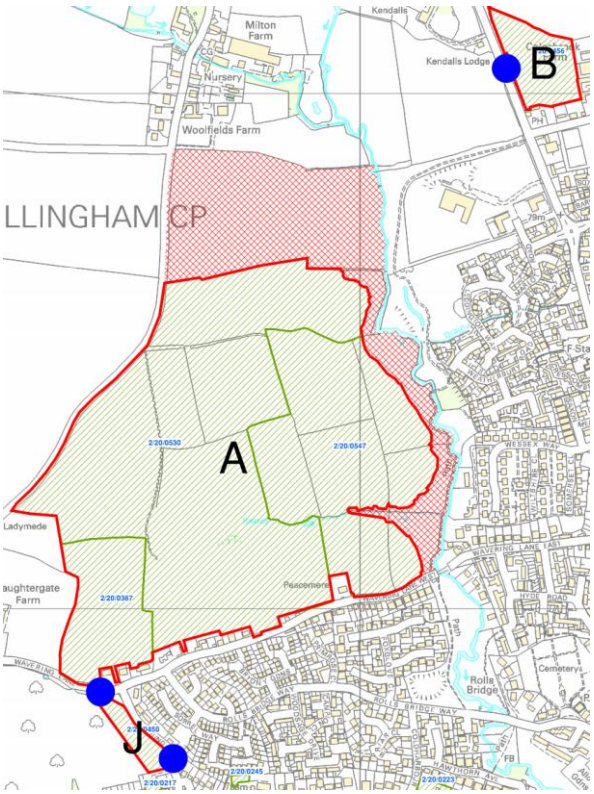
Zone Access Strategies

F.1.7 The following Sections define the access points, catering for each of the zones. Each access point has been considered on its own merits, mindful of the list of decisions and constraints given in paragraph F.1.4. The Figures within each section below, illustrate the zone bounded by a thick red line, with possible vehicle access points indicated by a large blue dot. Please note, no Figure included within this access assessment aims to derive or secure boundary limits of any site and any discrepancy in land ownership or allocation is unintended.

Zones A, B and J

F.1.8 Figure F.1 below illustrates the geography of Zones A, B and J, with indicative access points highlighted through the provision of a blue dot.

Figure F.1 – Access points for Zones A, B and J



Undevelopable land is shown in red.

Zone A

F.1.9 As previously mentioned in paragraph F.1.5 above, the possible access points proposed for Zone A, have been principally chosen through determination of a possible shared boundary with highway and thus incurring no required compulsory purchase order. Notwithstanding this, the ability for the highway to cater for increased flows of traffic has also been considered and thus access onto the eastern edge of Wavering Lane (between Zones A and J) and onto the unnamed lane bounding the western edge of Zone A, has not been considered due to their restricted width, rural aspect and poor standard of construction. However, access onto these discounted routes by bicycle and footway may be further advocated in the aim of accessibility, and by Fire tenders, ambulance and police vehicles in the aim of providing an emergency access. Furthermore, significant engineering improvements and possible compulsory land purchase cannot be completely removed from consideration, as these may lead to upgraded routes that may facilitate further vehicular access and benefit the wider area.

F.1.10 The size of Zone A, in terms of housing numbers, however leads to a potential requirement for 3 major access points and although these will require an upgrade to the existing network, their provision does not impact upon the modelling outputs, as the distribution of traffic towards affected junctions within Gillingham is not altered. With consideration for this and notwithstanding the above, access onto Wavering Lane is provisionally considered as the point of access for modelling.

Zone B

F.1.11 Zone B has only a single possible access point, although this leads onto the B3092 which is a well constructed two way highway, which can cater for the increased flows that may arise from the development of this site.

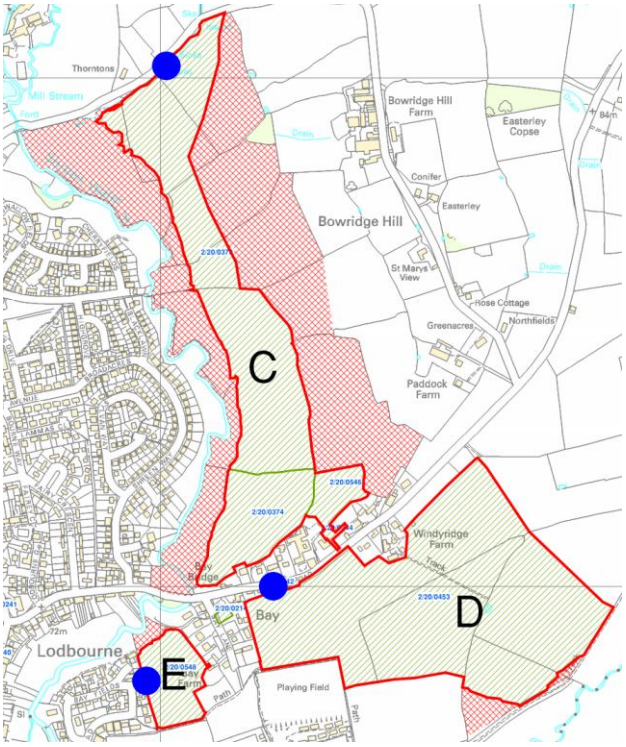
Zone J

F.1.12 Zone J exhibits two possible points of access, one onto Wavering Lane, the other onto Pound Lane. Due to the restricted and low level of development arising from this Zone, neither access point is materially preferred. However, the site may facilitate improvements along Pound Lane, due to increased frontage along this highway, which may bring benefits to the local community, possibly mitigating any traffic impact derived from this site.

Zones C, D and E

F.1.13 Figure F.2 illustrates the geography of Sites C, D and E, with indicative access points highlighted through the provision of a blue dot.

Figure F.2 – Access points for Zones C, D and E



Zone C

F.1.14 At this early stage in analysis, access for Zone C onto Bay Road at the south of the site and the highway to the north of the site, have been discounted due to restricted width for much of their length. The remaining access possibilities require either significant upgrade of either, or both of the boundary roads, or the provision of a new access to highway lying to the west of the site; this may require compulsory purchase of at least one existing property. Notwithstanding this, even in their current state, Bay Road and the northern boundary road may accommodate pedestrian, cyclist and emergency access, thus removing the sole reliance on a single new point of access for sustainable modes of transport.

F.1.15 For the purposes of the manual assignment model, to consider local highways, the access strategy for Zone C is considered through the residential estates to the west of the site, onto the B3092.

Zone D

F.1.16 Zone D is currently restricted through possible land ownership conflicts, to access onto Bay Road, which has already been discounted as an access for Zone A. Although this road is considered

unsuitable to cater for increased flows of traffic, should this site come forward, engineering solutions to facilitate access may be found at a cost to the eventual developer. Further access may also be derived from a farm track to the south of the site, although this has been equally discounted due to unknown status and location beyond the proposed allocation boundary. In conclusion, access onto Bay Road for Zone D has been considered in the modelling exercise.

F.1.17 Notwithstanding the above, the potential housing allocation of 529 on Zone D may lead to a capacity requirement for 2 points of access and thus the opportunity to access from the track to the south and implement improvements to Bay Road may both need to be considered.

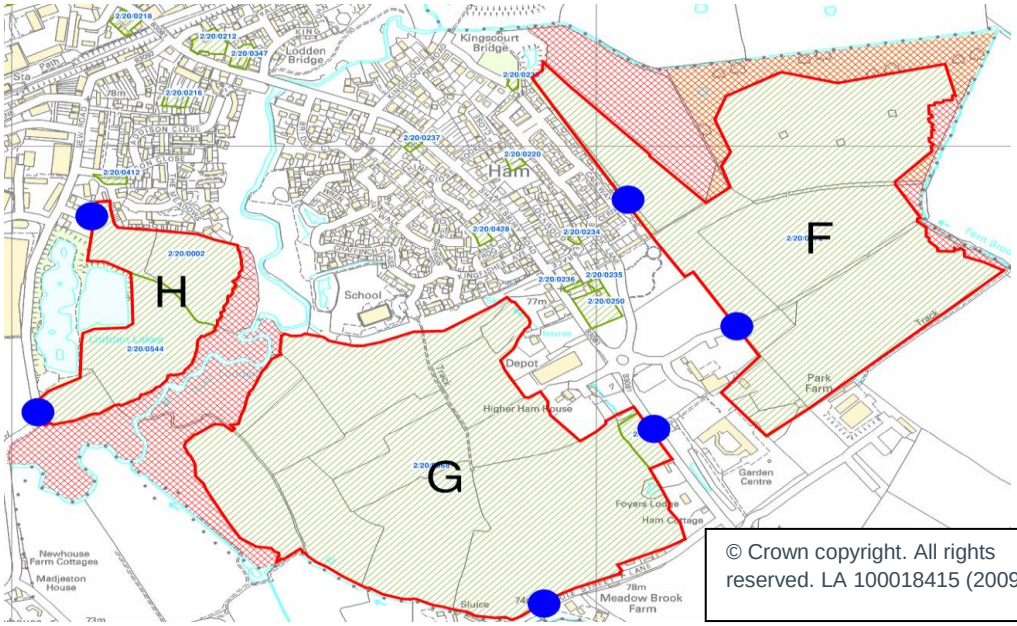
Zone E

F.1.18 Zone E, unlike Zones C and D, may be reasonably accommodated via access through Branaby Mead without significant constraint and thus this access provision has been considered in the modelling e exercise.

Zone F, G and H

F.1.19 Figure F.3 illustrates the geography of Sites F, G and H, with indicative access points highlighted through the provision of a blue dot.

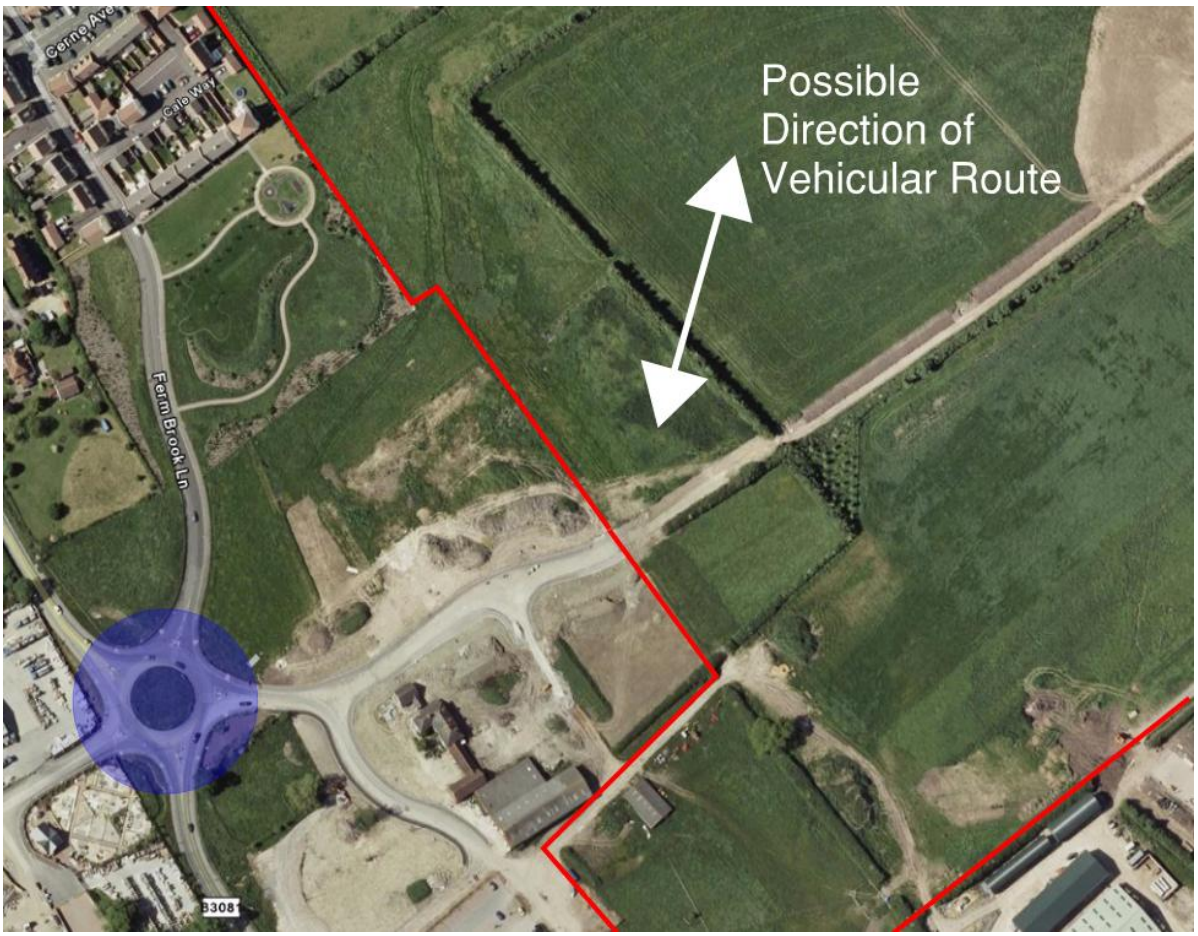
Figure F.3 - Access Points for Zones F, G and H



Zone F

F.1.20 Zone F is believed to bound existing highway to its eastern edge, through existing residential estates, which may provide a secondary access to a potential primary access which would lead directly onto the Fern Brook/ B3081 roundabout. Figure F.4 below illustrates the potential access point onto the Fern Brook/Shaftesbury Rd (B3081) roundabout.

Figure F.4– Access Points for Zones F, G and H



F.1.21 Although potential access onto the above roundabout unless this link and becomes public highway prove to be ideal, constraints of land ownership may prevent this provision being used or implemented. Notwithstanding this, the use of the roundabout, or access through the residential estates to the west of site F, incur the same proportion of traffic onto the junctions considered within the manual assignment model and thus the effect within the model of either or both provisions being used is respectfully considered.

Zone G

F.1.22 Zone G incorporates 876 dwellings completed to 2026 and thus, like site F above, there may be a capacity requirement to provide two points of access.

F.1.23 The principal point of access for Zone G is likely to commence from the B3081 to its eastern boundary, as illustrated in Figure F.4 above. However, the access point most likely to bound existing highway is located within close proximity to the Fern Brook/Shaftesbury Rd (B3081) roundabout and thus there may be considered a conflict in vehicular flows to the detriment of highway safety. With consideration for this, it is anticipated that direct linkage onto the existing roundabout may need to be sought, and may require compulsory purchase of third party land.

F.1.24 Secondary access to Zone G may be achieved through Cole Street Lane, to the south east of the site, although strategic integration of the site in the wider Gillingham area may require the provision of an access onto New Road to the west, through site H and across undevelopable floodplain. Whichever access strategy is eventually confirmed, the proportion of traffic travelling towards the considered junctions within the model remains the same and thus the impact upon the modelling exercise is negligible.

Zone H

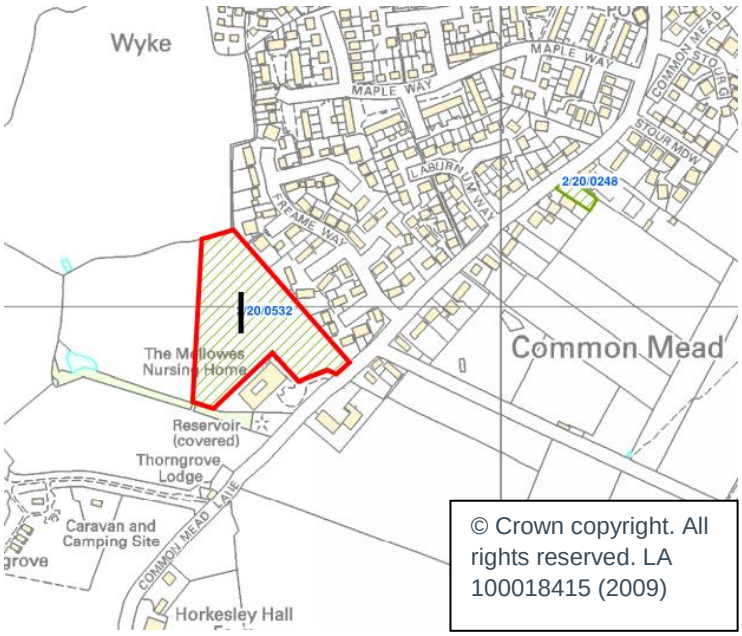
11.62 The principal access point for Zone H lies along New Road at a point where horizontal alignment may create difficulties for vehicle visibility. With consideration for this constraint of access, highway works may be required to either straighten existing bends, or provide a significant access feature supported by generous traffic calming. Further access may be derived from the north of the site from existing residential development; however the design of these existing estates may not cater for significant vehicle movements that may be generated by the proposed 290 dwellings in 2026.

11.63 The deliverability of Zone H on its own is severely compromised by the capacity of the NewRoad/A3081 junction. The junction is a 'bottleneck' in the area, without significant work, will not be able to accommodate development on Zone H.

Zone I

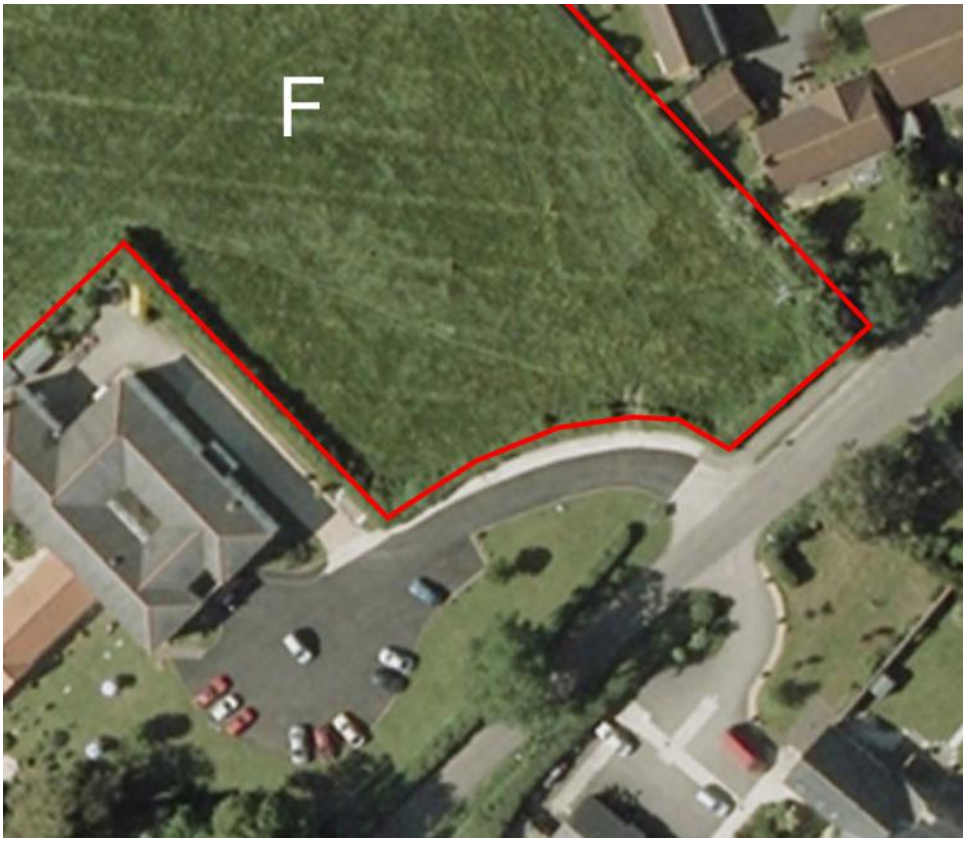
11.64 F.5 illustrates the geography of Zone I, with an indicative access point highlighted through the provision of a blue dot.

Figure F.5– Access to Zone I



F.1.25 The access opportunities for Zone I are severely restricted through the provision of a narrow frontage onto Common Mead Lane which may constrain the ability to provide appropriate visibility splays; however, this highway is easily capable of catering for the traffic potentially derived from this site. Notwithstanding this, as displayed in Figure F.6 below, the prospective access point may be result in conflict with adjacent and opposing commercial and residential accesses and thus a rationalisation of accesses in this location may be necessary.

Figure F.6– Zone I Access onto Common Mead Lane



F.1.26 Although Figure F.6 above illustrates the hindrances to direct access onto Common Mead Lane for Site I, the potential for access at this point has been considered within the modelling exercise.

Accessibility Audit

F.1.27 The level of access to key amenities from each of the proposed SHLAA sites has been assessed and the results are presented below. The assessment primarily uses the criteria set out in the South West's adopted Regional Planning Policy 10 (RPG10istance from each site to the nearest food shop, primary school, GP surgery and employment centre has been measured and is used to rank the accessibility of each site to vital services. The frequency at which different types of trips are made is taken into account by weighting different trip purposes. The highest weight is applied to the most frequently made trip purpose, namely employment.

RPG10 Accessibility Assessment

F.1.28 The residential and employment sites identified by the SHLAA for the town are shown in Table F3

Table F.3 - SHLAA Sites

Site number	Phase	Residential (dwellings)	Employment (hectares)
GILL 1	2 (post 2016)	450	None
GILL 2	2 (post 2016)	500	None
GILL 3	2 (post 2016)	1000	None
GILL 4	2 (post 2016)	500	None
GILL 5	1 (pre 2016)	200	None
GILL 6	1 (pre 2016)	0	11.0 ha B1/B2/B8
GILL 7	1 (pre 2016)	150	6.0 ha A1/B1/D1/D2
GILL 8	1 (pre 2016)	50	None
GILL 9	2 (post 2016)	1150	None

Table F.4 – Recommended Walking Distances to Services (Source RPG10)

To comply with RPG 10 major housing sites should meet the accessibility critera	Target distance (m)	Maximum distance (m)
Food shop	300	600
Primary School	300	600
Bus Stop	200	400
Railway Station	-	800

F.1.29 Table F5 shows the level of compliance of the possible residential sites in Gillingham with RPG10 guidance. Green shading indicates compliance with target distances and Amber with maximum distances. Red indicates non-compliance. Site 7 is the only site that complies with all target distances for access to food shopping, primary education, bus and rail connections. The remaining sites all fail to meet the maximum distance for access to food shops, primary education and a rail connection. All possible residential development sites are suitably located with respect to bus connection accessibility.

Table F.5– Walking Distance to Services (in metres) and compliance with RPG10 for sites in Gillingham

Site	Food Shop	Primary School	Bus Stop	Rail Station
Gill 1	1600	2100	200	2100
Gill 2	1100	1800	300	1600
Gill 3	1000	1000	300	1100
Gill 4	1100	1100	200	1300
Gill 5	1100	1100	300	1100
Gill 6	200	300	100	300
Gill 7	1100	1600	300	1600
Gill 8	1400	1300	300	1800
Gill 9	1600	2100	200	2100

Weighted Assessment

F.1.30 The primary assessment does not consider the frequency of different types of trips. The accessibility of each site was measured solely on the basis of its proximity to different services. The following assessment applies a weighting which is dependent on how often a service is travelled to. Access to the following services is tested:

- employment;
- food shops;
- primary schools;
- GP surgeries.

Limitations of the Methodology

F.1.31 The assessment only takes account of distance and does not make a distinction between levels of service. For example, a small local grocery store is regarded to offer the same level of service as a supermarket. Furthermore, only the existing major employment centres (including industrial estates and the four main town centres) have been tested.

Assessment Methodology

F.1.32 A site's accessibility to a service was assumed to be based on the walking distance from the site to that service, the shorter the walk the more accessible the service. By comparing the accessibility of each site to each service the sites can be ranked for overall accessibility.

F.1.33 As some services are travelled to more frequently than others it does not make sense to give them equal importance when ranking sites. Weighting was used to account for this.

F.1.34 Call the distance from a site to the nearest employment centre D_{Emp} and the weight applied to employment β_{Emp}, the distance from a site to the nearest food store and the weight applied to food shopping β_{Food} etc. The measure of the site's overall accessibility is the sum of the weighted distances to each of the individual services, $\sum \beta D$.

$$\sum \beta D = \beta_{Emp} D_{Emp} + \beta_{Food} D_{Food} + \beta_{Edu} D_{Edu} + \beta_{GP} D_{GP}$$

F.1.35 The sites are ranked according to this accessibility figure, the lower the figure the more accessible the site.

F.1.36 The weights used are based on the expected number of trips (per person per year) to each service. These figures are taken from the Regional Transport Statistics, (DfT, 2008) and are based on surveys carried out in 2005-2006. This publication did not split shopping trips between food and non-food; it is assumed here that food shopping accounts for half of shopping trips.

Table F.6 –Weights for accessibility (trips per person per year) (Dft 2008)

Employment, β_{Emp}	Food Shopping, β_{Food}	Education, β_{Edu}	GP, β_{GP}
149	112	58	8

F.1.37 The figure of 8 GP visits per person per year has been assumed in the absence of actual data.

Site Locations

F.1.38 Specific points need to be defined for each site from which walking distances to services can be measured. These points were assumed to be the most likely access points (for pedestrians) to the sites.

Results

F.1.39 The result of the weighted accessibility assessment is presented in Table F.7.

Table F.7– Weighted accessibility assessment for residential sites in Gillingham

Site	Rank	$\sum \beta D$
7	1	67.5
4	2	227.7
5	2	227.7
3	4	258.6
8	5	270.6
2	6	326
9	7	348.9
1	8	413.5

F.1.40 The results indicate that site 7 is the most accessible location for access to the existing services that were tested. The central location provides good access to the Town Centre, Station Industrial Estate and Gillingham railway station, all of which are within walking distance. The results indicate that site 7 could be used for mixed use development, accommodating 150 new homes and 6 hectares of employment. Furthermore, it is regarded as developable prior to 2016. The mixed use, dense development that could be provided on this site would further enable new residents to both live and work locally. Furthermore, it would provide additional employment on a site that already benefits from existing good quality access by public transport.

F.1.41 Sites 4 and 5 are identified as the next most accessible, both being well situated in relation to existing employment opportunities, notably the Brickfield Industrial Estate and Gillbury Yard. Furthermore, depending on where the access from the two sites is taken, both may also be within walking distance of Gillingham railway station. From a purely accessible perspective, results demonstrate that there is an opportunity to develop 200 homes at site 5 by 2016, with a possible further 500 being developed on site 2 by 2026. The only other site that is regarded as developable before 2016 is site 8 on which 50 new houses could be accommodated, the accessibility of this site is significantly lower (by this measure) than that of site 7 but is similar to that of sites 4 and 5.

F.1.42 The least accessible site with regard to proximity to existing services is site 1. The nearest employment site is assumed to be Tomlins Lane, approximately 1.2km south west of the site. Furthermore, this is only a small workshop area occupying 0.25 hectares. The next closest employment site is the Town Centre approximate 1.5km to the south of the site.

F.1.43 Site 9 and 2 are also significantly less accessible according to the weighted assessment than other sites. This is also due to the long walking distance from these sites to the nearest employment centres. The majority of employment opportunities are located south of the railway line; sites located on the northern periphery are, therefore, less accessible on foot from the existing centres of employment. The extended distance between sites 1, 2 and 9 may affect residents' choice of method of travel to work. Measures to improve cycling and public transport facilities in the northern part of the town should be considered.

Person Trips Per Household

	HB Work	*HB Employers Business (EB)*	*HB Education*	*HB Shopping*	*HB Personal Business (PB)*	*HB Recreation / Social*	*HB Visiting friends & relatives*	*HB Holiday / Day trip*	***Total***
Walk	0.04	0.00	0.11	0.03	0.01	0.02	0.01	0.00	**0.23**
Cycle	0.01	0.00	0.01	0.00	0.00	0.00	0.00	0.00	**0.02**
Car driver	0.25	0.03	0.04	0.03	0.01	0.03	0.02	0.00	**0.41**
Car passenger	0.05	0.00	0.08	0.02	0.01	0.02	0.01	0.00	**0.19**
Bus / Coach	0.01	0.00	0.02	0.00	0.00	0.00	0.00	0.00	**0.05**
Rail / underground	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Combined Modes	**0.38**	**0.03**	**0.25**	**0.09**	**0.03**	**0.08**	**0.05**	**0.00**	**0.92**

2008 Per Household Trip Rate (Tempro v5.3)

	HB Work	*HB Employers Business (EB)*	*HB Education*	*HB Shopping*	*HB Personal Business (PB)*	*HB Recreation / Social*	*HB Visiting friends & relatives*	*HB Holiday / Day trip*	***Total***
Walk	0.03	0.00	0.09	0.03	0.01	0.02	0.01	0.00	**0.21**
Cycle	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Car driver	0.25	0.02	0.04	0.04	0.01	0.03	0.02	0.00	**0.41**
Car passenger	0.05	0.00	0.07	0.02	0.01	0.02	0.01	0.00	**0.17**
Bus / Coach	0.01	0.00	0.02	0.00	0.00	0.00	0.00	0.00	**0.04**
Rail / underground	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Combined Modes	**0.37**	**0.03**	**0.22**	**0.09**	**0.03**	**0.07**	**0.04**	**0.00**	**0.87**

2016 Per Household Trip Rate (Tempro v5.3)

	HB Work	HB Employers Business (EB)	HB Education	HB Shopping	HB Personal Business (PB)	HB Recreation / Social	HB Visiting friends & relatives	HB Holiday / Day trip	Total
Walk	0.03	0.00	0.08	0.03	0.01	0.02	0.01	0.00	**0.20**
Cycle	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Car driver	0.24	0.02	0.03	0.04	0.01	0.03	0.02	0.00	**0.40**
Car passenger	0.05	0.00	0.07	0.02	0.01	0.01	0.01	0.00	**0.17**
Bus / Coach	0.01	0.00	0.02	0.00	0.00	0.00	0.00	0.00	**0.04**
Rail / underground	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Combined Modes	**0.36**	**0.03**	**0.21**	**0.09**	**0.03**	**0.07**	**0.04**	**0.00**	**0.84**

2026 Per Household Trip Rate (Tempro v5.3)

TEMPRO V.53 data sets

F.1.44 The default growth forecast from 2008 for 2016 and 2016 within TEMPRO v5.3 are set out below.

Table F.8 – Gillingham Planning Growth 2008 – 2016 dataset v5.3

Area	Workers	Households	Jobs	Total Population
SW (Region)	124715.6	215399.6	154973.8	253055.2
Dorset (County)	21646.2	27440.8	24876.8	30352.4
North Dorset (Authority)	1592.4	2528.2	2304.4	3579.4
Gillingham nr Shaftesbury (Zone)	241	382.6	254.8	643.6

Table F.9 – Gillingham Planning Growth 2008 - 2026 dataset v5.3

Area	Workers	Households	Jobs	Total Population
SW (Region)	223407.6	456879.6	283457.8	571566.2
Dorset (County)	36362.2	54705.8	42983.8	64226.4
North Dorset (Authority)	2697.4	4821.2	3963.4	7784.4
Gillingham nr Shaftesbury (Zone)	374	729.6	439.8	1343.6

F.1.45 Since the RNR was published a further version of the TEMPRO dataset (v5.4) has been published. For information, the default growth forecast from 2008 for 2016 and 2016 within v5.4 are reported below.

Table F.10 – Gillingham Planning Growth 2008 – 2016 dataset v5.4

Area	Workers	Households	Jobs	Total Population
SW (Region)	173249.6	214205	200896.4	389702.8
Dorset (County)	17549.6	28247.8	20776.2	49434.2
North Dorset (Authority)	1708.6	2552	1356.4	5044
Gillingham nr Shaftesbury (Zone)	232.4	386	192.4	776.8

Table F.11 – Gillingham Planning Growth 2008 – 2026 dataset v5.4

Area	Workers	Households	Jobs	Total Population
SW (Region)	343813.6	495056	413835.4	870251.8
Dorset (County)	32505.6	62360.8	40422.2	101080.2
North Dorset (Authority)	4154.6	5533	2484.4	11543
Gillingham nr Shaftesbury (Zone)	572.4	837	351.4	1752.8

F.1.46 Yeovil and Salisbury are reported within the Census 2001 as being key employment destinations for residents of Gillingham attracting 9% and 13% of trips, respectively. Both of these destinations could involve a car based trip along the A303 which would be classed by the Highways Agency as a short trip and therefore not one that should be encouraged on the trunk road network. The RNR

reports on the Highways Agency modelling on the A303 and the links from Gillingham to Yeovil and Salisbury are considered here.

F.1.47 The RNR reports (on maps) that sections of the A303 between Gillingham with Yeovil are reported to suffer Daily Stress. The maps have been interpreted within the following tables and have been compiled (in good faith as some areas of the map are unclear) from the RNR and are summarised in Table F.12

Table F.12 – A303 Westwards Levels of 'Stress'(Highways Agency RNR 2008)

A303 Link East to West	2006	2016	2026
To Wincanton (dual carriageway	90- 100%	110 – 130% (westbound) 100 - 110% (eastbound)	110 – 130%
Wincanton – A357 (dual carriageway	100 – 110%	110 – 130%	130 – 150%

F.1.48 A similar exercise has been carried out for the A303 between Gillingham and Salisibury and reported in Table F.13.

Table F.13 – A303 Eastwards Levels of 'Stress' (Highways Agency RNR 2008)

A303 Link East to West	2006	2016	2026
To Salisbury	90- 100%	110 – 130% (westbound) 100 - 110% (eastbound)	110 – 130%

TEMPRO Results

F.1.49 TEMPRO v5.3 reports a 3 hour peak period and to convert this to a single peak hour it has been assumed that 40% of movement occurs within this single peak hour. Traffic count data from Le Neubourg Way has been interrogated and this assumption is robust. A summary of the output in is reported in Table F.14.

Table F.14 – Per Household Person Trip Rates, by Mode

	2008	2016	
Walk	0.23	0.21	0.20
Cycle	0.02	0.02	0.02
Car driver	0.41	0.41	0.40
Car passenger	0.19	0.17	0.17
Bus / Coach	0.05	0.04	0.04
Rail / underground	0.02	0.02	0.02
Combined Modes	**0.92**	**0.87**	**0.84**

F.1.50 Utilising the 2016 and 2026 data it is possible to estimate the number of additional trips generated, by public transport. This exercise has been undertaken for the 54% and 75% containment scenarios as the 99% containment scenario will not generate significant additional bus patronage.

F.1.51 Table F.15 demonstrates the impact of the levels of self containment on external public transport trips. As would be expected, the higher the level of self containment, the lower the level of public transport patronage.

F.1.52 The key employment based movement corridors are linked to the destinations of Salisbury and Shaftesbury. An assessment has been undertaken for the scenarios that estimate, using

TEMPRO V5.3 data, the volume of bus passenger movement between these destinations. The predicted number of bus trips without the additional development is shown in Table F.15.

Table F.15 – Bus Patronage For Gillingham Residents without Additional Development

Scenario	2008	2016	2026
TEMPRO population	**8,978**	**9,622**	**10,322**
Salisbury	18	17	17
Shaftesbury	16	15	15

F.1.53 The estimated number of additional bus passengers due to the proposed increase in housing numbers are reported in Table F.16. A sensitivity test has also been undertaken to estimate the likely impact of a mode transfer (from privet car driver) to bus; 10% and 20% mode transfers have been assumed for all residents.

Table F.16 – 2016 Additional Bus Patronage (Tempro v5.3)

Scenario	Scenario 1 (54% self Containment)	Scenario 1 (75% self Containment)	Scenario 2 (54% self Containment)	Scenario 2 (75% self Containment)
No mode shift				
Salisbury	1	1	1	0
Shaftesbury	1	0	0	0
10% mode shift from car driver trips				
Salisbury	4	2	2	1
Shaftesbury	2	1	1	1
20% mode shift from car driver trips				
Salisbury	7	4	3	2
Shaftesbury	4	2	2	1

Table F.17 – 2026 Additional Bus Patronage (Tempro v5.3)

Scenario	Scenario 1 (54% self Containment)	Scenario 1 (75% self Containment)	Scenario 2 (54% self Containment)	Scenario 2 (75% self Containment)
No mode shift				
Salisbury	1	1	2	1
Shaftesbury	1	0	1	1
10% mode shift from car driver trips				
Salisbury	9	5	5	3
Shaftesbury	5	3	3	2
20% mode shift from car driver trips				
Salisbury	16	9	9	5
Shaftesbury	10	5	5	3

Public Transport Trips Per Household

	HB Work	*HB Employers Business (EB)*	*HB Education*	*HB Shopping*	*HB Personal Business (PB)*	*HB Recreation / Social*	*HB Visiting friends & relatives*	*HB Holiday / Day trip*	***Total***
Scenario S1C54									
Bus / Coach	12	0	20	4	1	2	2	0	**41**
Rail	12	1	2	0	0	0	0	0	**16**
Scenario S1C75									
Bus / Coach	17	0	27	5	2	3	2	0	**56**
Rail	16	1	3	0	0	0	0	0	**22**
Scenario S2C54									
Bus / Coach	6	0	10	2	1	1	1	0	**21**
Rail	6	0	1	0	0	0	0	0	**8**
Scenario S2C75									
Bus / Coach	9	0	14	3	1	2	1	0	**29**
Rail	8	1	2	0	0	0	0	0	**11**

2016 Public Transport Trips Per Household

	HB Work	*HB Employers Business (EB)*	*HB Education*	*HB Shopping*	*HB Personal Business (PB)*	*HB Recreation / Social*	*HB Visiting friends & relatives*	*HB Holiday / Day trip*	***Total***
Scenario S1C54									
Bus / Coach	31	1	50	10	3	6	5	0	**107**
Rail	31	2	6	1	0	0	0	0	**41**
Scenario S1C75									
Bus / Coach	43	1	70	14	5	8	6	1	**148**
Rail	42	3	8	1	1	1	1	0	**57**
Scenario S2C54									
Bus / Coach	16	0	25	5	2	3	2	0	**53**
Rail	15	1	3	0	0	0	0	0	**21**
Scenario S2C75									
Bus / Coach	22	0	35	7	2	4	3	0	**74**
Rail	21	2	4	1	0	0	0	0	**29**

Strategic Traffic Impact

Step 1 Trip Generation

F.1.54 Trip rates were needed in order to calculate the trips generated by development in each zone of the study area. TRICS[25] (2008b) was used to calculate the trip rates which are consistent with the NnEDTS. The TRICS database was interrogated to determine trip rates based on the selection of characteristics so rates for similar developments can be calculated.

F.1.55 There are two traditional highway peaks during the day, the AM peak at 8:00-9:00 and the PM peak at 17:00-18:00. Trip rates for arrivals and departures were generated for each of these periods.

F.1.56 The parameters selected in TRICs are shown in Table F.18.

Table F.18 – Trip Rate Categories and their assumed characteristics

	Urban
TRICS Land Use Category	3A – Residential – Houses privately owned
Independent Variable	Number of Dwellings
Locations Included	Town Centre, Edge of Town Centre, Suburban Area, Edge of Town, Neighbourhood Centre
Days	Mon-Fri
Population within 1 mile	1,001 to 25,000
Population within 5 miles	5,001 to 250,000
No. Surveys included	55

F.1.57 The parameters selected in Table F.19 produced the trip rates shown in Table F.19. These are the agreed vehicle trip rates used in the NnEDTS Dorset traffic model.

Table F.19 – Trip Rates

Period	Arrivals	Departures	Totals
AM	0.147	0.426	0.573
PM	0.396	0.234	0.630

F.1.58 The trip rates used are shown indicate the busiest period will be the PM peak.

F.1.59 By multiplying the trip rates by the number of dwellings to be constructed in each scenario, the total numbers of trips (arrivals and departures for AM and PM peaks) that will be generated has been calculated. The transport plots are aggregated and are explained in terms of the identified development sites above (see Table F1).

Table F.20 – Total Vehicle Trips Scenario 1 Am 2026

Plot	Arrivals	Departures
A	398	235
B	13	8
C	149	88
D	169	100
E	17	10
F	239	141

[25] TRICS is a national (UK and Ireland) database that contains trip generation data for over 2,800 sites. based on observed data.

Plot	Arrivals	Departures
G	279	165
H	92	55
I	14	8
J	3	2
Total	510	1,478

Table F.21 – Total Vehicle Trips Scenario 1 PM 2026

Plot	Arrivals	Departures
A	148	429
B	5	14
C	55	160
D	63	181
E	6	19
F	89	257
G	104	300
H	34	99
I	5	15
J	1	3
Total	1374	872

F.1.60 The modelling assumes that all trips contained in Gillingham will be pedestrian and walking trips and will have no vehicular impact.

Step 2 Containment

F.1.61 The level of containment assumed in each Scenario is given Table F.2. This containment factor is proportionally removed from the total trips shown in Table F.20 or Table F.21. These vehicle trips were used in the traffic modelling.

F.1.62 Contained vehicle trips are excluded from the modelling as they would not be using any of the static links present in the traffic model.

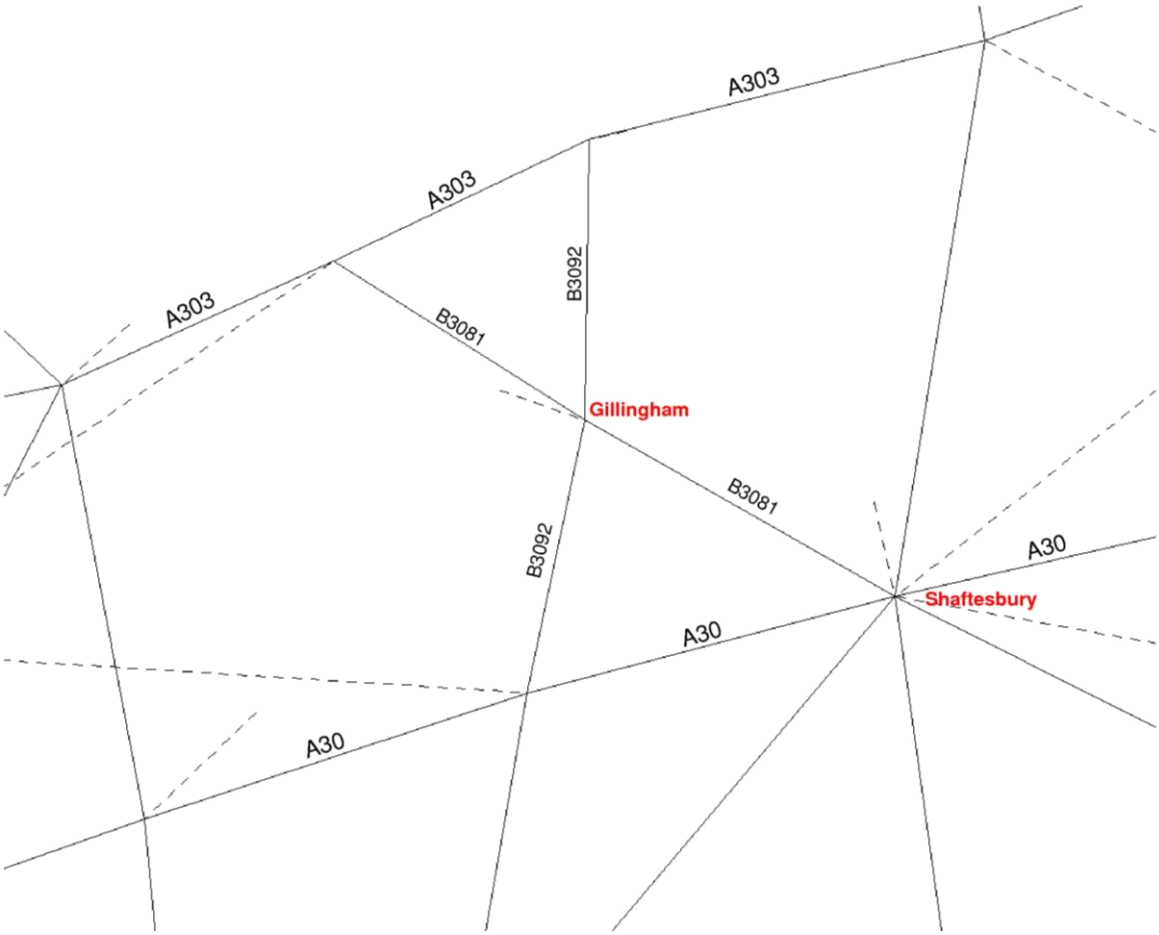
Step 3 Traffic Modelling

F.1.63 The traffic model covers Dorset, and locations around the county's boundary, including Yeovil (within Somerset), (within Wiltshire) and Ringwood (within Hampshire).

F.1.64 The traffic model represents towns as one zone each, with only the main strategic roads being provided. In the case of Gillingham, the town is shown as one zone, with the four arms of the B3092 and B3081 providing access to the town. Given the nature of the model, it would not show the traffic flows within Gillingham. Therefore, the traffic model was only used to determine the effects of quantum of development upon the strategic highway network.

F.1.65 For the purpose of this study the development quantum for Gillingham was taken in sequence from the combination of Scenarios detailed in Table F.2. Additional arrival flows for Gillingham were added onto the NnEDTS traffic model trip matrix. The full methodology will be contained in the NnEDTS background paper Transport Modelling to be published as part of the NnEDTS.

Figure F.7 – Section of the SATURN Model around Gillingham



Step 4: Traffic Impact

11.65 The new trip matrices, including the additional development flows, were assigned to the traffic model network, and the resultant flows on the B3081 and B3092 were examined. The larger of the two directions of flow were recorded, and reported. The flows were compared against the 'pinch point' capacities of the network. These values have been derived from the Design Manual for Roads and Bridges (DMRB) and agreed by DCC. The pinch point capacities are shown Table F.22

Table F.22 - Agreed Pinch Point Capacities

Link	Pinch Point Capacity
B3081 (A303)	1,020
B3092 (A303)	882
B3092 (A30)	744
B3081 (Shaftesbury)	744

Highways Improvements

Figure F.8 – Southern Link

Figure F.9 – Eastern Route

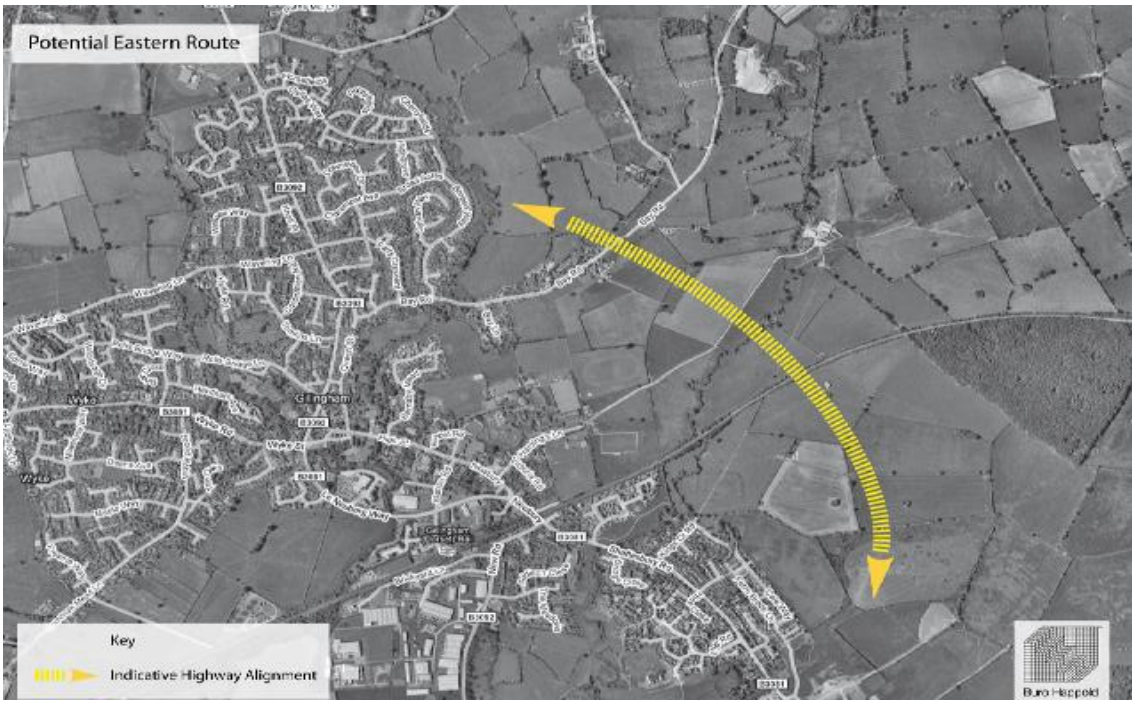
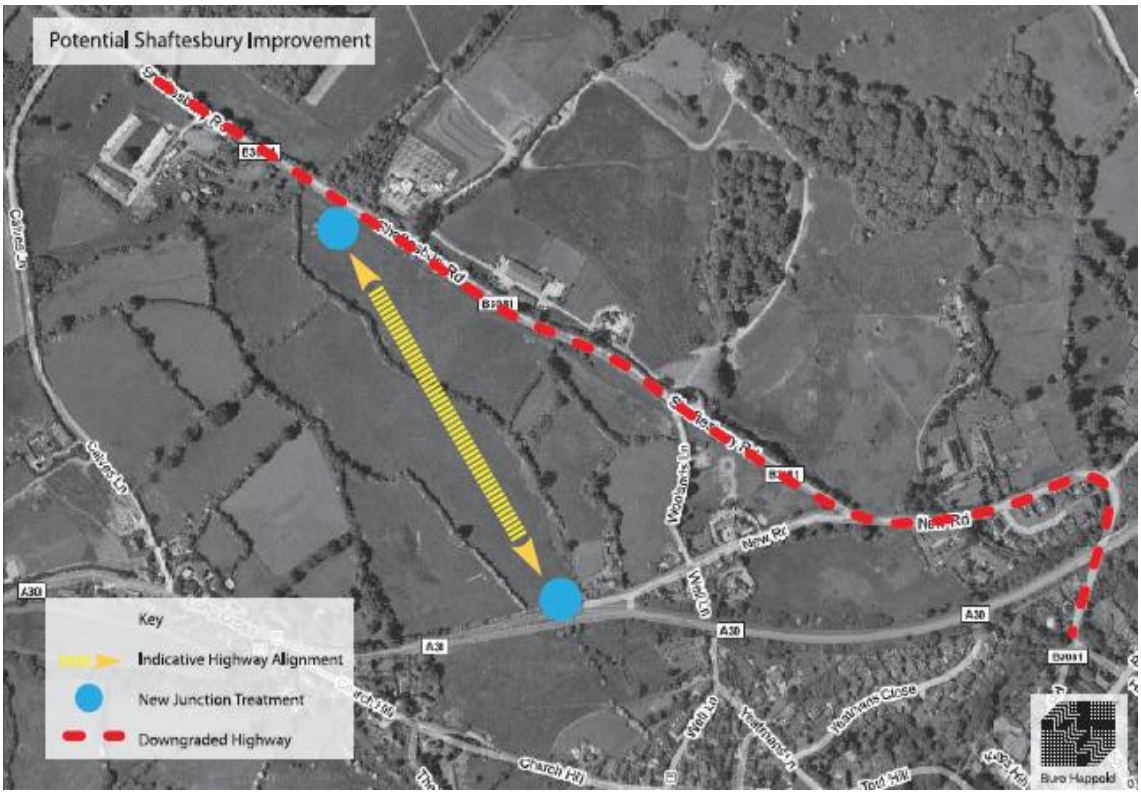


Figure F.10 – Shaftesbury Improvement



Cost Estimates

Project: Gillingham Capacity Options | **Job No:** 025755
Date: 24/06/2009
Title: Road Option Summary | **Author:** JC

Road Option			A Southern Link		B Eastern Route		C Shaftesbury Improvement
Road costs		£	6,474,000.00	£	13,867,000.00	£	4,855,000.00
Ground stabilisation costs		£	266,000.00	£	532,000.00	£	-
Temporary works		£	10,000.00	£	10,000.00	£	10,000.00
Road closures and traffic management		£	10,000.00	£	10,000.00	£	10,000.00
Flood Plain Compensation		£	30,590.00	£	61,180.00	£	-
Service Diversions (allowance)		£	100,000.00	£	250,000.00	£	100,000.00
Sub-Total		**£**	**6,890,590.00**	**£**	**14,730,180.00**	**£**	**4,975,000.00**
Site set-up and management (rounded)	20%	£	1,378,000.00	£	2,946,000.00	£	995,000.00
Sub-Total		**£**	**8,268,590.00**	**£**	**17,676,180.00**	**£**	**5,970,000.00**
Dorset Optimism Bias (rounded)	44%	£	3,638,000.00	£	7,778,000.00	£	2,627,000.00
Option Totals		**£**	**11,906,590.00**	**£**	**25,454,180.00**	**£**	**8,597,000.00**

Exclusions:
VAT
Design and Legal Fees
Land Aoquisition
Inflation/Deflation; rates at 2Q09
Contaminated Land remediation charges

Project: Gillingham Capacity Options | **Job No:** 025755
Date: 24/06/2009
Title: Southern Link | **Author:** JC

One km link between B3092 and B3081

Description	Quantity	Unit	Rate	Cost (£)	Comments
Road					
New Road Build Up; 13.3m carriageway	1000	m	1,650.00	1,650,000.00	
EO for flood plain viaduct	2660	m²	1,400.00	3,724,000.00	Short span low bridge
EO for roundabouts	2	nr	350,000.00	700,000.00	
EO for B3092 realignment	200	m	2,000.00	400,000.00	
Services diversions	1	Item		-	Covered on summary
			Option Total	**6,474,000.00**	
Ground Stabilisation					
Allowance to flood plain area	2660	m²	100.00	266,000.00	Carried forward to Summary
Flood Plain Compensation					
Allowance for compensation for viaduct	532	m³	57.50	30,590.00	Carried forward to Summary

Appendix G
Development Sites

G.1 Development Sites

G.1.1 Table G.1 identifies the sites that are included in the development scenarios in this study for both the scenarios identified in Section 3 and the refined scenarios (refined scenarios 1 and 2). The table shows the SHLAA reference number (where relevant) and the Atkins ID, as well as the scenario that the sites are included in.

Table G.1 – Development Sites

Atkins ID	SHLAA Ref	Location	Scenarios	Refined Scenario
ATK1	2/20/0221	St Martins Clinic	SC1, SC2, SC3, SC4	SC1, SC2
ATK2	2/20/0209	East of Station Road North	SC1, SC2, SC3, SC4	SC1, SC2
ATK3	2/20/0173	Land at School Lane	SC1, SC2, SC3, SC4	SC1, SC2
ATK4	2/20/0244	Adj Chubbs Meadow	SC1, SC3, SC4	SC1, SC2
ATK5	2/20/0546	Land Rear Chubbs Meadow	SC1, SC3	-
ATK6	2/20/0373	Land at Bowridge Hill Farm	SC1, SC3	-
ATK7	2/20/0374	land at Bay Bridge	SC1, SC3	-
ATK8	2/20/0456	Land off B3095	SC1, SC3	-
ATK9	2/20/0532	Land to the North of Common Mead Lane	SC1, SC2, SC3, SC4	-
ATK10	2/20/0249	Adj Heron Lodge	SC1, SC2, SC3, SC4	SC1, SC2
ATK11	-	Wyke land east of Culvers Lane	SC1	-
ATK12	-	Wyke land east of Dry Lane	SC1	-
ATK14	2/20/0242	Adj Primrose Cottage	SC1, SC2, SC3, SC4	SC1, SC2
ATK15	2/20/0453	Windybridge Farm	SC1, and part of site for SC2 and SC3	-
ATK16	2/20/0372	Park Farm	SC1, SC2, and part of site for SC4	SC1, SC2
ATK17	2/20/0544	Land Adj Lodden Lakes	SC1, SC2, SC4	SC1, SC2
ATK18	2/20/0368	Land at Ham Farm	SC1, SC2, and part of site for SC4	SC1, SC2
ATK19	2/20/0389	Land off Shaftesbury Road	SC1, SC2, SC4	SC1, SC2
ATK20	2/20/002	Land South of Meadows	SC1, SC2, SC3 SC4	SC1, SC2
ATK21	2/20/0548	between Barnaby Mead and Bay Lane	SC1, SC2, SC3	SC1, SC2

Atkins ID	SHLAA Ref	Location	Scenarios	Refined Scenario
			SC4	
ATK22	2/20/0387	Field at Wavering Lane	SC1, SC2, SC3	SC1
ATK23	2/20/0547	Land North of Wavering Lane West	SC1, SC2, SC3, SC4	SC1
ATK24	2/20/0530	Land between Milton on Stour and Wavering Lane	SC1, SC2, SC3	SC1
ATK25	2/20/0450	Site Adj pound Lane	SC1, SC2, SC3, SC4	-
ATK26	2/20/0247	Adj Henrietta Villa	SC1, SC2, SC3, SC4	SC1, SC2
ATK27	2/20/0220	Rear of Ferndale and Winmere	SC1, SC2, SC3, SC4	SC1, SC2
ATK28	2/20/0248	Adj Journey's End, Common Mead Avenue	SC1, SC2, SC3, SC4	SC1, SC2
ATK29	2/20/0223	Rear of Dene Hollow	SC1, SC2, SC3, SC4	SC1, SC2
ATK30	2/20/0214	Adj Kentom House	SC1, SC2, SC3, SC4	SC1, SC2
ATK31	2/20/0229	Adj 9 Victoria Road	SC1, SC2, SC3, SC4	SC1, SC2
ATK32	2/20/0245	Adj Wyke Barn	SC1, SC2, SC3, SC4	SC1, SC2
ATK33	2/20/0233	Adj Casa Mia	SC1, SC2, SC3, SC4	SC1, SC2
ATK34	2/20/0219	Rear of Wyke House	SC1, SC2, SC3, SC4	SC1, SC2
ATK35	2/20/0237	Adj Shaftesbury View	SC1, SC2, SC3, SC4	SC1, SC2
ATK36	2/20/0210	Rear Fairview House	SC1, SC2, SC3, SC4	SC1, SC2
ATK37	2/20/0250	2 Park Villas	SC1, SC2, SC3, SC4	SC1, SC2
ATK38	2/20/0216	Adj Lawrence Cottages	SC1, SC2, SC3, SC4	SC1, SC2
ATK39	2/20/0428	Hine Villa	SC1, SC2, SC3, SC4	SC1, SC2
ATK40	2/20/0236	Adj 26 Lockwood Terrace	SC1, SC2, SC3, SC4	SC1, SC2
ATK41	2/20/0347	Lodden Farm	SC1, SC2, SC3, SC4	SC1, SC2
ATK42	2/20/0235	Adj 27 Lockwood Terrace	SC1, SC2, SC3, SC4	SC1, SC2

Atkins ID	SHLAA Ref	Location	Scenarios	Refined Scenario
ATK43	2/20/0381	Land adj Vicotriana Army cadet Force Building	SC1, SC2, SC3, SC4	SC1, SC2
ATK44	2/20/0234	Adj 29 Lockwood Terrace	SC1, SC2, SC3, SC4	SC1, SC2
ATK45	2/20/0412	Addison Close	SC1, SC2, SC3, SC4	SC1, SC2
ATK46	2/20/0240	Churchbury House	SC1, SC2, SC3, SC4	SC1, SC2
ATK47	2/20/0212	The Elms	SC1, SC2, SC3, SC4	SC1, SC2
ATK48	2/20/0218	Oakleigh Court	SC1, SC2, SC3, SC4	SC1, SC2
ATK49	2/20/0241	A303 Tyres	SC1, SC2, SC3, SC4	SC1, SC2
ATK50	2/20/0217	Talisman Antiques	SC1, SC2, SC3, SC4	SC1, SC2
ATK51	-	Chantry Fields	SC1, SC2, SC3,	SC1, SC2
ATK52	-	Focus / Car Show Room	SC1, SC2, SC3, SC4	SC1, SC2
ATK53	-	Site Corner Station Rd/ Le Neubourg Way	SC1, SC2, SC3, SC4	SC1, SC2
ATK54	-	Station Road land to north of station	-	SC1, SC2
ATK55	-	Car Sales forecourt station road	-	SC1, SC2
ATK56	-	Station car park and storage sheds (station road)	-	SC1, SC2

Appendix H
Reference Group Attendance

H.1 Reference Group Attendance

Table H.1 – Reference Group Attendance

Title	First Name	Second Name	Organisation	Attend 27th April	Attend 1st July
	Gemma	Yardley	Dorset County Council	Y	Y
	Maxine	Bodell	Dorset County Council	Y	N
	Trevor	Warrick	North Dorset District Council	Y	Y
	Ian	Smith	North Dorset District Council	Y	Y
	Stephen	Hardy	Dorset County Council	Y	N
	Barbara	Talbott	Dorset County Council	Y	Y
	Stephen	Hill	North Dorset District Council	Y	
	John	Hammond	North Dorset District Council		
	Malcolm	Lewis	Dorset County Council		Y
	Nick	Fagan	North Dorset District Council		Y
	Amanda	Ford	North Dorset District Council		Y
	Hilary	Ritchie	North Dorset District Council		Y
	Anne	Gray	Dorset County Council	Y	
	Derek	Hardy	North Dorset District Council	Y	
	Richard	Dodson	Dorset County Council	Y	
	Paul	Willis	Dorset County Council		
	David	Dawkins	Dorset County Council		
	Stephen	Hellier	Highways Agency	N	
	Jon	Lovatt	Aecom (for Highways Agency)		Y
	Phil	Dominey	South West Trains	Y	N
	Katherine	Burt	Environment Agency	Y	
	Michael	Holm	Environment Agency		Y
	Janet	Ventre	Homes and Communities Agency	N	N
	Jessica	Potter	South West Regional Development Agency		
	Clare	Reid	South West Regional Assembly		
	Susi	Calder	Three Rivers Partnership	Y	
	Louise	Plumridge	Shaftesbury District Task Force		
	Sam	Fox Adams	Dorset Strategic Partnership		
	Vikki	Lilliehöök	Dorset County Council	N	
	Flo	Churchill	South Somerset District Council	Y	
	Sarah	Hughes	Wiltshire Council	Y	
	Sara	Shimali	Dorset PCT	Y	N
	Richard	Burden	Cranborne Chase and West Wiltshire Downs AONB		N
Cllr	Brian	Millichamp	Gillingham Town Council - Chairman Planning Committee	Y	
Cllr	Mick	Lodge	Gillingham Town Council - General Purposes & Planning Committees	Y	Y
Cllr	Anne	Beckley	Gillingham Town Council - Planning Committee	Y	Y
Cllr	Steve	Joyce	Gillingham Town Council - Planning Committee	Y	Y
Cllr	Ian	Stewart	Gillingham Town Council - Mayor, Planning Committee, District Councillor	Y	Y
	Mike	Hebditch	Three Rivers Partnership - Chairman	Y	Y

Title	First Name	Second Name	Organisation	Attend 27th April	Attend 1st July
	Lester	Dibben	Shaftesbury Town Council		Y
Cllr	David	Milstead	Dorset County Council / North Dorset District Council / Gillingham Town Council		Y

Appendix I
Infrastructure Thresholds

I.1 Infrastructure Thresholds

Table I.1 – Infrastructure Thresholds

Infrastructure	Calculations / Notes	Thresholds	Threshold Point
Transport			
Strategic Transport Network (A303)	Regional Network Report and associated data sets (see Appendix F). No current major upgrades planned for A303.	At 2016 and 2026 single carriageway sections of A303 through the region are 'highly stressed'.	Not specified
Local roads (B3081, B3092)	Illustration of step by step strategic traffic assignment model to test housing growth scenarios. Refers to N&NEDTS for more detail on methodology	SC1 – theoretical capacity exceeded on B3081 G to S exceeded by 2026 for C54 (am & pm) & C75 (pm) SC2 - theoretical capacity exceeded on B3081 G to S exceeded by 2026 for C54 (am & pm)	SC1 – 3,366 dwellings
Junctions (town)	Illustrates manual assignment tool, using existing traffic flow data, to determine distribution of traffic on the network following development for scenarios on housing growth (SC1, SC2), containment (C54, C75 & C90) and access strategy	There are no prescribed thresholds to indicate what level of traffic increase at a junction is a material impact. Data indicates highest increases relate to SC1 at C54 (as you would expect). Key signalised junctions in the town are at capacity already.	N/A
Rail and bus	Gillingham on mainline to London Waterloo. Some improvements to increase frequency of services.	High containment scenarios limit the scope for increased passenger demand for bus and rail	N/A
Economy			
Employment growth (jobs)	Potential capacity for job growth is identified for 3 scenarios to illustrate estimated level of employment that could be achieved in Gillingham to 2026 Compares economic scenarios to	Potential jobs needed: Lowest – SC1 1,842, SC2 1,256 (54% new residents stay for work) Highest – SC2 2,326, SC1 3,411 (100% new residents stay for work)	Some scope beyond SC1 (3,366 dwellings) but dependent on economic scenario and policy interventions would be required

Infrastructure	Calculations / Notes	Thresholds	Threshold Point
	housing growth scenarios ie potential labour supply and commuting scenarios Benchmarking enables comparison of employment in Gillingham with similar sized towns	Potential capacity: Lowest scenario – 2498 Highest scenario – 3249	
Employment Land	Translates potential job growth into land use requirements for 3 scenarios	Requirements: Lowest scenario 19.1 ha Highest scenario 24.6 ha Potential sites: existing 18.5 ha + Wyke 10.4 ha	Some scope beyond SC1 (3,366 dwellings) if enough land available, however it is important to provide sites of sufficient quality to attract a diverse range of businesses.
Town Centre	Assesses retail needs (floorspace) for upper and lower level requirements for comparison, convenience & services Identifies a standard sqm for community centres per dwelling	Requirements: SC1- 2,525 to 9,207 sqm SC2 – 1,017 to 6,985 sqm Opportunities: Retail floorspace: 7,452 sqm Office floorspace: 7,000 sqm Other sites in floodplain	Longer term town centre growth restricted by land availability and flooding constraints.
Green Infrastructure	Identifies open space requirements based on standards from the Local Plan	SC1 – could provide 15.11ha of on site open space SC2 – could provide 9.42ha of on site open space	Further growth above SC1 would need to include adequate on site and off site open space
Community Infrastructure			
Healthcare	Identifes a standard from Dorset PCT of 1 GP per 1800 dwellings	Requirements: SC1: 4 WTE GPs SC2: 3 WTE GPs Potential: A new surgery for SC2 in southern extension. SC1 would also need extension of existing surgery to accommodate 1 GP	N/A
Primary School	Identifies a standard for primary schools from DCC ie 28 pupils per age group per 1000 dwellings (approx	Requirements: SC1: 3.5 FE (ie 3.5 x 7 year groups)	SC1 appears to be at threshold but assume significant further growth can overcome this.

Infrastructure	Calculations / Notes	Thresholds	Threshold Point
	1 form of entry per 1000 dwellings). Use DCFS model to identify site area	SC2: 2 to 2.5 FE Potential: Scope to provide a 2 FE new school & expand St Marys by 1FE but additional more difficult	
Secondary School	Identifies a standard for primary schools from DCC ie 28 pupils per age group per 1000 dwellings (approx 1 form of entry per 1000 dwellings).	Requirements: SC1: 3.5 FE SC2: 2 to 2.5 FE Potential: SC2 could be accommodated at expanded Gillingham School. The refined SC1 requires further expansion but not at a scale large enough for a second secondary school.	SC1 would require expansion of exiting secondary school.
Indoor Sports	Identifies standards based on population for swimming pools and indoor sports halls from the Sport England Facilities Planning Model	No further requirement for swimming pool. SC1 adds a requirement for 1025sqm of sports hall and SC2 874 sqm	N/A
Landscape/Environmental capacity	Landscape constraints: • Higher ground to east & west of town • Visual boundary around Milton on Stour • Protect hamlet of Colesbrook	Unrefined SC1 (Max growth – 4,976 dwellings, 10,798 pop.n) would include development of these areas. Further growth would have to take place to the south.	Between SC1 and Unrefined SC1