



New Forest National Park Submission draft Local Plan 2016 - 2037

Topic Paper: Economy and Employment

January 2018

Introduction

The National Park Authority's Core Strategy was adopted in December 2010. It sets out a clear strategy for the economy, including support for employment. The evidence base for the Core Strategy's economic policies was outlined in the Economy and Employment Topic Paper in February 2010, including an assessment of business needs and employment land.

A review has now being undertaken, and a new Submission draft Local Plan has been produced – it has updated, where necessary, the economic policies in the Core Strategy, to reflect the changes in national planning policy and guidance and the latest economic trends that have arisen since the Core Strategy was put in place. This Topic Paper provides a review of the economic and employment requirements for the area in line with the new national planning policies and guidelines, and outlines the updated evidence on the local economy. The review of planning policies has been done in the context that New Forest District Council, Wiltshire Council, and Test Valley Borough are responsible for promoting economic development in their administrative areas that cover the National Park.

1 Policy Context

National Policy Framework

- 1.1 The Environment Act 1995 outlines the purposes of the National Park. These are:
 - to conserve and enhance the natural beauty, wildlife and cultural heritage of the Park; and
 - to promote opportunities for the understanding and enjoyment of the Park's special qualities by the public.
- 1.2 In relation to the local economy, however, the Act also outlines that the National Park Authority (NPA), in pursuing these two purposes, has a duty to *seek to foster the social and economic well-being of local communities*.
- 1.3 To ensure the planning system continues to support the delivery of the two statutory Park purposes and its duty, it is vital that the Authority has an up-to-date development plan in place to guide planning decisions within the National Park.
- 1.4 The English National Parks and the Broads: UK Government Vision and Circular (DEFRA, 2010) confirms that the planning system is a key instrument in the achievement of the Park purposes through its role in guiding the form and location of development; managing the impacts of development on the landscape and biodiversity; and conserving and enhancing the built heritage in Park settlements. It confirms that the National Park Authorities' primary responsibility is to deliver their statutory purposes. In doing so, they should ensure they are exemplars in achieving sustainable development, helping rural communities in

particular to thrive. It highlights that within the National Parks, conserving and enhancing the landscape, biodiversity, cultural heritage, dark skies and natural resources, and promoting public understanding and enjoyment of these should lie at the very heart of developing a strong economy and sustaining thriving local communities.

- 1.5 The government's 8 point plan for National Parks (March 2016) recognises that the special qualities in these areas underpin the economic activities that thrive in National Parks, including traditional farming, tourism, food and other businesses. The plan identifies three key drivers for the rural economy as supporting international tourism, developing new apprenticeships, and promoting local produce.
- 1.6 Since the NPA's Core Strategy was adopted in 2010 there have been significant changes in national planning policy. The Government's National Planning Policy Framework (NPPF) was published in 2012 and consolidated the previous national planning policy documents into a single, succinct framework. The Framework is now supported by the National Planning Practice Guidance (NPPG) online resource which was launched in March 2014.
- 1.7 In terms of local plan making, the NPPF reaffirms that National Parks, "...have the highest status of protection in relation to landscape and scenic beauty..." and that great weight should be given to conserving the landscape, wildlife and cultural heritage of National Parks (para. 115).
- 1.8 The NPPF's general presumption in favour of sustainable development also recognises that in some specific areas – including National Parks – development should be restricted (paragraph 14 and footnote 9). Policy SP1 of the Submission draft Local Plan (Supporting sustainable development) outlines how sustainable development will be considered in the context of the National Park.
- 1.9 The NPPF also confirms that planning permission should be refused for major development in a National Park except in exceptional circumstances and only where it can be demonstrated to be in the public interest (paragraph 116). Policy SP3 of the Local Plan outlines how major development is defined and will be considered in the New Forest National Park.
- 1.10 In terms of the economy, the NPPF clarifies that every effort should be made to objectively identify and then meet the business needs of an area, and respond positively to wider opportunities for growth. It outlines that the planning authority should set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth.

- 1.11 To promote a strong rural economy, the NPPF states that local plans should support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings; promote the development/diversification of agricultural/other land-based rural businesses; support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside; and promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship.
- 1.12 In relation to employment land requirements, the NPPF clarifies that local planning authorities should have a clear understanding of business needs within the economic markets operating in their area. To achieve this, they should work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and work closely with the business community to understand their changing needs and identify and address barriers to investment.
- 1.13 It goes on to state that Local Authorities should objectively assess the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all types of economic activity; the existing and future supply of land available for economic development; and its sufficiency and suitability to meet the identified needs. This can be found in Section 2 of the Topic Paper. The NPPF also outlines the reviews of land available for economic development should include a reappraisal of the suitability of previously allocated land.
- 1.14 The NPPF says that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. There are currently, however, no sites allocated for employment in the National Park.

Regional Policy Framework

- 1.15 The Regional Spatial Strategy for the South East – which covered the whole of the New Forest National Park – was revoked by the Government in 2013. The South East’s Regional Economic Strategy has also been replaced by the Strategic Economic Plans of the Local Enterprise Partnerships.

Local Enterprise Partnership (LEP) Plans

- 1.16 The National Park is covered by two LEP areas, with the vast majority of the Park within the Enterprise M3 LEP, and a small area within the Swindon and Wiltshire LEP.
- 1.17 The M3 LEP's Vision is for the Enterprise M3 area to be 'the premier location in the country for enterprise and economic growth, balanced with an excellent environment and quality of life'. Obviously the National Park will contribute significantly to the latter, but also to the former.
- 1.18 The key objectives for the Enterprise M3 LEP's Strategic Economic Plan 2014-2020 (SEP) is to achieve GVA per capita at 25% ahead of the national average (compared to the current 18%); the creation of 52,000 new jobs, one in five of which will be in R&D and high value added industries; and increased entrepreneurial activity with 1,400 businesses created per annum.
- 1.19 It is hoped that this will be achieved through the spatial strategy of (1) Interventions forming bespoke and integrated Growth Packages around Growth Towns and Step-up Towns that will be of a collective economic scale of a high performing City Region. None of these, however, are located in the New Forest, with the nearest being in Andover; (2) Infrastructure for the intersection of the Sci:Tech Corridor and surrounding areas covered by other LEPs. These include M3 Junction 9 and the Guildford A3 Strategic Corridor improvements; (3) The whole M3 LEP area being developed as the primary Sci:Tech Corridor in the UK. This strategy involves a radical reshaping of business support - this will draw in and co-ordinate all SME business support, along with a focus on high level skills, within a Growth Hub. The LEP will also invest in science skills and skills capital infrastructure that supports these sectoral priorities. This has been demonstrated in the New Forest with substantial support for a new innovative learning STEM centre, including high specification laboratories for physics, chemistry and biology at Brockenhurst College.
- 1.20 In addition, the M3 LEP's SEP highlights that the rural economy also plays a significant role. It confirms that the outstanding landscapes within the area, including the New Forest National Park, mean that the visitor economy is a strong driver of local economic growth and directly supports 8% of all employment. Policies in the Local Plan, particularly Policy SP46 will support the visitor economy. The LEP will deliver measures to exploit the potential of the rural economy, with particular focus around the development of a Rural Business Network, which will aim to operate strategic projects designed to have a significant impact on the rural economy and will complement the work of Local Area Groups (LAGs), including the New Forest LAG (see Paragraph 1.30 – 1.33)

- 1.21 The Swindon and Wiltshire Local Enterprise Partnership (LEP) produced its Strategic Economic Plan in 2014, which was then updated and revised in 2016. As with the M3 LEP Strategic Economic Plan, there are no specific spatial interventions planned for the New Forest area, with the focus for targeted investments being located in the Swindon-M4 Growth Zone, the A350 Growth Zone and the Salisbury-A303 Growth Zone.
- 1.22 Some of the key strategic objectives, however, do cover activity in the National Park. Skills, talent and business development interventions will be available to businesses and learners across the whole of Swindon and Wiltshire area.
- 1.23 A strategic objective is identified as needing an appropriately skilled and competitive workforce to achieve the growth ambitions. This will be achieved by making the education and skills system more effective and responsive to the needs of employers and learners; by helping businesses develop skilled workforces that will support long term sustained growth and improved productivity; and by supporting the development of an inclusive economy, helping people to overcome barriers to employment, to enter and stay in the workforce.
- 1.24 A further strategic objective is to deliver excellence in digital connectivity and cyber transformation to achieve business growth, innovative public services and influence societal change. One of the key priority actions is to deliver 100% high-speed broadband and mobile coverage and prepare for the delivery of ultrafast broadband.
- 1.25 A part of the place setting objective is to develop a strong visitor economy resulting in new investment as well as increased trade, visitor spend and national and international staying visitors. Policies in the Local Plan, particularly Policy SP46 will support this objective.
- 1.26 A further objective is to strengthen the competitiveness of SMEs and attract a greater share of foreign and domestic investment into the area. One of the ways that this will be achieved is by addressing the low rates of business formation by improving access to specialist public and private business support providers. The LEP also plans a new business support service - a Growth Hub. This will complement the business support being delivered by the Enterprise M3 LEP, as outlined in Paragraph 1.19.
- 1.27 An increased level of business support in the New Forest should be well received as it was identified by local businesses in the New Forest Business Needs Survey as a local requirement for business growth.
- 1.28 Overall, it is clear that the Strategic Economic Plans for the LEPs do not require the National Park to provide significant new business floorspace to contribute to their growth plans. Indeed, most of the economic gains envisaged for the National Park's economy from LEP

support are through the improvement of skills and through business support and advice. Whilst these may have limited implications for planning, the Local Plan policies will be supportive of their implementation.

Local Policy Framework

- 1.29 The Government's NPPG confirms that National Park Management Plans should be taken into account in the local planning authority's Local Plan. A key objective of the New Forest National Park's Partnership Plan 2015 – 2020 is to develop a diverse and sustainable economy that contributes to the well-being of local communities. The challenge is that while delivering its two statutory purposes (see paragraph 1.1) the Authority should at the same time foster a prosperous rural economy in ways which either enhance, or do not compromise the special qualities of the area.
- 1.30 The National Park's Partnership Plan outlines a set of priority actions aimed to deliver this objective, which are to:
- Continue to promote the Brand New Forest campaign, encouraging greater use of local businesses by local people, including a pilot Fair Booking initiative, establishing a locally based visitor accommodation booking system.
 - Deliver the Rural Development LEADER Programme for the New Forest, funding the growth and creation of jobs in rural businesses and supporting local services.
 - Work closely with the relevant Local Enterprise Partnerships to identify initiatives that both support a sustainable local economy within the Park and help deliver the LEPs wider economic objectives.
 - Encourage private sector investment in forestry and land management by providing a range of business opportunities for work on the Crown Lands, suitable for companies of different sizes and expertise.
 - Promote the New Forest Marque as the recognised symbol of local produce and help to support and develop new and existing local produce businesses. The target is to achieve 160 businesses as Marque members by 2020.
 - Provide practical means of connecting local producers with outlets, such as hotels, shops and pubs, through the European funded 'DEAL' project, providing supply chain software and a centre enabling the easy distribution of products.
 - Help rural businesses and communities to function more efficiently by supporting the national programmes to deliver superfast broadband to 95% of premises, and seek additional funding to provide a more complete coverage throughout the National Park.

- 1.31 These will be delivered by a range of organisations that operate in the New Forest, and in most cases do not need planning policies to help to facilitate them.
- 1.32 The New Forest LEADER Local Development Strategy 2015-20 is designed to deliver the objectives of European funding to support rural development. Its Vision for the local economy is to improve the diversity of available jobs and enable businesses to be more productive, efficient and boost wages, but at the same time this must be achieved without detriment to the landscape, culture and heritage of the area. To achieve this Vision the Strategy will aim to:
- Improve performance, resilience, efficiency and practice within small enterprises in rural areas, in particular those which contribute to the maintenance of the unique landscape of the New Forest on which the wider economy depends.
 - Support entrepreneurship and business start-ups with an emphasis on the creation of sustainable employment opportunities which support a year-round economy.
 - Support the development of the local workforce – including those not currently in education, employment or training (NEETS) - to ensure they have the necessary skills to contribute to the growth of the local economy.
 - Support communities to find sustainable solutions to meet identified gaps in rural service provision and facilities in order to improve the quality of life for residents.
- 1.33 The Strategy highlights five drivers of improved productivity for the New Forest economy, covering innovation, enterprise, skills, competition and investment. The focus on productivity gains and efficiency is important as the broad aim is to improve growth through better use of *existing* assets, improved skills and management, business support, and targeted investment in new efficient technologies, rather than focus on growth through the expansion of employment land and new sites. An example of this that has planning implications is the support for converting redundant farm buildings into tourist accommodation. Local Plan Policy DP49, Policy DP45, Policy DP43, and Policy DP44 all support the productive use of existing assets.

2 **Employment land**

- 2.1 The NPPF clarifies that every effort should be made objectively to identify and then meet the business needs of an area. It outlines that the planning authority should objectively assess the needs for land or floorspace for economic development and the supply of land required to provide for this demand.

- 2.2 To make this assessment it is important to firstly consider the wider economic area, and to understand the context within which the National Park's economy operates. The M3 LEP produced a Commercial Property Market Study¹, which covered the New Forest in the south, to Surrey boroughs adjoining London in the north. It analyses the demand and supply for employment land across the LEP area. It divides the M3 LEP commercial property market into defined market areas and identifies the New Forest (including both the National Park and most of the New Forest District) as a distinct commercial property market.
- 2.3 The Report highlights that the demand for office space in the M3 LEP area has picked up over the last few years, with nearly all of this being driven by the development of large sites in towns in the northern part of the M3 LEP area. The spatial pattern of office demand is also reflected in their rental values. There has been a recovery from the significant fall in rental values during the last recession, with rents rising predominantly in the most northerly part of the M3 LEP area. Rental values in the New Forest remain lower than those in the northern part of the M3 LEP area, but have seen a small pick-up in some areas around the southern coastal towns.
- 2.4 The supply of vacant office space in the New Forest is reported to be low. This may reflect the low turnover of businesses in the area, with the New Forest Business Needs Survey showing that almost half of all businesses have operated from the same location for more than 10 years. But in contrast, the Report shows that the New Forest has the largest percentage increase of office space in the pipeline with current planning permission of any of the market areas in the M3 LEP.
- 2.5 Overall, therefore, it appears that whilst demand for office space in the New Forest remains modest, there is ample supply in the pipeline.
- 2.6 The M3 Commercial Market Study also considers the demand and supply of industrial space. In the last few years the take up of industrial space has increased, but it is thought that the data is likely to give a misleading account of demand as agents report that take up has been constrained by an overall shortage of supply. The New Forest is identified as having a low level of vacant industrial space – this, like for offices, may reflect the lack of turnover in current site users. The report also highlights, however, that the future pipeline of industrial space is very limited in most of the market areas with the exception of the New Forest and Basingstoke/Andover.
- 2.7 Overall, it appears that there has been a pick-up in demand for industrial space since 2013, but unlike other market areas, there is ample supply in the pipeline in the New Forest for commercial market purposes.

¹ Enterprise M3 Commercial Property Market Study - Regeneris Consulting July 2016

- 2.8 Priorities for each M3 LEP market area are also outlined, including the New Forest. This states that for the office market, the rural nature of the district, poor accessibility, and close proximity to other established office locations (Bournemouth and Southampton) mean that demand is very limited and virtually all from local SMEs. It confirms that, like many rural areas, a key priority for most businesses seeking new accommodation is access to fast and reliable broadband, and the New Forest Business needs survey (2014) also showed strong demand for flexible types of accommodation (reflecting the large concentration of small and micro businesses). While the market is unlikely to provide for these type of business, this reflects the fact that the overall level of demand is very low (and therefore not a failure of the market). This, coupled with the fact that New Forest is not home to significant concentrations of the LEP's priority sectors, means the case for LEP intervention in commercial sites is relatively weak.
- 2.9 In terms of the priorities for the industrial market, the Study suggests that, like the office market, there is limited demand for industrial space in New Forest (particularly in the areas covered by the Enterprise M3 LEP). Most of the demand in the district as a whole is for small scale manufacturing space, with little demand for logistics and distribution, due to poor connectivity.
- 2.10 The Study concludes by providing some overall recommendations. It identified an increasing deficit in land for industrial and distribution uses for most market areas within the M3 LEP, and advocates that this needs to be addressed. As highlighted above, however, the Study shows that the New Forest is one of only a few market areas in the M3 LEP to have a strong future pipeline for industrial space. In terms of offices, the Study concludes that the New Forest is an area of lower current demand, where the market is working efficiently, but there is simply very low demand for office space. It suggests that there may be a case for M3 LEP intervention based not on market failure, but more on social equity. Managed workspaces for local SMEs might be appropriate.
- 2.11 The Authority recognises that some employment land demand is likely to be satisfied by sites outside the National Park. This is due to the significant employment sites in areas outside the Park, and the environmental constraints on many locations within the National Park. There will be a large choice of employment land close to the National Park as areas in South Hampshire, South Wiltshire and Dorset all have significant plans for economic growth during the plan period. It is also important to note that all residents of the National Park live within very close proximity of the surrounding towns and urban areas. This means that some employment needs are likely to continue to be satisfied in locations outside the National Park.

- 2.12 Given the very close proximity to the National Park of many of the major employment sites in the New Forest District (eg. Ampress site, Lymington), there is little doubt that a reasonable amount of the demand for employment space (particularly larger sites) in the National Park is being, and will continue to be, satisfied by sites beyond the Park's boundary.
- 2.13 In addition to considering the wider context for the demand and supply of employment land, local evidence has been gathered. The level of expected demand for new employment space has been assessed using a Business Needs Survey in 2014, and by looking into the long term trends for the demand and supply of employment space as outlined in the following two sections.

Business Needs Survey

- 2.14 The New Forest Business Needs Survey was carried out in early 2014 as a joint initiative between New Forest District Council and the New Forest National Park Authority with the support of New Forest Business Partnership. The survey was designed to gain a greater understanding of the business needs in the New Forest economic area and identify any changes which have taken place since the last survey in 2005.
- 2.15 The survey was distributed to around 4000 contacts via New Forest District Council's Employer Database, and was circulated via a number of partner organisations including The New Forest National Park Authority, New Forest Business Partnership, New Forest Tourism Association, Federation of Small Business, National Farmers' Union, New Forest Produce Ltd and New Forest Land Advice Service. It is estimated that in total the survey reached about 5000 local businesses.
- 2.16 The survey's responses showed that the New Forest economy had been very resilient in the five years prior to the survey during a period when the wider national economy showed little consistent growth following the financial crisis. Unemployment has been consistently lower than in the South East or the UK, and is now returning to levels last seen before 2008. Overall business confidence appears strong looking forward. Whilst this is not necessarily being shown in staff recruitment at this stage, most businesses believe that their turnover will increase in the next 5 years.
- 2.17 The survey showed that the majority of businesses are satisfied with the quality of their existing premises. Encouragingly, only 10% of respondents felt that the quality of their existing site location was poor or disadvantaged, with a similarly very low number stating that the premises they were occupying were of poor specification.



- 2.18 About 32% of respondents expect their space requirements to increase within the next five years. Whilst the majority of these are content to expand on their existing site, about 10% of respondents thought they may want to relocate to new premises in the future. Only about 5% of respondents wanted to relocate within the New Forest but were unable to do so, with the primary reason for this appearing to be the availability of suitable premises at an affordable price.
- 2.19 The amount of additional space required varied, although typically this was in the range of 50-100m², reflecting the large number of small businesses found in the New Forest. The highest demand for these premises was shown to be in the coastal towns of the New Forest District, even though there was also demand for space in the National Park.
- 2.20 In terms of the type of space required, the Businesses were asked, if looking for new premises, which characteristics would be of importance, and the results are shown in the graph below.



33% cited 'premises with superfast broadband', which demonstrates the need to be capable of transferring high volumes of data, and its importance to the local economy. 'Easy in/easy' out accommodation represented 26% of responses with 'rural business units' accounting for 28%. The requirement for easy in/easy out accommodation may reflect the high numbers of micro businesses which completed this survey. Many who currently work from home require such premises as their businesses grow.

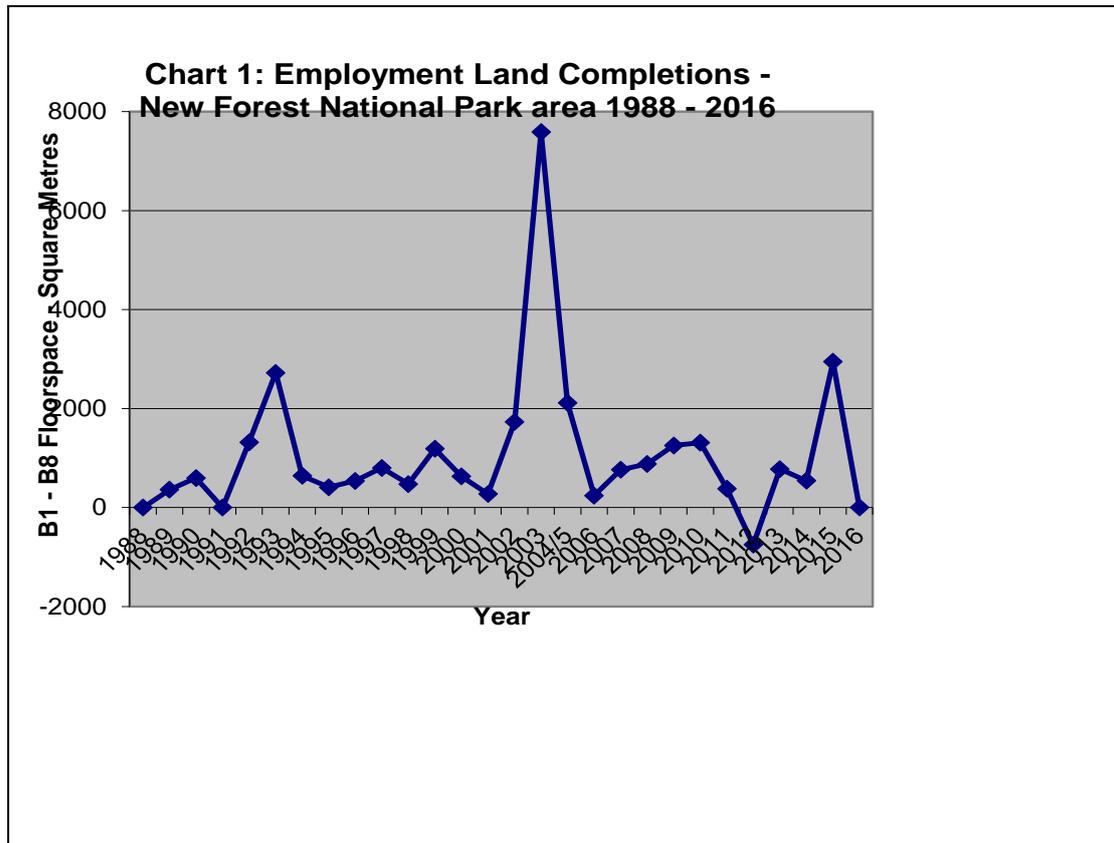
- 2.21 The survey also showed that there remains a need for business advice and training. Over 50% of all those responding felt that skills in Marketing, Promotion and Social Media are the greatest area of weakness followed by IT Professional Skills and Sales Skills. There is also a strong need for business support and advice, with training in Business Management and Legislation and regulations cited as important areas.
- 2.22 To conclude the survey, businesses were asked for the three main attributes and constraints of doing business in the New Forest. The main benefit was seen as the natural environment, which attracts large numbers of visitors. Many see the New Forest's location as a benefit, given its close proximity and easy access to Southampton and London. The coast was also seen as an asset both in terms of its benefit to the visitor industry, but also for marine related businesses.
- 2.23 In terms of business constraints, the most significant were seen as poor or inadequate transport links including the road network, coupled with insufficient provision of public transport. This was closely followed by a perceived poor or non-existent broadband provision and planning

restrictions. Parking fees and red tape also featured as common reasons that businesses felt constrained.

Assessment of economic development needs

- 2.24 The NPPF clarifies that every effort should be made objectively to identify and then meet the business needs of an area. It outlines that the planning authority should objectively assess the needs for land or floorspace for economic development and the supply of land required to provide for this demand. However, as noted in paragraph 1.8, the NPPF's general presumption in favour of sustainable development also recognises that in some specific areas – including National Parks – development should be restricted.
- 2.25 The National Planning Practice Guidance (NPPG) outlines methods for objectively assessing the economic development needs of an area. It highlights that the key objective of this assessment should be to identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development. The NPPG confirms that there are various methods and data that can be used for this assessment. It requires that the business cycle be taken into account and that forecasts and surveys are used.
- 2.26 As an initial way of assessing the demand for employment space, the past trends of employment land development in the National Park area has been reviewed. This trend can then be used to provide a forecast of the likely need for employment land in the future. Employment land development in the past has reflected the completion of individual sites that have been permitted under existing employment policies in the Core Strategy and previous Local Plans, rather than the take up of allocated employment land (there have been no allocated employment sites in the National Park area, even before its designation in 2005).
- 2.27 A long history of employment land completions for the area, which is now designated as the National Park, dates back to 1988. Much of the past development has been completed through the change of use of existing buildings, including agricultural ones. This past history of employment land completions shows that business development has continued to generate employment opportunities over an extended period, and despite the lack of any allocated employment land. Since 1988 until 2016, the average annual amount of business floorspace (in land use classes B1 to B8) to be completed has been just below 1000 square metres (m²) in the New Forest District part of the National Park area. In the Wiltshire part of the National Park area there has been about 1500 m² of business floorspace completed since 1991, and within the Test Valley Borough part of the National Park area about 1200 m² has been completed since 1988. Combining this information,

the total amount of completions in the National Park area during the period from 1988 to 2016² is shown in Chart 1³ below.



Source: NFNPA and Hampshire County Council

- 2.28 It can be seen that there was an unusually high level of development in 2003. This mostly related to one specific development that year at Tatchbury Mount Hospital. Over 5,000m² of hospital units were converted to offices on the Hospital site. Given that this type of development should be viewed as an exception, caution is necessary if these past development rates are to be used as an indication of future demand. Without the Tatchbury Mount Hospital development, the average rate of past completions in the National Park area is a little under 900 m² per annum since 1988.
- 2.29 To gauge whether this long term trend in floorspace development would be a good forecast for future development rates, we need to compare this with the recent past, covering the period since the National Park has been established, and the period since the National Park's Core Strategy has been in place (since Dec 2010). In the 6 years since the Core Strategy was put in place, there has been 3,896m² of business floorspace developed – an average of 649m² per

² Data for the Salisbury District (now South Wiltshire) part of the National Park started in 1991.

³ There was a change in the monitoring period end date from December to March in 2004, which resulted in an exceptionally 'long' 2004/05 period (Jan 2004 to March 2005) in relation to the rest of the annual periods - this could have resulted in a higher figure for 2004/05. This data shows floorspace completions and does not include losses associated with recent changes in permitted development.

annum. Whilst this is lower than the long term 28 year average, it covers a period which followed the economic downturn of the financial crisis in 2007-9. Consequently, one would expect this period to show lower development rates. Over the last 10 years (since the NPA started as the planning authority) 8,101m² of business floorspace has been completed. This represents an annual average of 810m², which is only modestly lower than the 28 year average. Both the 5 and the 10 year averages are, however, not significantly different from the long term 28 year average and this recent history of business development demonstrates that there is continuing need for new floorspace, and that the long term development trend remains in place.

- 2.30 The length of the employment land development history should also provide confidence in its use for forecasting future needs. With the historical information since 1988 covering varying periods of the economic cycle, with both periods of recession and periods of rapid expansion of the economy, this provides a good indication of the long-term average development rate. This can then be used with confidence for considering the future period of the Local Plan, without the risk of extrapolating any shorter term trend associated with the most recent economic environment (as could be evidenced in short term business needs surveys or commercial property market studies).
- 2.31 During this long history of new employment land development, there have been no employment land allocations - either in the current Core Strategy for the National Park, or in the previous Local Authority Local Plans that pre-dated the National Park. Given that much of the past employment development has come from the re-use, conversion or extension of existing buildings and the redevelopment of existing sites, it is important that employment policies in the Local Plan continue to accommodate these types of development.
- 2.32 To further assess the employment needs in the National Park and to satisfy the requirements of the NPPF and NPPG, a Business Needs and Commercial Property Market Assessment⁴ was commissioned, and this was completed in April 2017.
- 2.33 Key components of this assessment were to consider the existing commercial market characteristics, the existing and future employment land supply of sites and floorspace, and to then judge whether the predicted future demand for employment space can be satisfied by this. After considering these two elements, the assessment also forecasts how much employment space will be required during the Local Plan period.
- 2.34 To set the context of this analysis, the assessment summarises the specific circumstances relating to the supply of sites in the National Park. It outlines that “The levels of total floorspace and that available

⁴ Business Needs and Commercial Property Market Assessment – Chilmark Consulting April 2017.

across all B Use Classes in the National Park area is limited given the rural and protected environment nature of the designated Park area. The constrained supply position is significantly restricted by the availability of employment land opportunities and sites due to role, function and legal purposes of the National Park and with respect to the international and national nature conservation and landscape protections placed on much of the Park's area." This limited employment stock includes:

- B1 offices are constrained in terms of immediate availability, with just 381sq.m listed as currently on the market for lease/rent. The five year average trend is somewhat higher with an average of 1,848 sq.m available.
- B1 office rental values are similar (although very slightly higher) in the National Park than for the New Forest District Council area. Rental values have remained relatively stable over the past five years.
- There is very little specific B1c light industrial stock for lease/rent recorded for the National Park area.
- For B2 and B8 industrial and distribution floorspace, there has been a relatively stable total level of provision over the past five years. Available floorspace is highly restricted.

- 2.35 A key element of considering the existing supply of employment space is an assessment of the quality of the existing employment sites. The quality of sites is a key issue affecting their future use, lettable and fit for market requirements. 40 existing sites in the National Park were included in an assessment of their employment site quality.
- 2.36 Each identified existing site was subject to an assessment of its suitability for continued employment use through an examination of quality in terms of meeting market attractiveness and sustainability criteria. The criteria used to assess the quality of each site is available in Appendix 1.
- 2.37 The scoring for the overall site quality can be seen in Appendix 2 and shows that there are mainly average quality employment sites, but there are also quite a few with relative low quality. The lowest scoring sites in the overall site quality assessment were further assessed in terms of whether they should be released from a B Class Use activity in the future. The conclusion was that none of these sites were recommended for release from their current employment use (See Appendix 2).
- 2.38 Whilst there are quite a few low quality sites, the current use appears to still satisfy local employment needs and they are still fit for purpose for the current occupier. This situation may reflect that some businesses require cheap accommodation and can still operate from a lower quality location or site. It may also reflect the high number of

small businesses in the National Park that may only require small scale modest accommodation.

- 2.39 The Business Needs Survey (2014) also identified that the vast majority of businesses were satisfied with their current site (see Paragraph 2.17).
- 2.40 As this site quality assessment shows that all employment sites are still fit for purpose, then this supports the approach taken in the Local Plan (Policy SP43) that existing employment sites should be retained for future employment opportunities and not lost to other land uses.
- 2.41 The same criteria in the site quality assessment (Appendix 1) have been used to assess the quality of the sites proposed for business and mixed uses as part of the Call for Sites consultation. Only nine sites were proposed for employment use or for mixed housing and employment use. This indicates that there may be only modest need and a limited supply of employment land.
- 2.42 The Business Needs and Commercial Property Market Assessment also considered employment floorspace supply that is likely to be delivered in the future. It looked at what was in the current pipeline by identifying recently completed sites, floorspace under construction, and sites with current planning permission but where construction has not begun. The latter is considered a very good indicator of employment land supply in the immediate future.
- 2.43 It reported from the latest published Annual Monitoring Report (Dec 2016) that showed that whilst there was no new business floorspace built in the year to end March 2016, the previous year had seen a large rise of 2,947 square metres. Whilst this is a substantial fluctuation, it is still consistent with the long term average level of business floorspace development outlined in paragraph 2.28.
- 2.44 Unimplemented planning permissions in the Annual Monitoring Report (Dec 2016) were identified in the Assessment Report as being 3,520 square metres, of which 996 sq.m was B1a offices; 575 sq.m was B1b/B1c research and development and light industrial; 1,011 sq.m was B8 storage. Whilst there are no allocated employment land sites in the National Park area, this represents a strong pipeline of future business floorspace. The latest figures as at March 31st 2017⁵ show a similar level of outstanding unimplemented planning permissions of business floorspace available for development.
- 2.45 The Business Needs and Commercial Property Market Assessment then goes on to consider the demand for employment space, including both a broad overview of the underlying economic characteristics in the

⁵ The Annual Monitoring Report for 2017 has yet to be published.

New Forest area, and an assessment of future employment land demand based on past trends.

- 2.46 The Report identifies that the long term history of business floorspace since 1988 shows a relatively stable completion rate over time, with the long term average being approximately 900 square metres per annum. This reflects the data outlined above in paragraphs 2.27 – 2.30.
- 2.47 In addition to using past trends of employment development, the NPPG suggests that future forecasts of need for employment land can also be determined through demographically derived assessments. The Census data, coupled with the ONS (2013) Characteristics of National Parks⁶, shows that the population of the National Park has increased modestly by 2.6% between 2001 and 2011. The data also shows a large increase in the older age population with those aged 60-74 increasing by 26.8%, and those 75 and over increasing by 17.4%. Those aged 30-44 fell by 16% and those aged 45-59 fell by 7.6%. This demonstrates a trend of reduction in the working age population in recent years. Coupled with the normal aging of the population, it is reasonable to expect this trend to continue.
- 2.48 This trend appears to be confirmed by the recent population forecasts made by Hampshire County Council⁷ for the New Forest National Park. Their latest small area population forecast covers the period from 2015 to 2022. Whilst this forecasts an overall increase in the population of 1.2% during this period, it also shows that there is a significant shift towards those over 65 and away from those of a working age. There is a forecasted fall of 802 people, or - 4.6% in the working age population (16-64 years old), and a forecasted rise of 1,045, or 10.5% in those over 65. Clearly this trend suggests that there is likely to be a decrease in the number of residents that will be seeking employment during the Local Plan period. The implication is that the future need for new employment space will be reduced somewhat by this.
- 2.49 An adjustment was then made to reflect that only a proportion of the 802 population decline would be economically active and would work in the National Park area, and not all would be associated with B Use Class activities. This identified a relevant working age population reduction of 120 for the period 2015-2022.
- 2.50 The potential distribution of this economically active population decline across B Use Class categories was made, based on past-trends in employment land completions in the authority. The B8 use was adjusted downwards to reflect likely lower levels of B8 requirement in the area. Standard employment density ratios were applied to this data to identify the potential reduction in floorspace demand required over the period 2015-2022. A further modification was made to reflect the

⁶ Valuing England's National Parks, Cumulus Consultants Ltd and ICF GHK 2013

⁷ Small Area Population Forecasts (SAPF) 2015, Hampshire County Council.

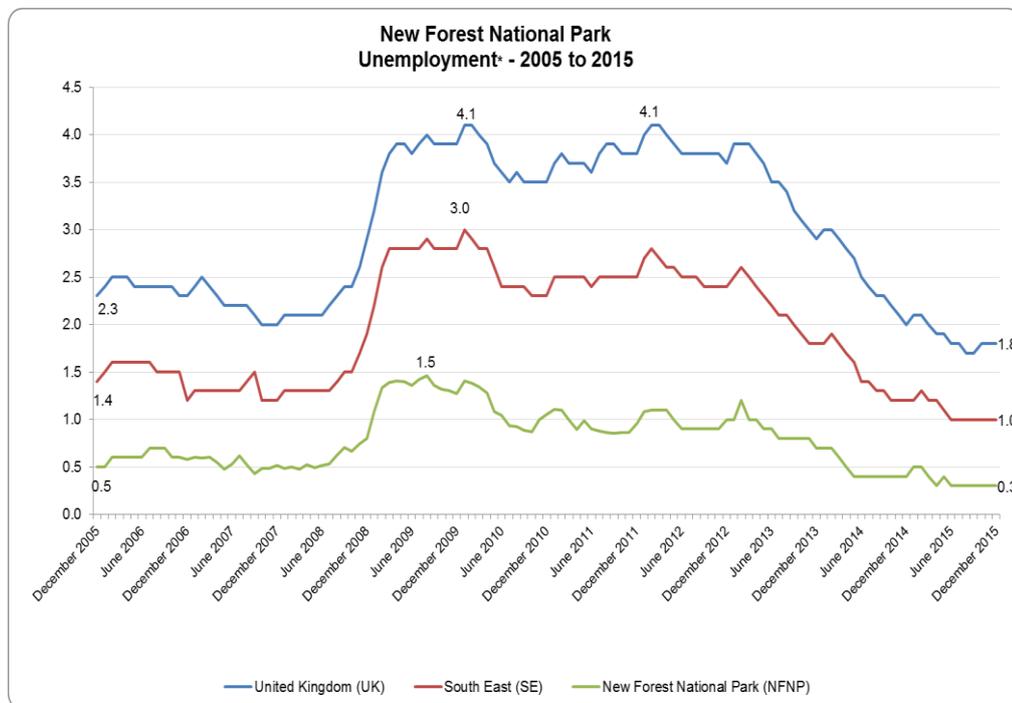
fact that there would be people working from home who would not require new floorspace.

- 2.51 The result of this analysis was the identification of a potential reduction in B Use Class floorspace of 2,460 sq.m over the period 2015-2022 in the NFNPA. This equates to a potential reduction in B Use Class floorspace demand of approximately 300 sq.m per annum. Applying this to the past-trend demand figure of approximately 900 sq.m per annum would indicate a future employment floorspace demand potential of approximately 600 sq.m per annum.
- 2.52 However, the analysis of new working methods and workspace trends in the Business Needs and Commercial Property Market Assessment Report highlights the drive for a greater variety of different types of space to meet changing employment needs. The Report notes that it is difficult to assess the extent to which employment density standards may change, but the pressure to provide a range of employment spaces is likely to require more floorspace provision to provide realistic choice.
- 2.53 The commercial property market review also identified a relatively tight market. The B1 office market has seen strong take-up over the past few years, with a very low headline vacancy rate. A similar pattern exists for the wider industrial sector, although there are difficulties in un-picking the variations between sub-sectors of this sector. The implication, however, is that there is latent pressure for more commercial floorspace in the National Park.
- 2.54 As a further sensitivity assessment in the commercial property market review, the impact of including the Tatchbury Mount Hospital redevelopment in the past-trend figures has been carried out. Over the period 1988-2016 the result is that the past-trend completion rate increases from about 900 sq.m per annum to about 1,100 sq.m per annum, or an increase of just over 20%. Whilst this is recognised as an exceptional redevelopment scheme, it does reflect employment floorspace supply that has been absorbed into the market and hence met a need.
- 2.55 Consequently, the Assessment Report highlights overall that the pressure for reduced floorspace provision as a result of a decline in the size of the working age population will be counteracted by changing workspace trends and an increasing relative shortage of space to meet current demands. It outlines that workspace and working method changes may lead to the need for more floorspace to meet differing needs, and there is a potential latent demand expressed through a relatively tight commercial property market. As such, the Assessment concludes that provision for a future average completion rate of between 600-900 sq.m per annum in the New Forest National Park Authority may be a prudent forecast of future employment floorspace demand.

- 2.56 The Authority is comfortable with this estimate of business floorspace need, as:
- the long term employment development trend (which is a similar level) has produced very low unemployment in recent years;
 - it is recognised that the economy of the National Park is diverse and many businesses, such as those in agriculture, leisure and tourism, do not need B1 – B8 business space; and
 - it is expected that the economy will be partially driven by productivity gains (rather than new space requirements) in the future (both the LEPs and the LEADER programme have identified improvements in productivity as the key to growing the New Forest economy - see paragraphs 2.70); and
 - this level is consistent with the modest level of need in the New Forest outlined in the M3 LEP Commercial Market Study.
- 2.57 The overall conclusions of the assessment of employment needs in the Business Needs and Commercial Property Market Assessment Report are that the revealed market demand characteristics and supply position indicate a short supply of available floorspace and there are limited opportunities for new development of supply; stock quality is noted to be generally average overall, although this masks a number of poorer and isolated employment sites and accommodation which ideally should be addressed in the future; there is a realistic demand projected for some 600 - 900 sq.m of new B Use Class employment floorspace per annum in future.
- 2.58 It also concludes that there are no allocated employment sites in the Park area, so new employment floorspace and sites have come forward only through windfall developments and the change of use of existing buildings to form part of the B Use Class supply over time; and it is reasonable, in the context of the National Park's wider environmental and social objectives that future employment land and floorspace is delivered through a continuation of the windfall development approach influenced and shaped through the Local Plan's criteria-based planning policies.
- 2.59 As outlined in paragraph 2.3, it is expected that the long term trend of new employment land development will continue and be able to satisfy future employment land needs. This approach, however, assumes that there will not be a significant loss of existing employment sites. The Local Plan contains a policy to retain employment sites (Policy SP43), as it is recognised that they are under pressure from other uses, and there are limited opportunities for alternative new sites. This Policy provides flexibility for mixed use developments to be considered where employment space is retained. Policy DP44 also provides flexibility for the redevelopment of brownfield employment sites for employment use by supporting a wider range of business uses than the prior use. Recent Government changes to permitted development rights, whereby offices can be converted to housing, has led to some losses

of office space in the last few years, but these have fallen after the initial take up following the change. The Authority will monitor this and its impact on the wider local economy in the coming years and assess if any changes of approach will be required.

2.60 The National Park's duty (as described in the Environment Act) is to foster the *economic well-being of its local communities*. Consequently, if unemployment is used as a measure to reflect this well-being, another way of assessing the need for new employment space is to consider the level of unemployment that needs to be tackled. Unemployment⁸ in the National Park has been lower than in Hampshire, the South East and the UK for well over a decade, both before and after the financial crisis in 2007-9. In October 2017 it was 0.4% of the working age population, which is amongst the lowest levels in the country. This represents 70 people who are unemployed and claiming Job Seekers Allowance in the National Park.



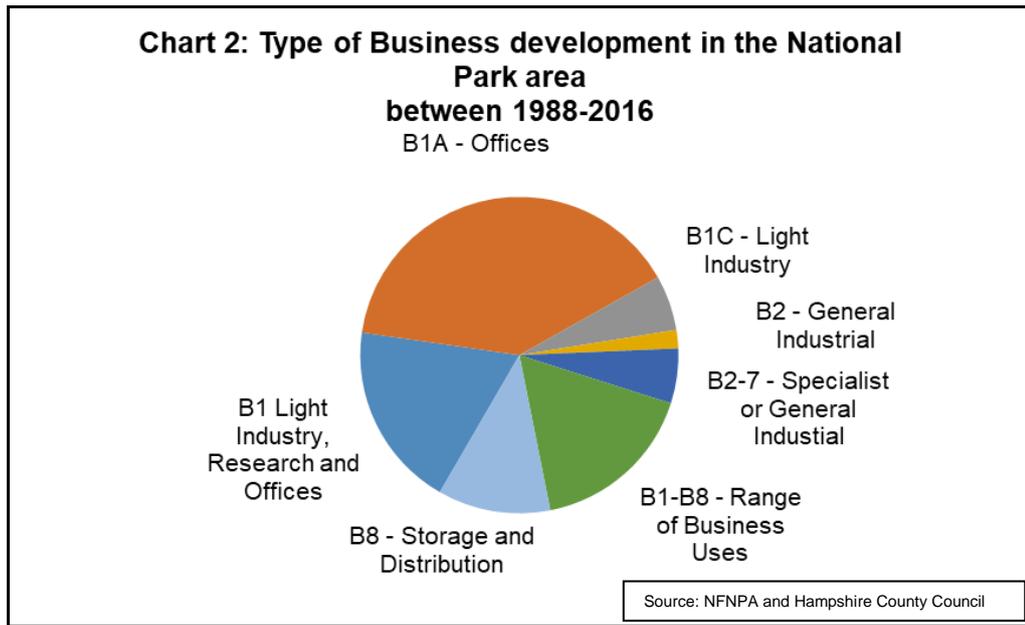
2.61 The employment policies in the Core Strategy since it was adopted in Dec 2010 (without any employment land allocations) have produced a level of employment space development which have helped unemployment to fall to these very low levels. This further provides confidence that the projected need for employment space in the Local Plan of 600 - 900 m² per annum will deliver low unemployment in the future.

⁸ Unemployment measured by Job Seekers Allowance. Source: NOMIS (ONS), Hampshire County Council. The New Forest NP is defined by ONS Lower Super Output Areas (LSOA) in Hampshire and Wiltshire that have 50% or more of addresses within the National Park boundary. New Forest National Park Rates are derived from ONS Lower Super Output Area 2012 Mid-Year (population) Estimates. Rate based on working age 16-64yrs.

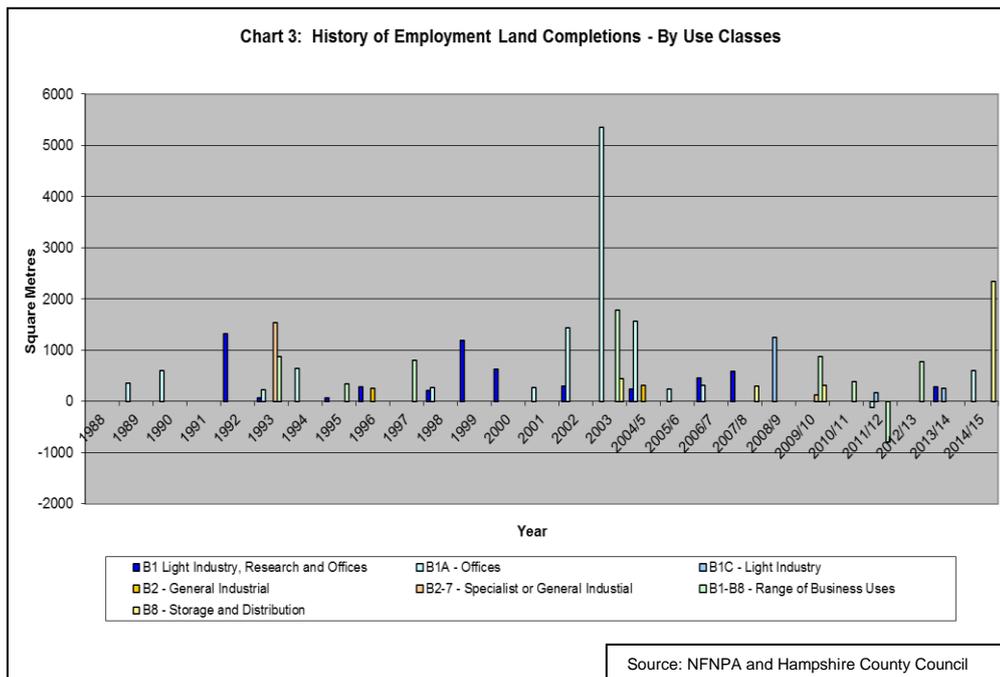
- 2.62 The Authority expects sufficient employment land development to come forward to satisfy the estimated level of need. This will be achieved in two ways. Firstly, as many of the key economic policies have not changed, it is expected that the range of economic policies outlined in Chapter 8 of the Local Plan are likely to deliver a similar level of employment floorspace as in the past. The Local Plan also takes a more flexible approach to the redevelopment of existing employment sites and encourages mixed use developments on existing sites. Secondly, new employment development is already in the pipeline. As at March 2016 there was 3,520 m² of business floorspace available for development in the National Park, as measured by unimplemented planning permissions. This is equivalent of between 3.9 and 5.9 years supply of employment floorspace based on the expected range of future employment land demand outlined in paragraph 2.55.
- 2.63 The overall conclusion is that analysis of the long history of employment land development, that encompasses a wide range of economic environments, demonstrates that it is reasonable to expect the rate of development of employment land to continue on this long term trend. The Business Needs and Commercial Property Market Assessment recognises that the pressure for reduced floorspace provision as a result of a decline in the size of the working age population will be counteracted by changing workspace trends and an increasing relative shortage of space to meet current demands. As such, the Assessment concludes that provision for a future average completion rate of between 600- 900 sq.m per annum in the New Forest National Park Authority may be a prudent forecast of future employment floorspace demand.
- 2.64 Importantly, given that the combination of employment policies in the Core Strategy and the development of employment land in recent years (consistent with this target rate) have resulted in a very low level of unemployment, it is expected that employment land development at this target level will continue to be sufficient to support the economic well being of the National Park's communities.

Type of business development

- 2.65 Detailed analysis of the total amount of business development during the 1988 to 2015/16 period shows the range of different types of business development that has taken place. Chart 2 below highlights the employment land relating to the different business uses that has been developed, with B1a Uses for offices being the largest, followed by B1 Uses covering light industry, research and offices. Much of this development has involved the change of use of existing buildings, including agricultural buildings.



2.66 Analysis of the development of the different business uses during the 1988 to 2015/16 period is shown in Chart 3 below. This demonstrates a reasonably consistent development of B1 and B1a Use classes over the period, suggesting an established need for this type of business space. The consistent and long term trend for B1 and B1a uses suggests that these types of business floorspace will continue to come forward in the future. The Local Plan's focus on small, locally distinctive, higher value and low impact types of businesses is consistent with the continuance of small scale development of office, light industry or research and development premises.

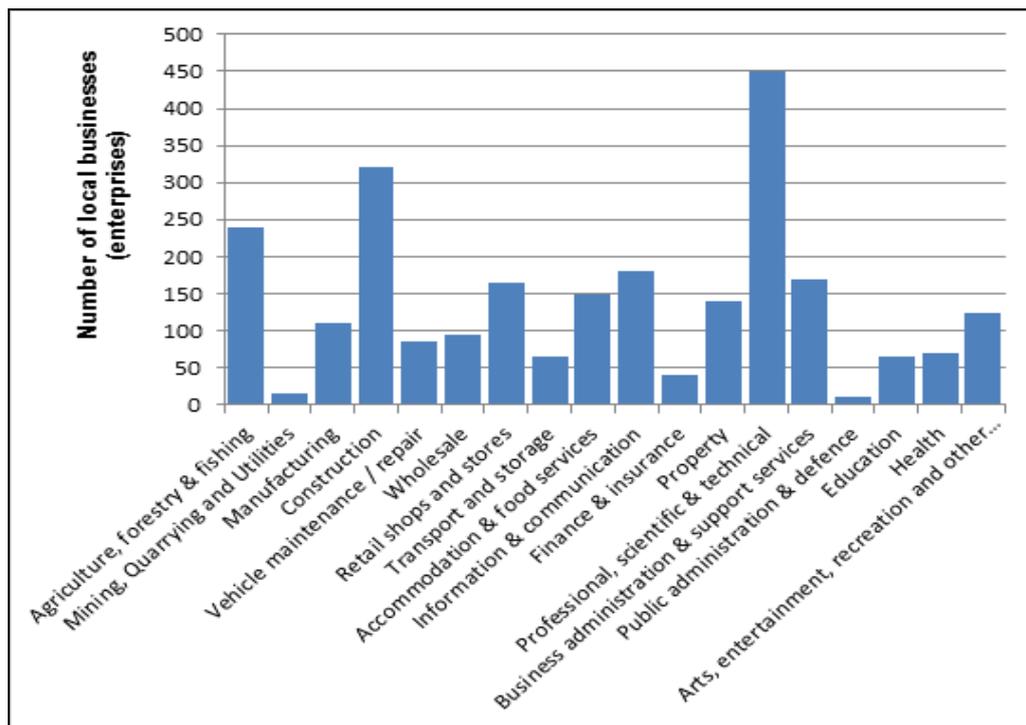


2.67 However, development of Use Classes B2 to B7, and B8 are sporadic, suggesting a less permanent need for these types of business development. This is not considered to be problematic as general warehousing is not encouraged. It is considered that warehousing does not generate significant employment opportunities relative to the amount of space required, and typically results in more traffic.

Other elements of the Local Economy

2.68 Of course, in addition to employment from Land Use Classes B1 to B8, local employment is generated in other sectors of the local economy such as retailing, hotels, restaurants, leisure activities, camping, commoning, forestry and agriculture. Many of these businesses are particularly important in the National Park and relate to the important rural and visitor economies. The diverse nature of the local economy can be seen in Chart 4, which shows the different types of business sectors represented in the National Park.

Chart 4: Number of Businesses per Sector 2015



Source: ONS (2016)

2.69 The very diverse nature of the local economy means that it does not heavily rely on the B1 to B8 Land Use Classes that need office and industrial spaces. The Local Plan contains supportive employment policies for the visitor economy, and for agriculture, forestry and commoning by supporting the land based economy.

- 2.70 Moreover, both the LEPs and the LEADER programme have identified improvements in productivity, aided by skills training and business support, as the key to growing the New Forest economy. This, of course, does not require additional employment land, but envisages a more productive use by workers of existing premises and spaces. This was also evident in the Business Needs Survey (2014), which showed that whilst 32% of respondents expecting their space requirements to increase within the next five years, the majority of these are content to expand on their existing site, with only about 10% of respondents wanting to relocate to new premises in the future.
- 2.71 Furthermore, when considering new and emerging sectors, the Local Plan allows for the growth of home working, and encourages the use of sustainable technologies and practices and technological advances that aid employment development.

3. Key Issues for the National Park economy

- 3.1 In reviewing the economic profile for the area, the following key economic issues have been identified:
- the beautiful environment of the National Park is a significant economic asset as it attracts both visitors and businesses to the New Forest, Hampshire and the South East. Maintaining this environmental asset makes an important contribution to both the local and regional economy;
 - the large areas covered by national and international nature conservation designations, and the high level of environmental protection provided by national planning policies, means that there are environmental constraints on new business and business expansion in the National Park;
 - the LEPs Strategic Economic Plans do not give any specific quantitative requirement for employment land development in the National Park to meet regional needs, but local employers, typified by small, indigenous enterprises, do have business needs;
 - unemployment has been, and remains, relatively low compared to regional and national levels;
 - looking forward to the next few years, a decline in the working age population is forecast, which suggests that there will be a decrease in residents seeking employment, and this could reduce the requirement for new business space somewhat.
 - the tourist industry makes a significant contribution to the local economy. The challenge is to balance the economic benefits from visitors, whilst avoiding potential impacts they may have on the environment or special qualities of the Park;
 - whilst traditional rural land use activities provide only a small proportion of jobs in the area, they are essential for maintaining the land use management practices that help to conserve or enhance the landscape character and natural habitats of the National Park. With likely structural changes in the agricultural economy, there

may be increasing demand for diversification of activities on farms to support ongoing agricultural activity;

- whilst the practice of ‘commoning’ is integral to the character of the National Park and the maintenance of the landscape, its economic prospects remain under pressure;
- local businesses with a clear New Forest relevance and origin can provide local employment that will help to sustain the rural communities in the National Park;
- the proximity of the urban conurbations to the east and west attract many residents to jobs there, thus creating substantial commuter traffic flows;
- retaining existing employment sites is difficult in the face of pressure for housing, particularly given the difference in land values between the two uses. However, to do so will be important to help to sustain rural communities; and
- whilst many residents have high skill levels, the productivity of the local economy would benefit from improved skills and business support. There has been a loss of traditional rural skills and new and improved skills are needed to support a mixed rural economy.

4. Consultation

4.1 The Authority ran a Regulation 18 Consultation in the autumn of 2015 which focused on identifying the key issues to be addressed in the Local Plan. The key issues that were proposed for comment in relation to the local economy were:

- Reviewing the need for new employment development within the Park; the retention of existing employment sites; and the spatial options for new employment development. A recent survey shows that local businesses are largely content with their existing premises, but some expect to require increased business space in the future.
- Sustaining the diverse local economy which has produced consistently low unemployment compared to regional and national levels.
- Reviewing the implications for the local economy and jobs from the recent changes to national Permitted Development Rights.
- Assessing the planning policy approach aimed at supporting the visitor economy while avoiding potentially harmful environmental and cultural impacts.
- Reviewing the planning policy approach to farm diversification.
- Assessing the policy options available to support the rural economy, including the provision of fast and reliable communications technology across the Park and flexible working arrangements such as home working.

4.2 The comments received about the key issues for the Local Plan included:

- There is support for the identification of employment land. It is proposed that small and medium space for industry/business should be provided to allow enterprises to develop within the NF villages

- Avoiding the loss of commercial, retail, and agricultural uses to housing is considered to be important.
- Sustainable development should be defined for the National Park and the 'Working Forest' concept should be clarified and explored.
- While the importance of the visitor economy is recognised, its impact on land management and traffic need to be considered, and other sectors of the economy should not be overlooked.
- Farm diversification is considered an important issue, particularly in relation to the viability of farm businesses. New forms of agricultural development due to changing farming practices should be considered. However, an alternative view is that the shift from land based businesses to tourism is a serious problem that is harmful to the Forest's distinctive character, that farm diversification should not include large scale solar PV installations, and that change of land use procedures should be strengthened to protect agricultural and commoning land use.
- There is some agreement that the key business constraints include poor transport links, the local road network, insufficient provision of public transport, a poor postal service, and poor broadband.
- A key issue raised is how the balance is struck between fostering the local economy and maintaining and enhancing the natural environment. Comments suggest that opportunities should be focused on those that benefit both the environment and the economy. It was noted that the economic prosperity in the Park relies on the quality of the natural environment.
- The potential for port development in the future at Dibden Bay was raised
- A view is expressed that horse keeping makes a significant contribution to the local economy and the Forest's cultural heritage, and that there should be no major changes to existing planning policies relating to horse keeping. An alternative view is that the current policy on manages hasn't benefited the Forest and needs to be reviewed, and that the rural landscape is in danger of being overwhelmed by paddock fencing and field shelters.

4.3 Following this consultation, the Authority set up a series of topic working groups, including one on the local economy, focusing on the issues that generated the most interest and concern during the consultation on the scope of the Local Plan. The purpose of the meeting, which was attended by a range of local business organisations, was to discuss the key points raised in the consultation and to suggest alternative approaches, or ways in which the existing policies could be amended or improved. The main conclusions of the Socio-Economic Working Group Meeting were that:

- No major change to the broad thrust of the existing business and economic policies was considered necessary.
- No substantial concerns were raised about the effectiveness of existing policies and, indeed, some thought that existing policies had been particularly effective. There were, however, a number of

issues raised that participants wanted to be considered in the review of existing policies, including the shift to raising beef cattle by commoners, the need for both good broadband and mobile communication coverage, the lack of affordable housing, the increased mechanisation and declining number of workers on farm holdings, the pay of local jobs, and the vibrancy of village centres.

- Given the number of small businesses in the National Park, the Local Plan review should consider the space needed for these businesses and their expansion, together with the trend for home working and start ups.
- Whilst the importance of retaining sites for businesses to operate in the long term is recognised, it may be worth considering the loss of an employment site in exceptional circumstances if there is an opportunity to deliver a more beneficial use for the National Park.
- Existing policies for tourism development are effective and don't need much change. Policies should, however, be reviewed to assess whether any change is needed in light of the new trends identified for the visitor economy.
- The existing policy on the land based economy is supported. Some flexibility should be considered for small scale developments associated with the expansion of local produce businesses and commoners.

5. Conclusions

5.1 When pursuing the National Park's two purposes, the National Park Authority also has a duty to foster the social and economic well-being of local communities. A healthy local economy is essential in maintaining the life and vibrancy of the National Park, providing local employment and sustaining its rural communities. Flexibility is needed to respond to changes in the wider economy, but without compromising the special qualities and essentially rural character of the area. The Authority will seek to foster the economic well being of its communities through the range of policies in Chapter 8: A Sustainable Local Economy in the Local Plan, including Policy SP42 that allows for small scale employment development in the Park, and supports a variety of employment opportunities where they do not have an adverse impact on the special qualities of the National Park.

5.2 To sustain the economic well-being of communities, it will also be important to retain existing employment opportunities and this is particularly important within the New Forest where high house values mean there is strong demand for alternative uses for employment land. Moreover, suitable alternative sites that are available are limited given the constraints of the high level of protection afforded to the landscape in National Parks in the NPPF and the protection of the majority of the planning area covered by internationally designated nature conservation sites. The Socio Economic Working Group of local business representatives recognised the importance of retaining sites

for businesses to operate in the long term. These factors are reflected in Policy SP43.

- 5.3 Analysis of past trends of employment land development shows that employment opportunities have been created and unemployment has fallen and remains very low. This trend also projects that development is likely to continue to support employment opportunities in the future. The approach of supporting small scale employment development through business and employment policies, rather than allocated sites, will be continued through the policies in Chapter 8 of the Local Plan. It is also recognised that a large proportion of the local economy does not rely on B1-B8 employment land classification business space, and with such a diversified range of local business sectors, the local economy is expected to thrive without the need of substantial new B1-B8 employment land. Moreover, both the LEPs and the LEADER programme have identified improvements in productivity, aided by skills training and business support, as the key to growing the New Forest economy, rather than substantial new employment space.
- 5.4 The Business Needs and Commercial Property Market Assessment concludes that provision for a future average completion rate of between 600- 900 sq.m per annum in the New Forest National Park Authority may be a prudent forecast of future employment floorspace demand. The Authority expects sufficient employment land development to come forward to meet this estimated local need. It expects that this will be delivered through the continued long term trend in windfall development and the implementation of criteria based business policies, which are outlined in Chapter 8. Approved planning permissions for employment floorspace indicate a strong pipeline of development is already in place to meet this need. This is estimated to be between 3.9 and 5.9 years of supply of employment space.
- 5.5 In terms of supporting a prosperous rural economy, the NPPF outlines that planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To achieve this, the Local Plan will support the re-use and extension of existing buildings (Policies DP45 and DP49), the redevelopment of existing business use employment sites (Policy DP44) and farm diversification (Policies SP48) throughout the National Park, together with small scale employment development also using new buildings in the defined villages (Policies SP42). The Authority will encourage the redevelopment of redundant brownfield employment sites for employment use by supporting a wider range of business uses than the prior use.
- 5.6 The Local Plan also recognises that whilst traditional rural land use activities (including commoning) provide only a small proportion of jobs in the area, they are essential for maintaining the land use management practices that help to conserve or enhance the landscape character and natural habitats of the National Park. Policy SP48 will

support land based businesses that help maintain the overall character and cultural identity of the Park and the diversification of activities on farms to sustain existing farming activities.

- 5.7 The New Forest National Park's unique environment attracts many visitors and the tourism industry is of considerable importance to the National Park's economy. Spending associated with leisure trips to the National Park is significant, supporting the accommodation, retail and other business sectors, providing employment, and thus supporting local communities. The Local Plan Policy SP46 aims to support sustainable tourism development where it provides opportunities for the understanding and enjoyment of the special qualities of the National Park in a way that either enhances, or does not damage, the special qualities.

Appendix 1: Criteria for the Measurement of the Quality of Employment Land and Premises⁹

Character of Area (Existing Sites)		
Score		Indicator
5	High	Established commercial area with room to expand
4	Above average	Established commercial area
3	Average	Mixed commercial / residential area
2	Below average	Residential area with some commercial uses
1	Low	Mainly residential area with no / few other commercial uses

Quality of Site (Existing Sites)		
Score		Indicator
5	High	Visually attractive with ample parking, excellent landscaping and services
4	Above average	Visually attractive with good parking provision, landscaping and services
3	Average	Unremarkable with adequate levels of parking, limited landscaping and services
2	Below average	Untidy site with limited levels of parking, little landscaping
1	Low	Scruffy site with inadequate levels of parking, poor quality or no landscaping

Quality of Buildings (Existing Sites)		
Score		Indicator
5	High	New or refurbished premises of top specification
4	Above average	Modern premises recently occupied, flexible accommodation with good facilities
3	Average	Refurbished older building or modern building with inflexible accommodation
2	Below average	Older building but with potential for conversion or refurbishment
1	Low	Older building in poor condition with limited potential for conversion or refurbishment

Site Prominence – Key Criterion (Existing and Proposed Sites)		
Score (weighting x 2)		Indicator
5	High	Gateway site visible from main road network
4	Above average	Visible site on main road or prominent estate
3	Average	On a main road or prominent estate away from view
2	Below average	Visible on a minor road or estate
1	Low	On a minor road or estate away from view

⁹ Developed by the New Forest District Council and NFNPA

Road Access – Key Criterion (Existing and Proposed Sites)		
Score (weighting x 3)		Indicator
5	High	Immediate access to strategic road network; easy access for all vehicles
4	Above average	Adjoining main road; easy access for all vehicles
3	Average	Indirect or restricted access to main road; easy access for all vehicles
2	Below average	Restricted access for HGVs; restricted access to major road network
1	Low	Restricted access for commercial vehicles; severely restricted access to main road

Public Transport Access – Key Criterion (Existing and Proposed Sites)		
Score (weighting x 2)		Indicator
5	High	Near to station; frequent bus route; good cycle and pedestrian links
4	Above average	Near to station or peak time bus route; near to cycle route; good pedestrian links
3	Average	Near to either a station, or peak time bus route, or cycle route; with pedestrian links
2	Below average	Not near a station, peak time bus route, or cycle route; with pedestrian links
1	Low	Not near any of the above
<i>Note: “Near” facilities is within 10 minutes walk.</i>		

Local Amenities (Existing and Proposed Sites)		
Score		Indicator
5	High	Near town centre facilities
4	Above average	Near local centre facilities
3	Average	Near limited range of basic facilities
2	Below average	Near one or two facilities
1	Low	Not near facilities
<i>Note: “Facilities” include one or more of bank, convenience shop / newsagent, pub. “Near” facilities is within 10 minutes walk.</i>		

Impact on Locality – Key Criterion (Existing and Proposed Sites)		
Score (weighting x 2)		Indicator
5	A good neighbour	No impact on residential amenity. No cultural heritage constraints on expansion
4	Above average	Minor impact on residential amenity and / or with minor cultural heritage constraints
3	Average	Acceptable impact on residential amenity and / or with some cultural heritage constraints
2	Below average	Negative impact on residential amenity and / or cultural heritage interests
1	A bad neighbour	Serious negative impact on residential amenity and / or cultural heritage interests

Site Availability & Constraints (Proposed Sites)		
Score		Indicator
5	Immediately available	No obstacles to development
4	Available short term	Easily resolved obstacles to development
3	Available medium term	Some obstacles to development; moderately costly and time consuming to resolve
2	Available long term	Major obstacles to development; difficult, costly and time consuming to resolve
1	Potentially available	Major obstacles to development; very difficult costly and time consuming to resolve

Environmental Constraints – Key Criterion (Proposed Sites)		
Score (weighting x 2)		Indicator
5	No constraints	No apparent environmental constraints on development
4	Minor constraints	Potential minor landscape, nature conservation constraints on development
3	Some constraints	Landscape and /or nature conservation constraints requiring mitigation
2	Significant constraints	Significant negative impact on trees, landscape and / or conservation designations requiring major mitigation. Potential flood risk
1	Serious constraints	Flood risk area. Serious negative impact on trees, landscape and / or conservation designations

Appendix 2: Assessment of the Quality of Employment Sites

Employment Sites Quality Assessment

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 1	Wessex Institute of Technology Lyndhurst Road, Ashurst	Employment Segment	Character of Area (Existing Sites)	3	Set apart in open Forest location	41 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Very attractive Forest setting. Adequate parking.	
			Quality of Buildings (Existing Sites)	3	Well maintained older building.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Signed from A35 but not visible.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Access road leads directly from A35. Restricted access for HGVs.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near bus route and cycle path.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Rural office site situated in high quality environment	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Rural office site situated in high quality environment with good access to main road network. Outside a settlement; but no other alternative use considered appropriate.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 2	Cadnam Works (Triangle Sprays Car Repairs)	Employment Segment	Character of Area (Existing Sites)	2	Mainly residential.	33
		General Industrial / Business Area	Quality of Site (Existing Sites)	3	Adequate parking, but no landscaping	
	Southampton Road, Cadnam, Copythorne		Quality of Buildings (Existing Sites)	3	Traditional building with relatively modern shed extension.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Just off main road, but hidden behind housing	
			Road Access – Key Criterion (Existing and Proposed Sites)	9	Direct, but narrow, access to main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes	
			Local Amenities (Existing and Proposed Sites)	2	Near corner shop.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential for impact on neighbours.	
			Site Availability & Constraints (Proposed Sites)			
	Environmental Constraints – Key Criterion (Proposed Sites)					
Overall comment	Constrained site located behind housing on two sides. Paint shop has potential to cause nuisance to near neighbours.					Release assessment required? <input type="checkbox"/>

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 3	Brewgas Old Lyndhurst Road, Cadnam, Copythorne	Employment Segment	Character of Area (Existing Sites)	1	Residential Street.	25 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Limited parking and landscaping	
			Quality of Buildings (Existing Sites)	2	Older buildings, but may be capable of refurbishment.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible from a minor residential road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Below average access	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.	
			Local Amenities (Existing and Proposed Sites)	2	Near corner shop.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential impacts on residential neighbours.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Storage of gas cylinders in residential area. Constrained site. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Site currently in employment use. Originally used for egg packing and distribution. Use established in 1977 as 'light industrial building for any purpose'. Constrained site within residential area. Sustainable Development Factors:- It is on a residential street with close neighbours.

Local Planning Factors:- The site provides employment opportunities and is clearly fit for purpose for the current occupier. With alternative sites limited throughout the National Park, the site should be retained unless other overriding benefits would be attained by not doing so. The current use appears to still satisfy local employment needs and no overriding benefit in this location would accrue from the loss of this employment site.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 4	Windle Works, Southampton Road, Cadnam, Copythorne	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Mainly residential.	39 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Adequate parking. No landscaping.	
			Quality of Buildings (Existing Sites)	2	Older buildings, but may be capable of refurbishment.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Visible from a main road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	On a main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.	
			Local Amenities (Existing and Proposed Sites)	2	Garden centre and pub.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Location on busy main road, but older buildings.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 5	Ringwood Road Saw Mill, Ringwood Road, Bartley, Netley Marsh	Employment Segment	Character of Area (Existing Sites)	3	Rural location with some adjoining housing.	36
			Quality of Site (Existing Sites)	2	No landscaping.	
	General Industrial / Business Area	Quality of Buildings (Existing Sites)	2	Sheds	Release assessment required? <input type="checkbox"/>	
	Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Visible site on main road.			
	Road Access – Key Criterion (Existing and Proposed Sites)	12	Adjoining main road.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Noisy saw mills with adjoining residential properties.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Prominent main road location and good access. Timber yard and buildings fit for purpose.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 6	Ex Redmayne Engineering Co Station Approach, Brockenhurst	Employment Segment	Character of Area (Existing Sites)	3	Residential on two sides, but next to railway station.	40 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Limited parking and landscaping.	
	Quality of Buildings (Existing Sites)	2	Older industrial sheds.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Just off A337, but in a prominent location.			
	Road Access – Key Criterion (Existing and Proposed Sites)	9	Direct, but restricted, access to A337.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	10	Next to railway station and frequent bus route.			
	Local Amenities (Existing and Proposed Sites)	4	Close to village centre			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential for impact, but long history as employment site.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Site next to railway station and close to village centre, just off A337.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 7	Bucklers Hard Boat Builders Ltd,	Employment Segment	Character of Area (Existing Sites)	3	Rural site.	21
	Agamemnon Boatyard, Bucklers Hard, Beaulieu, Brockenhurst	Site for Specific Occupiers	Quality of Site (Existing Sites)	2		Release assessment required? <input type="checkbox"/>
			Quality of Buildings (Existing Sites)	3	Purpose-built sheds.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Remote - Not visible.	
			Road Access – Key Criterion (Existing and Proposed Sites)	3	Access via single track road well away from any main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	None	
			Local Amenities (Existing and Proposed Sites)	2	Pub / hotel in Bucklers Hard.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Impact on nature conservation and landscape interests.	
			Site Availability & Constraints (Proposed Sites)			
			Environmental Constraints – Key Criterion (Proposed Sites)			

Overall comment Remote site, isolated from facilities, but serving a specific use. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Site currently in employment use, and fit for purpose. Remote and probably unattractive as a business location to other than boat-building concerns.

Sustainable Development Factors:- The current use is probably the only acceptable form of built development on the site due to its isolated and sensitive location.

Local Planning factors: The boat building activity on this site stems from a long history of boat building in this area. The business could have some impact upon the sensitive nature conservation and landscape of the area. An alternative use would not be appropriate.

Conclusion: Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 8	24, Brockley Road, Brockenhurst	Employment Segment	Character of Area (Existing Sites)	3	Shops adjoining and opposite and dwellings.	43 Release assessment required? <input type="checkbox"/>
		General Industrial / Business Area	Quality of Site (Existing Sites)	3	Garage and car sales. Good level of parking, but with limited landscaping.	
		Quality of Buildings (Existing Sites)	3	Smart purpose-built premises.		
		Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Close to main road, and visible from minor local road.		
		Road Access – Key Criterion (Existing and Proposed Sites)	6	Access into site narrow and often with parked cars.		
		Public Transport Access – Key Criterion (Existing and Proposed Sites)	10	Within easy walk to Brockenhurst railway station.		
		Local Amenities (Existing and Proposed Sites)	4	Near to village centre.		
		Impact on Locality – Key Criterion (Existing and Proposed Sites)	8	Quiet clean and well maintained.		
		Site Availability & Constraints (Proposed Sites)				
	Environmental Constraints – Key Criterion (Proposed Sites)					
Overall comment	Garage site within defined New Forest Village. Proximity to village centre and access to good public transport.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 9	Sway Road Garage	Employment Segment	Character of Area (Existing Sites)	1	Mainly residential.	40 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Adequate parking and limited landscaping.	
	Quality of Buildings (Existing Sites)	3	Converted older buildings and large workshops.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Minor local road.			
	Road Access – Key Criterion (Existing and Proposed Sites)	9	Reasonably easy access via local roads.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	10	Close to mainline railway station and frequent bus route.			
	Local Amenities (Existing and Proposed Sites)	4	Near to village centre.			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Garage site in defined New Forest Village. Proximity to village centre and access to good public transport.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 10	Whitefield Business Units Lepe Road, Blackfield	Employment Segment	Character of Area (Existing Sites)	3	Rural site.	36 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Visually attractive with adequate parking.	
	Quality of Buildings (Existing Sites)	3	Converted rural barns and outbuildings.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible on minor rural road.			
	Road Access – Key Criterion (Existing and Proposed Sites)	9	Easy access to main road network, but a little distant.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Infrequent bus service.			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	8	On its own. Rural character of buildings have limited impact in rural setting.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Good quality accommodation in isolated, but accessible location.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 11	Hypro Marine, Mount Pleasant, Lymington	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Rural Residential location.	28 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Average site with adequate parking.	
			Quality of Buildings (Existing Sites)	3	Light industrial sheds	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Minor rural road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Remote from main road network.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Not on a public transport route.	
			Local Amenities (Existing and Proposed Sites)	2	Hotel nearby.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Good quality accommodation, but in slightly isolated location.

Release Assessment Report

Market Attractiveness Factors:- No recent permissions. Refusal for housing development in 1999. Local Planning Factors: Contributes to supply of small scale employment sites, and is clearly fit for purpose for the current occupier. With alternative sites limited throughout the National Park, the site should be retained unless other overriding benefits would be attained by not doing so. The current use appears to still satisfy local employment needs and no overriding benefit in this location would accrue from the loss of this employment site. Conclusion: Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 12	R/O The Bungalow Bull Hill, Boldre, Lymington	Employment Segment	Character of Area (Existing Sites)	1	Rural Residential area.	18 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	1	Very untidy site.	
	Quality of Buildings (Existing Sites)	1	Dilapidated appearance.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Minor road.			
	Road Access – Key Criterion (Existing and Proposed Sites)	6	Remote from main road network.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Infrequent bus service.			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Nearby residential properties.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Poor quality remote site in residential area. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Established Use Certificate for metalwork, welding and building granted in 1976. No recent applications.

Sustainable Development Factors:- Remote rural location. Local Planning Factors: Rural site with long established use. No alternative sites are available in the locality. The site is low quality, but with limited alternative sites in the National Park, the site should be retained unless other overriding benefits would be attained by not doing so.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 13	Castle Malwood Minstead, Lyndhurst	Employment Segment Established or Potential Office Location	Character of Area (Existing Sites)	3	Established commercial site in rural location.	41 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Adequate parking and landscaping.	
			Quality of Buildings (Existing Sites)	3	Historic house with adjacent office block and depot.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Entrance visible from A31.	
			Road Access – Key Criterion (Existing and Proposed Sites)	15	Immediate access from A31.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Not on a public transport route.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment This is a rural site, which has immediate access from the strategic road network.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 14	Appletree Court, Gosport Lane, Lyndhurst	Employment Segment Established or Potential Office Location	Character of Area (Existing Sites)	1	Mainly residential area.	42 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Excellent landscaping and good parking provision.	
			Quality of Buildings (Existing Sites)	3	Converted older building with 1950s and 1980s extensions.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Near main road but not visible from it.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Access from and to main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near to frequent bus route.	
			Local Amenities (Existing and Proposed Sites)	4	Short walk to village centre.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Pleasant office site adjoining main roads and close to village centre facilities, but outside defined village boundary.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 15	Hawklease, Chapel Lane, Lyndhurst	Employment Segment Established or Potential Office Location	Character of Area (Existing Sites)	1	Mainly residential with church adjacent to the south-east.	41 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Attractive premises and grounds with good landscaping	
			Quality of Buildings (Existing Sites)	5	Top specification building.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Off main road but not visible from it.	
			Road Access – Key Criterion (Existing and Proposed Sites)	9	Near main roads.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near to frequent bus route.	
			Local Amenities (Existing and Proposed Sites)	4	Near village centre shops.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Top specification offices in pleasant location, with access to main roads.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 16	Meridien Modena 77 High St, Lyndhurst	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	4	Within village commercial centre.	41 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Visually attractive but parking and access not good	
			Quality of Buildings (Existing Sites)	4	Modern premises.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Prominent site on main road in village.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Adjoining main road junction. Potential problems with access, and deliveries.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near frequent bus route.	
			Local Amenities (Existing and Proposed Sites)	4	Within village centre.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Within Conservation Area close to hotel.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Attractive site, but potential issues with access and delivery vehicles.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 17	Bramshaw Garage	Employment Segment	Character of Area (Existing Sites)	2	Rural site close to housing.	22 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	1	Untidy garage use, no landscaping	
	Bramshaw Village, Lyndhurst	General Industrial / Business Area	Quality of Buildings (Existing Sites)	1	Poor quality sheds with tin rooves.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible on a minor road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	On a minor forest road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	No public transport.	
			Local Amenities (Existing and Proposed Sites)	2	Close to village store	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential impact on neighbouring dwellings.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Poor quality buildings in isolated location. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- No recent planning consents. Isolated location in the middle of the New Forest.

Sustainable Development Factors:- Remote location

Local Planning Factors: This site provides a local employment opportunity and is probably capable of operating as a garage without causing much detriment to the surrounding area. No alternative sites are available in the locality. The site is low quality, but with limited alternative sites in the National Park, the site should be retained.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 18	Pats Garage Romsey Road, Lyndhurst	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Busy road into village. Mainly residential uses with some commercial.	38 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Average quality garage site.	
			Quality of Buildings (Existing Sites)	3	Ageing modern building and canopy.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Adjoining main road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Adjoining very busy main road approach to village. Potential issues with access and deliveries.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near frequent bus route.	
			Local Amenities (Existing and Proposed Sites)	4	Near village centre.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Car sales showroom / servicing and petrol station in prominent location on main road close to village centre.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 19	Ocknell House Beechen Lane, Clayhill, Lyndhurst	Employment Segment Established or Potential Office Location	Character of Area (Existing Sites)	3	Edge of village.	47 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Average quality site with adequate parking.	
			Quality of Buildings (Existing Sites)	3	Offices Built in 1980s.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	10	Gateway site in Lyndhurst visible from main road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Adjoining main road - A337	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near frequent bus route.	
			Local Amenities (Existing and Proposed Sites)	4	Near village facilities.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Accessible office accommodation on main road into Lyndhurst.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 20	Estate Yard, Longdown, Denny Lodge	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Rural location amongst estate buildings.	25 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Average rural site	
			Quality of Buildings (Existing Sites)	2	Older buildings, but may be capable of refurbishment.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Isolated location.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	On a minor road, and distant from a main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	No public transport.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	One dwelling at entrance to the site.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Site on isolated rural road. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Isolated location adjoining wildlife conservation park.

Sustainable Development Factors:- Relatively remote rural location with poor access to facilities and services.

Local Planning Factors: This site provides local employment opportunities and is probably capable of operating in its current use without causing much detriment to the surrounding area. No alternative sites are available in the locality. Contributes to the supply of small scale employment sites, and no overriding benefit would be anticipated from the loss of this employment site in this location .

Conclusion: Not considered for release

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 21	Carlton House Ringwood Road, Woodlands, Netley Marsh	Employment Segment Established or Potential Office Location	Character of Area (Existing Sites)	3	Rural location, On its own.	40
			Quality of Site (Existing Sites)	4	Recently built additional buildings make for above average site.	Release assessment required? <input type="checkbox"/>
			Quality of Buildings (Existing Sites)	4	Mix of character older building and recently built additional buildings.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Entrance off main road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Easy access off main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Some potential visual impact given location within open countryside	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Rural offices on main road. Some recently built modern buildings, so this obviously meets the occupiers requirements.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 22	Netley Marsh Workshops	Employment Segment	Character of Area (Existing Sites)	3	Some residential. Community use adjacent.	37
			Quality of Site (Existing Sites)	3	Average rural site.	
	Ringwood Road, Woodlands, Netley Marsh	General Industrial / Business Area	Quality of Buildings (Existing Sites)	2	Older buildings, but may be capable of refurbishment.	Release assessment required? <input type="checkbox"/>
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	On main road, but not prominent.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Adjoining main road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Modest potential impact with some residential neighbours	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Group of small workshops on main road.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 23	Mortimers Trading Estate, Romsey Road, Ower.	Employment Segment	Character of Area (Existing Sites)	4	Small industrial estate.	45 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Mixed. Some large sheds, but some new units which are smart.	
			Quality of Buildings (Existing Sites)	4	Some new buildings recently added.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Visible but set back from the main road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	15	On main road and very close to the motorway.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.	
			Local Amenities (Existing and Proposed Sites)	2	Pub and hotel	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Some adjoining properties. Countryside location.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Rural industrial estate adjoining Paultons Park. A mixture of smart new development and sheds. Offers excellent access to motorway.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 24	Forest Corner Farm, Hangersley Hill, Hangersley, Ringwood	Employment Segment	Character of Area (Existing Sites)	3	Semi-rural location - converted farm.	32 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Rural site with no landscaping.	
	Quality of Buildings (Existing Sites)	3	Variety of sheds of varying ages.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible on country lane.			
	Road Access – Key Criterion (Existing and Proposed Sites)	12	Access via narrow lane, but directly from the A31 strategic road network.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Limited bus service.			
	Local Amenities (Existing and Proposed Sites)	1	Not near facilities.			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Some potential impact on adjoining properties. Open countryside location with potential landscape impact.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Rural location, but access from strategic road network.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 25	Holmsley Sawmills	Employment Segment	Character of Area (Existing Sites)	3	Entirely rural surrounded by forest.	35
			Quality of Site (Existing Sites)	3	Suitable for purpose	
	Holmsley, Burley.	Site for Specific Occupiers	Quality of Buildings (Existing Sites)	3	Assorted sheds and small offices built for purpose.	Release assessment required? <input type="checkbox"/>
	Site Prominence – Key Criterion (Existing and Proposed Sites)		6	On a main road, but away from view		
	Road Access – Key Criterion (Existing and Proposed Sites)		9	Access via unmade road directly onto A35.		
	Public Transport Access – Key Criterion (Existing and Proposed Sites)		2	None		
	Local Amenities (Existing and Proposed Sites)		1	None		
	Impact on Locality – Key Criterion (Existing and Proposed Sites)		8	No neighbours, and surrounded by trees.		
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Remote site, which is fit for purpose, with access onto A35.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 26	Grove Farm, Grove Lane, Redlynch	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Mainly rural, but edge of settlement.	25 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Quite untidy site; parking informal, no landscaping.	
			Quality of Buildings (Existing Sites)	1	Variety of low quality sheds.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Hidden from view on minor road	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Long distance to major road network on minor country road.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Some distance from bus services	
			Local Amenities (Existing and Proposed Sites)	2	Pub in village.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Adjoining properties. Countryside location.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Low quality accommodation. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Low quality accommodation, but appears to fulfill the needs of the current occupiers.

Sustainable Development Factors:- Edge of settlement location.

Local Planning Factors: Contributes to supply of small scale employment sites, and appears fit for purpose for the current occupiers. With limited alternative sites in the National Park, the site should be retained unless other overriding benefits would be attained by not doing so.

Conclusion: Not considered for release

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 27	Pensworth Milk Delivery Co Goggs Lane, Redlynch	Employment Segment	Character of Area (Existing Sites)	3	Rural site - some residential along approach lanes.	22 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Large parking area including parking for HGVs; no landscaping.	
	Quality of Buildings (Existing Sites)	1	Mixture of older buildings, some purpose-built, others converted.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Site is remote.			
	Road Access – Key Criterion (Existing and Proposed Sites)	6	On single track minor roads with limited access to main road network.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Remote site.			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Impact of traffic movements on surrounding roads. Open countryside location with potential landscape impact.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote countryside site with low quality accommodation. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Remote site with low quality accommodation.

Sustainable Development Factors:- Remote site.

Local Planning Factors:- Contributes to supply of small scale employment sites. With limited alternative sites in the National Park, the site should be retained. The current use appears to still satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site.

Conclusion: Not considered for release

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 28	Glendale Farm Whiteparish	Employment Segment	Character of Area (Existing Sites)	3	Rural site; dwelling on site.	42 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Parking inadequate, no landscaping.	
			Quality of Buildings (Existing Sites)	3	Mixture of converted farmbuildings and new sheds.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	On A36 but behind frontage.	
			Road Access – Key Criterion (Existing and Proposed Sites)	15	Direct access from A36.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near long distance A36 bus route.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Few dwellings, but potential impact on open countryside.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Rural site with direct access to A36 strategic road.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 29	Jewsons, Common Lane, Whiteparish	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Predominantly rural, scattered dwellings.	38 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Parking adequate, no landscaping but site well screened.	
			Quality of Buildings (Existing Sites)	3	Large sheds of mixed age.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible from minor road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Easy access to A36.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near long distance A36 bus route.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Few dwellings, but potential impact on open countryside.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Remote site, but with easy access to A36.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 30	R D Avery New Road, Landford	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Mainly rural / residential.	23 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Little parking, no landscaping.	
			Quality of Buildings (Existing Sites)	3	Mixture of metal-clad sheds of various age.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Behind residential frontage on minor road.	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	On minor road linking directly to A36, but poor access to site.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Infrequent bus.	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Residential neighbours and open countryside.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Site not prominent, behind houses, and isolated from facilities. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Rural site which is remote from facilities and services. Appears to meet the requirements of the existing occupants.

Sustainable Development Factors:- Remote site.

Local Planning Factors:- Contributes to supply of small scale employment sites, and appears fit for purpose for the current occupiers. With limited alternative sites in the National Park, the site should be retained. The current use appears to still satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site.

Conclusion:- Not considered for release

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 31	Landford Common Farm New Road, Landford	Employment Segment	Character of Area (Existing Sites)	3	Rural Area	28 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Fairly untidy site - some parking but not marked out - no landscaping.	
	Quality of Buildings (Existing Sites)	3	Assorted sheds of mixed age and quality.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Site well hidden by landform off minor road.			
	Road Access – Key Criterion (Existing and Proposed Sites)	9	Minor road links directly to A36; narrow drive, but HGVs on site.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Infrequent bus.			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Few dwellings, but potential impact on open countryside.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Somewhat isolated site, but appears to be serving its purpose.

Release Assessment Report

Market Attractiveness Factors:- Large number of varied businesses currently on the site.

Sustainable Development Factors:- Remote area. Local Planning Factors: Contributes to the supply of small scale employment sites, and is clearly fit for purpose for the current occupiers. With limited alternative sites in the National Park, the site should be retained. The current uses appear to satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site. Conclusion: Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 32	Sway Park Station Road, Sway	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Next to train station but houses nearby.	40 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	No landscaping. Sufficient car parking but none for HGVs.	
			Quality of Buildings (Existing Sites)	3	Small units of varying quality	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Tucked away down small access road, but next to station	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Restricted access for HGVs.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	10	Adjoining mainline railway station.	
			Local Amenities (Existing and Proposed Sites)	4	Close to Village centre	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	8	Well tucked away. No immediate impact.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Small industrial units within defined New Forest village next to railway station, but remote from main road network.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 33	Meadens of Sway Durnstown, Sway	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Edge of the village site in amongst housing	36 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Tidy, but no landscaping. Limited parking on site	
			Quality of Buildings (Existing Sites)	3	Converted and extended building.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Prominently visible on main road into Sway.	
			Road Access – Key Criterion (Existing and Proposed Sites)	9	Accessed via Forest roads, but HGVs appear to manage.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Railway Station in village. Pedestrian and cycle access to housing	
			Local Amenities (Existing and Proposed Sites)	3	Near village centre and Pub.	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Could impact on residential neighbours	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Car sales and servicing in defined New Forest Village.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 34	Gordleton Farm Industrial Park	Employment Segment	Character of Area (Existing Sites)	3	Close to large industrial estate in the countryside.	24 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Untidy older industrial estate	
	Quality of Buildings (Existing Sites)	1	Sheds and older buildings			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	2	On minor road away from view			
	Road Access – Key Criterion (Existing and Proposed Sites)	6	Distant from main road network.			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Limited bus service.			
	Local Amenities (Existing and Proposed Sites)	2	Hotel			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Adjoining residential properties.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote small business estate with low quality accommodation. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Low quality accommodation which, however, appears to meet the requirements of the uses currently occupying the site.

Sustainable Development Factors:- Relatively isolated rural location, close to sizable industrial estate, but distant from facilities and poor public transport.

Local Planning Factors: There is an alternative modern industrial estate close to this smaller, older industrial estate. However, this site contributes to the supply of small scale employment sites, and the current uses appear to satisfy local employment needs. No overriding benefit in this location would be anticipated from the loss of this employment site.

Conclusion: Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 35	Tower View, Crabbeswood Lane, Sway	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Rural site.	27 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	Untidy. Some parking, but no landscaping.	
			Quality of Buildings (Existing Sites)	2	Assorted older buildings and sheds.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible from Crabbeswood Lane.	
			Road Access – Key Criterion (Existing and Proposed Sites)	9	Access road narrow but clearly navigable by HGVs.	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	None	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential impact on neighbours.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote site, but access appears sufficient for purpose

Release Assessment Report

Market Attractiveness Factors:- Site currently in employment use. New building and extension in the past. Appears to suit existing occupant's requirements.

Sustainable Development Factors:- Relatively remote rural location with poor access to facilities and services Local Planning factors: Clearly fit for purpose for the current occupier. With limited alternative sites in the National Park, the site should be retained. The current use appears to still satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site. Conclusion: Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 36	Chatmohr Office Village	Employment Segment	Character of Area (Existing Sites)	3	Primarily rural and partially separate from scattered housing	42 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	4	Parking neatly laid out, site surrounded with parkland	
	Quality of Buildings (Existing Sites)	3	Converted buildings and new offices - primarily an office site			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	8	Signposted from a strategic road, but not visible from it.			
	Road Access – Key Criterion (Existing and Proposed Sites)	12	Direct access to A36 via narrow drive - not suitable for HGVs			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	4	Near infrequent bus routes.			
	Local Amenities (Existing and Proposed Sites)	2	Limited facilities in West Wellow			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Little potential impact on dwellings, but in open countryside.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Office site in rural parkland setting with good access to primary road network.					

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 37	Tower Farm Barrow Lane, Sway	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	2	Rural setting with scattered housing	19 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	1	Poor quality site with no landscaping	
			Quality of Buildings (Existing Sites)	1	Old low concrete sheds in poor condition.	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	On a minor road, mostly out of view	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Poor site access and long way from main road network	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	None	
			Local Amenities (Existing and Proposed Sites)	1	None	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential impact on neighbouring houses and in open countryside	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote site with low quality accommodation. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Site currently in partial employment use. The outstanding permission for B1-B8 floorspace has not been taken up for a number of years.

Local Planning Factors:- Contributes to the supply of small scale employment sites. With limited alternative sites in the National Park, the site should be retained, and no overriding benefit is anticipated in this location from the loss of this employment site.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 38	Arnewood Court Farm, Barrow Lane, Sway	Employment Segment	Character of Area (Existing Sites)	2	Rural setting with scattered housing	25 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Adequate parking, but no landscaping	
	Quality of Buildings (Existing Sites)	3	Older wooden and wood clad buildings.			
	Site Prominence – Key Criterion (Existing and Proposed Sites)	4	Visible on a minor road			
	Road Access – Key Criterion (Existing and Proposed Sites)	6	Poor site access and long way from main road network			
	Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	None			
	Local Amenities (Existing and Proposed Sites)	1	None			
	Impact on Locality – Key Criterion (Existing and Proposed Sites)	4	Potential impact on neighbouring houses.			
	Site Availability & Constraints (Proposed Sites)					
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote site, but with functionable buildings. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Site currently in employment use.

Local Planning Factors:- Contributes to supply of small scale employment sites, and is clearly fit for purpose for the current occupiers. With limited alternative sites in the National Park, the site should be retained. The current use appears to still satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 39	Pitmore Farm, Pitmore Lane, Sway	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Rural setting	26 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	2	In amongst agricultural buildings, no landscaping	
			Quality of Buildings (Existing Sites)	3	Large storage shed	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	2	Not visible on a minor road	
			Road Access – Key Criterion (Existing and Proposed Sites)	6	Poor site access and long way from main road network	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	2	Distant from Infrequent bus route	
			Local Amenities (Existing and Proposed Sites)	2	Pub	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	Little potential impact on dwellings, but in open countryside.	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						

Overall comment Remote site with poor access. Release assessment required.

Release Assessment Report

Market Attractiveness Factors:- Site currently in employment use.

Local Planning Factors:- Contributes to supply of employment sites, and is clearly fit for purpose for the current occupier. With limited alternative sites in the National Park, the site should be retained.

The current use appears to still satisfy local employment needs and no overriding benefit in this location would be anticipated from the loss of this employment site.

Conclusion:- Not considered for release.

Site Ref	Site Name / Address	Site Classification	Assessment Criteria	Weighted Score	Comment	Overall Score
NP 40	Romsey Garden Centre, Romsey Road, Ower	Employment Segment General Industrial / Business Area	Character of Area (Existing Sites)	3	Rural location. On its own	41 Release assessment required? <input type="checkbox"/>
			Quality of Site (Existing Sites)	3	Average site	
			Quality of Buildings (Existing Sites)	3	Various sheds	
			Site Prominence – Key Criterion (Existing and Proposed Sites)	6	Just off a main road	
			Road Access – Key Criterion (Existing and Proposed Sites)	12	Good access to A36 and M27	
			Public Transport Access – Key Criterion (Existing and Proposed Sites)	6	Near long distance A36 bus route.	
			Local Amenities (Existing and Proposed Sites)	2	Pub	
			Impact on Locality – Key Criterion (Existing and Proposed Sites)	6	No immediate neighbours, in open countryside	
			Site Availability & Constraints (Proposed Sites)			
Environmental Constraints – Key Criterion (Proposed Sites)						
Overall comment	Modest site, but good access to A36 and M27.					