

## Appendix 3: Stakeholder Views

In carrying out this study, we have gathered the views of a range of stakeholders including:

- Caroline Lewis – Wiltshire Strategic Economic Partnership
- Caroline Lightfoot – North Wiltshire District Council
- Colette Mallon – Kennet Economic Partnership
- Len Turner – West Wiltshire Economic Partnership
- Sarah Hughes – Natalsa Style and Celine Mills Salisbury
- Ed White – Kennet District Council
- Jim Sherry – West Wiltshire District Council
- Adam Nardell – West Wiltshire District Council
- Lachlan Robertson – North Wiltshire District Council
- Henry King – Kavanaghs, Melksham
- Andrew Maddick – Dreweatt & Neate, Trowbridge, Chippenham & Marlborough
- Dean Speer – Myddelton & Major, Salisbury

The consultations covered the following broad issues:

1. Recent take up of employment space & available employment space.
2. Key employment locations, employers, and sectors.
3. Strengths and weaknesses of the local economy (identifying any factors that are likely to change).

The responses from these consultations can be summarised as follows:

### Wiltshire

- Generally across Wiltshire there is a shortage of large/strategic sites – for example for inward investment projects of 500+ employees.
- Wiltshire has Solstice Park and Castle Down amongst other business parks, but none of regional significance.
- However, Wiltshire doesn't really have the labour market capacity to meet large scale inward investment in any case.
- There is a need to keep a balance between jobs and homes as growth in housing takes place in the area.
- Wiltshire County Council are starting to look towards a new economic strategy (the existing one ends in 2008). The approach in relation to key sectors is being re-considered. An alternative might be to just focus on higher value added sectors – which ties in with reducing the overall quantum of sites, but improving quality of sectors and employers (E.g. Porton Down – focus on Biotechnology / Health Protection Agency / DSTL).
- Military/civilian integration project in Tidworth – trying to get armed forces to stay in Tidworth long-term, and bring partners of armed forces into labour market.
- Wiltshire is wealthy, but the economy is not growing as fast as in other areas.
- There is a high level of public sector employment, which is in decline.

### North Wiltshire

- In the last year, there has been an increase of 10% in available office stock – a number of sites have come forward in Chippenham, Corsham and Calne.
- Industrial availability has dropped by 6.5% in the last year.
- Employment land availability has dropped 47% in last year due to the take-up of bigger sites.
- North Wiltshire DC has not been receiving as many enquiries in recent months as previously.
- Employment land availability is a significant issue – there are a couple of major employers trying to find sites in Chippenham, and have threatened to leave area (this is for industrial use in particular).
- Employment sites are not available in practice – a number of developers are sitting on land, trying to obtain planning permissions for housing.
- Main employment locations are Chippenham, Calne, Corsham (Leafield Industrial Estate), Cricklade (small estates), Wootton Bassett (Interface park, Templars Way), Kemble Airfield, and Castle Coombe.
- The shortage of available large sites in Chippenham is putting two major employers at risk, both of whom need to relocate.
- Site opportunities include: the now closed Highgrade factory which is now an empty site; the chicken factory site in Sutton Benger, close to Chippenham (allocated for mixed use, but no firm plans yet).
- The area suffers from significant out-commuting of resident workers – particularly to Swindon.

## **Kennet**

- Devizes – Devizes suffers from little availability of employment land generally. There are a couple of sites yet to be developed (Bureau West), and the ex-Highgrade site currently on the market (Alder King), with 6,000 sq ft of specialist space (food storage). There is a current requirement for employment land for managed office space. Devizes is the preferred employment location in the area, but has no room for expansion / new entrants. There is a concentration of manufacturing in the area relative to the rest of Wiltshire.
- Tidworth – There are plenty of available sites but not of the right kind. There is no availability for dirty trades/retail/open storage. Tidworth is receiving significant investment in regeneration/development at present.
- Pewsey – has a number of small industrial estates. There is a current requirement for 20,000 sq ft of open storage (company currently thinking of re-locating towards Swindon due to lack of availability).
- Kennet (general) – Kennet provides a different offer than Swindon. It mainly caters for local demand/local relocations rather than inward investment. There have been few new entrants in the last year. The area has several large employers with over 200 employees (e.g. Wadworth), and lots of small sites in rural areas. It is difficult to find smaller office units with sufficient parking outside the main towns, and difficult to find space for non-B uses – e.g. gym / dentists / units with consent for assembly and retail.

- Strengths of Kennet's economy – Devizes has a good number of specialist niche businesses (e.g. furniture/kitchen manufacture, specialist car parts); high value businesses which cater for national/international customers; and numerous companies with £20m-£30m turnover. Marlborough has numerous small, high value, knowledge-based businesses/consultancies, and retail and education are key sectors. Other key employers in Kennet include the district council, MOD and Wiltshire police.
- Housing – Kennet has a total housing allocation of 1900 units in the RSS. The majority of housing growth is targeted at Tidworth and Marlborough, not Devizes.
- Devizes has seen majority of growth in recent years, and now suffering from congestion / issues with further extension.
- A remarketing campaign for Tidworth is underway, and regeneration investment is taking place in the town. Tidworth has Castle Down business park (room for expansion), good quality homes, a leisure centre and a new academy school – Kennet District Council is trying to direct growth towards Tidworth. There is space for large scale and industrial uses in Tidworth, and it is proximate to Porton Down.

### **West Wiltshire**

- West Wiltshire has lots of potential for growth, but is frustrated by a lack of available sites.
- West Wiltshire District Council had more than 5 significant requirements at one point last year that proved difficult to meet due to a shortage of suitable /available sites. There are still current enquiries now, despite the economic down-turn. There is a current requirement for the relocation of a 400 job business within West Wiltshire and WWDC are struggling to find suitable site. There is another requirement for a company who currently have 3 sites to co-locate their operations.
- The A350 corridor is the focus of growth in West Wiltshire, and the four towns combined (Melksham, Trowbridge, Warminster and Westbury) are a significant driver of growth in a regional context.
- WWDC expressed disappointment that the RSS does not seem to place enough emphasis on the A350 corridor.
- There is a need to boost employment in the area, to address the significant out-commuting currently occurring, and allow for further housing growth. There is also a need to address the skills drain – it is mainly higher skilled workers that out-commute, so there is a need to improve the employment offer in West Wiltshire.
- West Wiltshire needs flexibility and availability in employment land.

### **Salisbury**

- Salisbury is quite different from other areas in Wiltshire and functions as part of the Southampton market
- Concerns are held over the deliverability of some of the employment land
- There is a need to bring forward regeneration in the city centre. Two key schemes include Southampton Road and Churchfields Industrial Estate
- Enquiries tend to be for industrial premises

- Porton Down is considered to be a special case, outside of the normal demand forecasting exercise
- Feel that Wilton is a suburban of Salisbury and sites in Wilton form part of the SSCT offer
- Agreed that Amesbury is a key market town in the authority
- Continuing with the Salisbury LDF but it is being rebranded as South Wiltshire LDF. However, no change in administrative boundary
- Main employment areas include London Road and Boscombe Downs
- Sites being considered through the LDF process include:
  - Land south of Netherhampton Road (Agent: Charles@ Middleton & Major)
  - Fuggleston Red
  - Old Sarum (new allocation)
  - United Kingdom Land Forces, Wilton. This site is owned by the MOD however they have identified that they are putting together a disposal strategy for the site and it will become available within the LDF period.

#### **Kennet (Ed White)**

- Kennet is quite rural compared to other areas of Wiltshire and this needs to be noted.
- The Economic Development department is currently experiencing difficulties trying to satisfy a number of requests for premises. However, due to the credit crunch this issue is not as significant as it was, e.g. a local firm was looking to expand and needed specialist outdoor storage facilities however, a very limited supply was identified.
- Concerns held over the under utilisation or limited use of certain areas of land that are available for employment. This is a particular issue in Devizes where it is hard to satisfy the requirements of small to medium sized firms.
- In Marlborough there is an industrial estate which is ready for development. However, take up has been slow. The reason for the slow take up is unclear however it could be due to high rental values. Devizes is considered to be the main employment centre for traditional B Use Class occupiers. This includes some larger office developments which are predominantly occupied by the public sector.
- Marlborough also has a large employment base. However, a significant volume of jobs are not accommodated in traditional B Class units as identified in the Atkins Employment Land study.
- Tidworth, Luggershall is an area currently being jointly promoted with SWRDA. It is likely that more land will become available for employment in the future. This area is likely to compete with Amesbury for occupiers.
- Strengths of the economy considered to include its resilience economy to the current credit crunch and the presence of some higher value occupiers.

- Weaknesses of the economy considered to include lack of higher paid jobs with people commuting out for these jobs, limited pool of labour for certain jobs.eg a local bakery is having to bus in staff to cope with an order won from Waitrose.
- Agreed that Devizes is the main employment town at the moment however, Warminster needs to be considered and the role of Devizes should not be over played.
- In terms of allocations, limited land remaining available. A small area remains at Nurstead Road.
- There are areas such as Folly Road within the county that need to be reviewed in terms of their employment role going forward and whether they should be redeveloped and rationalised insitu or occupiers should be located to new areas and the current sites redeveloped for alternative uses.
- Two particular issues that need to be considered in the context of Kennet is how rural the county is and the role that the military play, particularly in the south east of the district.

### **West Wiltshire (Jim Sherry)**

- He is a relatively new comer to the area. However, a first impression is that there is a significant employment base in the area, more than he was expecting as a new comer.
- Main employment areas are considered to be very busy with limited space available for further development.
- The local Chamber of Trade feel that there is a need for more land than is forecast for the Trowbridge/Warminster Travel to Work Area.
- A particular issue in the district is Bradford upon Avon. There is considered to be a large residential base at the town but limited employment opportunities. This needs to be balance going forward. This could be potentially addressed by only providing limited housing going forward.
- Key strengths are considered to be the large employment base that is accommodated in the county.
- Key weaknesses include the reliance on traditional industries including the food sector and the limited availability of certain types of premises.
- Generally agreed with the key market towns. However, highlighted that Warminster will be their second place of emphasis after Trowbridge in the emerging LDF.
- In terms of Warminster that are a number of issues including the need to reshape the town centre and the emphasis on the military which may change in the future.
- It is considered that West Wiltshire had a healthy economy until the current downturn.
- In terms of maintaining a healthy economic activity it is considered that some existing employment areas need upgrading and there is need to bring forward new deliverable supply.
- The main employment area in Trowbridge is Whitehorse Business Park. There is considered to be a need to mirror this provision on the other side of the railway. However, access to this area is an issue.
- The Council are currently working to bring forward the large undeveloped employment allocation EA1. They are actively negotiating with a housing developer in terms of bringing forward the

housing allocated to the north east of the site which will provide the necessary infrastructure to unlock the employment allocation.

- In terms of Trowbridge, the town centre is considered to be a particular issue in the sense of the Core Strategy. It is considered that the redevelopment of the town centre is wider than employment and not necessarily concerned about the loss of traditional employment sites in the town centre to alternative uses. Evidence demonstrates that when firms think their current premises are no longer fit for purpose they are more likely to re locate rather than redevelop in situ.

### **West Wiltshire (Adam Nardell)**

- The operation of the commercial market is very different to a year ago in West Wiltshire. However, it is considered that manufacturing is continuing to perform reasonably well in the district. However, this tends to provide lower skilled jobs with a limited availability of higher value jobs in the county.
- Employers in the district have identified that it is difficult to attract and retain high skilled white, collar workers. There have been instances where employers have stated that jobs are based in Bath to try and attract people to West Wiltshire.
- It is felt that the urban fabric of West Wiltshire is considered to be poor by potential employees and therefore they do not choose to relocate to the area. In terms of supply and demand it is considered that the 34 hectares requirement which has traditionally been identified is too modest and there is a need for at least 50 hectares of land to be allocated and available at any one time to accommodate large relocations.
- Herman Miller is currently looking for a large employment site in West Wiltshire but to date has not identified such a site.
- Considered to be the opportunity to create a Porton Down Science Park equivalent in West Wiltshire around the Warminster area related to Military R & D.
- It is considered that Warminster is the first town in the second tier under the SSCT's in West Wiltshire. It was actually considered that it has greater employment potential than Trowbridge. The employment potential of Westbury and Melksham was also identified.
- Keen to see an over allocation of employment land going forward to ensure that large single requirements can be met easily.

### **North Wiltshire (Lachlan Robertson)**

- From a planning policy perspective it is evident from the Employment Land Review that there is a lot of land available. However, this tends not to be of the right type or in the right location to meet occupier requirement.
- There is considered to be a particular issue in relation to quality sites and the deliverability of sites with issues in terms of bringing them forward.
- Hope value is considered to have stagnated development of many employment sites. However, it remains to be seen whether the current state of the market will help to address this issue.
- Chippenham is considered to be the key employment location in the area, with a high manufacturing base.

- Traditional employment areas such as Bumpers Farm provide traditional employment opportunities and are considered to be relatively healthy. However, the environmental quality of these areas is questionable.
- The role of Corsham needs to be given consideration going forward. With the development planned at Bassett Hill Barracks it is likely that this will involve secondary employment uses which may impact on employment land provision going forward.
- In terms of Calne, Port Marsh Industrial Estate is considered to be suffering in the current economic climate.
- In general the district has been subject to the loss of a lot of lower rental employment areas over the year due to change of use application. However, this is considered to have an issue on supply and there is a recognised need for start up units going forward.
- Strengths of the North Wiltshire economy include the large pool of skilled labour, the attractive location of the north of the county located on the M4 motorway, its proximity to Swindon and the high pool of academic people available.
- Weaknesses of the local economy are considered to be the level of out commuting to high skilled/paid jobs, the negative impact of previous schemes on the environment e.g. Dysons is in the wrong location. Other weaknesses include poor north/south communication links through the district and poor quality links to other key market towns. It is also considered that the area does not utilise or maximise the potential offered by its network of railway stations.
- It is considered that the RSS underestimated the requirements for employment land and therefore any increase in provision is seen as a positive.
- It is felt that the future of RAF Lyneham needs to be reviewed especially if the helicopter unit does not relocate to the base. However, whilst significant infrastructure investment would be required to open up the site it is considered to be an important location going forward.
- In terms of Wootton Bassett it is considered that the RSS would consider it to be a dormitory town. However, more work is required to confirm this and allocating land at the town will not necessarily reduce out commuting from the area due to its proximity to Swindon.
- In terms of a market town hierarchy, it is considered Corsham should not be ignored due to the volume of vacant land that exists on the west side of the town and the impact of any potential MOD reorganisation going forward.
- In terms of Calne, care needs to be taken when assessing its growth potential as there are various issues in relation to the potential of the town centre in traffic terms to accommodate growth.