

Examination of the Winchester District Local Plan 2020-2040

Stage 1: Matter 2 Statement

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Issue: Whether the spatial strategy and distribution of development is positively prepared, justified, effective and consistent with national policy

1. **The Settlement Hierarchy Review (2024) scores settlements and groups them which provides the settlement hierarchy in the District. Is the methodology used robust and the outcomes? Accurate? Is the distribution of development between the tier of settlements justified and how has it been established?**

1.1 The Settlement Hierarchy Review 2024 (DS010) ("the SHR 2024") is neither robust nor accurate. As a consequence, Policy SP2 and H3 fail to be justified.

1.2 The purpose of settlement hierarchies and why it is so critical for them to be robust, accurate and justified was perfectly articulated within the Council's albeit now dated 2009 Settlement Hierarchy Background Paper:

"1.9 A settlement hierarchy is a key planning tool for the delivery of sustainable development. It provides the structure by which the level and scale of change can be managed to ensure that the right amount of development occurs in the most appropriate locations for sound reasons. It is a mechanism that lies at the heart of 'place making'. The revised planning system relies on a holistic spatial approach to making plans, where a 'good' plan is not just one which is technically and legislatively sound, but one that reflects the needs of the community.

1.10 Settlements work by providing a range of services for their residents and for a wider area – typically the bigger the settlement the more services it has and the wider area it serves."

1.3 The settlement hierarchy within the adopted Winchester District Local Plan Part 1 Joint Core Strategy (LPP1) (LP03) categorises Waltham Chase as one of five Larger Villages, alongside Colden Common, Denmead, Kings Worthy and Swanmore. Larger Villages being the second tier, below Market Towns (Bishops Waltham and New Alresford) (tier 1). Below the Larger Villages are two further tiers (settlements with boundaries (tier 3), and settlements without boundaries (tier 4)).

1.4 The LPP1 supporting text provides a useful summary of the methodology and rational of the adopted Larger Villages category:

"6.17 Colden Common, Denmead, Kings Worthy, Swanmore, Waltham Chase, and Wickham each have quite different characteristics, but all act as a focal point for their own communities and sometimes smaller surrounding villages (added emphasis).

6.19 An assessment of their population, service provision and connections, together with how many surrounding smaller villages rely on them for specific services/facilities, indicates that these are sustainable locations appropriate for development to meet local needs, whilst protecting their individual identity."

1.5 The methodology used to inform the adopted hierarchy i.e. assessing population, service provision and relationship with surrounding settlements, is a recognised approach. Indeed, neighbouring local councils¹ apply this broad methodology as opposed to a simple 'yes' and 'no' presence of key facilities and services exercise.

1.6 It is noted that the Council's 2021 Settlement Hierarchy Review² (DSx) accepts (paragraph 2.2) that the methodology used only provides an audit of facilities and services and that it therefore only forms part of the method for determining the settlement hierarchy. Other information (e.g. population estimates) can be used to establish a Local Plan settlement hierarchy.

¹ Basingstoke, East Hampshire, Test Valley, New Forest, Eastleigh, Fareham, and Havant.

² <https://www.winchester.gov.uk/assets/attach/27841/Settlement-Hierarchy-Review-2021.pdf>

- 1.7 For background context, the Council's 2021 Settlement Hierarchy Review² (DSx) retained Waltham Chase as a Larger Village. However, within the 2022 iteration of the settlement hierarchy background paper³ (DSx) and the subsequent SHR 2024 (DS01) Waltham Chase has been demoted to the lower Intermediate Rural Settlements category.
- 1.8 Against the background context of the adopted hierarchy, our overarching soundness concern associated with the SHR 2024, Policy SP2 and Policy H3, is the downgrading of Waltham Chase to an Intermediate Rural Settlement – this being the equivalent category to the adopted 'settlements with boundaries' category (tier 3). Our concerns focuses on three key aspects:
- (a) Factual scoring errors.
 - (b) Alignment with the Local Plan Vision and the strategic spatial strategy policies and principles.
 - (c) Failure to consider of the role and function of settlements.

Factual Scoring Errors

- 1.9 The methodology used for assessing bus service connectivity is set out within paragraph 4.12 of the SHR 2024 (DS01). By reference to the schedules within Appendix A of the SHR 2024 it is understood that settlements score two points for having a daily bus service (hourly). Waltham Chase correctly scores two points as the number 49 provides a daily and hourly service. However, the D2 service providing daily and hourly services to Denmead has failed to be recorded.
- 1.10 Irrespective whether settlements have a frequent bus service, the SHR 2024 also scores one point for having an infrequent daily bus service, and one point for having a weekly bus service. The 69 service between Winchester and Fareham, which serves both Waltham Chase and Swanmore, has failed to be recorded (**Appendix 1**).
- 1.11 Once these omissions are corrected, the total facilities score for Waltham Chase should be at least 21, for Swanmore: 24 and Denmead: 27.

Alignment with Spatial Strategy Principles

- 1.12 A key underlying aspect of the Local Plan spatial strategy is the concept of the 20-minute neighbourhood and supporting the use of sustainable modes of transport:
- The Local Plan Vision for Winchester (page 19).
 - Strategic Policy SP2 vi.
 - Strategic Policy D4 vi.
 - Paragraphs 6.10 to 6.16.
 - The Roll of the Local Plan Key Issues ii and v (page 115).
 - Strategic Policy T1 iii.
 - The Local Plan Vision for the Market Towns and Rural Area (paragraph 14.2).

³ <https://www.winchester.gov.uk/assets/attach/33571/Settlement-Hierarchy-Review-2022-November-2022-Update.pdf>

- 1.13 However, the Council appears to have specifically chosen not to embed and apply these overarching principles and policies within the SHR 2024 methodology and settlement hierarchy. The Council even outlines within its response to the Regulation 18 representations (RP15) that it considers the proximity to nearby facilities outside of the settlement to be appropriate when assessing sites, but for an unspecified reason(s), not when assessing settlements:

"The assessment of individual sites is informed by the IIA which considered the proximity services and facilities. However, when considering the please ("sic") each settlement should have in the settlement hierarchy, it is considered more appropriate to focus on the services and facilities which are present in that settlement." (RP15, page 7)

- 1.14 The presence of a settlement, parish or any other administrative boundary is irrelevant as part of the application of the 20-minute neighbourhood concept, or a person's decision over whether to travel by an active travel mode or the private car.
- 1.15 Within an easy walking distance of Waltham Chase, and well within the settlements 20-minute neighbourhood catchment area, there is (see **Appendix 2**):
- A secondary school (Swanmore College) [which the Council acknowledges within its 2009 Settlement Hierarchy Topic Paper as being 'within reasonable walking distance']: 730m.
 - An outdoor sports facility (Swanmore Skatepark and sports pitches): 470m.
 - A facility with both indoor and outdoor sports (Swanmore Leisure complex): 697m.
- 1.16 Although being accepted by the Council as being 'within a reasonable walking distance', the presence of these facilities, which existing Waltham Chase residents use on a daily basis, have been unjustifiably excluded from the SHR 2024 assessment process.
- 1.17 As summarised within Table 1 below, based on an assessment of proximity to key facilities and services that accords with the principles of the 20-minute neighbourhood and reducing the need to travel by private car, the settlement score for Waltham Chase would be 24.

Table 1: Large Rural Settlement and Intermediate Rural Settlement Key Facilities and Services Score Comparison

Settlement	SHR 2024 Settlement Category	Daily Facilities	Other Facilities	Total
Wickham	Large Rural Settlement	18	8	26
Denmead	Large Rural Settlement	18 [*]	9	27 ⁵
Kings Worthy	Large Rural Settlement	18	5	23
Swanmore	Large Rural Settlement	18	6 ^{5**}	24 ³
Coldon Common	Large Rural Settlement	18	5	23
Waltham Chase	Intermediate Rural Settlement	18	2 ^{6***}	24 ⁰
Sutton Scotney	Intermediate Rural Settlement	14	6	20
Hursley	Intermediate Rural Settlement	18	2	20
South Wonston	Intermediate Rural Settlement	16	3	19
Otterbourne	Intermediate Rural Settlement	16	2	18

^{*}Frequent bus service: 2 points.

^{**}Infrequent bus service: 1 point

^{***} Infrequent bus service: 1 point.

Proximity to a secondary school: 1 point.

Proximity to an outdoor sports facility: 1 point.

Proximity to Built Leisure: 1 point.

- 1.18 Without prejudice to our concern over the robustness of the Council's revised category 'cut off' points, a score of 24 places Waltham Chase at the mid-point of the Larger Rural Settlements score category (22-26 points).

Role and Function of Settlements

- 1.19 The policy review section of the SHR 2024 (paragraph 2.2) recognises within the context of NPPF (paragraph 83) that:

"Indicators of service provision and accessibility should be considered, and the role of different settlements in Winchester District taken into account [added emphasis], as part of a future development strategy."

- 1.20 The Local Plan at paragraph 14.5 also states:

"Following assessment of sites, updating of the information on facilities and services and reconsideration of the hierarchy [added emphasis], an updated settlement hierarchy and housing provision has been developed as set out in Policy H3."

- 1.21 The Market Towns and Rural Area Allocations table (page 389-390) goes on to state that:

"Following assessment of potential sites and updating of the settlement hierarchy, the settlement of Waltham Chase has been moved from this category [Larger Rural Villages] to the 'intermediate rural settlements' grouping."

- 1.22 The reason cited within the Local Plan (page 389) being:

"Following assessment of potential sites and updating of the settlement hierarchy, the settlement of Waltham Chase has been moved from this category [Larger Rural Settlements] to the 'intermediate rural settlements' grouping."

- 1.23 Our soundness concern (justified) is that despite stating the role of different settlements has been considered as part of the settlement hierarchy and decision-making process, no tangible evidence has been provided by the Council that any such consideration has been undertaken as part of the plan-making process.
- 1.24 Part of the Council's inferred case for downgrading Waltham Chase appears to be a lack of potential sites. However, this position is not supported by the Council's evidence base. The Strategic Housing and Employment Availability Assessment (SHELAA) 2023 confirms that Shedfield Parish has theoretical capacity to deliver 3,845 dwellings (HA04 Table 10).
- 1.25 Specifically, within and adjoining Waltham Chase there are 14 sites that have been assessed by the Council as being both 'deliverable' and 'developable' (NPPF Appendix 2) (For ease of reference a schedule of the 14 sites is included as **Appendix 3**). These sites have the combined potential to deliver around 780 dwellings over the Local Plan period.
- 1.26 Given the 14 sites comprise a broad range of site sizes there were (and are) demonstrably numerous reasonable alternative site allocation options available to the Council. Indeed, Gleeson Land's land interest at Land at Forest Farm (SH09) site (131 dwellings) being one such site.
- 1.27 Despite being declassified as a Large Rural Settlement, the Local Plan describes Waltham Chase as a 'large village' within paragraph 14.188. As referred above (paragraphs 1.4 and 1.29), an important role and function of settlements is to support smaller settlements, hamlets and more isolated homes and farmsteads within the wider catchment area.
- 1.28 Within Shedfield Parish, Waltham Chase provides a clear supporting role to the smaller settlements of Shirrell Heath and Shedfield. Waltham Chase also has a longstanding interrelationship with Swanmore and Bishops Waltham.
- 1.29 As illustrated within Table 2 below, from a demographic perspective Waltham Chase more closely aligns with the settlement size characteristics of the settlements within the Larger Rural Settlements Village as opposed to the Intermediate Rural Settlements.

*Table 2: Large Rural Settlement and Intermediate Rural Settlement
Population (2021)*

Settlement	Local Plan Settlement Category	Population 2021	
Denmead	Large Rural Settlement	5,865	>2,500 residents
Kings Worthy	Large Rural Settlement	4,828	
Swanmore	Large Rural Settlement	3,118	
Coldon Common	Large Rural Settlement	2,948	
Waltham Chase	Intermediate Rural Settlement	2,829	
Wickham	Large Rural Settlement	2,505	
South Wonston	Intermediate Rural Settlement	2,212	<2,500 residents
Sutton Scotney	Intermediate Rural Settlement	1,173	
Otterbourne	Intermediate Rural Settlement	654	
Hursley	Intermediate Rural Settlement	480	

Summary and Recommended Change

- 1.30 The SHR 2024 is neither robust nor accurate. As a consequence, Policy SP2 and H3 as submitted fail to be justified.
- 1.31 Our overarching concern is that Waltham Chase has been downgraded from being a Large Village to the lower Intermediate Rural Settlement within the Local Plan settlement hierarchy. Our SHR 2024 concerns focus on three key aspects:
- (a) Factual scoring errors.
 - (b) Alignment with the Local Plan Vision and the strategic spatial strategy policies and principles.
 - (c) Failure to consider of the role and function of settlements.
- 1.32 Once the factual errors are remedied and due consideration is given to applying robust and justified proximity analysis to key facilities and services it is demonstrably clear that Waltham Chase more closely aligns with the Large Rural Settlement grouping of settlements as opposed to the Intermediate Rural Settlement category settlements.
- 1.33 Once consideration of the role and function that Waltham Chase provides as a supporting settlement to the smaller settlements, hamlets etc, with the wider parish (and beyond) area it is again evident that it more closely aligns with the large Village category as opposed to the Intermediate Rural Settlement category.
- 1.34 For Policy SP2 and H3 to be justified, Waltham Chase must be reclassified back to being a Large Rural Settlement within the settlement hierarchy.

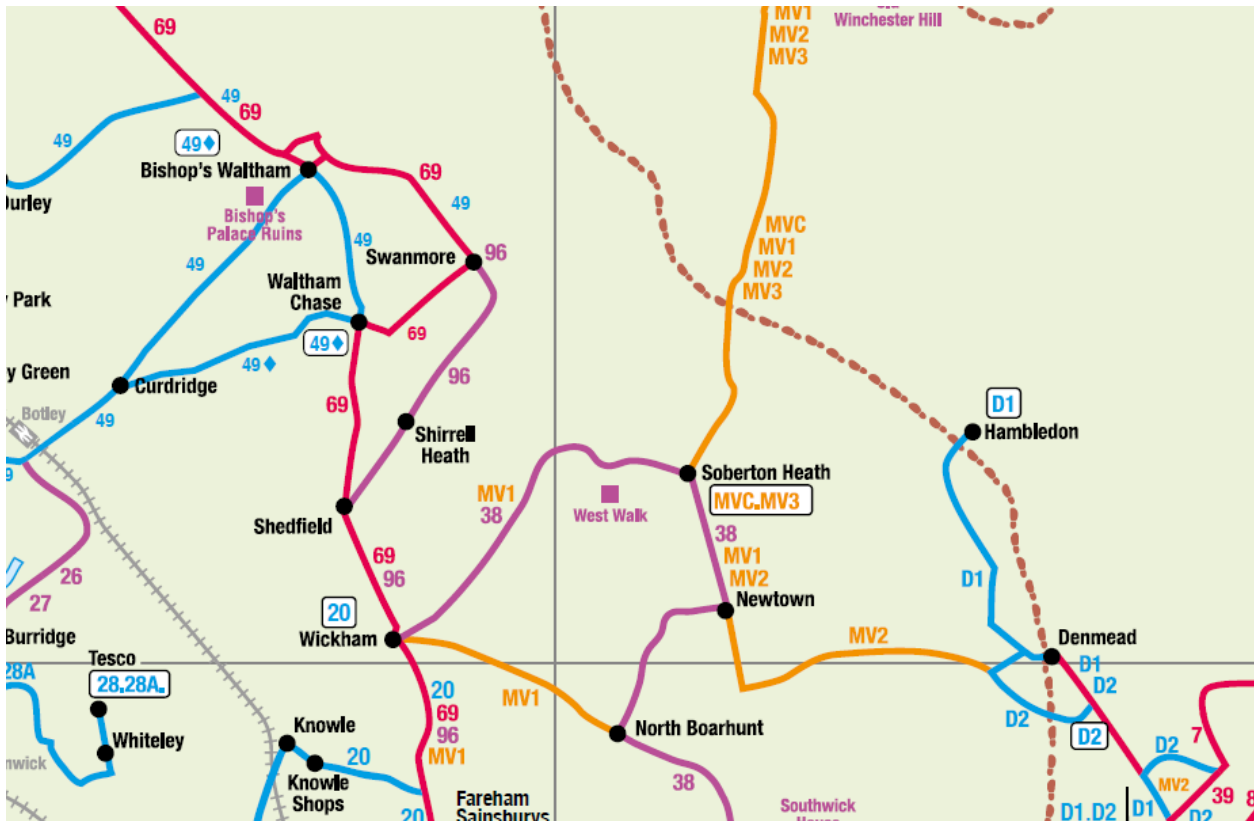
2. Is the spatial strategy and settlement hierarchy as set out in Strategic policy SP2 justified as an appropriate strategy, taking account of reasonable alternatives, and based on proportionate evidence?

- 2.1 No.
- 2.2 For the reasons outlined within our response to Question 1, the settlement hierarchy as set out in Strategic Policy SP2 which categorises Waltham Chase as an Intermediate Rural Settlement as opposed to retaining it as a Large Rural Settlement fails to be justified.
- 2.3 To address this soundness issues (NPPF paragraph 25, justified) Waltham Chase must be reclassified as a Large Rural Settlement within Strategic Policy SP2 and other relevant policies and supporting text within the Local Plan.

Appendix 1

Hampshire County Council Bus Service Map Extract

- Red - Service with at least one bus every hour up to seven days a week daytime
- Blue - Service with at least three buses per day operating up to seven days a week
- Green - Irregular service operating up to six days a week
- Orange - Certain days only or peak hour service or Sunday service



Source: Hampshire County Council

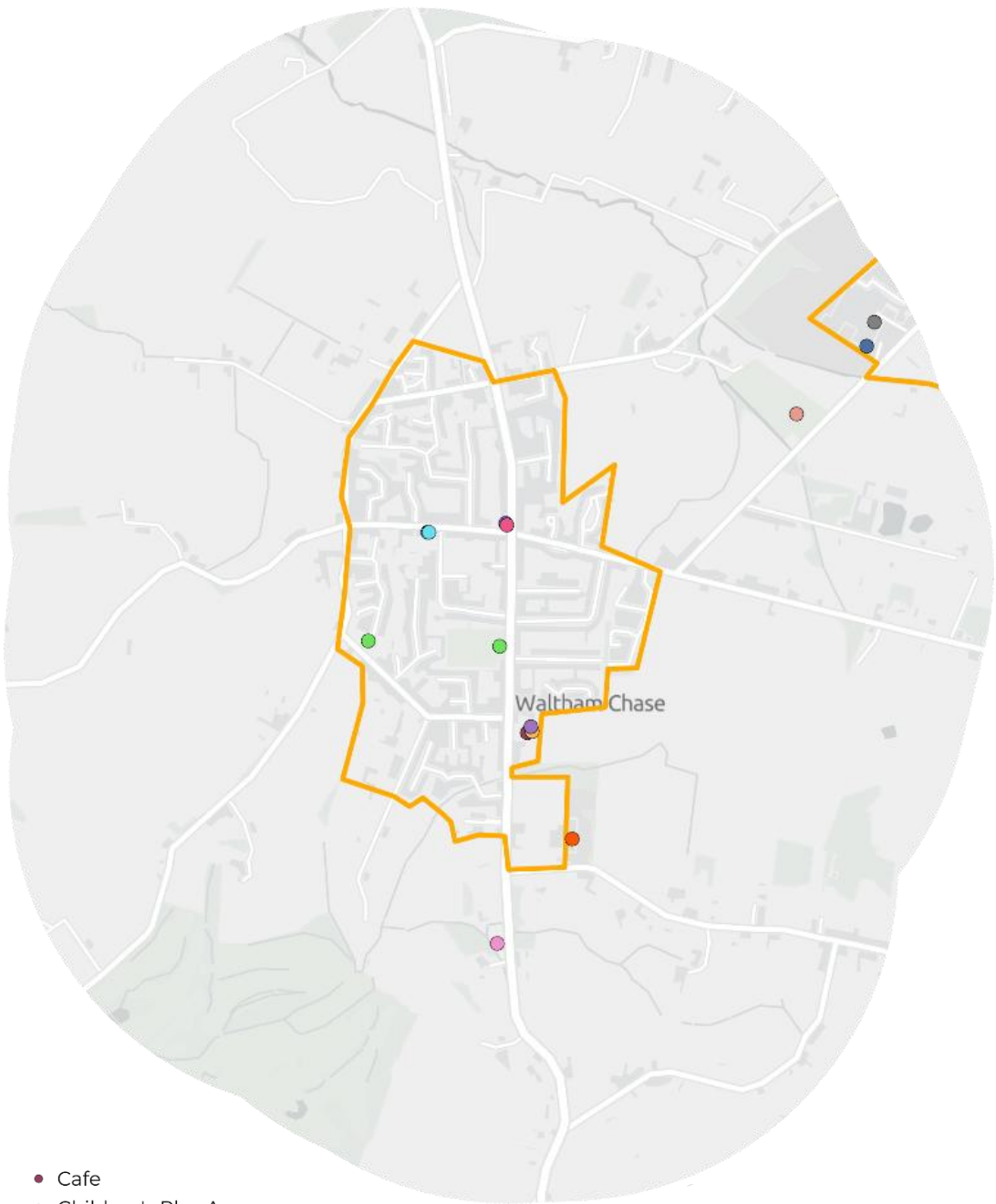
Bus, Train and Ferry Travel Guide 2024/2025

[Travel guides, timetables and maps | Transport and roads | Hampshire County Council](#)

Appendix 2

Waltham Chase: 20-minute Neighbourhood

Map extent: 800m



- Cafe
- Children's Play Area
- Church
- Community Centre/Village Hall
- Convenience Store
- Dentist
- Leisure Centre
- Library
- Optician
- Outdoor Sports Facility
- Petrol Station
- Pharmacy
- Post Office
- Pre School/Nursery
- Pub
- GPs
- Primary School
- Secondary School
- Settlement Boundary

Appendix 3

Strategic Housing and Employment Availability Assessment 2023 Waltham Chase Deliverable and Developable Sites

SHELAA 2023 Ref	Site Name	Dwellings
SH02	The land adjacent Ivy Cottage, Solomons Lane	10
SH03	Land to the rear of Little Bull Lane	73
SH04	Oakley Field, Sandy Lane	6
SH09	Land at Forest Farm	131
SH11	Land at Lower Chase Road	78
SH13	Land at Church Farm, Winchester Road	121
SH28	Land at Pine Cottage, Turkey Island	13
SH33	Poplar Cottage, Solomons Lane	26
SH41	Oaklands Farm, Lower Chase Road	72
SH48	Poplar Cottage, Solomons Lane	27
SH49	Land on the north side of Solomons Lane	41
SH50	Land at Northcroft Farm, Sandy Lane	38
SH52	Gamblins Farm, Solomons Lane	131
SH53	Land at Oaklands Farm, Lower Chase Road	42
Waltham Chase SHELAA 2023 Total Potential Capacity		809