

# EMPLOYMENT FOCUS GROUP REPORT

## SUMMARY

### Is the amount of employment provision: about right, or are there local aspirations to see changes?

#### Have we got it right?

- Employment provision: mainly commercial and light industrial, complemented by Town Centre employment in retail, service provision and community services.
- Occupation Structure is healthy, with large numbers employed in managerial and professional jobs well suited to employment in M27 corridor locations. Unemployment remains low and well below the national and SE averages.
- Local job opportunities: extremely wide range of medium and small industry suitable for accommodation on business parks; banking/office/administration/services; health, educational, recreational and library services, catering, agricultural. Tourism is not currently a large employer, but the National Park does provide some future opportunities.
- There is little inward migration of younger workers, largely because it is an expensive housing area.
- Estimate of local jobs is 2226 (WCC), of which 1098 are 'self-containment' and 1128 commute in.
- Of the economically active 3509 (WCC), some 31.3% or 1098 are 'self-containment', with the remainder of 68.7% or 2411 commuting out.
- A vibrant and prosperous Town, which is not by any measure, a dormitory town.
- General feedback is that the Town has 'got it right'.
- **So, how to 'keep it right'?**
- An additional 500 houses in the community, plus the compound effect of 250 at Waltham Chase and 250 at Swanmore over the next 20 years will have an effect on the Town. This will drive a demand for additional employment opportunities.
- Sainsburys have agreement to build a superstore on the edge of the Town, which is expected to increase local job opportunities, but also adversely affect some local retail outlets. Many of these jobs will be part time service and shift working, which will not suit the skills profile of the town (40.4% technical and skilled trades)
- The Town Centre is vibrant, with few vacancies. Continuing efforts will be needed to keep it vibrant.

- Parking is one of the negative feedback areas about the town. Sainsburys will provide a large car park which may alleviate some of this pressure, but there currently remains a difficult situation for local shoppers and traders alike, contributing to a stifling of local trading. In particular town centre parking must remain competitive with Sainsbury's, both in availability and price.
- The Town Centre boundary and the Shopping Centre boundary have been redrawn to recognise the current situation and allow for some expansion, and to include the heritage section of the town.
- Population growth by 2031 is estimated to be 11.3% (WCC). As a rough rule of thumb, to preserve the balance of employment in the Town the volume of jobs would therefore need to increase by a similar amount: 256. (see page 25)
- Survey feedback from the Town's non-retail sector has indicated that there are a number of companies interested in moving within Bishop's Waltham to larger premises, thereby increasing local job opportunities. Feedback from local agents indicates that there is a demand for small starter business units.
- Recommendation, that needs more evaluation, is that a piece of land (of a size roughly similar to Claylands) is allocated for the development of a mixture of large and small business units. It is estimated that Claylands employs around 260 people. This land should be zoned to allow use for business, industrial and retail. If no space is allocated, there is a danger that the 'got it right' scenario is diluted.

## SECTION 1 COMMERCIAL

**Sustainable development has an economic role** – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure

**Is the amount of employment provision about right or are there local aspirations to see changes?**

1. Consider the range of local employment opportunities available in your settlement, from industrial and commercial sites, to shops, service providers (opticians, estate agents etc.) and community services such as health centres and schools/nursery provision – all of which provide a range of job opportunities.
2. If local people wish to work locally do the opportunities exist? Consider how many jobs there are, and whether there is a reasonable balance between jobs available locally compared to the working population.
3. How many local people are self-employed / work at home – do they need local flexible premises? Are there opportunities to share, or rent a space for short periods?

4. Do any of the existing employment premises/sites offer potential for other uses? Are they causing problems (e.g. traffic, environmental); should they be replaced or relocated? Undertake an audit of existing premises – how many are vacant and speak to local estate agents to determine demand.

## **EVIDENCE, METHODOLOGY, DATA AND CONCLUSION FOR BISHOP'S WALTHAM ARE SET OUT BELOW**

**1. Consider the range of local employment opportunities available in your settlement, from industrial and commercial sites, to shops, service providers (opticians, estate agents etc.) and community services such as health centres and schools/nursery provision – all of which provide a range of job opportunities**

The employment provision in Bishop's Waltham is varied and currently thriving, with mainly commercial and light industrial jobs complemented by Town Centre employment in retail, service provision and community services. Although much focus is paid to the retail element of local employment, probably because it is most visible, and also, more recently because of the concerns when Sainsbury's store opens, commercial and light industrial business provide by far the most local employment. It is critical that this element is encouraged to grow in the future in order to preserve the current 'got it right' feeling.

The population and working statistics for Bishop's Waltham (Census 2001 and 2011) remain healthy, with more than 60% of residents falling into the working age groups (16 – 64). The Census returns categorise people aged 16 to 74 as economically active, although "retired" is a permitted activity, as is "unemployed".

Some local people in the 64-75 group will need to continue working, and 7.8% of the residents of Bishop's Waltham fall into this age bracket (717 people in 2011)(see Table 1 below).

Average age increased from 40 to 44 from 2001 to 2011. This ageing was faster than South East and National trends, but this is to be expected in a rural community with low death rates and very little inward migration of new young workers. Planned new build housing should help to retain and attract young people to live and to work in Bishop's Waltham and so moderate the aging effect in the future.

**Table 1 Age Structure- By percentage Census 2001 and 2011 (Parish data) all residents 6550**

	2001 – total Residents 6550	2011 – total Residents 6723
People ages 0-15	21.2%	18.2%
People ages 16 - 64	62.4%	61.2%
People ages 65 – 74	7.8%	10.7%
People aged 75 – 90+	8.6%	9.9%
TOTALS	100%	100%

The Occupation Structure of Bishop's Waltham is also healthy and varied, with very large numbers working in Managerial and Professional roles (35%) well suited to employment in many M27/M3 locations (Portsmouth, Fareham, Southampton, Eastleigh and Winchester) as well as to some local jobs. Comparison with South East of England statistics is favourable. Skilled and industrial staff (17.6%) technical and admin (22.8%) comprise together 40.4% of the 2011 workforce, emphasising the importance of this commercial sector. Workers in caring, leisure and retail are relatively few despite the viability of Town centre retailing.

**Table 2 Occupation Groups – Census 2001 and 2011 (Parish data)**

The total number aged 16-74 in employment rose from 3291 to 3377

Occupation	2001	%	2011	%	SE 2011
Managers and Professional	1128	34.0%	1191	35.3%	31.0%
Technical, Admin and Secretarial	861	26.0%	777	22.8%	25.3%
Skilled Trades and Processing	578	17.6%	589	17.6%	16.8%
Caring and Leisure	205	6%	287	8.5%	9.3%
Sales and Services	204	6%	237	7.0%	7.9%
Elementary	315	10.4%	296	8.8%	9.7%

Occupations					
<b>TOTALS</b>	<b>3291</b>	<b>100%</b>	<b>3377</b>	<b>100%</b>	<b>100%</b>

Official Unemployment Statistics remain low (see Table 2a below) with only a small increase, in spite of recession. Percentages compare favourably with the South East of England. There are a rising number of people who are unable to work or who are long term unemployed. Most of the need for new local jobs in the future will be driven by new housing (1000 units locally).

**Table 2a Unemployment Statistics from Census 2001 and 2011**

	<b>2001</b>	<b>SE England</b>	<b>2011</b>	<b>SE England</b>
Of working population	72 = 1.56%	2.31%	121= 2.5%	3.4%
Of those economically inactive aged16-74	18		57	
Long term unemployed	19		46	

**2. If local people wish to work locally do the opportunities exist? Consider how many jobs there are, and where there is a reasonable balance between jobs available locally compared to the working population**

The range of employment opportunities currently available within Bishop’s Waltham is extremely wide, including medium and small industry suitable for accommodation on Business Parks, retail (convenience and comparison), banking/office/administrative services, (see Section 2) a range of health services, schools, recreational and library services, self-employment, a great many catering businesses, (from take-aways to pubs to coffee shops to restaurants) (see Section 2), and (outside the settlement) a good range of large and small scale agricultural businesses, including pigs and horses. (AMP Report 2012, Local Surveys2013 and Table 3)

Tourism is not currently a source of much employment. The close proximity of the new South Downs National Park and the important heritage site of the Bishop’s Palace (12<sup>th</sup> Century ruin) in the centre of Bishop’s Waltham provide opportunities for expansion of the local economy.

The strength of local employment is partly attributable to the location of the Town and its villages. Although there are regular hourly bus services to the bigger towns, generally buses are slow (with circuitous routes) and expensive; and utilize busses far larger than the volume of usage requires, leading to constrained traffic flow in some narrow streets. Car ownership is high, but the rising costs of motoring may make local jobs more desirable.

Bishop's Waltham also attracts workers from outside the locality. Notable are workers in some specialist and highly skilled jobs in the local industry available in Bishop's Waltham, jobs in the flourishing Bishop's Waltham catering scene, in commercial services and in community services (schools, healthcare, library etc).

The importance of local employment was clearly demonstrated in the WCC 2007 Travel to Work Data (based on 2001 Census data). These data showed strong flows of workers to bigger towns but also that local employment played an important part in meeting the many job needs of local people plus a significant inflow of workers from surrounding settlements and towns. So Bishop's Waltham in 2001 was not just a dormitory for urban workers. It had a vibrant employment life of its own. Unfortunately comparable WCC data based on the 2011 census will not be available for some years, but other indications are that the local employment scene has remained lively and growing and that the available local job opportunities match well with demand.

The Town is currently very prosperous. Town Centre retail units are all taken, and there are only two small vacant offices in the Town Centre. Commercial and light industrial units are more dispersed, and there are only 3 reasonable quality units suitable for commercial or light industrial use, which are vacant, out of 125. Most vacancies are situated in unattractive locations, with a significant portion of storage. (See table 3 below).

**Table 3: Commercial Vacancy Figures**

			Vacant	%
<b>B2 plus B8 (general and storage/distribution)</b>				
	26 large units	Claylands type	3	11
	32 small units	Swanmore Park Type	3	9.3
<b>A2 plus B1 (Financial and professional services, business offices)</b>				
	13 Large	Barclays Bank type	0	0
	54 Small	Smaller offices	10	18.5
<b>Overall Summary</b>				
	39 Large		3	7.6
	86 Small		13	15

	<b>125 units</b>		<b>16</b>
			<b>12</b>

Of the 16 vacancies, further investigation reveals that the majority of the vacant premises are unlikely to be attractive to most local companies. Only 2 small vacant offices are located in the Town Centre See Table 4, below.

**Table 4: Location of vacant unattractive premises**

Bank Street	Building which has lacked maintenance	3
Brook Street	Storage areas behind High Street	2
Trinder House	Damaged roof	4
Swanmore Park	Storage Yards	2
Winchester Road	Storage Yards	2
<b>Total</b>		<b>13</b>

A survey of light industrial firms has revealed a buoyant picture, with several looking to expand. Some 44% of firms surveyed are actively looking for more space. Many of these have an established network of customers and suppliers in Bishops Waltham and they would wish to move to larger premises within Bishops Waltham, rather than lose the commercially valuable existing network.

Almost half the firms supply the local market, but there is also a surprising number (44%) serving the wider market, including some high technology firms. Local ownership of 56% is a strong feature, and it appears that low rents and rates have been attractive.

Claylands Road and Garfield Road industrial areas have suffered conflicts with residential areas nearby. There are firms in these areas who would consider relocation if economic circumstances were favourable.

Sainsbury expect to employ about 300 staff. Most will be part time service jobs, which are unlikely to attract the majority of the local population who are predominantly technical, professional, skilled or administrative. Many employees are likely to be from outside the area. A number of convenience shops may close as a result

Surveys in the Town and neighbouring villages indicate considerable satisfaction with the facilities and way of life of Bishop's Waltham, suggesting that the Town has 'got it right'. There are virtually no second homes. In spite of its charms this is not a "visitor settlement" like Alresford, Bishops Waltham is very much a working settlement.



The settlement of Bishop's Waltham is planned to grow by 500 dwellings in the next 20 years, indicating the need for growth in employment opportunities in order to preserve the current 'got it right' balance. Bishop's Waltham functions as a hub for 5 other villages, 2 of which are also planned to take extra housing (a further 500 dwellings). These Villages also look to Bishop's Waltham for local employment (local PC surveys) and services, especially for young people. Local young people and families in need of affordable housing will be able to occupy new build local housing and so stay in the local jobs market. Some of the new housing may attract family units from bigger towns, adding to the potential demand for local jobs. This further emphasises the future need for more commercial and industrial employment in Bishop's Waltham.

The assumption of 500 additional houses over the plan period indicates an additional 650 people in Bishops Waltham and a further 650 from Swanmore and Waltham Chase from their combined additional 500 houses. (This uses the WCC factor of 1.3 people per household). Surveys of the neighbouring parishes indicate a great reliance on Bishop's Waltham for shopping and for services. This puts a significant further pressure on Bishops Waltham to address current issues like parking as well as growth of infrastructure and services demand.

The assumption is that in order to preserve the current 'got it right' feeling, it is necessary to preserve the overall balance of employment within this working Town. This needs to take account of growth in population in both Bishops Waltham and the neighbouring villages. It also needs to recognise that firms will not employ exclusively local staff. The attached assessment (Job Growth, Page 25) indicates that a range from about 200 to 250 additional jobs will be required. Sainsbury will generate up to 300 jobs, but the bulk of these will be service type and part time. The majority of Bishops Waltham residents (40.4%) are technical or skilled trades, whilst only 16 % are employed in services and it is important to maintain the range of employment opportunities in the Town. So it is recommended that facilities are provided for commercial and industrial jobs expansion as well, and that this is achieved by allocating additional land for industrial units. This should include a range of small units suitable for "one man band" operations and larger units, similar in scope and scale to Claylands Road.

The area should be zoned to allow use for industrial, business and retail activities. This will allow flexibility for relocation of businesses from areas such as Claylands, Malt Lane and Garfield Road to achieve better land usage. The risk of expansion of retail usage in competition with the Town Centre is judged as acceptable. It appears that there is no flexibility in zoning to achieve the objective: to allow retail activities in the new business park only if they are not detrimental to the Town Centre.

**3. How many local people are self-employed/work at home – do they need local flexible premises? Are there opportunities to share, or rent a space for short periods?**

There is a solid core of self-employment in Bishop’s Waltham. Statistics from the 2011 census show an increase since 2001 (Table 5). This is reflective of the national trend; for in times of recession when jobs are scarce, more people embark on self-employment as a way to support themselves and their families.

The role of the Internet in creating self-employed job opportunities is growing. Bishop’s Waltham and its locality have Broad Band cover and Mobile Phone cover which remain highly variable in quality. It is critical for all commerce in Bishop’s Waltham, and particularly for the self-employed, that these vital modern services should be improved (see the Community and Social Infrastructure Document).

**Table 5 Self Employed – based on all residents aged 16 - 74**

	2001	%	2011	%
Self employed	550	11.96%	597	12.35%

Some of these newly self-employed people will be successful enough to need business premises. The jobbing builder will need a lock up, the computer advisor needs shop premises, the peripatetic beauty consultant, the interior designer, and providers of business services or training will look to hire a unit in a business park. The two business parks in Bishop’s Waltham are currently full and some companies seeking to move in order to expand. So this natural expansion of employment activity is restricted until more land is allocated.

Feedback from local agents is that there is a significant need for small business units which these starter businesses can access. The Community Survey also indicated that of the respondents who worked from home (20% of local people who work in Bishop’s Waltham), a third might want flexible business premises in the next 10 years.

**4. Do any of the existing employment premises/sites offer potential for other uses? Are they causing problems (eg. traffic, environmental); should they be replaced or relocated? Undertake an audit of existing premises – how many are vacant and speak to local estate agents to determine demand**

A complete review of land for use for business and industrial will be undertaken in Stage 3 of the Development Plan. Vacancies have been analysed see Tables 3 and 4, and there are few vacant sites.

It is envisaged that the Primary Shopping Area (Policy SF5), already (2013) very much larger than documented in Winchester's Town Centre First Policy (Bishop's Waltham Town Centre Boundary and Primary Shopping Areas), will need to expand further in order to offer some retail development and offices with more modern interior space. This could be inside the Town Centre Boundary on land at Malt Lane.(SHLAA 1712 Nov 2011) where there is the possibility of a mixed development, plus associated car parking and revised bus route). Only the Sainsbury site is currently outside the Town Centre Boundary (Policy SF1). These Policies are addressed in Section 2.

## Parking

Parking in Bishops Waltham is a constraint on local businesses. In every case, when local businesses were interviewed, the shortage of parking was in the top three of their concerns in maintaining a viable, long term presence in Bishop's Waltham. It is vital for the future vitality of the town centre that parking facilities are as attractive as Sainsbury's to ensure that the centre can compete on equal terms.

**For businesses that are High Streetfacing:**The effect is reduced footfall and hence sales, especially at peak times. Staff parking (long stay) is limited and it deters potential new staff.

**For other businesses away from the High Street:** Customers/clients frustrated by lack of parking, is making them contemplate taking their custom elsewhere. NB In many cases such businesses have provided for staff parking, but not all.

There remains a severe need for additional car parking in the Town Centre to maintain its viability. In particular the town centre parking must remain competitive with Sainsbury, both in cost and availability.

## SECTION 2 SHOPPING AND SERVICES IN THE TOWN CENTRE

Any modern community needs a wide range of facilities and services to function properly. Bishop's Waltham has a range of facilities that meet the immediate needs of local residents. In order to continue to serve the community it is important to retain and, wherever possible, improve the existing shopping and commercial centre. The more viable the Town is, the more employment will be provided. The centre needs to be accessible by various means of transport, including walking, cycling and public transport, helping to reduce dependence on the private car. (Winchester District Local Plan Review, adopted July 2006).

Bishop's Waltham Town Centre also serves the neighbouring villages of Swanmore, Waltham Chase, Durley, Upham and Lower Upham. New housing is planned for Bishop's Waltham (500 units), for Swanmore (250 units) and for Waltham Chase (250 units) in the period to 2031. This makes it vital that the Town Centre and Primary Shopping Area should have scope for growth over that period. The Town Centre mix of retail and services includes a good number of catering establishments and some gift shops. These might encourage tourism, which is currently not a major driver of Town Centre employment. Except for restaurants, bars and cafes the Town Centre currently provides little in the way of leisure opportunities.

Although these facilities and services are so important to the settlement, the numbers of local jobs in Town Centre retail and commercial services are relatively few at 12% (Census 2011). Sainsburys said, in their planning application, that their new superstore might employ 300 people, but some of these jobs will be taken up by non-local applicants.

### **Are the defined shopping area and town centre boundary about right?**

**The Town Centre Boundary** (Town Centre First Policy SFI – Map 2.1 - attached) is currently adequate, except that the imminent Sainsburys Development (approved Dec 2011, Ref: 10/01650/FUL), will lie beyond the B2177 and well outside the Town Centre Boundary. The Town Centre Boundary might now be revised to include the main heritage areas of the Town (St. Peter's Street, St. Peter's Church and Bank Street), to enhance tourism. Together with the High Street they lie within a conservation area. There are numerous retail, commercial and leisure businesses located outside the Town Centre. (Section 1.2 above)

**The defined Primary Shopping Area** (Policy SF5) is out of date. Primary shopping (A1), currently extends well beyond the High Street and Upper Brook Street (as defined in the existing Policy SF5) to include some of St George's Square, parts of Houchin Street, plus a more modern parade of retail units on Basing Mews and Merlin Mews.

Adjacent to St George's Square are the Malt Lane/B2177 sites, which include Budgensconvenience store and Fox (garden machinery sales and care). Most of this additional retail has been in place for some years. The Protected Primary Shopping Area should be adjusted to include some of these retail areas.

The Town Centre accommodates a total of 52 comparison, convenience and service retail units (A1) and 23 commercial services (office A2) units and 12 catering (A3,4 and 5) units. Three further catering units (two pubs and one Indian restaurant) lie very close to the Town Centre. (Table E2.1 below)

(Bishop's Waltham Business Lists June 2013), (AMT Bishop's Waltham Town Centre Benchmarking Report 2012), (Glossary – Page 24)

- Vacant premises are few. There are currently no retail units vacant but 2 office premises and some warehouses vacant in the Town Centre have been empty for more than 6 months. There might be some demand for larger and more modern units. Outside the Town Centre Boundary there are several other vacant office premises.
- The Sainsburys Development (approved Dec 2011) is due for completion by 2014. It lies outside the Town Centre (SF1). The Primary Shopping Area. (SF5) It is geographically too distant for Sainsburys to be included inside it. The superstore will be connected to the Town Centre by a walkway and pedestrian crossing over the B2177 to Malt Lane.
- There are no shops with frontages which require protection of their usage (except for Policy SF5), but the High Street shops lie within a Conservation Area, some of them are listed and there are constraints on the appearance of their shop fronts. The Kings Church occupies a large Victorian building in the High Street. A Working Men's Club occupies a small building on Houchin Street.
- The main shopping area has grown substantially in recent years, but could be improved further by the addition of more comparison shopping. There is a good supply of convenience shopping, retail services, commercial services and catering. The Youth Club, the Working Men's Club and the Kings Church offer Assembly and Leisure (D2) for particular categories of user.
- There is some potential for change of use, especially on the Malt Lane/B177 sites (SHLAA 1712) which could be used for a mixed retail / office/leisure development. The Youth Club building on the Malt Lane site is in poor condition and this facility should be relocated. Some offices on the High Street might do better as residential accommodation, but are constrained by the existing Policy SF5. In the longer term, should the Kings Church and the Social Club consider moving to alternative premises, their units might be attractive for other uses. The Surgery site on Lower Lane lies within the Town Centre: it which will shortly become available for change of use when a new Surgery is built as part of the Sainsburys development. This site has poor access.

Suggested evidence sources/methodology:	Data for Bishop's Waltham:	Conclusion
<p><b><u>Are the defined shopping area and town centre boundary about right?</u></b></p> <p>Policy SF1</p> <p>MAP 2.1</p> <p>** Bishop's Waltham Business List Survey 2013</p> <p>** AMT Bishop's Waltham Town Centre Benchmarking Report 2012</p> <p>NLP Site Survey 2007</p> <p>Parish Council Surveys in neighbouring villages.</p> <p>BW Survey July 2013</p> <p>Table E2.1 (below)</p> <p>Table E.2.3 (below)</p>	<p><b><u>The settlement of Bishop's Waltham</u></b> has one main retail, leisure and commercial services centre (the Town Centre, policy SF1) but also has units for retail and commercial services on the Claylands business and retail park. Also outside the Town Centre are one convenience store, 3 pubs, 1 restaurant, a petrol station, three car maintenance businesses, a dentist, a vet, an undertaker, various retailers and 3 churches. (see Section 1)</p> <p><b><u>The Town Centre</u></b></p> <p><b><u>Policy SF1</u></b> states that retail and leisure development will be permitted within town and village centres (namely Winchester, Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham) as defined on the Town Centre Proposals map (attached).The Town Centre provides a good range of facilities primarily serving the day to day needs of residents in Bishop's Waltham and the neighbouring villages of Swanmore, Waltham Chase, Durley, Upham and Lower Upham. These villages have Post Offices plus convenience stores for top up shopping. There is a cycle shop, Post Office and convenience store in Waltham Chase.</p> <p><b><u>Policy SF5 The Primary Shopping Area is out of date</u></b>, as retail (A1) units have extended beyond the designated area. Some revision is needed.</p> <p><b><u>Shopping, Commercial Services and Leisure in the Town Centre</u></b></p> <p>There is a good supply of Convenience shopping, a fair range of consumer Comparison and Service retailers (A1) and a good range of Commercial Service facilities (A2). A wide range of restaurants, bars, cafes and takeaways is provided, (A3,A4 &amp;A5) several of which open in the evenings and during the daytime on some Sundays. There is otherwise little leisure provision within the Town Centre. (see Community &amp; Recreation report)</p> <p>Table E2.1 (below) shows that 102 business units were recorded in or near to the Town Centre in June 2013; Almost all available units are in use. <u>No retail premises are vacant</u>. 5 office or warehouse units are currently vacant although two or three retail units are on short term leases. Most Retailers and Commercial Services providers in the Town Centre are independents. Exceptions are Boots, Lloyds Pharmacy, the 2 Co-ops, plus Costa Coffee and Budgens (both of which are franchises).</p>	<p>The Town Centre Boundary (SF1) is substantially correct. It does allow some space for increased retail, services and leisure to 2031. (Map 2.1). The Town Centre Boundary could now be revised to include the main heritage areas of the town (Map 2.2) but not the Bishop's Palace or planned Sainsburys' superstore. (Ref: 10/01650/FUL)</p> <p>The Prime Shopping Area (SF5) is out of date. The existing Shopping Areas should be protected by a revised policy SF5 to include some existing retail units currently outside the Primary Shopping Area although within the Town Centre Boundary.</p> <p>The planned Sainsburys development lies outside the Town Centre Boundary and should also remain outside the Primary Shopping Area.</p> <p>The range of retail and services is generally satisfactory and well appreciated by residents of Bishop's Waltham and neighbouring settlements. <u>There are currently no shop premises available for rent in town.</u></p> <p>There are some vacant office premises; They</p>

\*\* Bishops Waltham  
Business List Survey -  
updated 2013

Glossary for use definitions –  
NLP Retail and Town Centre  
Uses study 2007

**Table E2.1 Bishop's Waltham retail & services in Town Centre.- 2013**

Type of Unit	Number of Units	Proportion of Total Number of Units (%)		
See Glossary for definitions				
2013 retail and services in Bishop's Waltham	Checked June 2013 **	Bishop's Waltham %	2007 NLP National * Index = 100	2006 Goad National Average*
A1 Comparison Retail	29	28.4	91.2	46.4
A1 Convenience Retail	11	10.8	169.2	9.1
A1 Services	12	11.8	216.3	8.0
A2 Services	23	22.5	143.9	10.7
A3 and A5	10	9.8	55.4	13.9
A4	2	2.0	n/a	n/a
Miscellaneous	10	9.8	n/a	1.4
Vacant offices	5	4.9	19	10.5
Total	102	100	n/a	100

\*.UK average from town centres surveyed by Goad Plans (Nov 2006)

\*\* BW Business List Survey 2013 and

\*\*\*AMT BW Market Town Benchmarking Report 2012.

\* NLP Site Survey June 2007

are too small and/or without adequate private parking.

TABLE E2.1 shows comparison retail rather below the 2007 National Averages, and that Bishop's Waltham has a good provision of convenience shopping (higher than the 2006 Goad average).

The number of Comparison and Services retailers has increased since the 2012 AMT Benchmarking Survey for Bishop's Waltham\*\*\*

It would seem that currently the Town Centre is blossoming.

Bishop's Waltham Business  
List updated 2013

There is a good trend towards Sunday opening (cafes and shops) especially when organised Street Markets, rallies and the annual Festival and Carnival take place though out the summer. This programme of activities is mainly organised by the Chamber of Trade and the Rotary Club.

**Table E2.2 Bishops Waltham retail and services outside Town Centre (Claylands Business Park and elsewhere).**

Type of Unit	Bishop's Waltham non-town centre
See Glossary for definitions	**
A1	8
Others	4
Comparison	7
Convenience	5
Total	12



**Table E2.3**

Note: These Table E2.3, E2.4 and E2.5 numbers have not been changed.

Winchester CC Retail Study Update 2012

**Convenience Shopping**

The Town Centre enjoys comprehensive convenience shopping including three national food stores, plus independent, specialist convenience retailers such as a butcher, specialist baker, fishmonger, greengrocer and delicatessen.

**Table E2.3 : Convenience Shops (2010 Prices)** [Winchester Retail Study Update 2012](#)

Centre/ Stores	Gross Floor- space Sq M	Net Sales Floor- space Sq M	% Conv. Floor- space	Conv. Sales Floor- space Sq M	Company *  Average Per Sq M	Bench- mark Total £M Turn- over
Bishops Waltham  Budgens	929	539	98%	528	£4,000	£2.11
Co-Op	453	186	98%	182	£7,279	£1.33
Local Shops	n/a	329	100%	329	£4,000	£1.32
<b>Bishops Waltham Total</b>		<b>1,054</b>		<b>1,040</b>		<b>£4.76</b>

\* Turnover densities exclude an allowance for petrol sales in large food stores and include an allowance for VAT.

*Retail Rankings and Verdict 2011*

*Institute of Grocery Distribution*

*Goald Plans Nov 2006*

Winchester CC Retail Study  
Update 2012

**Table E2.4: Convenience Retail Commitments (2010 Prices)**[Winchester Retail Study Update 2012](#)

Centre/ Stores	Gross Floor- space Sq M	Net Sales Floor- space Sq M	% Conv. Floor- space	Conv. Sales Floor- space Sq M	Company *  Average  Per Sq M	Bench- mark Total £M Turn- over
Bishops Waltham  Sainsbury's		3,255	70%	2,279	£12,599	£28.71

**Table E2.5: Comparison Shops within Other Main and Local Centres 2010 (2010 Prices)**  
[Winchester Retail Study Update 2012](#)

Location	Net Sales FloorspaceSq M	Average Turnover  Per Sq M	Benchmark Turnover £M
Bishops Waltham	800	£4,000	£3.20

Sources: *Goald Plans Nov 2006*

Table E2.4 indicates the planned provision of convenience shopping by Sainsburys, to be in place by 2014. A further 30% of floor space (975 sq. m) will be allocated to Comparison shopping.

Sainsbury's provision of convenience and comparison shopping will exceed the total floor space currently allocated for both in Bishop's Waltham Town Centre.

Policy CP6 WCC Local Plan  
Part 1 submitted Oct/Nov  
2012)

**Issues affecting employment and retail in Bishops Waltham Town Centre (based on 2013 information, revised)**

Planning permission for a SainsburysStore has been granted, and work is due to start on site imminently(July 2013). It will include a new Surgery (**Ref: 10/01650/FUL**) see **Table E2.4 for floor space data.**

- The Town Centre is supported by a loyal local customer base from Bishop’s Waltham and from its neighbouring villages. Local residents would have to travel in excess of 7 miles to reach alternative facilities (at Hedge End, Whiteley, Winchester or Fareham).
- The Town Centre is dominated by independent traders and the demand for premises within Bishop’s Waltham from national and regional retail and leisure operators is poor. If independent convenience traders were to close in the future, when Sainsburys opens, the availability of new occupiers is uncertain. There has been a recent surge of new traders, so that there are currently no vacant retail units in the Town Centre. More retail units currently needed to allow for newcomers and for movement by existing traders, some of whom are known to want more space. Most traders are however satisfied with their space and location within the Town Centre. (**Local Town Centre Visual and Verbal Surveys**). If larger national or regional operators were to want space in the TownCentre, there are currently no units to offer them.
- The historic character of the town centre (SF1) means that future development opportunities are limited except on the Malt Lane sites (SHLAA 1712) or the Surgery site (when vacated as planned). The Town Centre Boundary could be changed to incorporate some heritage areas, St Peter’s Street, Bank Street (both sides), in order to establish Bishop’s Waltham as an historic town with tourism potential.
- The Town Centre now has a reasonably wide range of specialist independent convenience shops and the number and range of comparison shops has improved markedly since 2011, so that the shopping experience is comparable with that of Alresford. Nevertheless the range could be improved. Most shops supply essentials for local residents, although there are some gaps (e.g. menswear, sports and hobbies and technology). There are few shops for visitors. Some tourist style outlets would enhance the Primary Shopping Area, (e.g. local crafts, galleries).

**CONCLUSIONS**

Bishop’s Waltham has an historic Town Centre with many listed buildings within an extensive conservation area. Development opportunities are limited and the existing urban form may act to restrict expansion of facilities within the Town Centre.

**THE FUTURE OF THE TOWN CENTRE**

As Bishop’s Waltham and its neighbouring villages grow, with planned extra new build dwellings (500+250+250) in the period to 2031, the Town Centre will be under pressure to improve its range and choice of shopping and leisure facilities. Any Tourism development will add to this. There must be scope for controlled expansion of retail, services and leisure within the Town Centre. There may be a need to build additional units or to change some uses (see Page 21). The current provision of comparison retail does not adequately meet the needs of men, young people, sport or tourism. The Town Centre does not provide a sufficient range of opportunities for leisure and recreation.

The approved Sainsburyssuperstore development will be completed by 2014. There will be some increase in employment opportunities, but there is also the possibility that some convenience shopping outlets will close.

Car Parking Report (EFG  
June 2013)

- There is a reasonable range of leisure and entertainment facilities, based on bars, cafes, restaurants and take-aways). This applies most evenings and some Sunday's daytimes.
- There is a very limited supply of premises available in Bishop's Waltham to accommodate new leisure and recreation operators looking to trade in Bishop's Waltham Town Centre, given the low vacancy rates. (Community & Recreation Report)

**Issues affecting the future of employment and retail**

- TOURISM currently contributes little to the employment scene in Bishop's Waltham. There is scope to expand tourism activities. There is already a busy programme of Sunday markets, street fairs, and a carnival, a week-long Festival, road races, rallies, open gardens and pre-Christmas events. These are mainly organised by the Bishop's Waltham Chamber of Trade and the Rotary Club and aimed at local residents.

As Bishop's Waltham is a gateway town to the South Downs National Park and contains the ruins of the Bishop's Palace, there is scope for attracting visitors from further afield; some visitors to the Museum in the Palace grounds come from quite distant locations. More could be done to promote the Town to raise visitor numbers and so increase the demand for food and drink and for additional tourism retail.

- CAR PARKING in the Town Centre is a major constraint on local business. High Street retailers complain that lack of parking at peak times reduces footfall and hence sales. Business owners have difficulties in finding long stay parking when called out on business or when working shifts. Parking for one or two coaches would facilitate the development of Tourism. The imminent Sainsbury's car park may be helpful, but is not well located to serve the Town Centre and may need most of the spaces for its own customers, staff and for the new Doctors Surgery.

**Scope for change and improvement**

- Leisure activities other than pubs, cafes and restaurants are poorly provided for within the Town Centre.
- Small spaces for new retail start-ups are needed and for new tourism-related shopping (e.g. shops for local crafts).
- More over-night accommodation is needed for Tourism.
- New, larger, more modern retail spaces could be attractive to new traders.

	<ul style="list-style-type: none"> <li>Any new building development should match externally with existing architecture</li> <li>Car parking provision needs improving and enlarging and is under review by the Parish Council and by C&amp;IS</li> </ul>	
<p><b>Is your settlement named in the retail hierarchy in Policy DS1?</b></p> <p><b>What will this mean for future provision?</b></p> <p><b>Might there be changes of use?</b></p>	<p>Under Policy DS1, Bishops Waltham is defined as a District Centre which has potential to deliver additional retail/leisure floor space. Possibilities exist within the Town Centre Boundary and in other settlement locations for some changes of use to accommodate a mix of new retail / office / leisure units: for example on the Malt Lane sites fronting the B2177 or on the Surgery site (Lower Lane) to be vacated when the Surgery is relocated to the Sainsbury's development. (This site has poor access.)</p> <p>Any newly built provision should be limited to the addition of more local shopping / office / leisure units.</p>	<p><b>CONCLUSIONS</b></p> <p>1. There will be a need for additional retail/office/leisure floor space within the Town Centre. This may involve some site specific changes of use.</p> <p>2. There may be a need for additional retail, offices and leisure in other locations within the settlement. This may also require some changes of use (e.g. Claylands).</p>
<p><b>Provide a map of existing provision (shop types, non-retail, and services) – how does this compare to the town centre / primary retail boundaries defined in the 2006 Local Plan?</b></p> <p>See MAPS 2.1,2.2</p>	<p>The Town Centre Boundary is adequate at this time, but consideration could now be given to extending the boundary to include the adjacent main heritage sector of the town. (St Peter's Street, St Peter's Church and Bank Street) for reasons of tourism.</p> <p>The Primary Shopping Area needs some updating now and may need further review in future.</p> <p>A potential new mixed retail/office/leisure development on the Malt Lane/B2177 sites could create an attractive frontage to the town on the B2177 and also a vital link with Sainsburys.</p>	<p>3. Changes to Policy SF1 (Town centre Boundary) and SF5 Primary Shopping Area are suggested (See MAPS)</p> <p>The Policy SF1 Boundary remains adequate for our current needs, but consideration should be given to extending the boundary to include the major heritage sector of the town.</p> <p>4. In view of existing changes in retail activity in Bishop's Waltham the Policy SF5 Area needs urgent review to include the shopping parade (Merlin Mews and Basing Mews) and possibly parts of St George's Square and Houchin Street. This policy will need to be reviewed periodically up to 2031.</p>

<p><b>CONCLUSION :</b></p> <p><b>DETERMINE THE QUANTITY OF NEW RETAIL FLOORSPACE</b></p> <p><b>HAVE A PLAN showing TOWN CENTRE BOUNDARY AND ANY ADDITIONAL/CHANGED RETAIL SPACE FOR CONSULTATION</b></p> <p><b>MAPS 2.1,2.2,</b></p>	<p><b>New Retail Floor Space</b></p> <ul style="list-style-type: none"> <li>• It is not possible at this time to estimate new floor space requirements inside or outside the town centre.</li> <li>• Market forces following on the opening of the SainsburysStore may make it possible to accommodate any required increase in retail businesses within an expanded Primary Shopping Area</li> <li>• Some sites within the Town Centre should nevertheless be earmarked for future expansion of shopping/offices/leisure</li> </ul> <p><b>Town Centre Boundary and Primary Shopping Area</b></p> <ul style="list-style-type: none"> <li>• The Town Centre Boundary could be enlarged to include some of the heritage areas of the Town (but not the Bishop’s Palace.).</li> <li>• The Primary Shopping Area should be extended (as Map 2.1 attached for consultation) to include Basing Mews and Merlin Mews. Consideration could be given to extending the Primary Shopping Area to parts of Houchin Street and St George’s Square.</li> </ul>	
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Reference Sources:

<http://www.winchester.gov.uk/planning-policy/local-plan-review-adopted-2006/>

<http://www.invest-in-southampton.co.uk/property/>

<http://www.winchester.gov.uk/business/commercial-property/>

<http://www.winchester.gov.uk/planning-policy/evidence-base/economy/>

**Other Evidence**

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**\*\* Local surveys, reports and data (Bishop's Waltham Development Plan exercise 2013/ Employment) includes**

- A comprehensive List of Businesses in Bishop's Waltham settlement updated to June 2013 and analysed by type and location
- Visual surveys and formal and informal interviews with Town Centre traders and businesses.
- A survey and EFG report on a group of comparable Market Towns (Comparative Towns Report) using local information, internet and census data.
- Conclusions for Bishop's Waltham Town Centre; an EFG report drawing on the Comparative Towns Report and other relevant reports (Mary Portas, AMT Bishops Waltham, Small Towns of the Future, Test Valley Report on Romsey, Parish Council Forward Plan 2011) to arrive at conclusions and recommendations for Bishop's Waltham Town Centre. Much detail from this will be used in the Bishop's Waltham Forward Plan.
- Other EFG reports covered the very wide range of businesses operating outside the Town Centre. These businesses account for the majority of local jobs.
- A Survey of a sample of these businesses and a report of Conclusions for Employment in Bishop's Waltham. Much detail from this will be used in the Bishop's Waltham Forward Plan.

\*\*\* Maps used in this report include the WCC Proposals Map, showing recorded SF1 and SF5 boundaries, Parish, Settlement and National Park Boundary maps and SHLAA Maps for Bishop's Waltham (Nov 2011 and 2013). The WCC Proposals Map has been used to outline proposed changes to boundaries.

**Glossary**

Definitions from [NLP Retail and town centre uses study, 2007](#) **Convenience Goods** Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.

**Comparison Goods** Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

The following is a guide definition of the Use Classes taken from <http://www.planningportal.gov.uk/permission/commonprojects/changeofuse/>

- **A1 Shops** - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes.
- **A2 Financial and professional services** - Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices.
- **A3 Restaurants and cafés** - For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
- **A4 Drinking establishments** - Public houses, wine bars or other drinking establishments (but not night clubs).
- **A5 Hot food takeaways** - For the sale of hot food for consumption off the premises.
- **B1 Business - Offices** (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.
- **B2 General Industrial** - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
- **B8 Storage or distribution** - This class includes open air storage.
- **C1 Hotels** - Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels).
- **C2 Residential institutions** - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
- **C3 Dwelling Houses**
- **C4 Houses in multiple occupation** - small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.
- **D1 Non-residential institutions** - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non-residential education and training centres.
- **D2 Assembly and leisure** - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).
- **Sui Generis** - Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: theatres, houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos.
- **W** - Working from home.



### **Employment Focus Group, Calculation of job growth required**

Despite the need for some minor improvements, Bishop's Waltham is an attractive and vibrant place for people to live.

Feedback, from residents, commercial and retail traders, suggests that the Town has 'got it right'. This 'lifeblood' of the Town is created not just by the residents, but also by the 'commuting in' people who deliver retail and commercial services locally. The market will find its own level, and the total volume of residents, not just those who are economically active, drive demand for their services.

This comments below set out the argument for the encouragement of additional local jobs over the plan period, simply to preserve the 'status quo', taking account of our commitment to accommodate additional housing.

The 500 new houses, planned over the next twenty years is, therefore, the starting point. And, in order to preserve the current balance contributing to the feeling of 'got it right', the effect of these homes needs to be managed. Managing the growth of the Town involves, not just the fact that there will be an assumed additional number of 'economically active' local residents (500 new houses extended by an average of 1.3 people per household, giving an additional 775 people), but that these additional residents will use local services, causing expansion by volume and type of demand.

There can be no absolutely accurate number by which the local jobs need to grow, because the complexity of local, national and international economic conditions will influence the local market. The only certainty about assumptions is that most are likely to be wrong. At best, we should aim to propose future employment needs that:

- Use, as far as possible, 'safe' assumptions – those that are either known, or are at a sufficiently macro level that they will most likely happen
- Support the BW Attributes
- And, can be influenced by our District/Neighbourhood Plans.

One way to determine the need for local jobs growth is a simple calculation based on growth of total population. WCC numbers show that today's (2011) population estimate is 6723, and that of 2031 is 7498; an increase of 775, or 11.5%. Based on the assumption that the whole population determines the local economy, then, we should assume an 11.5% growth in the number of local jobs. A rough estimate of local jobs is 2226 (WCC figure). Therefore a job increase of 11.5% would be 256 jobs.

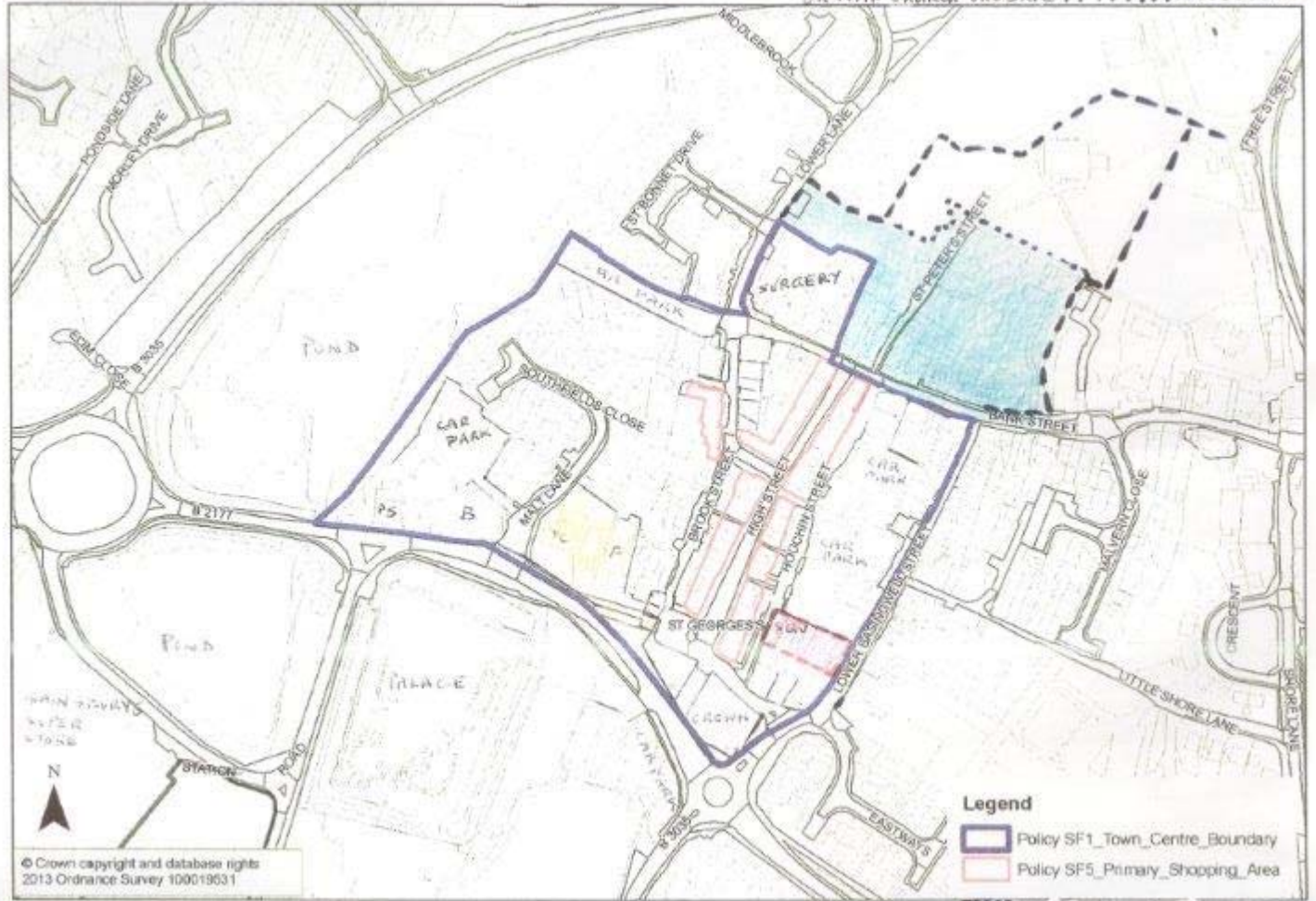
To give an initial assessment of land required, it has been assessed during surveys that the existing Claylands Road estate employs about 300 people, and it is proposed that an equivalent area is allocated in the plan.

There has been considerable discussion with WCC about the number of jobs required (Steve Ovacic, Jenny Nell) these range from 105 to 600. There will obviously be more definitive assessments of job requirements during Stage 3.

These assumptions suggest, that to preserve the current balance of 'got it right', there needs to be specific actions to encourage and stimulate jobs in the Parish, somewhere in the range 200 to 250 jobs. Local/Development Plans need to reflect this requirement in terms of site allocations, and actions, for example by the Town Team, need to be supportive of demand for these jobs.

Bishops Waltham Town Centre Boundary and Primary Shopping Centre Areas

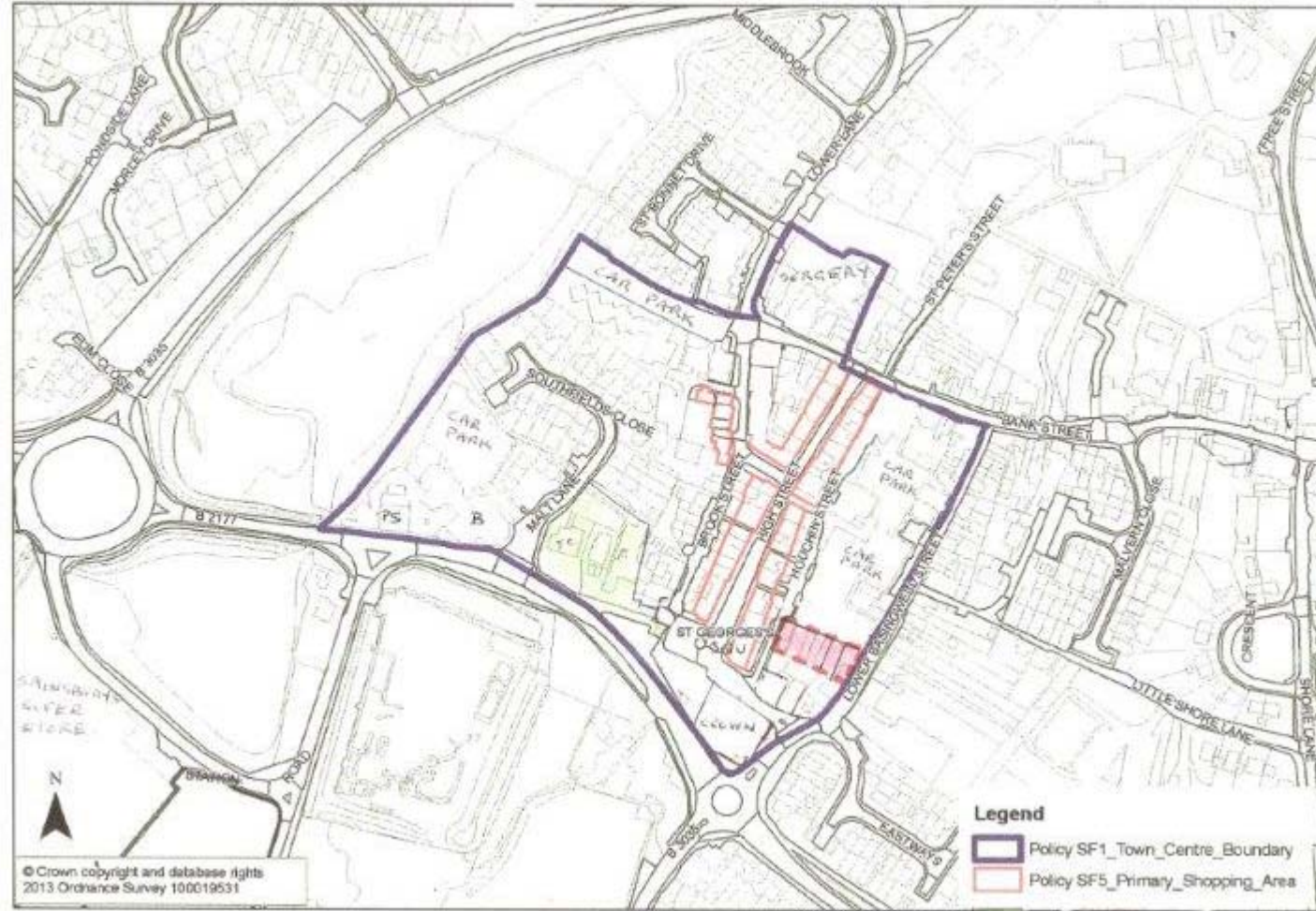
MAP 1 New Town Centre Boundary  
*PS with church outside*



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Bishops Waltham Town Centre Boundary and Primary Shopping Centre Areas

Map 2 Additional Primary Shopping



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- Legend**
- Policy SF1\_Town\_Centre\_Boundary
  - Policy SF5\_Primary\_Shopping\_Area
  - Potential Development (Mixed)