West of England
Joint Study Area Report to the Regional Assembly
This report has been prepared following technical studies that respond to a brief from the Regional Assembly and consultations undertaken by the West of England Partnership. The Partnership is the steering group for the study and is committed to developing and implementing integrated strategies for the West of England to secure its Vision for 2026.

The report will feed into consideration by the Partnership of a sub-regional spatial strategy for the West of England and ‘first detailed proposals’ of the Unitary Authorities for inclusion in the Regional Spatial Strategy.

There will be a need for continuing studies, many of which are identified in this report, to develop the sub-regional spatial strategy and ‘first detailed proposals’ including a need to assimilate findings of the Greater Bristol Strategic Transport Study.

The Partnership and the Unitary Authorities look forward to a continuing dialogue with wish to assist the Regional Assembly with consultation in the West of England to achieve effective public involvement in the emerging Regional Spatial Strategy.
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SUMMARY

Introduction
The West of England is economically one of the strongest city regions in the UK and the largest in the South West region. It is a densely populated mix of urban and rural areas, with most of its residents and jobs in the principal urban areas. It also has outstanding environmental qualities that are part of its attraction to residents and businesses. Although part of the South West, it also has strong links with other regions.

The West of England has consulted widely on a Vision that will underpin the spatial strategy. The Joint Study Area Report responds to the Regional Assembly’s technical brief and regional strategies, in the light of public consultation and local community strategies.

Key Issues
The Joint Study Area Report provides information that will help develop Vision 2026. It does not contain policy proposals. These will be included in ‘first detailed proposals’ for the Regional Spatial Strategy and other sub-regional strategies.

This report recognises the scale, complexity, and distinctive characteristics and needs of the sub-region. Specifically, it takes account of the priority Vision 2026 gives to:

- investment in infrastructure in and around South Bristol;
- providing efficient links between Bristol International Airport and Bath, Bristol and Weston-super-Mare;
- improving connectivity to the motorway network in North Somerset and South Gloucestershire; and
- reducing road congestion and local traffic on the motorway networks

– all with the aim of increasing business investment, economic growth and productivity, accelerating regeneration and improving the local environment.

A number of key issues for the spatial strategy are highlighted, to achieve sustainable growth and improve quality of life, including:

- Responding to the sub-region’s potential for substantial and continuing economic growth, and ensuring that the distribution of future prosperity closes the gap between disadvantaged and other communities;
- Meeting the area’s housing needs, including a sufficient supply of affordable housing, in sustainable locations and with a strong emphasis on urban renewal;
• Ensuring that the delivery of infrastructure and services contributes towards resolving existing needs, particularly for transport solutions and is coordinated with future development;

• Protecting and enhancing the area’s key environmental assets: including its landscape, biodiversity and historic environment; the character of its cities, towns and rural areas; and managing energy, waste, water and mineral resources;

• Developing an effective implementation plan that identifies infrastructure requirements, funding sources, partnership opportunities and delivery mechanisms.

Future Growth

Future rates of growth should be considered by reference to economic forecasts, demographic projections of population and households and other factors that contribute to housing needs. Current forecasts and projections show a wide range of figures for future housing growth. These forecasts are subject to expectations about job growth, changes in economic activity, demographic changes, and assessments of the existing backlog of housing needs. Their implications will need to be considered in conjunction with other information about how growth might be accommodated, its spatial implications and the need for supporting infrastructure, before reaching policy conclusions about what levels of growth should be accommodated.

Economy

There are differing economic forecasts that reflect variations over economic cycles and other assumptions. Some of these uncertainties require further investigation, especially in relation to recent forecasts prepared for the Regional Assembly. The implications for population, migration and household growth depend on how economic activity levels will be affected by an ageing population. However, it is clear that there will be continuing growth in the demand for office accommodation, local service jobs and employment at strategic sites, including the Airport, with less change in the demand for industrial sites.

The strength, quality and prospects of key business sectors, and the location and number of employment sites, will be important. Most of the demand will be in Bristol, but there are also important needs in Bath, Weston-super-Mare and South Gloucestershire. New developments should provide for employment in local services and existing local employment needs should be considered, especially in urban areas where there may be competition for sites from housing.

Housing

There are increasing problems in the affordability of housing, in spite of recent increases in new housing completions, especially in Bristol. Brownfield sites provide more than 50% of new housing and the proportion is increasing. However, the stock of social and affordable housing is diminishing and there is a
large backlog of unmet housing need. Special housing needs, including those of Gypsies and travellers also need to be considered.

The West of England Partnership has agreed to produce an action plan in response to the independent West of England Housing Market Study, to ensure it makes the fullest possible contribution to solutions, in conjunction with regional bodies and the Government. Social and economic partners of the Partnership are making significant contributions to this work.

Transport
The area suffers major problems of traffic congestion and under-investment in transport infrastructure. Shortages of capacity and conflicts between sub-regional and long-distance journeys will require high priorities for investment through the Regional Transport Strategy. The Greater Bristol Strategic Transport Study is currently investigating strategic transport solutions and every effort is being made to integrate the study with development of the spatial strategy. However the Transport Study programme means that important aspects of transport and land use strategy will need continuing development through the Regional Spatial Strategy beyond the timetables set for the Joint Study Area and ‘first detailed proposals’.

Retailing and Town Centres
There are major proposals for shopping in Bath and Bristol. Opportunities in Weston-super-Mare should result from the Area Development Framework. Smaller centres may need to adapt to population growth in their catchments and the future role of out-of-town centres needs to be considered, especially at Cribbs Causeway. Projections of the need for increased floorspace need to take into account changing social trends, including Internet shopping. The wider roles of the main centres also need to be considered.

Culture, Health and Education
The spatial strategy will need to consider relationships between these sectors and population growth and their roles in achieving sustainable development, which have social, economic and environmental dimensions, especially in relation to urban regeneration and social inclusion. The Partnership recognises the essential contribution of these sectors to the overall quality of life and attractiveness of the sub-region, to communities and investors alike.

Environmental Resources
The West of England has distinctive and important environmental resources. Biodiversity, flood risk, water resources, landscape, energy use, renewable energy, mineral extraction and waste management will all need consideration in the Regional Spatial Strategy and its sub-regional policy framework. These issues have a very high priority in the area, and public responses to the Vision
2026 consultation stressed the importance of clearly defining our understanding and future actions in these areas.

Spatial Considerations

The Vision contains a number of aims that have significant implications for spatial planning.

The urban and rural areas are varied and inter-related. Most of the area’s population and employment is concentrated in the urban areas, which contain a wide range of development opportunities. Area-based strategies for renewal offer the best prospects to optimise these varied opportunities. The potential for additional housing in the urban areas will depend on policies, funding and market conditions.

Projected housing requirements imply a continuing need for greenfield development and related development in sustainable new communities.

Beyond the urban areas, opportunities for development may exist by means of urban extensions or the expansion of smaller towns. However, there are potential conflicts with the Green Belt and with environmental and social considerations.

Social and economic changes in the rural areas also need to be considered in relation to the need for local housing and employment, community facilities and transport. The rural areas are closely related to the urban areas, but they also have distinct roles, including agriculture.

Implementation

Implementation will rely on funding as well as the planning system. It is important for strategic infrastructure and local services to be provided in step with development to achieve sustainable development. Effective co-ordination will require clear infrastructure priorities to be identified and supported by the Regional Spatial Strategy. It will also require funding regimes to be aligned with planning aims and this may require new delivery mechanisms to be devised. Different approaches to the co-ordinated funding and delivery of infrastructure are being applied in other parts of the country and their experiences need to be evaluated in relation to the needs of the West of England in an implementation plan that will be developed to support the sub-regional spatial strategy and ‘first detailed proposals’ for the Regional Spatial Strategy.
INTRODUCTION

The Vision
1. The West of England is one of the most competitive and economically important city regions in the UK and, in terms of population and output, the largest in the South West. The sub-region has a population of almost 1 million – 20% of the region’s total, on just over 5% of its area. It has a higher overall density of population and development than any other part of southern England outside London.
2. The West of England Partnership - which comprises the four councils of Bath and North East Somerset Council, Bristol City Council, North Somerset Council and South Gloucestershire Council and a range of social, economic and environmental partners - is focused on delivering substantial growth in jobs, homes, local services and transport solutions: balancing economic, environmental and social needs to deliver sustainable development.

3. The Partnership’s Vision for the area is one of sustainable growth supported by successful investment, to improve the quality of life for all in the sub-region. For it to succeed, people and businesses must make positive choices to live and invest in thriving cities, towns and rural areas. The Vision is expressed as characteristics to which the West of England should aspire.

4. In May 2004, the Partnership held a stakeholder conference on “Your Area: Your Vision”. Meetings of the Partnership and its specialist sub-groups, including stakeholder organisations, then developed the vision statement. Implementation of the Vision statement was discussed at a second stakeholder conference in October 2004, and the consultation document, “Vision 2026 and Delivery Priorities”, was published on 24 November 2004. The Partnership will consider the final Vision 2026, taking into account views expressed by respondents, in June 2005.

The Vision on which views were sought states that, in 2026, the area will have:

- One of Europe’s fastest growing and most prosperous regions which has closed the gap between disadvantaged and other communities – driven by major developments in employment and government-backed infrastructure improvements in South Bristol and North Somerset.

- A buoyant economy competing internationally, based on investment by innovative, knowledge-based businesses and a high level of graduate and vocational skills.

- A rising quality of life for all, achieved by the promotion of healthy lifestyles and access to better quality healthcare and an upturn in the supply of affordable housing of all types.

- Easier local, national and international travel, thanks to transport solutions that link communities to employment opportunities and local services, control and reduce congestion and improve strategic connections.

- Cultural attractions that are the envy of competitor city regions across Europe, making the West of England the place of choice for talented, creative workers and affluent visitors.

- Success secured in ways that are energy efficient, protect air quality, minimise and manage waste and protect and enhance the natural and built environment.

- Built upon the benefits of its distinctive mix of urban and rural areas.

- Real influence with regional and national government, by demonstrating vision and leadership and delivering these achievements.

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1 Stakeholder members of the Partnership include representatives of Business West, South West TUC, Greater Bristol Foundation, North Bristol NHS Trust, University of Bristol, and Envolve. Stakeholder members of the PT&E Group include representatives of Business West, Transport 2000, Friends of the Earth, CPRE, First Group, and Wessex Trains.
Responding to the Regional Assembly Brief

5. The West of England Partnership acts as the steering group for the Joint Study Area work that has been undertaken to meet the Regional Assembly’s brief for a sub-regional input to the Regional Spatial Strategy. This work has been undertaken principally through the Partnership’s Planning, Transport and Environment Group. It has drawn on work previously undertaken for the Joint Strategic Planning and Transportation Committee, which was established in 1996 by the four unitary authorities to advise on sub-regional planning and transport policy.

6. The public consultation document seeking views on a spatial strategy for the sub-region, “Your Area, Your Vision : Directions for Change”, was published simultaneously with the “Vision 2026” document in November 2004, with the consultation period ending on 14 January 2005. A third consultation document, on the Greater Bristol Strategic Transport Study (GBSTS), was published at the same time.

7. “Your Area, Your Vision : Directions for Change” summarised initial work undertaken to meet the original SWRA brief. It emphasised the need to implement the draft Vision for the sub-region, by making provision for sustainable growth supported by successful investment, to improve the quality of life for all in the sub-region.

8. It stated the need to focus future development within the existing built-up areas, in ways which make all parts of the area better places in which to live, through regeneration, renewal, re-use, improved public transport and environmental enhancement. It also set out the need to consider the accommodation of further major growth beyond the existing urban areas, to meet social and economic needs. It set out three spatial scenarios, to highlight future directions for possible development. These were not separate “options”, and it was suggested that the final strategy might contain elements of more than one option. However, views were sought on the scenarios.

9. The consultation also sought views on eight key questions. Information on the responses is given in Appendix 1a:

- What sorts of new jobs and businesses should be encouraged – and where?
- What sorts of new homes are needed – and where should these be built?
- Where will transport improvements be most needed?
- What would make towns and cities more attractive places in which to live and invest?
- What types of good quality higher density housing would be acceptable – and where?

2 that is, the Bristol city area together with immediately adjoining built-up areas in South Gloucestershire, such as Filton, Patchway, Bradley Stoke, Downend, Kingswood and Hanham.

3 Stakeholder members of the Partnership include representatives of Business West, South West TUC, Greater Bristol Foundation, North Bristol NHS Trust, University of Bristol, and Envolve. Stakeholder members of the PT&E Group include representatives of Business West, Transport 2000, Friends of the Earth, CPRE, First Group, and Wessex Trains.
• What are the implications of growth for areas adjoining the towns and cities, including the Green Belt?
• What are the needs of communities for new facilities for shopping, education, health, sport, the arts and tourism?
• What unique qualities of the area’s environment should be protected and conserved?

10. Copies of each of the three leaflets were distributed through bulk deliveries to the four councils, libraries and other partners, posting to parish and town councils and other organisations on the mailing lists of the four councils, the Partnership and other partner organisations, and in response to inquiries.

11. The Partnership’s website (www.westofengland.org) provided details of the Partnership and its meetings; opportunities to download Directions for Change and Vision 2026; links to related websites for further information (including the GBSTS consultation); and an opportunity to respond to the questions in Directions for Change, make other points or engage in discussion forums, using an interactive facility (e-consult).

12. In addition, wider public participation took place through established forums, networks and conferences, focused on the Councils and the Local Strategic Partnerships. A list of these is attached (Appendix 1b). A further stakeholder workshop was held on 8 December 2004. This covered Vision 2026, Directions for Change and the GBSTS consultation. It encouraged stakeholders to develop their views and to engage with their networks to achieve a wider public involvement and response.

13. Some 300 respondents commented on Directions for Change. These represented a wide range of viewpoints and interests. Including stakeholders, local authorities, including Parish and Town Councils, statutory undertakers and representatives of landowners.

14. The public response to Directions for Change was summarised and made available on the Partnership website. Copies of the response, which will contribute to the development of the sub-regional spatial strategy, were sent to each Council and made available for public reference.

Strategic Sustainability Assessment

15. The Regional Assembly has issued advice on the approach to be followed in joint study areas (JSAs), to help enable the Regional Spatial Strategy (RSS) meet the statutory requirements of Sustainability Appraisal (SA) and Strategic Environmental Assessment (SEA). This report on work undertaken in the West of England JSA is not itself subject to the requirements, but should assist the RSS to meet them.

16. There is a distinction between the use of sustainability appraisal to generate a spatial strategy and the appraisal or assessment of a chosen strategy. The first applies objectives and related criteria to choose the most sustainable options. The second appraises a chosen strategy to identify positive and negative impacts and actions required to gather further information through monitoring, to mitigate negative impacts and to enhance positive impacts.

17. Appraisal criteria have been developed for these two separate but related stages of developing an agreed spatial strategy.
• Stage 1: to appraise strategic locations that will form the “building blocks” of the final spatial strategy. These strategic locations were the basis of the three scenarios set out in the consultation document “Directions for Change”. The purpose of these criteria is to assess the suitability/feasibility of the strategic locations to accommodate sustainable development. Initial work has been done on this basis.

• Stage 2: to assess the overall impacts of a preferred spatial strategy, including the need to maximise positive impacts, minimise or mitigate negative impacts, and to monitor outcomes.

18. The SSA process will be explained in more detail in future reports which will accompany the “First Detailed Proposals” and “Detailed Strategy Document” to be submitted to the Assembly later in 2005.

The regional context

19. In 2004, regional organisations across the South West, under the auspices of the Regional Assembly, jointly agreed and published an integrated regional strategy (IRS) for the South West, “Just Connect”. This identified five headline aims for the region, which were intended to be reflected across the work of regional organisations and partners, as follows:

• To harness the benefits of population growth and manage the implications of population change
• To enhance our distinctive environments and the quality and diversity of our cultural life
• To enhance our economic prosperity and quality of employment opportunity.
• To address deprivation and disadvantage to reduce significant intra-regional inequalities
• To make sure that people are treated fairly and can participate fully in society

20. Other strategies at regional and more local level – including the Regional Spatial Strategy (incorporating the Transport Strategy), Economic Strategy, Environment Strategy, Housing Strategy and Cultural Strategy – will pick up and develop particular broad themes within the IRS.

21. Work in the sub-region has taken into account work on these regional strategies. This has included the public consultation exercise undertaken by the Regional Assembly in autumn 2004 on regional spatial strategy options - “What will the South West be like in 2026?”

22. One of the key strategies to be taken into account at regional and sub-regional levels is the Communities Plan for the South West - ‘The Way Ahead – Delivering Sustainable Communities in the South West’. The sub-region has contributed to this work. It contains key statements about the West of England, which are set out in Appendix 2.

23. The process of developing a new sub-regional spatial strategy also needs to take into account, and review, existing spatial planning frameworks for the sub-region, in particular:
• RPG10, Regional Planning Guidance for the South West, which was published in 2001 and, under new legislation, became the Regional Spatial Strategy in September 2004

• The Joint Replacement Structure Plan for the four authorities in the sub-region, which was adopted in 2002

The local strategic context

24. All the Local Strategic Partnerships in the West of England have adopted Community Strategies - Bristol and South Gloucestershire in 2003 and Bath & North East Somerset and North Somerset in 2004. Timescales range from 2014 in Bath & North East Somerset to 2025 in North Somerset.

25. The strategies all have a number of related key themes. These include:

• community;
• housing;
• economy;
• sustainable environment;
• transport;
• health and well being;
• learning;
• community safety; and
• working together

26. In addition, North Somerset includes leisure, culture and recreation as a theme, social inclusion is identified separately in Bath & North East Somerset and Bristol, and land use planning is identified separately in Bath & North East Somerset

Emerging Key Issues for the Sub-Region

27. The West of England is a key economic driver in the region with the highest output (GDP) per head of the core city regions in England outside London. It has a range of high-performing, knowledge-based business sectors containing world-class companies. These have the support of a very high level of graduate skills within the workforce and of four universities with national and often international reputations for excellence in research and teaching. The range of strategic employment sites offers major business opportunities in a sub-region at an important hub of national communications, with the benefits of the rapidly expanding Bristol International Airport and one of the most modern and best-equipped sea ports in the UK.

28. The sub-region is noted for its environmental qualities. Most of the area is attractive countryside, and the green spaces that surround and penetrate the urban areas are themselves an important part of the area’s distinctive character.
Nearly 70% of the sub-region’s homes and 75% of its jobs are concentrated in the Bristol conurbation, Bath, and Weston-super-Mare. The sub-region’s smaller towns, villages and countryside, much of it protected as Green Belt, together also contribute to making this a complex, closely integrated polycentric area.

29. Vision 2026 for the West of England commits to anticipating, encouraging and shaping the continuing high levels of growth in employment, housing and population with appropriate investment in physical and social infrastructure.

30. The Joint Study Area Report provides information that will help develop Vision 2026. It does not contain policy proposals. These will be included in ‘first detailed proposals’ for the Regional Spatial Strategy and other sub-regional strategies.

31. This report recognises the scale, complexity, and distinctive characteristics and needs of the sub-region. Specifically, it takes account of the priority Vision 2026 gives to:

- investment in infrastructure in and around South Bristol;
- providing efficient links between Bristol International Airport and Bath, Bristol and Weston-super-Mare;
- improving connectivity to the motorway network in North Somerset and South Gloucestershire; and
- reducing road congestion and local traffic on the motorway networks
  – all with the aim of increasing business investment, economic growth and productivity, accelerating regeneration and improving the local environment.

32. A number of key issues for the spatial strategy are highlighted, to achieve sustainable growth and improve quality of life, including:

- Responding to the sub-region’s potential for substantial and continuing economic growth, and ensuring that the distribution of future prosperity closes the gap between disadvantaged and other communities;
- Meeting the area’s housing needs, including a sufficient supply of affordable housing, in sustainable locations and with a strong emphasis on urban renewal;
- Ensuring that the delivery of infrastructure and services contributes towards resolving existing needs, particularly for transport solutions and is coordinated with future development;
- Protecting and enhancing the area’s key environmental assets: including its landscape, biodiversity and historic environment; the character of its cities, towns and rural areas; and managing energy, waste, water and mineral resources;
- Developing an effective implementation plan that identifies infrastructure requirements, funding sources, partnership opportunities and delivery mechanisms.

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4 that is, the Bristol city area together with immediately adjoining built-up areas in South Gloucestershire, such as Filton, Patchway, Bradley Stoke, Downend, Kingswood and Hanham.
FUTURE GROWTH

Introduction and Summary

1. The Vision looks forward to the West of England as one of Europe’s fastest growing sub-regions that anticipated, encouraged and shaped high levels of growth in employment, population and housing to the benefit of the sub-region and its communities. This chapter reviews the components of economic and demographic change, their inter-relationships and current trends, with the aim of reaching a balanced view about the prospects for future growth in the economy and employment, resident workforce, population and households. As there is uncertainty about all long-term forecasts and projections, a considered view about the future is best reached by looking at the consistency of different views about economic and social change that are inherent in different approaches.

2. This analysis also responds to the requirements of the Regional Assembly’s brief to test a range of long-term growth rates (including benchmarks based on the housing targets of the existing Regional Planning Guidance, RPG10, increased by 25% or 50% from 2011). Further information is awaited from the Regional Assembly in the form of population projections commissioned from Anglia Polytechnic University (Chelmer projections) and the outcomes of a study by Roger Tym & Partners on the functions of settlements and linkages between them. There is also a need for the Assembly (working with the RDA and the Joint Study Areas) to resolve differences of view about recent economic forecasts supplied to them by Cambridge Econometrics.

3. None of the figures in this section should be interpreted as proposals or policy targets. They are statistical analyses to be considered, in conjunction with other information about how growth might be accommodated, its spatial implications and the need for supporting infrastructure, before reaching policy conclusions about what levels of growth should be accommodated. Such conclusions will be fed into the Regional Spatial Strategy through the ‘first detailed proposals’ of the unitary authorities, working through the West of England Partnership. They do not form part of this report.

4. The implications of projected changes for housing, employment and other land uses are considered further in later chapters. Uncertainties about variations in the key variables are considered, ranges of possible outcomes assessed, and the risks of under- or over-provision are discussed, as a basis for drawing conclusions about what rates of growth should be the basis for the spatial strategy.

5. Future rates of growth are considered by reference to:
   - Economic forecasts and their demographic implications;
   - Projections of population and household growth;
   - Relationships between household growth and housing requirements;
   - Existing unmet housing needs.
These methods produce a range of forecasts of employment, population and households.


7. In Directions for Change this figure was equated to some 4,700 additional dwellings per annum. Taking into account recent information about changes in economic activity among older people and future changes in retirement, employment growth of 3,200 could equate instead to between 3,600 and 4,100 additional dwellings per annum.

8. Population projections by the Office of National Statistics, based on demographic trends (births, deaths and migration), indicate population growth of 5,400 people per annum. This rate of population growth is likely to result in a growth of about 3,700 households per annum. (Official household projections will not be available until later this year.)

9. To the household projections should be added allowances for sharing and vacant dwellings (at about 100 per annum). Assessments of the backlog of unmet housing needs suggest a need to add some 20,000 households to the requirement for new dwellings – or 800 per annum if they were met in full over a 25 year period.

10. Taking into account the consistency of different forecasts and projections, and adjustments to the employment-led forecasts and demographic projections, current projections imply a housing requirement of some 4,600 to 4,850 per annum. However, the assumption about the backlog of housing needs, in particular, requires further consideration.

11. The following sections provide much more detail on the forecasts and projections described in this summary.

**Economic forecasts**

12. Economic forecasts for the West of England are available from the Local Economic Forecasting Model (LEFM) provided by Cambridge Econometrics and held by the Learning and Skills Council (May 2004). They show employment in the West of England rising by an average of 3,570 per annum between 2001 and 2015, largely as a result of continuing growth in the office sectors - professional, business and computer services. Further losses are predicted from the manufacturing sector. Gross Value Added (a measure of output) is shown as rising by 3.0% per annum for the West of England compared with 2.9% per annum for the UK.

13. The LEFM forecast to 2015 has been used as a basis for a longer-term employment projection to 2026. (The difference between the three-year

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1 The relative rate of employment increase shown for the West of England by the LEFM output (May 2005) corresponds approximately with the rate shown for the wider Northern Sub-Area by an earlier Cambridge Econometrics forecast (Autumn 2003) commissioned by the SWRA.
moving averages for 2001 and 2014 (3,240) has been projected on a linear trend to 2026.)

14. More recent economic projections for the Bristol Joint Study Area prepared for the Regional Assembly, also by Cambridge Econometrics, show employment increasing much more rapidly to 2026, by an average of 5,000 per annum. This rate of growth is high in comparison with long-term employment trends, which show employment in the Sub-Region rising by 1,000 per annum average during the 1970s, 3,000 per annum average during the 1980s and 6,000 per annum during the 1990s.

15. The high rate of local economic growth in the 1990s is unlikely to be maintained over the longer-term future. It was associated with recovery from recession and high levels of unemployment, with much ‘spare capacity’ readily available to be taken-up by expanding businesses. Such ‘cyclical’ effects must be discounted when considering long-term future growth rates. These high levels of growth also reflect an exceptional period of national economic expansion that is unlikely to be maintained indefinitely.

16. The rate of employment growth in the West of England over the future is also likely to be restricted by the ageing of the population, with increasing numbers reaching retirement age as a result of the early post-war ‘baby boom’. A recent population projection for the West of England, which assumes a net inflow of 3,500 migrants per annum, shows the population in the prime working ages of 20-59 rising by less than 1,000 per annum between 2001 and 2026. Strong demand for labour and the pensions crisis are likely to raise activity rates amongst older people and encourage higher rates of in-migration. However, national population projections also show the effects of ‘ageing’, with only a very gradual increase in the working population expected over the long-term leading to a potentially ‘tight’ national labour market. There will therefore be strong competition for labour from other regions, which may limit the attraction of migrants to the West of England and in turn, constrain the potential for employment growth in the West of England.

17. The high rate of employment growth in the recent Regional Assembly/Cambridge Econometrics projections is largely accounted for by rapid growth in professional, business and computer services, and public administration. The rate of growth shown is well above that recorded in the 1980s and 1990s, which was a period of exceptional office expansion in the West of England under-pinned by several major office relocations from London. It appears that this growth may be the outcome of the methods underlying the projections, which may have accentuated the recent pattern of growth in the West of England in making long-term projections.

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2 The Bristol Joint Study Area comprises the Bath, Bristol and Weston-super-mare travel to work areas, which extend over an area slightly larger than the West of England.
3 GLA/Avon population model. Short-term migration trend. March 2004
18. Further advice about the Regional Assembly/Cambridge Econometrics projections has been requested to gain a better understanding of the basis for this much higher projected growth. Information currently available suggests that the LEFM forecasts and projected employment growth in the West of England averaging some 3,240 per annum represent a more realistic view of the future. However, the phasing and implementation of the spatial strategy will need to recognise the inherent uncertainties underlying economic forecasts and the likelihood of the need to adjust growth assumptions as new information emerges about the performance of the local economy.

Implications of economic forecasts for demographic change and future dwelling requirements

19. Employment growth in the West of England of 3,240 per annum over the period between 2001 and 2026 would require an additional 4,700 dwellings per annum to accommodate the rising workforce, if national projections of economic activity are applied. This approximates to the dwelling requirement represented by the Regional Assembly’s benchmark rate of the RPG 10 housing target increased by 50% after 2011.

20. The estimate of future dwelling requirements arising from this economic forecast shows a more rapid rise in dwelling requirements than in the numbers of people working. This is because rising numbers reaching retirement age place more dependence on inward migration to meet the demand for labour. It reflects national activity rate projections published in March 1998 and a projected continued decline of economic activity rates in males aged over 50.

21. However, in contrast to the national activity rate projections, a recent report of the Pensions Commission advises that employment rates amongst males aged 50-64 have been rising in recent years, rather than declining, and there are good reasons to expect further increases. The report identifies good prospects for a rise in the male 50-64 activity rate over the next 25 years to about 80% rather than a decline to about 70% as shown in national projections.

22. The report of the Pensions Commission also identifies good prospects for a sharp rise in the female 50-64 activity rate to over 70%, rather than the 60% of the national projections, partly as a result of the raising of the female retirement age to 65. There is also potential for the male retirement age to rise with rising life expectancy.

23. Applying higher economic activity rates among older people, as suggested by the Pensions Commission, has a significant impact on the projected workforce and requirements for additional dwellings. Preliminary analysis suggests that the requirement for additional dwellings with the employment

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forecast of 3,240 per annum would fall from 4,700 per annum to about 4,100 per annum. After adjustments to the activity rate of males aged over 65, the dwelling requirement would fall further to about 3,600 per annum.

24. Higher employment forecasts for the Bristol Joint Study Area of 5,000 per annum prepared for the Regional Assembly (also by Cambridge Econometrics) suggest a requirement for additional dwellings of between 5,000 (if allowance is made for rising economic activity rates amongst older persons as suggested by the Pensions Commission) to 6,200 per annum (with the falling activity rates used in the national projections).

Population and household growth

25. The Office for National Statistics (ONS) 2003-based sub-national population projections are based on trends in births, deaths and migration in the five years between 1998 and 2003. These projections will be the basis of the ONS/ODPM 2003-based sub-national household projections, which are due to be published later this year. The ONS population projections indicate a level of population growth in the West of England of 136,100 (13.7%) people, an average increase of 5,400 people per year, between 2001 and 2026. These projections do not take into account possible future changes such as a substantial relocation of jobs into the area, increased net in-migration or changes in the numbers of new homes.

26. The West of England differs from much of the rest of the South West in that roughly half the population growth is generated by natural change (births minus deaths). The ONS 2003-based population projections estimate that some 2,600 of the annual change over the next twenty five years will come from natural change, whilst some 2,800 will come from migration and other changes.

**West of England Population Projections 2001-26: Average Annual Population Change**

Sources: ONS Crown copyright 2005, SWRA Chelmer Projections (February 2005), GLA/JSPTU Projections (December 2004)
27. The chart above shows how the ONS population projections align with a range of other demographic- and dwelling-led population projections. The ONS projections, although using a model run on a different methodological basis, are broadly similar to the population changes arising from the RPG10 dwelling led projections (a net increase of some 3,700 dwellings per year).

28. When published, the ONS/ODPM 2003-based sub-national household projections, are likely to show a net increase in households of around 3,700 per year, assuming that household formation rates do not change significantly from 1996 rates (see below). These would be similar to the RPG10 dwelling led projections.

29. The chart below shows how the range of other demographic- and dwelling-led population projections, based on adjusted 1996-based household formation rates, convert into household projections. These DETR 1996-based projections show continuing decreases in household size resulting from social changes, with more people living alone and in smaller households, changes to the age structure of the population and increasing longevity.

Sources: ONS Crown copyright 2005, SWRA Chelmer Projections (February 2005), GLA/JSPTU Projections (December 2004)

30. There are some variations in the components of population change (natural change and migration and other changes) between the different projections. This is likely to be a result of different methods and information used in the projections including the level of sophistication in the treatment of migration. There are also notable differences between projections of economically active population projections between the Chelmer and GLA economic activity rate projections. These issues will be explored in more detail as further information becomes available.
Households, Dwellings and Unmet Needs

31. Estimates of net increases in households need to be translated into dwelling requirements. The Chelmer demographic projections commissioned by the South West Regional Assembly make an adjustment to the household projections to translate them into dwellings. These adjustments take into account both sharing households and dwelling vacancy rates and suggest an approximate increase of 100 per year to translate households into dwellings. Thus projections indicate that an average annual increase in 3,700 households would lead to a requirement of 3,800 dwellings per year.

32. It is important to distinguish between net and gross household changes, as the characteristics of new and dissolving households differ and homes that are vacated are not necessarily available to new households, in particular because of affordability problems.

33. There is a growing affordability problem, particularly for access to owner occupied housing. A significant feature of the West of England housing market since 1996 has been a large rise in house prices –179% between the second quarters of 1996 and 2004: not matched by the increase in average earnings. In mid 2004, the average house price in the West of England was £194,100. National estimates suggest that whilst 46% of new households could afford to buy in the late 1980s only 37% could afford to buy in 2002.

34. A forthcoming sub regional study on housing affordability and need by Professor Glen Bramley estimates that in 2004 only 34% of new households could afford to buy in the sub region. (This and other figures referred to from this study are preliminary ones and subject to further analysis).

35. Trends in affordability put additional pressures on the existing affordable stock, particularly the social rented stock, which has been declining as numbers of newly built social houses have been exceeded by sales under the right to buy. As a result there is a growing unmet housing need.

36. None of the demographic projections makes any adjustment for a backlog of unmet housing need within the existing population. The Bramley study estimates that this total backlog need will be around 21,000 households in 2006. If this scale of need were to be met in full in the 2001 to 2026 period, it would amount to an annual average need for over 800 households per year (although local housing needs studies normally seek to address such backlogs in a 5-10 year period). If this figure is added to the demand of 3,800 dwellings per year arising from new households, the result is an annual dwelling requirement of 4,600 between 2001 and 2026.

37. Another consideration is the fact that many newly forming households will not be able to access the private housing market. The additional net need
for affordable housing alone to meet both this need and the backlog might, under the Bramley estimates, average 4,000 p.a. or more up to 2010. Such an increase in affordable stock is unlikely to be achievable under existing national and local policies. If it were possible, it would suggest a requirement for an even higher annual net increase in dwellings.

Other Implications of Growth

38. Historically, increasing income levels have always led to an increase in the amount of travel, mainly manifested through longer trips. It is likely that this linkage will continue to operate, and without further intervention will increase the amount of car travel and exacerbate road congestion. Government forecasts also incorporate a reduction in future car operating costs, which is likely to speed up the process. Further land use development and increased economic activity will superimpose itself on this. However, worsening travel conditions can be moderated through more attractive public transport; through locating housing close to jobs; and through locating all development in places that can be easily served by public transport.

39. Rising population levels and higher incomes will generate demands for new shopping, culture and leisure facilities. The expansion of Broadmead and the Southgate redevelopment and other schemes in Bath will make a major contribution to meeting this requirement but other major new schemes will be required to meet the expanding sub-regional market. The development of new communities will also require the expansion of some local and district centres and, in some instances, the establishment of new centres. Further studies will be undertaken to establish these requirements as well as the need for additional sub-regional facilities as part of the sub-regional spatial strategy.

40. Growth also has implications for a number of other services and utilities, including energy, water supply, sewerage and waste management. These issues are considered briefly in the chapter on environmental resources (below), but they will need to be the subject of detailed consultations with the utility companies and other agencies when developing ‘first detailed proposals’ for a sub-regional spatial strategy and an implementation programme.
ECONOMY

1. The Vision for the West of England is committed to anticipating, encouraging and shaping high levels of economic and employment growth, and enjoying a robust and diverse economy that benefits from support for key sectors, innovation and enterprise, and the development of the port, airport and strategic sites. South Bristol and Weston-super-Mare are highlighted as benefiting from economic growth and accelerated regeneration as a result of strategic transport improvements and business investment. Improved linkages between education, skills and jobs are also envisaged along with increased social and economic inclusion and a better distribution of employment.

Regional Economic Strategy

2. The Regional Economic Strategy sets out a framework for co-ordinating actions over the period between 2003 and 2012 to raise productivity and competitiveness, secure an equitable society and a quality environment. A wide range of ‘Strategic Actions’ is identified. These include:
   • Support for business growth;
   • Delivering a supply of appropriate business sites and premises (including incubators and science parks, regionally significant sites and an appropriate range of business space),
   • Improving strategic communications infrastructure to support business needs;
   • Conserving and enhancing physical and cultural capital to provide benefit to tourism and the wider economy;
   • Supporting the regeneration of disadvantaged communities, in particular ensuring appropriate land release for housing and encouraging higher proportions of social and affordable housing, especially in areas of highest inequality; and
   • Promoting the renaissance of the region’s largest urban areas.

3. The West of England benefits from the largest economy in the South West Region. It generates considerable wealth, high productivity and employment levels. GDP per capita and economic activity rates are above regional and national averages, and local unemployment has fallen to a low level. A wide range of industries is represented with significant local specialisation in aerospace/defence, computer services and other high technology industries, financial and business services, media and creative industries, tourism and higher education. Consistent with this specialisation and the attractiveness of the Sub-Region, a high proportion of local employment is accounted for by the ‘knowledge economy’ which many commentators see as an indication of the competitiveness and potential for growth of the local economy.

4. The local economy has a long history of prosperity and success in adjusting to changing economic circumstances. While this success has underpinned the performance of the wider South West Region, the proximity of the West of England to the expanding economy of the South-East continues to be a key influence on the character and performance of the local economy. Linkages with South-East Wales are also important. The future success of the local economy
therefore will continue to be influenced by and have implications for the well-being of these adjacent areas.

5. The prosperity and success of the West of England economy also reflects its scale and diversity within which buoyant and expanding sectors are well represented. Other factors underlying the prosperity and success of the local economy include the availability of attractive business development sites and their low relative low cost, the large and diverse labour market, and the good environment and ‘image’ of the Sub-Region, which facilitates the recruitment and retention of skilled labour. The presence of prestigious universities is also important to the development of high technology and innovative new industries.

6. With the recent strong performance of the national economy over the last decade or so, the structural and locational advantages of the West of England economy are leading to sharp increases in local employment levels. These increases in turn are encouraging high levels of inward migration, reinforced by the growth in FE/HE student numbers. With the prospect of continuing economic growth, high levels of in-migration can be anticipated over the future.

7. The prosperity and expansion of the local economy is supporting considerable regeneration in Bristol City Centre and extensive business park development on the edge of the urban area, especially in the North Fringe of Bristol. Royal Portbury and more recently, Avonmouth/Severnside also is seeing considerable economic expansion largely related to the growth of the Port and major, regional distribution centre developments.

8. The prosperity and expansion of the local economy is also being accompanied by a continuing shift in the socio-economic and occupational make-up of the West of England workforce. The expansion of the office and service sectors is leading to the growth of white collar, managerial, professional, semi-professional and personal service occupations while the loss of traditional industrial and related jobs is leading to the decline of many traditional blue-collar occupations. These changes and the growing technical and skilled nature of work is also leading to the need for higher educational attainment and a better qualified workforce that addresses skill shortages and offers the capacity to adapt to the accelerating pace of change in the requirements of the workplace.

9. Despite the success of the West of England economy and the current low level of unemployment, persistent concentrations of relatively high unemployment and deprivation across a range of indicators remain, closely associated with educational under achievement, low skills and the decline of traditional local industries. Two wards in the inner area of Bristol and three on the outer council estates are within the worst 10% of wards nationally, ranked according to the Government’s composite indicator of deprivation. Weston-super-Mare also has two wards in the top 10%. Furthermore, the inner area wards within Bristol with a history of high unemployment have seen a far slower rate of fall in unemployment through the 1990s compared with the City as a whole. Tackling these disparities could add some 7,450 to the workforce of the Sub-Region.

10. Many of these wards are located very close to localities enjoying considerable prosperity and a strong labour market. This demonstrates the significance of a range of factors that together constrain the access of some communities to work.

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1 The result of reducing high levels of unemployment and under-employment at the ward level to the Sub-Regional average as shown by the 2001 Census.
The persistence of these disparities in prosperity and employment threatens harm to prospects for continuing prosperity and economic growth in the Sub-Region over the future. Overcoming this threat requires the resolution of social and economic divisions across the Sub-Region and the under-performance of some institutions.

The balance between homes and workplaces

11. The levels of employment and resident workforce in the West of England are virtually in balance. However, the relatively small excess of employment has been rising gradually and now stands at about 24,000, largely as a result of increased inflows of commuters from beyond the West of England to the North Fringe (+7,470 between 1991 and 2001) and to a lesser extent, Bath (+ 3,118 between 1991 and 2001) and Bristol City Centre (+ 2,492 between 1991 and 2001).

12. Rapid economic expansion in the North Fringe has led to concerns about traffic congestion, excessive car-based commuting and the over-development of the wider area. The number of jobs in the North Fringe far exceeds the resident workforce leading to considerable commuting from the expanding settlements beyond the Green Belt, from Weston-super-Mare and from other more distant localities. Local residents account for only some 26% of employment in the area while commuters from beyond the Bristol urban area account for some 40% of North Fringe employment. Consistent with this pattern of commuting, nearly 40% of persons employed in the North Fringe travel more than 10km to their workplace. In contrast, the large amount and wide choice of employment in the North Fringe has encouraged some 50% of the resident workforce to take-up jobs in the area and comparatively short journeys to work.

13. Concern has also arisen about the growth of commuting to Bath as a result of the rising excess of employment in the City compared with the resident workforce. Census data shows that this excess more than doubled between 1991 and 2001 (to 11,100) with the daily inflow of commuters to the City increasing by some 26%. Residents from other parts of Bath and North East Somerset now account for about 16% of Bath employment while commuters from Somerset and Wiltshire account for another 17%. Bath’s economically active residents take-up about 50% of the employment in the City despite nearly three quarters of these residents working in the City. As a result of the scale of commuting from outside Bath, about a third of persons employed in the City commute in excess of 10km. For Bristol, less than a quarter travel this distance whereas in the West of England as a whole, nearly 27% commute more than 10km. Further assessment of these patterns and the influence of other factors such as house prices, incomes, and their implications for the spatial strategy is being undertaken.

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3 The 2001 Census shows that the West of England ‘workplace’ population amounted to of 496,548 and residents in employment, 473,802.
4 The 2001 Census shows some 27% of West of England residents travelling more than 10km to their workplace.
14. Current planning policies seek to restrict further residential development at Weston-super-Mare to the pace of local employment growth in order to prevent the continued growth of commuting to the Bristol area. Census data shows that between 1991 and 2001 the expansion of employment in the town continued to lag behind the growth of the resident workforce leading to a further rise in the outflow of commuters from the town (+4,850). At 2001, some 65% of residents were employed in the town with nearly half of the remainder (6,250) travelling to the Bristol area. Traffic surveys indicate that much of this outflow is from the new residential developments on the edge of the town. Confirming this pattern, Census data for the area shows comparatively lengthy journeys to work (36% travelling more than 10km).

15. Rising commuter flows to both the Bristol and Bath areas suggest the need for a better balance between homes and jobs across the West of England and the appropriate investment in transport infrastructure. Weston-super-Mare and south Bristol in particular have been identified as priorities for regeneration. However, prospects for encouraging a better relationship between homes and jobs at these locations and elsewhere across the Sub-Region will be constrained by the dominant role of the well-established centres of business activity in journey to work patterns and their potential for further growth. It may be constrained as well by further increases in mobility and changes in lifestyles and working practices that together are leading to a far looser geographical relationship between the location of homes and jobs.  

Employment trends and prospects

16. Recent employment trends provide evidence of the competitive success of the local economy. During the 1970s and 1980s, the decline of several major industrial concerns, with overall manufacturing employment levels falling by nearly a half, was more than matched by rising numbers of jobs in offices, especially financial, professional and business services, and a wide range of other services. During the 1990s and more recent years, the rate of employment growth in the Sub-Region has accelerated as a result of a tailing-off in the decline of manufacturing, -reflected by the growing success of aerospace and emerging high technology/electronics based industries, and continued growth in services, reinforced by the rising importance of new sectors related to call-centre operations, computer services and media related activities. Over both the 1980s and 1990s, the overall rate of local economic expansion has been in excess of regional and national averages.

17. Recent employment trends also illustrate the range of uncertainty about the future rate of growth of employment in the Sub-Region. The high growth rate of the 1990s with the average level of employment climbing by 6,000 per annum contrasts with the 1970s when unfavourable economic conditions resulted in an annual average employment increase of 1,000 per annum and the 1980s when employment growth over the decade averaged 3,000 per annum. 

5 ‘The People: Where will they work?’ Report of TCPA research into the changing geography of employment. Ed. by M.Breheny.
6 Refers to the ‘workplace population’ as recorded by Population Census Workplace Statistics.
7 Data on employees from the Census of Employment (1981-91), the Annual Employment Survey (1991-98) and the Annual Business Inquiry (1998-2001) shows a more rapid rate of growth between...
18. The high rate of local economic growth since the 1990s is unlikely to be maintained over the longer-term future. Recent growth has been associated with recovery from the recession and high levels of unemployment with much ‘spare capacity’ readily available to be taken-up by expanding businesses. Such ‘cyclical’ effects should be discounted when considering future long-term growth rates. The recent high levels of growth may also reflect an exceptional period of national economic expansion that is unlikely to be maintained indefinitely. The ageing of the population with increasing numbers retiring from the workforce, is also likely to restrict the rate of expansion. Nevertheless, it is likely that the locational and structural economic advantages of the West of England and the clear prospect of continuing although more modest national economic expansion will lead to the further growth of the local economy over the future.

**Industrial and office land requirements**

**Industry**

19. Analysis of the economic forecast set out above (LEFM May 2004) suggests that the overall stock of industrial premises in the West of England is unlikely to change by a significant amount over the years ahead. Further decreases of manufacturing employment appear likely to be matched rather than exceeded by extra jobs in transport, distribution and a wide range of other uses that traditionally occupy industrial land. Competitive pressures, new business opportunities and technologies, and the ageing of existing premises therefore are likely to be the main factors leading to demands for new industrial development.

20. The current industrial property market of the West of England supports about 21 ha of development per annum. Assuming that this level of demand is maintained to 2026 (setting aside the potential for further port and airport related development), indicates that some 462 ha of industrial development (in the B1bc, B2-8 categories) would be undertaken in the Sub-Region between 2004 and 2026. This overall scale of development could support about 28,000 jobs.

21. About 950ha of land are identified in planning terms for development for office and industrial uses in the West of England. In addition, opportunities for further industrial and especially office development are likely to come forward over the future as a result of some sites currently in employment use coming forward for re-development. Together these sites and potential re-development opportunities represent a considerable amount of potential for new investment compared with past take-up trends- 32 ha per annum between 1989 and 2001, and the

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1981 and 2001- 5,570 per annum average compared with a growth in the ‘workplace population’ of 4,630 per annum average according to the Population Census. These differences may be accounted for by the growth of ‘double-jobbing’ and the rising share of employment accounted for by the self-employed.

8 This view is supported by the average of medium term (2004-8) national economic forecasts compiled by the treasury (February 2005) which shows annual GDP growth at about 2.5% compared with a growth rate of about 3% for some recent years.

9 See Technical Note: ‘West of England Sub-Regional Spatial Strategy- Economic forecasts, employment in the ‘B’ and non-‘B’ use categories and requirements for employment land.’

10 See Technical Note: ‘West of England Sub-Regional Spatial Strategy- Take-up of employment sites and local employment.’
 projections of future land requirements set out above- 462ha for industrial uses and 1.3m sq m gross office floorspace (see para. 25).

22. The location of some existing employment sites however, does not correspond closely with patterns of demand while some sites are only likely to come available for development in the longer term. Recognition also needs to be given to the need to provide for a choice of development opportunity in order to ensure that the diverse nature of business location requirements can be met in accord with the Vision. As a result, shortfalls of existing, allocated sites in relation to many business requirements are already evident across the Sub-Region, especially within and on the edge of Bristol, at Bath, Thornbury and Yate. In contrast, the supply of employment sites in some other localities appears to be excessive when compared with recent development and occupier interest.

23. Allocated industrial sites, largely the strategic sites at Avonmouth/Severnside, could meet some 220 ha of the projected demand for industrial sites (see paragraph 20) and support about 10,400 new jobs, leaving a shortfall of 250ha. ‘Brownfield’ sites not currently identified, could offer the potential to meet some 130ha of this shortfall leaving a requirement for some 120ha of new greenfield industrial sites with the potential to support about 5,600 jobs. Current patterns of market demand show much of this shortfall arising in South Gloucestershire.

24. With the overall stock of industrial property likely to remain largely unchanged over the future and the prospect of continuing industrial development largely on new sites, some existing less attractive industrial locations are likely to become less in demand. This might approximate to up to 200ha given current expectations about the pace of new development and the scope likely to arise for accommodating this development on sites that are not currently in industrial use. Monitoring land use change and employment land studies will allow the review of this broad guideline and clarification of its locational character as well as the scope for re-cycling derelict sites and premises to offer attractive locations for expanding businesses thereby reducing the need for greenfield sites.

Offices

25. In contrast to industrial uses, the economic forecasts (LEFM May 2004) show a prospect of continuing (net) growth in the overall stock of office floorspace in the West of England amounting to about 1m sq m gross between 2001 and 2026, as a result of continuing strong growth in the professional, computing and business service sectors. At the same time, current market demand if maintained, indicates a potential for some 1.3m sq m gross of new office development between 2004 and 2026 with the capacity to support some 68,000 jobs. The difference between net and gross figures indicates the potential for renewal of the existing stock.

26. The economic forecast provided by the Regional Assembly, also prepared by Cambridge Econometrics, indicates a higher rate of office employment growth. Accommodating this higher growth would raise the requirement for office floorspace at 2026 from about 1m sq m gross to 1.4m sq m gross. The Regional Assembly forecasts show manufacturing employment declining by a similar scale to that shown by the LEFM based projection. It does not therefore suggest a need for additional land beyond that arising from the considerations set out above.
27. Allocated office sites, largely in Bristol City Centre, the North Fringe and Bath, could support the development of some 650,000 sq m gross office floorspace and about 32,100 jobs. This would leave a shortfall of 671,000 sq m gross compared with the anticipated requirement arising between 2004 and 2026. Vacant offices and ‘brownfield’ sites not currently identified, largely arising in Bristol City Centre, may offer the potential to accommodate an additional 185,000 sq m gross of the projected office floorspace requirement while success with the regeneration of Bristol City Centre and Weston-super-Mare (‘Area Development Framework’) in accord with the ‘Vision’, could attract at least a further 293,000 sq m gross office floorspace. This would leave an outstanding requirement compared with projected take-up between 2004 and 2026 of 193,000 sq m gross floorspace in the Bristol area, equivalent to 10,100 jobs, to be met by the release of new sites.

28. The Bristol area is likely to account for much of the ‘allocated development’ anticipated over the future- 75% in the case of industrial development and over 90% in the case of office development, reflecting the dominant position of the Bristol industrial and office property market in the wider Sub-Region, the stock of existing sites and, the nature and strength of the local economy. Avonmouth-Severnside is expected to be the major focus for industrial development. Bristol City Centre and (in the short and medium term) the North Fringe and Emlemsons Green, are expected to dominate the pattern of office development. The science park at Emlemsons Green is also expected to become a major element in the pattern of new business development over the next decade or so.

West of England
Projected take-up of industrial and office development sites

<table>
<thead>
<tr>
<th></th>
<th>Industrial</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ha.</td>
<td>sq m gross</td>
</tr>
<tr>
<td>Allocated</td>
<td>230</td>
<td>651,000</td>
</tr>
<tr>
<td>Brownfield</td>
<td>130</td>
<td>185,000</td>
</tr>
<tr>
<td>Regeneration</td>
<td>0</td>
<td>293,000</td>
</tr>
<tr>
<td>Other new sites</td>
<td>120</td>
<td>193,000</td>
</tr>
</tbody>
</table>

Notes: 'Allocated’ describes sites with planning permission or otherwise committed to industrial or office development. 'Brownfield' describes opportunities for re-cycling existing employment sites to meet current patterns of demand. 'Regeneration’ describes the current perceived scope for relocating demand for office development on the edge of Bristol to Bristol City Centre or WSM. 'Other new sites' describes the difference between these opportunities and the potential for new development given current market demand.

11 Vacant offices in the City Centre have amounted to over 10,000 sq m gross over recent years. Much of this stock has been of a secondary character and proved difficult to let. Some of it has been converted to other uses or either refurbished or redeveloped to provide new office accommodation.

12 This estimate is based on the findings of the study of ‘Strategic Employment Sites in the WESP Area’, by RPS & Alder King for SWRDA/WESP 2003.
29. The estimates about the capacity of existing sites and shortfalls reflect current perceptions of the development requirements of the Sub-Regional economy. Also, they do not attempt to anticipate exceptional developments such as further port-related development related to the success of the Port Company, business expansion that may occur directly as a result of airport growth or the success of the rail-freight terminal at Avonmouth. The Vision envisages support for these key facilities. In addition, the projections and forecasts of future land requirements do not allow for a choice of sites. Traditionally, a margin of 50% above anticipated development requirements is allowed in order to allow the market to operate smoothly, with occupiers and developers able to meet their particular requirements.

The Airport

30. Currently, about 2,450 persons are employed at the Airport while about 4.5 million passengers passed through the terminal during 2004. This represented a jobs: passenger ratio of 533 per million passengers. Current forecasts suggest that between 10 and 12 million passengers will be using the terminal by 2030. Applying the ratio of 533 passengers per million passengers suggests that by 2030 the Airport could support over 6,000 jobs. The current jobs : passenger ratio at Bristol is low compared with larger airports. With increasing size, the Airport may attract a larger share of airport-related services. This may lead to the number of jobs at the Airport rising more rapidly to perhaps over 8,000 by 2030.

31. The range and frequency of services offered by an airport are often identified as important influences on business location decisions. However, the implications for jobs cannot be quantified. Furthermore, this effect will extend across the sub-region and beyond rather than being confined to the immediate Airport locality. Nevertheless, businesses related to serving Airport requirements or highly dependent on the use of air services will require locations offering good airport access. The Airport is seeking to commission a study of these wider economic effects.

The Port

32. The expansion of Royal Portbury and its associated employment has been rapid over recent years. Very little additional land is now available and further development of the Port and its employment will need to be as a result of intensification and/or development at Avonmouth. A recent assessment of the growth potential of the Port advised that a continuation of the growth rate of the 5-year period to 2002 would lead to a land requirement of between 13 and 18 ha per annum over the next 20 years, supporting between 1,100 and 2,600 additional jobs. Accommodating this growth, unless an extension to the Port boundary is allowed or more intensive forms of use are secured, would require further development at Avonmouth, improved access between Royal Portbury and Avonmouth, and overcoming other constraints on development at Avonmouth.

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Summary of Local Employment Prospects

33. The take-up of industrial and office development allocations, other proposals for major job-generating developments and opportunities for brownfield re-cycling and regenerating local economies, as identified above, together indicate a potential for nearly 80,000 jobs in the West of England. Bath, Bristol City Centre, the North Fringe and Emersons Green, and Weston-super-Mare account for the bulk of these ‘committed’ jobs. Addressing shortfalls in greenfield employment sites would provide about another 15,500 jobs.

34. In contrast, some existing jobs on industrial land are likely to be shed as a result of closures and relocations to new developments. These losses may amount to more than 20,000 jobs given the prospect of industrial development at new, often greenfield locations and a continuing, small decrease in total industrial employment. Realising opportunities for to secure new office development also will result occasionally, in the loss of older, existing offices and the associated jobs.

35. The expansion of local services associated with residential development will also generate significant new employment. Local service jobs are supported at a ratio of about 0.15 per resident (or 7 residents per job). This indicates a potential for increases in local service employment in the West of England ranging from +21,650 if provision were to be made at the RPG10 rate of dwelling provision to +37,500 at the RPG10 rate increased by 50% after 2011. Airport expansion and other improvements to sub-regional services will also generate significant additional employment.

36. Local employment growth as described above will have only a limited impact on the overall distribution of employment across the Sub-Region, as many of the new jobs will reinforce the role of already well-established locations. Workplace locations available to occupiers of new housing will therefore continue to be dominated by the major centres of business activity of the Sub-Region.
1. In looking forward to being one of Europe’s fastest growing and most prosperous sub regions driven by major developments in employment, the Vision acknowledges the importance of improved housing provision. It recognises the requirement for urgent support from government and the public and private sectors, to accelerate investment and deliver sufficient homes of the right type, including an adequate proportion of affordable homes, in successful, high-quality neighbourhoods. Adequate decent housing will therefore be an integral part of economic growth.

2. Affordable housing provision will also be an essential component in achieving the rising quality of life as promoted by the Vision. The quantity and quality of housing have a significant impact on life chances in such areas as health and education. The renewal of some poorer quality housing can be an important component in achieving area-wider regeneration of disadvantaged communities.

3. This emphasis on adequate, quality housing provision is in line with the government’s housing objectives set out in Planning Policy Guidance Note No.3: Housing, PPG3, that
   • everyone should have the opportunity of a decent home
   • there should be greater housing choice
   • the housing needs of all the community should be recognised
   • sustainable patterns of development should be promoted making better use of previously developed land with a focus on existing towns and cities
   • new housing and residential environments should be well designed and should make a significant contribution to promoting urban renaissance and improving the quality of life.

4. A comprehensive study of the West of England housing market was undertaken by DTZ Pieda and published in 2004. It reported that in common with the position across all of southern England, including the South West, that there was a serious and growing imbalance between the demand for and supply of all types of housing within the West of England. It said that unless action were taken quickly, and over a sustained period, the imbalance threatened the sustainable development of the West of England, potentially undermining the strong economic performance of the sub region, increasing social polarisation, and potentially leading to adverse environmental impacts as people move ever further from where they work in search of housing they can afford. In summary, the imbalance in housing remains a threat to the achievement of the economic vision for the sub region whilst posing real challenges in accommodating additional housing to minimise adverse environmental impacts.

5. DTZ said that the most evident feature of the housing market had been the rise in house prices since 1996. These increased by 179% between the second quarters of 1996 and 2004 to an average sub regional price of £194,100. This level of increase is mirrored in the South West as a whole and is above the national increase of 150% over the same period. Average
prices were significantly higher in Bath and North East Somerset, similar in North Somerset and South Gloucestershire, and lowest in Bristol. However, the price of semi detached/detached housing in Bristol was the highest in the sub region after B&NES.

**Average House Prices in the West of England Area**

<table>
<thead>
<tr>
<th>Unitary Authority</th>
<th>Detached</th>
<th>Semi-Detached</th>
<th>Terraced</th>
<th>Flat/Maisonette</th>
<th>Average Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath and North East Somerset</td>
<td>368,767</td>
<td>220,897</td>
<td>194,324</td>
<td>168,678</td>
<td>222,719</td>
</tr>
<tr>
<td>Bristol City</td>
<td>313,319</td>
<td>222,719</td>
<td>168,979</td>
<td>160,205</td>
<td>177,166</td>
</tr>
<tr>
<td>North Somerset</td>
<td>281,340</td>
<td>194,324</td>
<td>176,188</td>
<td>129,841</td>
<td>182,314</td>
</tr>
<tr>
<td>South Gloucestershire</td>
<td>269,890</td>
<td>187,324</td>
<td>146,967</td>
<td>114,263</td>
<td>182,314</td>
</tr>
</tbody>
</table>

Source: HM Land Registry July-Sept 2004

6. As a result of increased prices not being matched by increased earnings, and despite low interest rates reducing the cost of borrowing, DTZ estimated the affordability of housing had declined by 40% between 1999-2003. The Barker Report on the ‘Review of Housing Supply’ reported that nationally only 37% of new households could afford to buy a property in 2002, compared to 46% in the late1980s. A soon to be published report by Professor Glen Bramley, ‘West of England Housing Need and Affordability Model’, estimated that in 2004 only around 34% of households in the sub region could afford to buy, even after allowing for wealth, and that such measures are significantly influenced by house prices with 10% lower prices increasing affordability by nearly 6 percentage points.
7. Whilst the house price to income ratio, a shorthand for affordability, is higher in many South West local authorities than it is in the West of England unitary authorities the numbers affected by affordability problems, and consequently unable to buy, are higher in the sub region because of the larger population; a Joseph Rowntree Foundation report published in 2003, ‘Can Work, Can't Buy’, details this. So, for example, using the JRF published analysis, the number of working households unable to buy a 4/5 room dwelling at lower quartile house prices was estimated to be higher in the West of England than in any other South West county, and nearly a third higher even when compared to counties such as Dorset where house price to income ratios were consistently higher.

8. Declining affordability means that recorded housing need has increased in the sub region. Households on the four UA housing registers totalled some 23,600 at the end of 2003/04 compared to nearly 21,000 in 1996.

### Number of households on the housing register

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;NES</td>
<td>2,060</td>
<td>3,052</td>
<td>2,428</td>
<td>3,324</td>
<td>3,521</td>
<td>2,375</td>
<td>2,640</td>
<td>3,289</td>
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<tr>
<td>Bristol</td>
<td>10,386</td>
<td>10,030</td>
<td>11,299</td>
<td>12,280</td>
<td>11,853</td>
<td>11,384</td>
<td>12,944</td>
<td>11,632</td>
</tr>
<tr>
<td>North Somerset</td>
<td>3,391</td>
<td>3,827</td>
<td>3,696</td>
<td>2,623</td>
<td>4,000</td>
<td>2,280</td>
<td>2,957</td>
<td>3,728</td>
</tr>
<tr>
<td>South Gloucesters hire</td>
<td>5,138</td>
<td>6,000</td>
<td>3,538</td>
<td>4,523</td>
<td>5,530</td>
<td>3,513</td>
<td>5,205</td>
<td>4,961</td>
</tr>
<tr>
<td><strong>Sub Region</strong></td>
<td><strong>20,975</strong></td>
<td><strong>22,909</strong></td>
<td><strong>20,961</strong></td>
<td><strong>22,750</strong></td>
<td><strong>24,904</strong></td>
<td><strong>20,152</strong></td>
<td><strong>23,746</strong></td>
<td><strong>23,610</strong></td>
</tr>
</tbody>
</table>

Source: ODPM HIP 1 Returns. Data is for financial years.

9. The number of households accepted as unintentionally homeless has also increased and numbered 3,535 during 2003/04, an increase of over 500 on the previous year, this increase is also reflected in a rise in the use of temporary bed and breakfast accommodation.

10. At the same time as affordability has been declining there is increasing pressure on the existing social rented stock as stock numbers decline primarily as a result of sales under the right to buy outstripping new social housing provision. So in 2003/04 gross losses from the social rented stock totalled nearly 1,090 dwellings, and whilst offset by new build/acquisitions of nearly 870, ultimately resulted in a stock loss of around 220 dwellings. These net losses have reduced more recently as there has been a general increase in housing completions including affordable housing.

11. Overall therefore an increasing proportion of newly forming households are unable to access the existing or newly built housing stock that meets their needs as a result of a number of factors: insufficient amount of housing, inadequate mix of the right type of homes, affordability,
and/or a locational mismatch between the stock and where need arises. Statistics which simply equate the net growth in household numbers to net dwellings needed tend to hide this mismatch between the numbers and types of dwellings becoming available and the position of new households requiring homes, and fail to reflect existing backlogs in need.

12. The sub regional Bramley study estimated that the backlog of existing housing need, even before annual household growth is met, totalled about 20,000 households. Most local housing studies assume that this need should be met over a 5-10 year period. The study estimated the net annual need for new affordable housing alone, after allowing for re-lets in the existing stock and assuming the backlog was met over 10 years, would average nearly 4500 dwellings between 2002 - 2009. Not all of this need would be met by social renting, a third could be addressed by intermediate forms of housing tenure, such as shared ownership.

13. The composition of new dwellings built is therefore as important as the numbers otherwise the most pressing needs will remain unmet. Whilst the Government has put much emphasis on generating affordable housing through Section 106 planning agreements, local information suggests that only 30% of affordable housing has arisen from this source recently, the majority coming from direct Housing Association provision. This share however, should increase as UA affordable housing policies are applied to new developments and the policies strengthened. Higher overall levels of development than in the past could also provide more affordable housing particularly if UA affordable housing targets were applied to major sites. However, the need to maintain the viability of private developments will limit such affordability targets; the one-third target recently adopted by South Gloucestershire, following an examination of its Local Plan, is the current maximum operating in the sub region. In addition there will remain many sites particularly those smaller brownfield sites in the urban area, from which it will not be possible to obtain affordable housing. In 2003/04 in Bristol 39% of new housing was on sites below 25 dwelling capacity and the then threshold for affordable housing.

14. It is quite clear that whilst new developments should gradually make a significant contribution to housing need, the need for affordable housing cannot be simply addressed through an increase in housing numbers and the operation of Section 106 agreements. Significant direct public investment will be required to address existing needs and these needs will continue to grow whilst the owner occupied housing market remains buoyant and house prices increase. These affordability issues will remain to be tackled whatever the rate of growth of the economy.
House Building Trends

15. Overall house-building rates in the sub region have been primarily geared to meeting a Joint Replacement Structure Plan target averaging 3,347 additional net dwellings annually between 1996-2011. This target has, however, been exceeded, numbers averaging 3,565 pa between 1996-2004 and the most recent completions in 2003/04 reaching 4,671 pa., partially as a result of a major increase in building on small/medium sized brownfield sites in Bristol City, major developments on greenfield sites at Weston-super-Mare and a major brownfield regeneration site at Portishead in North Somerset. The diagram below shows the longer-term pattern of completions. With these recent increases in development the sub region may meet the higher regional RPG 10 target of 3,700 net dwellings pa for the period 1996-2011.

Dwelling Completions and Sub Regional Spatial Strategy Growth Scenarios.

Source: Unitary Authorities Residential Land Surveys.

16. RPG10 and JRSP policies focus on growth within and adjoining the Principal Urban areas. Between 1996-2004 nearly 76% of the total gross completions in the West of England (23,300) took place in the Principal Urban areas, 58% (17,680) in the Greater Bristol PUA (32% in Bristol City, 26% in South Gloucestershire), 14% in the Weston-super-mare PUA and 4% in Bath. Some of these dwellings replaced existing ones as poorer dwelling stock was renewed and total PUA dwelling losses of around 2000 (250 average p.a.) were estimated to have offset these gains.
Gross Housing Completions in Principal Urban Areas 1996-2004

<table>
<thead>
<tr>
<th>Gross PUA figures</th>
<th>96/97</th>
<th>97/98</th>
<th>98/99</th>
<th>99/00</th>
<th>00/01</th>
<th>01/02</th>
<th>02/03</th>
<th>03/04</th>
<th>Total 1996/04</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath PUA</td>
<td>275</td>
<td>271</td>
<td>263</td>
<td>106</td>
<td>59</td>
<td>53</td>
<td>183</td>
<td>172</td>
<td>1,382</td>
</tr>
<tr>
<td>Greater Bristol PUA</td>
<td>1,680</td>
<td>2,106</td>
<td>2,291</td>
<td>2,020</td>
<td>1,986</td>
<td>2,128</td>
<td>2,180</td>
<td>3,289</td>
<td>17,680</td>
</tr>
<tr>
<td>Weston-super-Mare PUA</td>
<td>390</td>
<td>471</td>
<td>612</td>
<td>416</td>
<td>320</td>
<td>559</td>
<td>654</td>
<td>802</td>
<td>4,224</td>
</tr>
<tr>
<td>Total Gross Completions in PUAs</td>
<td>2,345</td>
<td>2,848</td>
<td>3,166</td>
<td>2,542</td>
<td>2,365</td>
<td>2,740</td>
<td>3,017</td>
<td>4,263</td>
<td>23,286</td>
</tr>
</tbody>
</table>

17. A significant part of this PUA supply has occurred on green field sites that formed part of earlier local plan allocations inside the outer fringe of the built up area. Urban housing capacity studies indicate that this, together with the redevelopment of vacant land and buildings, is expected to remain a significant part of urban housing supply up to 2011. (See chart below.) Thereafter, these sources of supply are expected to diminish and increasing reliance placed on the redevelopment of existing uses as a source of additional housing, with some further losses of existing dwellings a likely part of that process possibly on a similar scale to that occurring up to 2003/04.
Sources of Urban Housing Capacity for each UA 2002-2011

18. Despite this greenfield development, brownfield sites, large and small, have formed an important part of sub regional dwelling supply in accordance with government policy, which expects to see 60% of new dwellings on such sites, 50% being the South West regional planning target. Brownfield completions therefore averaged 53% between 1996-2004; in 2003/04 70% of sub regional completions were brownfield, in part due to the sharp increase of completions in Bristol City. (See diagram below.)
Dwellings built on greenfield and previously developed land and buildings in the West of England
(figures in brackets indicate dwelling numbers).

Source: Bath and North East Somerset Council, Bristol City Council, North Somerset Council, South Gloucestershire Council
Note: figures pre 2004 do not include Bristol’s revised figures (“others” mostly cluster flats) and total completions therefore 1996-2004 may not tally with total completions by brownfield/Greenfield split 1996-2004.

19. One feature of this brownfield development focussed on the urban areas is the increasing numbers of completions on sites that have not been formally allocated through the local planning system. In 2003/04, 52% of gross dwellings completed were on “large” windfalls of over 10 dwellings capacity. Small sites yielding 10 or fewer dwellings, accounted for 22% of the sub regions gross completions: most of these were on speculative brownfield sites.

20. Ultimately the absolute brownfield/greenfield numbers are more important than percentage figures in meeting housing requirements, and these will depend on the mix of sites available at any one time. There will therefore be a need to develop a mix of different types of sites to ensure that required dwelling targets are met; with priority being given to brownfield sites where these can be brought forward to meet housing need and demand within the necessary timescales. However, this increasing reliance on large and small site brownfield windfall capacity in the main urban areas suggests that it would be very difficult to plan with any certainty to raise housing completions much above the
current RPG figure in the short term up to 2011. The focus would therefore be on re-phasing existing large allocated sites but, given the current projected lead-in times for such developments, the ability to do this is likely to be very limited. (See also Spatial Implications, Testing Levels of New Housing Provision 2001-2026, below)

Gypsy / traveller sites

21. Under the Housing Act 2004 a joint assessment of the need for Gypsy / Traveller sites should be undertaken as soon as practicable following the publication of appropriate guidance on assessments from the Office of the Deputy Prime Minister. A search sequence approach should be applied that promotes the use of locations in or near settlements with access to local services such as shops, doctors and schools. Priority should be given to the use of previously developed land, including untidy or derelict land within urban areas at the beginning of the sequence.
TRANSPORT

(This section will be expanded in conjunction with the Greater Bristol Strategic Transport Study through iterative testing of land-use and transport solutions to ensure their convergence in the spatial strategy.)

1. The Regional Assembly’s brief calls on the local authorities to co-ordinate transport and land use planning and to have transport modelling in place to make assessments of the transport implications of development strategies. Transport improvements are a high priority for the West of England, as public consultations on the Vision and spatial strategy confirm. The Greater Bristol Strategic Transport Study is expected to report in early autumn 2005.

2. The sub-regional spatial strategy, the Regional Spatial Strategy and Regional Transport Strategy will need to identify priority measures to resolve existing problems and to accommodate growth, in accordance with the West of England’s importance to the South West Region as a large and dynamic economy that is located at a gateway to the Region on strategic national routes. Transport strategy and land-use strategies will need to be complementary in terms of managing travel demands and matching future demands with capacity. Future development will depend on addressing existing deficiencies in the transport networks and ensuring that future investment in transport matches growing travel demands. For this purpose, a “contract” with those promoting development is needed on infrastructure provision, if growth is to be accommodated.

3. The West of England Partnership’s Vision includes a number of ‘delivery priorities’ for ‘connectivity and accessibility’ including:
   a. More use of public transport through short-term measures, including bus showcase corridors, park and ride schemes and real-time information, and longer-term measures including innovative schemes such as alternative rapid transit and ways to discourage car use.
   b. Improvements to the strategic road network in and around South Bristol; between the Airport and the three principal urban areas; improving connections to the motorway network in North Somerset and South; reducing road congestion and local traffic on the motorway network and as a result improving business investment and economic growth, accelerating regeneration and improving the local environment.
   c. An increase in rail capacity to improve rail access to Weston-super-Mare in support of the Area Development Framework; to provide a rail link between Bristol and Portishead; and to secure a local link between Avonmouth and Portbury to support expansion of the Port.
   d. Reducing the need to travel by promoting innovation in new communication technologies, new working practices and better physical relationships between home, work and other activities.
e. Government support for a joint Local Transport Plan that delivers improved performance on the shared priorities of congestion, accessibility, road safety and air quality.

f. Investment in longer-term transport priorities that reinforce the sub-region’s spatial planning strategy, improve national and international links, build on the recommendations of the Greater Bristol Strategic Transport Study and attract funding from a wide range of sources.

4. These delivery priorities are now the subject of detailed examination by the joint Local Transport Plan for the West of England and the Greater Bristol Strategic Transport Study.

5. Extensive consultations on options for the joint Local Transport Plan took place in March 2005. The consultation report set out ways to address ‘shared priorities’ of the Government and the Unitary Authorities:
   a. Tackling congestion,
   b. Improving accessibility,
   c. Improving air quality, and
   d. Improving road safety.

It set out a range of measures to tackle congestion, including promoting alternatives to the car, encouraging more sustainable ways of travelling and managing the demand for private car travel. A provisional joint LTP will be approved by the four Councils and submitted to the Government in July 2005, and there will be further consultations in the autumn of 2005 on the full joint LTP before it is finalised in March 2006.

6. The Greater Bristol Strategic Transport Study was commissioned jointly by the authorities, the Department for Transport, the Highways Agency and the Regional Development Agency in late 2003. A number of other organisations are also participating in the Study, which should help to identify priorities for transport investment and support the case for public funding. Public consultation on options took place between November 2004 and January 2005 and further consultation on recommended strategies will take place in Spring 2005.

7. Early stages of the Study reviewed existing problems and solutions, and considered some impacts on existing problems of potential changes in land use. Initial results, which were the subject of public consultation, projected continuing long-term growth in road traffic, congestion and delays, even with wide-ranging transport improvements in roads and public transport and measures to manage the growth in travel demands. Differing land-use patterns appeared to have only a small effect in limiting this growth in congestion.

8. The results of this work are still being examined and it is hoped that they will assist in developing the sub-regional spatial strategy. Consideration is also being given to how transport solutions will be tested in conjunction with developing a preferred spatial strategy. However, the Study will not provide its final recommendations on transport solutions until summer 2005.
9. The Greater Bristol Strategic Transport has important implications for the Regional Spatial Strategy and the Regional Transport Strategy. As the Study programme does not fit easily with the Regional Assembly’s programme for developing the draft RSS, there will need to be a continuing dialogue between the Assembly, the authorities and the Partnership to ensure that conclusions arising from the Study can feed into the development of spatial strategy and the priorities of the RTS.

Problems and Issues

10. Listed below are summary facts that describe many of the challenges for transport policy in the West of England. They are drawn mainly from existing problems and issues that were identified in the brief for the Greater Bristol; Strategic Transport Study.

- There is evidence that investment in transport infrastructure and revenue support in the area have been inadequate. Spending per head on major capital schemes over the last 20 years has averaged £5 per head per year. Work for the joint Local Transport Plan has estimated the backlog of past under-investment is more than £300 million. Barriers to investment need to be overcome if existing problems are to be solved, in addition to the further investment needed to accommodate travel demand from new developments.

- Bath and Bristol are among the most congested cities in Britain with low and declining peak road traffic speeds. Bristol was 17th out of 18 English cities in 2002, with a speed of 16 mph across the city in morning peak.

- There is a relatively low level of high-capacity, dual-carriageway links on local roads. The historic built environment and high population densities of the cities and the quality of the rural environment are real constraints on the development of transport routes to match growing demands.

- Car ownership is above the national average, although below the regional average. Decentralised development patterns of the past 40 years have added to travel demands.

- Strategic links and conflicts between long-distance and local movement result in congestion on both the strategic road and rail networks.

- About half of the peak-hour traffic on the M5 at Avonmouth has both its origin and destination in the area. However, this finding is not unlike other large cities with adjacent motorways, such as Sheffield or Birmingham.

- The rail network suffered a reduction in capacity for local movements in the 1960s. Track congestion affects 40% of the area’s network, which in turn affects reliability and needs to be addressed to improve rail services.
• Unreliability results from networks operating at close to capacity, and unpredictable events resulting in road closures can result in massive and widespread delays.

• Buses are inhibited by congestion and innovative management measures are required to improve quality, including 'showcase routes' (as proposed in the draft joint Local transport Plan).

• The sub region suffers from an inadequate and under-developed local rail network that contributes to endemic congestion in many parts of the area. It is essential that growth in local services is secured, as an essential part of the sub region’s strategy for delivering an integrated transport system.

• ‘Softer’ measures designed to influence behaviour through information, offering new choices (for example through workplace travel plans) and demand management (through congestion charging or workplace parking levies) will also need to be considered as part of the future strategy.

• National and international links include the motorways, Bristol International Airport and, for freight, the Port of Bristol. Passenger links to the Channel Tunnel, the London airports and the channel ports are in need of improvement. Growth in the Airport and the Port are important aspects of the spatial strategy. The economic importance of the Airport and the Port is described in the economy section of this report. Both are surrounded by Green Belt and potential conflicts between their expansion and maintaining the Green Belt will need to be resolved. Growth of the Airport also has consequences for road traffic in the surrounding area including the Chew Valley.
RETAILING AND TOWN CENTRES

1. Bristol City Centre has been undergoing a renaissance in business, housing, leisure and other activities, which will continue. There are strong demands for new shopping floorspace, which are being recognised by the current proposals for the expansion of Broadmead. There is strong demand as well for prime office space but few opportunities available to meet this demand. Considerable scope for additional office development however is coming forward which could meet occupier requirements over the short and medium term with other opportunities for accommodating further office expansion likely to emerge. In addition, proposals have been made for prestigious new leisure and cultural facilities and there are major commitments and longer-term opportunities for additional housing.

2. Bath City Centre also has proposals for major shopping redevelopment backed by buoyant demand from retailers, and is likely to require further new floorspace in the longer-term. The City Centre provides mainly small-scale office accommodation, for which there is continuing demand, but the Western Riverside will provide the opportunity for modern office accommodation on a much larger scale with the potential to attract major relocations and contributor to the economic well-being of the wider area as envisaged by the Vision. The new Spa development should provide a boost to tourism.

3. At Weston-super-Mare, the expansion and enhancement of the town centre and the regeneration of the adjacent sea-front represents a key component of the draft Development Framework for the town. This envisages developing the quality of shopping, leisure and cultural opportunities of the town centre, including the establishment of a department store, new small retail units and leisure facilities. Re-development of out-worn buildings on the edge of the town centre and extending the primary shopping area of the centre would be required to accommodate these improvements.

4. Roles of smaller centres need to be considered in relation to the future expansion of their catchment populations and competition from out-of-town shopping. Although the physical expansion of out-of-town shopping has slowed, their turnover continues to rise as a result of the widening range of goods available and longer opening hours. The developing role of these centres therefore continues to threaten the role and future of many smaller centres.

5. A considerable increase in the requirement for additional shopping floorspace can be anticipated over the years ahead as a result of higher living standards and the rising population. Much of this growth is likely to be accounted for by rising expenditure on clothing, footwear and many household and leisure related goods. Projections of per capita expenditure on such items indicate a rise of in excess of 4% per annum. However, a large part of this increasing expenditure is likely to be accounted for by the purchase of higher quality, more expensive goods which could reduce the need for additional shopping floorspace by perhaps a half. Nevertheless, a
need may remain for of the order of an additional 250,000sq m gross of additional shopping floorspace. Current commitments, principally the Broadmead expansion and proposals and emerging opportunities for new shopping development within and on the edge of Bath City Centre could meet towards a half of this requirement. The widening retail role of superstores and retail park developments, and the growth of Internet shopping, may account for a further significant element of the expected rise of expenditure. However, opportunity for in excess of perhaps 100,000sq m gross of new comparison shopping floorspace may need to be identified to meet requirements arising over the period to 2026. Further study is needed to confirm this guideline and locational options following clarification of the spatial strategy.

6. The need for convenience shopping floorspace over the future is likely to rise far more gradually. Additional requirements are likely to relate to meeting the needs of growing local communities through the provision of facilities in expanded or new local or district centres. Perhaps more significant to the scope for expanded or new centres however, will be the increasing demand for a widening range of local services related to meeting day-to-day requirements. Again, further study following clarification of the spatial strategy will be required to establish these requirements and their implications for new development.

7. The future role of Cribbs Causeway needs to be assessed, taking into account regional shopping demands and the scope for expansion in the town and city centres, opportunities for renewal and enhancing the operation of the centre as well as local factors including impacts on the local transport network and future development in adjacent areas.
CULTURE, HEALTH AND EDUCATION

1. The West of England has a rich cultural heritage and a wide range of cultural facilities of regional significance, some of the most popular visitor attractions in the South West and events such as the Bath International Festival, the Balloon Fiesta, the St Paul's Carnival and Badminton Horse Trials, which attract hundreds of thousands of visitors into the sub region. Its cultural diversity is important to the quality of life and has other benefits for the economy, society and the well being of its residents.

2. Planning Policy Statement 1 states: ‘sustainable communities need sufficient quality housing to meet the needs of the community, a flourishing local economy supported by adequate infrastructure, a high quality safe and healthy local environment, and the amenities and sense of place to support a diverse local culture’. The Regional Assembly’s brief for Joint Study Areas states that the JSA should identify the linkages of spatial policy with policy in culture, health and education and should assess the implications of development and change in the JSA on these services.

3. The West of England Partnership includes representatives of the health and education sectors and has specialist groups on the economy and learning skills, and on culture, leisure and tourism. Culture, health and education sectors have also been involved in developing the Partnership’s Vision and in consultations on the spatial strategy. The Vision highlights the importance of cultural, sporting and leisure facilities in attracting highly skilled workers and visitors, as well as the importance of local and community facilities to the quality of life and health of local people. It also lists a number of important cultural projects that will be important to the cultural and community regeneration of the sub region.

4. As the Joint Study Area Report does not contain recommendations on spatial strategy (which are to be made as ‘first detailed proposals’ by the ‘Section 4 (4) authorities’) detailed discussions with the education and health authorities will need to take place on the implications of growth, its form and distribution as the spatial strategy is developed when the agencies’ views will be sought on long-term provision to meet changing patterns of demand and the spatial implications to feed into ‘first detailed proposals’.

5. Initiatives by Culture South West, including a report by Professor Martin Elson and workshops for Joint Study Areas, have helped to clarify some of the cultural issues in Spatial Planning, which have been discussed with officers responsible for culture, leisure and tourism in the four unitary authorities.

6. There are important spatial dimensions of cultural provision in relation to existing under-provision, growing demands and the need for renewal of facilities. Local community facilities require a strategic approach to implementation (including clear ‘community entitlement’ policies on Section 106 contributions). Large-scale facilities, such as regional sports stadiums, arenas and leisure or tourism facilities are clearly of strategic
significance. The Regional Assembly and Regional Development Agency need to provide clear guidance on and commitment to the location of future investment in the region to secure the long-term viability of these projects. The demand for new facilities will be affected by the location of new housing and related development and the location of growth will be equally important for local, district and regional facilities. These demands will need to be considered in the spatial strategy and implementation plans.

7. The diversity of the West of England creates a wide range of needs and opportunities for cultural development. Some differences suggest complementary approaches, for example in the cultural facilities of the Cities and the major towns, their tourism roles and those of the rural areas, and in the promotion of specialist provision such as Kuumba and Art and Power that target the needs of disabled people and minority ethnic communities.

8. Culture needs to be integrated with many other aspects of spatial strategy. It is part of the Sustainable Communities agenda for quality, mixed-use development. What is sometimes described as the ‘well-being’ agenda is given a significant emphasis by the government in ‘Choosing Health: Making Healthy Choices Easier’. Culture is a component of the Core Cities and Competitiveness agenda, which addresses the economic potential of core city-regions and a key element in regeneration as emphasised by ‘Culture at the Heart of Regeneration’, a recent report from the Department of Culture, Media and Sport.

9. Culture is an important facet of economic development. Creative industries are a key sector in the West of England, in terms of jobs, wealth and growth potential. Creative industries are one of the growth areas in the South West: employing some 3.6% of the regional workforce (compared to 2.6% nationally with Bristol experiencing a 12.8% growth in employment between 1998 and 2002. since 2002 the stock of businesses in the creative industries grew by a further 9% (compared to 5% nationally). The presence of a strong creative industry sector, including internationally renowned industry leaders like the BBC Natural History Unit, Aardman Animation, Hewlett Packard and Spike Island make an enormous contribution to the reputation and profile of the sub region and contribute significantly to its economic vitality

10. Economic impacts of culture include its contributions to tourism and retailing. The West of England received nearly 27 million tourist trips and £1.3 billion tourism expenditure in 2001, mainly through day trips although there were an estimated 10.8 million nights spent by tourists (worth about £522 million). Employment generated by tourism is estimated at over 29,000 full-time equivalents (8% of total employment).

11. Social inclusion is served by investment that enhances participation in cultural activities as part of a comprehensive package of regeneration measures in areas of economic and social exclusion (as emphasised by the Department of Culture, Media and Sport in ‘Culture at the Heart of Regeneration’) The Culture, Leisure and Tourism sub group of the West of England Partnership is working collaboratively to produce a “community
entitlement” model based on agreed formula for S106 agreements and planning gain which secure basic entitlement to community provision “as a right” which will reinforce community resilience and contribute to better health, lower crime rates and greater social cohesion.

12. The scale of population growth expected in the sub region will require that new community and cultural infrastructure is developed alongside any new housing. However it is equally important to recognise that much of the existing infrastructure is in need of refurbishment and, in some circumstances, may already be operating at capacity so that where development is to take place on ‘brownfield’ sites there is an equally strong argument for reinvestment in, and refurbishment of, existing community and cultural infrastructure.

13. Urban renewal is often secured by cultural uses that help to revitalise neglected areas or heritage buildings. (An outstanding example in Bristol is the Tobacco Factory.)

14. Environmental conservation and cultural development are complementary in many ways, contributing to ‘sense of place and ‘quality of life’ through design and art in the built environment, and supporting sustainable tourism. The Forest of Avon provides a good example of a jointly managed project that encompasses environmental and recreational benefits for the whole of the Partnership area.

15. Infrastructure investment planning for the sub region is wholly dependent on the effectiveness and efficiency of the transport network. Accessibility to local neighbourhood and strategically located sub regional/regional facilities will require careful consideration in the Regional Spatial Strategy and integration with the emerging GBSTS.

16. Discussions are progressing with Culture South West, culture and leisure officers of the Unitary Authorities and the Culture, Leisure and Tourism Group of the West of England Partnership to clarify needs, opportunities and approaches to implementation, including sub-regional priorities for major facilities and the use of Section 106 Agreements to provide cultural infrastructure. Culture South West is considering a report by Professor Martin Elson on ‘Culture and the Regional Spatial Strategy for the South West’, including a recommendation that sub-regional cultural strategies should be prepared in Joint Study Areas.

Health

17. Culture has a major contribution to make to the health agenda as opportunities for sport and recreation support healthier lifestyles. The cultural contribution to improving the quality of life by integrating physical activity and mental/spiritual well-being, stimulated by the provision of sports, playgrounds, parks, gardens, open spaces, arts and community venues, with economic and commercial activities in town centres and other neighbourhood locations, should be a major driver of investment planning for the future. There are many existing projects and further opportunities for joint provision at the local level which combine health and cultural facilities in hubs and joint service centres. In addition, the innovative
proposals to develop a joint hospital and sports complex in south Bristol including sub regional swimming facilities will have an impact right across the West of England area.

18. Although the West of England has higher standards of health overall than the South West or England and Wales, there are significant geographical variations in standards of health. Low levels of health are often linked to multiple-deprivation (low incomes, low educational attainment, high unemployment, poor housing standards and low levels of public transport accessibility) in areas that require comprehensive social regeneration. The spatial strategy should take account of the need for comprehensive approaches to renewal in such areas where poor standards of housing and economic exclusion are often linked with environmental decline.

19. Important reviews of hospital provision are under way, including the Bristol Health Services Plan, which will result in investment of £500 million in new facilities over the next eight years to improve specialist hospital services and to provide more services locally. The spatial strategy will need to take account of these plans and provide information to help service planning in the longer-term future.

Education

20. Education is closely linked with cultural provision in a variety of ways which develop skills and provide lifelong learning opportunities for the whole community. The sub region already has excellent examples of joint provision between libraries, museums and learning institutions (such as the Campus in Weston-super-Mare, the Knowle West Education Park and the emerging plans for the National Brunel Archive), which seek to break down barriers to education. The opportunity provided through the major schools rebuilding programme (Building Schools for the Future) in Bristol can provide a template for the wider region. Here a clear emphasis has been placed on shared community use throughout the schools opening hours with standards of sports and other cultural provision enhanced to meet the wider community needs.

21. All of the Unitary Authorities have School Organisation Plans or Education Development Plans. These are five-year plans to ensure that extra school places are phased to match needs, taking account of Local Plan allocations and windfall sites. The Regional Spatial Strategy will provide a longer-term planning framework than has existed in the past, although its local implications will be subject to interpretation by Local Development Frameworks.

22. The Education Development Plans of the four UAs have the following main themes:
   - To be a driving force for social inclusion and integration within and between communities.
   - To provide both young people and adults with the necessary skills for the world of work in the 21st century.
   - To ensure that educational establishments engage with and enrich their wider communities.
To develop links with their respective Community and Cultural Strategies, the private sector cultural community and local community organizations.

To bring forward strategies to deal with underperformance in particular geographic areas and or/groups (e.g. travellers).

To develop a proactive working relationship with the Primary Care Trusts with particular reference to the effective delivery of the National Healthy Schools Strategy, and:

To develop, in partnership with the Education Business Learning Organisation and Connexions, an area-wide strategy for engaging with local employers to improve the quality of education business links and work related learning.

23. Projections of growth and its distribution may have significant implications for the education sector, in relation to the skill requirements of future job growth or longer-term decisions about school provision. The West of England has a high proportion of highly skilled workers, but also high proportions of people without employment skills. Like health standards, the spatial distribution of skill levels is uneven and will require comprehensive approaches to regeneration in deprived areas, with initiatives in education and training that complement economic development. Currently education standards are poorer in the urban areas, especially in parts of south and east Bristol, south west Bath, central Weston-super-Mare and Norton Radstock.

24. Higher education is a particular strength of the West of England, which has four Universities: Bristol, Bath, the University of the West of England, and Bath Spa University College (recently entitled to be a 'University' rather than a 'University College'). There are some 43,000 students aged over 18 and over living in the West of England during term time – mainly in Bristol and Bath (including students in further education). Some 20,000 student households were accommodated in private rented housing in 2001: the proportion of students in such accommodation is well above the national average and their numbers have an important impact on the housing market.

25. Universities contribute to economic growth in various ways. In addition to the in-migration of students and their resulting housing needs, spending by students and graduates provides a stimulus to the local economy. The Universities also provide technical innovation and technology transfer to business, and enterprise. Universities in the West of England have major development plans to enhance their facilities and expand student numbers. Six universities (including the University of Gloucestershire and the Royal Agricultural College at Cirencester) recently launched a regional ‘gateway’ centre for innovation, ‘Knowledge West’, at the Ememsons Green Science Park.

26. The four universities in the West of England area have a significant cultural impact through the cultural programmes that they stage (Bath International Guitar Festival), organisations they support (Bristol Old Vic, Arnolfini, Royal West of England Academy, Watershed) and through the wider engagement of their 43,000 students that contribute to the cultural
vitality and night time economy of the sub region. Their academic engagement with drama, animation, film, media, music, etc. produces a stream of skilled professionals many of whom remain in the area after graduation and make a significant long term contribution to the local economy, reinforcing its importance as a centre of creativity and innovation.
ENVIRONMENTAL RESOURCES

1. The vision for the West of England in 2026 supports a rising quality of life for all, now and for future generations. The vision aspires to:
   - environmental awareness of its communities;
   - conservation and enhancement of the natural and built environment;
   - a reduction in household, transport and commercial energy consumption leading to a carbon neutral sub regional economy;
   - increased renewable energy generation;
   - adaptation to climate change and rising sea levels;
   - resource efficiency with waste production minimised and waste managed using sustainable approaches; and
   - retention, enhancement and restoration of biodiversity.

2. A number of delivery priorities relevant to environmental resources are suggested by the vision including:
   - supporting energy saving schemes in households, businesses and other organisations;
   - ensuring energy efficiency in new developments;
   - implementing targets for renewable electricity production and facilitating renewable energy projects;
   - developing an effective and co-ordinated approach to waste minimisation and sustainable waste management and
   - championing the Avon Biodiversity Action Plan.

3. This chapter considers:
   Climate change, energy use and renewable energy;
   Flood risk;
   Water resources;
   Biodiversity and geodiversity;
   Landscape;
   Built and historic environment;
   Minerals; and
   Waste.
Climate Change, Energy Use and Renewable Energy

4. Climate change has been directly linked to increases in human produced levels of greenhouse gases including Carbon Dioxide (CO2). Energy use is a significant contributing factor to the increase in carbon dioxide in the atmosphere. Demand for energy comes from four main sectors: domestic industry, service and transport, illustrated below.

![Final UK energy consumption 2003](Source: DTI UK Energy in Brief July 2004)

5. Recent experimental statistics on energy consumption from the DTI suggest that in the West of England in 2003 2,014 GWh electricity and 6,514 GWh of gas was purchased by domestic consumers, whilst commercial and industrial consumers purchased 2,722 GWh of electricity and 10,327 GWh gas (this figure excludes the gas consumption by Seabank power station).

6. Under the Kyoto Protocol, the UK has a legally binding target to reduce emissions of six key greenhouse gases by 12.5% relative to the 1990 level over the period 2008 to 2012. It also has a domestic goal to cut carbon dioxide emissions by 20% below 1990 levels by 2010. The Government has a target to produce 10% of electricity from renewable sources as soon as possible, hopefully by 2010. Locally, the authorities accepted a provisional target range of between 35 and 52 MW of installed renewable electricity capacity by 2010, subject to refinement, as a working basis for renewable electricity planning. Most of West of England REvision 2010 renewable electricity target is potentially to be derived from energy from waste and wind.

7. If the UK is to achieve these targets a significant contribution will have to come from reducing energy use and increasing energy efficiency. There is also a need to adapt to climate change through, for example, responding to increased risks of flooding. New development should provide opportunities for improving the energy efficiency of the building
stock and integrating renewable energy generation. Transport improvements, which will need to accompany new development, should also help to reduce the emissions of carbon dioxide.

Flood Risk

8. Flood risk issues have increasingly been recognised as being material planning considerations and this has been reflected in successive Government Planning Policy Guidance and advice from the Environment Agency. In the autumn of 2004 a consultation exercise was launched by the Government entitled “Making Space for Water”, seeking views on proposals for a new cross-Government strategy for England. A review of Planning Policy Guidance 25 is due to be published later this year. Climate change and potential sea level rises are both factors which contribute to increasing flood risk in the area.

9. The area bordering the Seven Estuary has extensive areas that have been identified by the Environment Agency as being at particular risk. Bristol City Council, South Gloucestershire Council and the Lower Severn Drainage Board and have commissioned a Strategic Flood Risk Assessment of the Avonmouth/Severnside Area. A further study in the area has been commissioned by the Environment Agency, this will look at producing proposals to improve the flood defences in the area. This work is due to commence in April 2005.

10. There are also studies in progress at the moment, which have been commissioned by the Environment Agency as part of the their Catchment Flood Management Plans, which are looking at Bristol and Bath.

Water Resources

11. Bristol Water operates a single water resource zone, supplying a population of just over a million people in Bristol and the surrounding area. Its main sources are the River Severn, via the Gloucester and Sharpness Canal, and the Mendip reservoirs, including Chew Valley reservoir. The company also has a number of groundwater sources.

12. A report recently published by the Environment Agency, Housing Growth and Water Supply in the South West of England 2005 to 2030 (March 2005), looks at future water resources in relation to housebuilding rates and possible water efficiency scenarios. The report highlights that in the Bristol water resource zone, which broadly covers the West of England, at the highest rate of housing growth RPG10 +50% together with the highest water efficiency option (21%) there may be a water deficit from 2019/20 and therefore water efficiency measures would need to be implemented. These measures could include further active leakage control, retrofitting and water use audits of existing households, waste minimisation for industrial and commercial use or additional metering of existing households.
13. Further work may be necessary to refine the dwelling stock change inputs into the modelling. The Environment Agency model has been designed to be easily adapted to provide more accurate predictions as more becomes known about the precise scale and distribution of growth. Further work may also be necessary to explore at the environmental impacts of further water abstraction, particularly in relation to biodiversity.

**Biodiversity and Geodiversity**

14. Ecologically the West of England area has diversity that for its size (1,332 sq km) which is comparable with some of the best in the South West Region. The varied geology of the area results in the occurrence of a wide range of habitats, from the species-rich calcareous grasslands of the Cotswolds and the Mendips and the ancient woodland of the Ridges; to the network of rhynes of the Levels and Moors and the coastal salt marshes of the Severn Estuary.

15. The sub-region contains a number of nationally important designated and legally protected wildlife and geological areas. These include 86 Sites of Special Scientific Interest (SSSIs), and the Gordano Valley and Leigh Woods National Nature Reserves (NNRs). There are also a number of internationally important habitats in the area including: Chew Valley Lake Special Protection Area (SPA) for birds; Uphill Cliff which is proposed for Special Area of Conservation (pSAC) status for limestone grassland; Brockley Hall Stables and the Combe Down and Bathampton Down Mines, both proposed as pSACs for bats; and the Avon Gorge Woodlands pSAC. The Severn Estuary is a SSSI, SPA, pSAC and a Ramsar site. Other areas have been designated by the local authorities as Sites of Nature Conservation Importance (SNCIs which are known and Local Wildlife Sites in North Somerset) and Regionally Important Geological Sites (RIGS).

16. The West of England contains examples of 19 of the 28 UK BAP priority habitats. These habitats support a wide variety of plant and animal species, a number of which are regarded as vulnerable nationally. These include dormice, water voles, barn owls, the lesser horseshoe bat and butterfly species. Otters are recovering across much of the sub-region. Rare plants include the round-headed leek, lizard orchid, adder's tongue and Bath asparagus.

**Local Biodiversity Action Plans**

17. To safeguard and enhance this diversity, the Avon Biodiversity Partnership has produced a Biodiversity Action Plan (BAP) for the West of England area (published 2004). This is an important link between the UK and local BAPs, whether at a Unitary Authority or other organisation level. It does not however replace the need for local BAPs where much of the actual delivery will be focussed. Each of the Unitary Authorities has its own biodiversity action planning process. At this point in time, Bath & North East Somerset Council and North Somerset Council have
published their BAPs, with South Gloucestershire Council and Bristol City Council still to complete theirs.

18. Other agencies have also produced their own individual BAPs, which need to be taken into account. They include the Environment Agency, the British Association of Shooting and Conservation, Wessex Water and the Highways Agency. These operate at a broader scale than the West of England area.

Landscape

19. The landscape of the West of England is a major attraction to both residents and visitors alike. The landscape forms an important backdrop to the settings of the three major urban areas of Bristol, Bath and Weston-super-Mare and smaller settlements. Large parts of the area are nationally important and are designated as part of the Cotswold and Mendip Hill Areas of Outstanding Natural Beauty.

20. Bath and North East Somerset, North Somerset and South Gloucestershire have all undertaken their own individual landscape character assessments of their areas in line with advice issued by the Countryside Commission. These assessments divide up the landscape into parcels of land with common characteristics and then describe the component features and characteristics. The map below illustrates the landscape character areas identified by the landscape character assessments.
Built and Historic Environment

21. The built and historic environment of the West of England is nationally and internationally important, providing a valuable resource for both residents and visitors. The area contains over 16,000 listed buildings, with high concentrations in parts of Bristol (e.g. Clifton) and the centre of Bath. The historic fabric of Bath, including its urban design, Roman remains and Georgian town centre, has international importance through UNESCO World Heritage Site status. Bristol has a rich and diverse architectural and maritime heritage, it is also home to some of Brunel’s most important achievements including the Clifton Suspension Bridge, Temple Meads station and the SS Great Britain. Much of the built up part of the West of England is designated as conservation area.

22. Outside the main urban areas there are many nationally designated Scheduled Ancient Monuments, Historic Parks and Gardens, historic battlefields and nationally important industrial landscapes, including the former Somerset and Bristol Coalfields. A number of the towns in the area are attractive medieval market towns, Victorian coastal “resorts” or historic industrial settlements.

Minerals

23. Minerals, in the form of crushed rock aggregate, are essential for construction, industry and a range of other uses. The West of England has an established and important role to play in the continuing supply of primary aggregate. The strategy is aimed at conserving primary resources and maintaining a steady supply of aggregate as a contribution to regional and national requirements. An important part of the strategy is to protect areas of nature conservation or landscape importance from mineral development; to minimise the production of waste from mineral operations; to encourage the efficient and appropriate use of high quality materials and recycling; and to encourage sensitive working practices within the mineral industry.

24. Following the publication of revised ODPM guidelines as part of MPG6 in June 2003, and subsequent advice from the South West Regional Aggregates Working Party (SWRAWP), the South West Regional Assembly agreed the sub-regional apportionment of these guidelines in March 2004. For the sixteen-year period 2001-2016 the West of England is expected to supply 95 million tonnes of crushed rock. The area does not make a contribution to the production of sand and gravel, other than as a provider of port facilities for landing marine dredged aggregate.

25. Mineral Local Development Documents will be expected to bring forward proposals to ensure that the aims of the minerals strategy and in particular, the Regional and Sub Regional need for crushed rock aggregate is met, while at the same time conserving important environmental resources.
26. There is an outstanding need to review the way in which the contribution from North Somerset and South Gloucestershire is to be identified, both over the period 2001-2016 and in maintaining a crushed rock land bank beyond 2016. As part of the review there is the need to consider the appropriateness of continuing with a land bank period of "at least 15 years", and to consider the appropriateness of reducing the land bank period. (A land bank is a stock of reserves with planning permission sufficient to provide for continued extraction over a given period of time and at the end of that period). The review will need to address a range of factors and evidence, including the historic contribution of North Somerset and South Gloucestershire in providing crushed rock, an assessment of the extent of the resource itself and the likely significant environmental effects of further extraction of crushed rock aggregates, including the transport of aggregates.

27. There is a critical need to conserve minerals as far as possible so as to ensure the continuing supply of aggregates in the longer term. The sustainable management of mineral resources also involves the efficient use of natural resources and the reduction of mineral waste by, for example greater recycling and by the reuse of construction and demolition wastes.

Waste

28. The need to minimise the production of waste in the West of England is urgent, as is the need to treat and dispose of it more efficiently and effectively and in a manner that protects the environment. Some 3 million tonnes of waste are produced annually in the area, around 75% of which is landfill. Only 18% of the waste arisings is Municipal waste, which is half the amount of industrial and commercial waste produced each year.

29. In a period of rapid change in the development of waste management processes and technologies, there is a need for the waste management and waste planning authorities, waste industry and the public of the West of England to work together to facilitate the effective, co-ordinated and timely provision of new facilities needed for the sustainable management of waste.

30. A West of England Waste Strategy will be prepared to provide better co-ordination between the Municipal Waste Strategies and Waste Local Development Documents of the four unitary authorities and the plans and working practices of the waste management industry, commerce and industry in general and the public. Waste minimisation will need to be at the heart of such a Strategy, but so too will be the need to plan for and provide waste management facilities designed to treat, recycle, compost, recover energy from waste, and dispose of residual waste, including hazardous wastes at landfill facilities.

31. The need to plan for waste management facilities is urgent, and as part of the preparation of a Waste Strategy the four unitary authorities, in
partnership should plan for a network of waste management facilities in accordance with guidance on “Waste Planning in the West of England 2026”, the Regional Waste Strategy and in accordance with the sustainable management principles set out in the emerging PPS10 “Planning for Sustainable Waste Management”, which include the waste hierarchy, regional self-sufficiency and the proximity principle.

32. Each Unitary Authority should identify sites that could be developed to meet the recycling/composting and recovery/treatment targets of their Authority’s municipal waste management strategy. Such facilities could be shared. There is an urgent need to identify sites to enable the existing level of recycling/composting of commercial and industrial waste to continue, and to identify at least one site for an additional recycling/composting facility for commercial and industrial waste.

33. Provision will need to be made for energy from waste facilities. Given the urgency to provide facilities as an alternative to landfill, a site for one large scale energy from waste facility (250,000+tonnes/annum) and at least three small scale advanced thermal treatment facilities (100,000+tonnes/annum) should be identified in the West of England to serve the population centres of Bristol/Avonmouth, South East Bristol/Bath, North Bristol/Yate and Weston-super-Mare. The larger facility, at least should be rail-linked. A joint approach to the identification of suitable sites and the procurement of appropriate treatment facilities should be adopted. There may be opportunities to co-locate these strategic facilities with other waste processing/recovery/recycling facilities.
SPATIAL CONSIDERATIONS

The Spatial Implications of Vision 2026

1. The draft “Vision 2026” published by the West of England Partnership states that change in the sub-region should be “driven by major developments in employment and government backed infrastructure improvements in South Bristol and North Somerset”.

2. The sub-regional content of the Regional Spatial Strategy will need to take this forward, in particular by looking at the scope for major regeneration and new development opportunities:

   - Within existing built-up areas of south Bristol, which score relatively poorly on indices of deprivation, have relatively few local employment opportunities or high quality community facilities, are relatively isolated and poorly served by transport infrastructure, and would benefit from environmental improvements.

   In areas adjoining south Bristol, including in particular areas in North Somerset such as the area described below as the Ashton Vale/Barrow Common area adjoining the A38, A370 and rail line to Weston-super-Mare.

   - In Weston-super-Mare, which is the major area of development opportunity within North Somerset.

3. Current information indicates that additional development opportunities will need to be considered to ensure that other elements of the Vision can be realised. Although the Vision needs to be taken as a whole, some aspects of it have specific spatial implications.

4. Some examples of key references in the Vision, and their possible implications, are:

   - “One of Europe’s fastest growing and most prosperous sub-regions. A buoyant economy competing internationally….” This statement implies that economic growth will continue at a high level, similar if not faster than that achieved in recent years. This will require investment in employment sites, within and beyond existing urban areas. It will also require investment in infrastructure and housing to support economic needs.

   - “A rising quality of life for all…” This aspiration has implications for social inclusion, health, education and culture as well as the economy, housing and the environment. It also implies that social and physical infrastructure, including affordable housing must be delivered with new development.

   - “Easier local, national and international travel, thanks to transport solutions that link communities to employment opportunities and local services, control and reduce congestion and improve strategic connections” This statement implies major investment in public transport,
innovative transport schemes to reduce congestion, and in new capital schemes within the sub-region, possibly including new roads.

- “Success secured in ways that are energy efficient, protect air quality, minimise and manage waste and protect and enhance the natural and built environment” This implies that development must pay a very high regard to a wide range of sustainable development criteria, and that the sub-regional spatial strategy must be based upon a clear process of sustainability assessment.

5. The delivery priorities in the draft Vision 2026 go into much greater detail about what may be needed to achieve the intended outcomes. The Partnership will be reviewing these in June in the light of the public consultations.

6. In some cases, they identify specific locations. Spatial planning implications of the Vision need to be tested, through sustainability assessment and the Greater Bristol Strategic Transport Study. The more detailed delivery priorities in the draft Vision include :-

- “understand, strengthen and promote key business sectors in the sub-region ;-

  - airport and port ............
  - “accelerate innovation........including the active promotion of the Science Park ....”
  - “ensure the spatial plan provides adequate employment land sustained by proper investment in transport, housing and quality of life”
  - “successfully develop existing and additional strategic employment sites in the sub-region including:--
    - South Bristol ...
    - Regeneration of Weston-super-Mare ..... 
    - Science Park provision at Emersons Green
    - Avonmouth Severnside (a green business waste park)
    - Norton Radstock
    - Bath city centre ......
    - Bristol city centre ......
    - Wallscourt Farm (Hewlett Packard)

- “sustain the success of businesses in the ‘North Fringe’ ..... but avoid accelerating development until investment is made in improved transport solutions”

- “secure the economic regeneration of disadvantaged communities and under-performing locations, in particular South Bristol and Weston-super-Mare”
“secure urgent support from government and the public and private sectors to accelerate investment and the delivery of homes of the right type, including an adequate proportion of affordable homes, in quality neighbourhoods that work”

“put in place the cultural infrastructure to make the West of England a place of choice, including :-

- regional sports and leisure facilities

“ensure energy efficiency in new developments .....

“promote the use of public transport .....

“secure a strategic road network which

- improves access to, and movement in and around south Bristol
- provides efficient links between Bristol International Airport and Bath, Bristol and Weston-super-Mare
- improves connectivity to the motorway network in North Somerset and South Gloucestershire
- reduces road congestion and local traffic on the motorway network .....

“secure an increase in rail capacity to strengthen public transport by :-

- improving rail access to Weston-super-Mare .....
- ensuring a passenger rail link between Portishead and Bristol
- securing a local link between Avonmouth and Portbury .....

“reduce the need to travel through a range of measures and policies including .....closer living to work and services

“secure investment and leadership for longer term transport priorities that reinforce the sub-region’s spatial planning strategy and improve national and international links .....

The Structure of the Sub-Region

7. Although in terms of current Regional Planning Guidance the sub-region contains three “Principal Urban Areas”, over half of the housing, jobs, facilities and movement within the sub-region occurs within the Bristol PUA. The relationships between Bath and Bristol, and Weston and Bristol, are also important, as are the roles of the smaller towns (especially Yate) and rural areas, and the strategic movements through the sub-region.

8. Information on travel to work within the West of England sub-region and across its boundary is summarised in section... (Economy).

9. There is a growing gap, now about 24,000, between levels of jobs and workforce across the sub-region as a whole, which is filled by commuters into the sub-region from neighbouring areas. Rapid economic expansion in the
North Fringe in particular has led to concerns about congestion and travel distances, with almost 40% of those working in that area travelling more than 10km to their workplace. Concern has also arisen about the growth of commuting to Bath as a result of the excess of employment in the City over the resident workforce. Further assessment of these patterns and their implications for the spatial strategy is being undertaken. At Weston-super-Mare, there has been growth in the outflow of commuters from the town, in particular from residential developments close to the motorway.

10. Map 1 shows concentrations of employment within the sub-region. The largest single concentration of jobs is in Bristol City Centre (91,000), followed by the “North Fringe” (67,000). However, these two locations together contain only about one-half of all the jobs in the Bristol urban area, which total about 310,000. This total compares with some 52,000 in Bath, 29,000 in Weston-super-Mare, and 17,000 in the Yate area.

11. Map 2 shows living densities measured by household spaces per hectare, from the 2001 Census. It shows that the highest housing densities occur in the inner areas of the main cities and towns – but generally not in the hearts of the city centres themselves. In Bristol, densities of over 60 dwellings per hectare (gross) mainly occur in the Kingsdown, Montpelier, Easton and Bedminster areas, with similar densities occurring in smaller areas of Bath and Weston-super-Mare. Higher than average densities also occur along some radial routes from the city and town centres, and in general in areas of older housing such as in east Bristol and the Kingswood area. Higher density residential areas include terraced housing with small gardens, often little or no off-street car parking, large houses converted into flats, and more three or four storey buildings.

12. The mix of uses affects gross residential densities, so that areas predominantly of employment, and with large areas of open space, show lower overall densities. Lower density residential areas, with gross densities often below 20 units per hectare, can also be identified on the map, including parts of Bristol such as Stoke Bishop, parts of Bath, and many of the smaller towns. Such areas generally include a predominance of family houses or bungalows, often detached or semi-detached, with bigger gardens, more generous car parking, and more incidental open space.

13. Map 3 shows areas of “multiple deprivation” in the sub-region. The largest areas of deprivation occur immediately east of Bristol city centre, particularly in the Lawrence Hill and Easton areas, with concentrations also in parts of south Bristol (Knowle, Hartcliffe, Withywood), north Bristol (Southmead, Lawrence Weston, Avonmouth) and Weston-super-Mare. Most of the rural areas, small towns, suburbs and much of Bath have very low levels of deprivation shown on this index.

14. Map 4 shows levels of public transport accessibility measured by PTAL scores\(^1\). The highest public transport accessibility scores occur in the centres of Bath and Bristol, with higher than average scores along many of the radial routes extending from the city centres. In Bristol in particular, the

\(^1\) Definition of PTAL
radial routes score well north of the city centre as far as Filton and Stoke Gifford, as do parts of the radial and orbital routes to the east of the city.
Main Employment Areas - 2001 Census
Sub-Area Workplace Population UV075

Sub-Area Workplace Population

- 82,200 to 91,300 (1)
- 64,600 to 73,400 (1)
- 55,800 to 64,600 (1)
- 47,000 to 55,800 (2)
- 20,600 to 29,400 (2)
- 11,800 to 20,600 (4)
- 3,000 to 11,800 (9)
ODPM Index of Multiple Deprivation 2004

Index of Multiple Deprivation 2004:
Lower Level Super Output Area Score

- 65 to 80 (8)
- 49 to 65 (24)
- 33 to 49 (62)
- 17 to 33 (161)
- 1 to 17 (398)
West of England: Public Transport Accessibility
AM Peak - Bus and Rail PTAL Scores.
Sources: Bus data Sept 2004, Rail data Sept 2003

- 40+  
- 30 to 40 - Very high  
- 20 to 30 - High  
- 15 to 20 - Medium to high  
- 10 to 15 - Medium  
- 5 to 10 - Low to medium  
- 2 to 5 - Low  
- 0.1 to 2 - Very low

Notes: AM Peak period is 08.00 to 09.00.
PTAL Scores use timetable data and a 400m grid. Calculations use 'crow fly' measurements, maximum walking distance is 400m or 5 minutes for a bus or 10 minutes for a train with a walking speed of 4.8km/hr.
Urban Areas

15. Most population and employment in the West of England sub region is concentrated within its urban areas, particularly Greater Bristol (which includes the northern and eastern built-up fringes of South Gloucestershire), Bath and Weston-super-Mare. Nearly 70% of the population and 75% of the jobs are concentrated in these three areas, which are currently listed as Principal Urban areas (PUAs) in RPG10.

16. These urban areas have distinctive characteristics and differing potential for change. They are where most people live, and will continue to live in the future. Most of the buildings which will exist in 2026 are those which already exist now, and most of the infrastructure which will be needed is already in place. It is in the urban areas where it is most important to focus positive initiatives for sustainability, and to concentrate efforts to improve people's quality of life through environmental, social and economic change.

17. The Bristol urban area has some 54% of the sub region’s population, 60% of its jobs, and major cultural and shopping facilities focussed on the City centre. It is the main regional centre for business and services, with a dynamic economy, continuing scope for economic growth within the City centre and out of centre, and a large higher education sector.

18. Bristol City had a net decline in population in the 20 years to 2001 (although recently reversed) and a much smaller 5,000 net increase in jobs. It has undergone major restructuring of its land uses particularly in its central area with major new office development, leisure and housing, in part replacing former employment uses. Gross dwelling completions within the city have averaged over 1,200 a year since 1996, most being on brownfield sites, with a current emphasis on flats and maisonettes. The City has a diminishing supply of large sites, difficulties in achieving the necessary levels of affordable housing through planning obligations alone on sites with high development costs, and needs for environmental improvements, transport and social infrastructure. To the south of the City, development generally occurs up to the City boundary and the edge of the Green Belt.

19. Most of the conurbation’s growth in recent decades occurred within South Gloucestershire, in areas adjoining the City, largely on greenfield sites close to good strategic communication links particularly the M4 and M5. The “North Fringe” in particular has seen major new business, housing, retailing, education and other development over the last 30 years, and some 30,000 jobs have been created in that area over the period. The area now has high levels of congestion at peak times, and a marked imbalance between employment and housing. There are continuing high demands for business development in the area, but the area is tightly surrounded by Green Belt.
20. **Bath**, with a 2001 population of 84,000 has seen little outward expansion over the last 20 years. Policies protect the City as a World Heritage Site, and Green Belt and AONB policies preserve its unique setting; dwelling completions have consequently averaged under 200 pa. More recently the decline in older industries has presented new opportunities to restructure parts of the city for housing, employment and other uses, particularly the inner areas along the river, including Western Riverside. Anticipated changes in Ministry of Defence and NHS land holdings should present further opportunities in the future.

21. Key issues facing the City include the need for transport solutions, the retention of local employment sites so that the city can contribute to the overall growth of the sub region, the development of its important retail function, the continued protection of the World Heritage Site, and the need to address Bath’s future housing needs, including the need to provide housing within or close to the City to meet local needs, particularly for affordable housing, and to address high levels of inward commuting including that from parts of Wiltshire and Somerset. Opportunities for housing and business development adjoining Bath would not be substantial in sub-regional terms but could be locally significant.

22. **Weston-super-Mare** has grown in size by nearly 50% since 1971 as major greenfield housing developments have extended towards the M5 motorway. Its population at 2001 was 72,000. Housing completions have averaged around 530 pa since 1996. Most of the associated job growth has been in local public and retail services, and the continuing need to attract significant office and light industrial jobs has led to out-commuting, especially from new developments close to the M5, putting pressure on road and rail transport systems. Although the town has strategic road and rail links, capacity issues need to be addressed.

23. Extensive areas adjoining the built-up area, at the former RAF Locking and Airfield present new opportunities for future growth. An evolving Area Development Framework, supported by English Partnerships and the RDA, provides a clear vision for the town and proposes major employment led mixed-use development. Priority has also been given to the regeneration of the older town together with significant transport improvements across a wider area. The balance struck between these objectives will affect the ultimate shape and pace of development at Weston-super-Mare within any sub regional strategy.

**Change Within the Main Cities and Towns**

24. In line with the West of England Vision it will be essential to maintain and improve the sustainability of urban areas in the broadest sense – to ensure that people will want to live and work there, now and in the future; that detrimental environmental impacts, particularly those arising from traffic congestion or an overcrowded living environment are minimised; that commercial and public facilities such as local shopping centres and schools are improved and renewed; and that the gap between disadvantaged and other communities is closed.
25. For this to happen a mix of land uses needs to be safeguarded and developed, the need for housing needs to be offset against the need to maintain and provide for, other uses, transport services need to be improved and those areas suffering from high levels of deprivation need to see both improvements in a range of basic services and rising skill levels. The sole objective within urban areas cannot simply be the maximisation of housing numbers.

26. Planning strategies at every level already emphasise the need to focus development within and immediately adjoining the main urban areas, maximising the use of previously developed land, minimising travel distances, and concentrating area-based investment to maximise benefits. To achieve this, an active process of urban renewal needs to continue, with the better use of vacant land and buildings as well as the renewal of outdated social infrastructure and the modernisation of employment premises. PPG 3 promotes good design of new housing and residential environments and expects them to make a significant contribution to promoting urban renaissance and improving the quality of life.

27. The need to secure investment to maintain both a modern economy and urban employment levels necessitates the retention of key employment sites for new business investment. These sites and other commercial and public uses, will need to be retained and safeguarded from the competition of higher value uses. However, proposed changes to PPG3, and recent ODPM guidance, particularly place the focus on the future of employment sites in urban areas and the potential re-use of some of them for housing. Studies of the demand for and supply of employment land therefore need to take place at the urban area level as part of the more detailed development of the sub regional strategy, within a framework of economic forecasts and trends in land utilisation, to identify areas which might be released at a future date for new mixed use developments, which might include housing, and which could form the basis for the realisation of the urban housing potential in the post 2011 period. Economic forecasts suggest that the overall demand for industrial land in the ‘B’ use class land categories is small. It is estimated that in the future within the Greater Bristol area some 5 ha. of current industrial land may become surplus each year, and perhaps 1 ha. in Bath at least into the medium term.

28. Work done to identify the scale of possible change within the urban areas has emphasised both the high quality of development schemes and the high net residential densities already being achieved within the urban areas. However, the future scale and pace of urban renewal and its contribution to development needs is difficult to estimate. Much of it is on a relatively small scale, is privately led, and, once currently known vacant sites and buildings are redeveloped, will increasingly depend on redeveloping land and buildings now in use but which may suffer eventual decline as patterns of employment, residential and institutional use change.
29. Several important factors will influence the scale, shape and mix of development in urban areas:

- The expected decline in the number of development opportunities as known large vacant brownfield sites and buildings, many of which are a relic of historic development patterns, and any remaining greenfield sites inside the built up area allocated in local plans, are utilised. These sources accounted for 35% and 22% respectively of the total dwelling potential identified in the 2002 Urban Housing Capacity study.
  - The relatively small scale nature of much of the urban renewal process, and its consequent unpredictability

30. The need to balance high residential densities with other considerations, including the need for a variety of types of housing, with high quality design, neighbourhood character, marketability, and location, particularly in relation to public transport.

31. The need to provide for a mix of uses within urban areas, particularly to maintain a range of employment opportunities for the local population.

32. The increased land needs for other uses necessary to support communities, such as schools, particularly in areas where facilities may have closed or need renewal, and where open space may need to be re-provided.

33. The need to promote a wider urban renaissance agenda and improve overall quality of life, particularly through protecting formal and informal open spaces and improving environmental quality.

34. The redevelopment process in any urban area will be complex and gradual, involving a large number of different sites at scattered locations and often requiring the acquisition and/or relocation of existing uses, and/or the redevelopment of difficult sites. It will depend on the economics of individual sites and on the market for particular types of dwellings, employment buildings, and other commercial opportunities. The realisation of urban development potential will therefore be a continuing process in the period up to 2026 and beyond, with the pace of it dependent on numerous players.

35. The sub-regional planning strategy could propose policies to promote and support such changes within the urban areas through an area approach to be developed through UAs core strategies and local development plan documents. Policies can support renewal by:

- Identifying significant areas of physical decline and redundant uses, particularly in the industrial sector, and positively promoting a framework for new mixed use development- *Opportunity Areas*. Examples might include parts of the North Fringe, areas immediately east of Bristol city centre including St Philips, and Bath Western Riverside.

- Supporting change in existing mixed commercial use areas close to existing town and district centres, encouraging the renewal and intensification of residential and employment uses – *Intensification Areas*. These might include some areas immediately north and south of Bristol city centre, and parts of Bath and Weston-super-Mare.
• Promoting regeneration in areas of high social and economic deprivation by improving the quality of life across a range of key services such as education, health and transport, with some selective renewal of poorer housing, and improvements in access to jobs – ‘Regeneration Areas’. These could include parts of south Bristol and Weston-super-Mare.

• Generally encouraging (a) higher residential densities close to the larger centres where there is good accessibility to local facilities and public transport, and (b) infill and selective redevelopment in existing low density residential areas, whilst ensuring that developments fit into the neighbourhood and the wider townscape in accordance with the guidance in PPG 3 - Housing Densification Areas.

A more detailed account of influences on the pace of change, actions needed within an area framework and resource requirements is included in Appendix 1.

Residential Development Within Urban Areas

36. Between 1996/97-2003/4 some 26,700 (3,339 p.a.) gross dwelling completions took place within the PUAs and the smaller towns as then defined, about 87% of total gross West of England completions in that period. Gross completions in the three PUAs averaged c.2,900 pa but the net figure was around 250 pa. less than this due to losses in the urban stock.

37. The scale of future urban potential is difficult to estimate because of the nature of the developments constituting it.

38. Urban Housing Capacity Studies have been undertaken and recently reviewed. These have included all local plan sites plus a range of other unallocated sites believed to have potential for housing, particularly those in transitional areas where existing uses are declining and around local district centres. Density assumptions have reflected locations and in particular the higher densities of c.200 dwellings per hectare or more being obtained on some central and inner area sites. Utilising this data on all known large sites within the study, and making assumptions about a continuing flow of new urban housing from smaller sites, it is estimated that 36,000 dwellings gross might be delivered in urban areas between 2001 to 2011, with a further 14,000 dwellings 2011-2026

39. Changes cannot be identified on an individual site basis as far ahead as 20 years. However, additional opportunities will inevitably become available particularly after 2011, as further changes in the structure of urban areas take place, existing uses cease, and social and economic patterns change. Local development policies will need to respond accordingly. Consequently the promotion of the proposed area approach will be essential.

40. If there are supportive policies, a further 14,000-15,000 dwellings could be achieved, mainly after 2011. Further policy interventions, including investment in sites and infrastructure may provide another 4,000-5000 dwellings, especially if these are focused within the opportunity areas and areas for
41. However, these additions will inevitably be offset partly by some dwelling losses as renewal policies are pursued. Assuming a minimum loss of figure of around 5000 dwellings between 2004-2026 (c.230 p.a.), the majority of which are likely to be within Bristol City, an additional 65,000 net dwellings from within the urban areas would be a reasonable upper figure to assume on the basis of current information, giving a potential average housing contribution from the urban areas of between 2000-2600 net dwellings per year between 2001-2026.

42. A possible distribution of this potential is set out below, subject to further detailed investigation:

**Potential for additional dwellings within the urban areas 2001-2026**

<table>
<thead>
<tr>
<th>(net dwellings)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Bristol PUA</td>
<td>44,000</td>
</tr>
<tr>
<td>Bristol City</td>
<td>31,000</td>
</tr>
<tr>
<td>S. Glos. (PUA part)*</td>
<td>13,000</td>
</tr>
<tr>
<td>Bath PUA</td>
<td>4,500</td>
</tr>
<tr>
<td>Weston-super-Mare PUA**</td>
<td>9150</td>
</tr>
<tr>
<td>Other Urban Areas***</td>
<td>7,350</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>65,000</td>
</tr>
</tbody>
</table>

* Source: JSPTU and UA data

** South Glos. figures exclude the urban extension proposed in the South Glos. Local Plan at Emersons Green east of Ring Road (A 4174) and safeguarded land at Harry Stoke.

** Weston-s-Mare figures exclude any consideration of potential at former Weston Airfield and RAF Locking as part of Weston Area Development Framework but assumptions incorporate possible regeneration opportunities within the existing town.

*** Thornbury, Yate / Chipping Sodbury, Keynsham, Norton Radstock, Clevedon, Nailsea and Portishead
43. Earlier sections of this report have summarised the components of economic and demographic change, their inter-relationships and current trends, with the aim of reaching a balanced view about the prospects for future growth in the economy and employment, resident workforce, population and households. The Economy section sets out available current information on the likely requirement for new employment sites within the sub-region over the period.

44. The analysis of future growth prospects also responds to the requirements of the Regional Assembly’s brief to test a range of long-term growth rates, including benchmarks based on the housing targets of the existing Regional Planning Guidance (RPG10) increased by 25% or 50% from 2011.

45. The charts below summarise current forecasts of future housing requirements in the sub-region, and indicate, in broad terms, the development that may be required to accommodate them. They are not proposals. They indicate ranges of possibilities that will need to be considered to develop strategic policy on the level and broad distribution of future housing development.

46. The first graph compares possible future dwelling requirements for the sub-region, based on demographic and economic projections, against the Regional Assembly’s RPG-based benchmarks. It also shows the implications for the figures of making additional allowances for existing unmet housing needs. On the basis of current projections, and taking unmet needs into account, average annual requirements fall within the range of 4,400 to 7,000 dwellings. The wide range illustrates the effects of the Regional Assembly’s economic forecasts, which indicate higher housing requirements than previously suggested even if rising economic activity rates are assumed among older people.
West of England annual average dwelling requirement estimates 2001-26: a comparison of demographic and economic-based projections

Notes: RPG10 refers to the dwelling provision set out in Regional Planning Guidance. Demographic based projections are the expected level of dwellings based on recent demographic trends. LEFM are forecasts using the Cambridge Econometrics Local Economic Forecasting Model held by the West of England Learning and Skills Council. EA refers to Economic Activity rates. SWRA/CE are forecasts commissioned by the South West Regional Assembly directly from Cambridge Econometrics.

47. The second chart, below, takes the dwelling requirements arising from these various demographic and economic projections and looks at the possible implications for the distribution of development within and beyond the urban areas based on the net amount of housing it might be possible to achieve within those urban areas. Taking the 65,000 upper figure for urban housing potential, equating to 2,600 average net dwellings a year, the number of dwellings which might need to be found beyond the urban areas ranges from 45,000 to 110,000 in the period 2001-2026.
The West of England Partnership has expressed the view that it would not be possible to achieve development at these higher rates.

More work needs to be undertaken on:
- projections of future growth
- long-term assessments of urban capacity
- housing densities that are achievable and acceptable in existing urban areas and new communities
- requirements for other uses within sustainable new communities of various sizes, including the provision of employment, infrastructure and open space
- sustainability assessment of locations for future development in both urban and rural areas, within information from the Greater Bristol Strategic Transport Study, to identify preferred spatial options for development

48. The locational strategy which emerges will need to reflect phasing constraints (including the availability of infrastructure), the distribution of housing needs and the location of employment, as these considerations will determine how and where sustainable communities can be created or enlarged.

49. In its brief for Joint Study Areas (Annex 2), the Regional Assembly also calls for ‘accelerated provision to 2011’ to be tested ‘within RPG 10 figures’ for 2016. This is shown as doubling the target rate of housing completions in the West of England to 7,400 per annum between 2006 and 2011. The feasibility of this proposition can be tested by reference to information presented in this report and other considerations. First, it is important to note that adopted and emerging development plans in the West of England do not extend to 2016. One limitation to an immediate doubling of housing completions is therefore likely to be the supply of land allocated in development plans. As sites are not allocated to meet the RPG 10 target beyond 2011, there are limits to the
scope for re-phasing. The possibility of re-phasing is also limited by the need for investment in transport infrastructure to open up some larger sites.

50. Windfall sites (mainly on previously developed land) can increase the supply of housing land, especially in buoyant market conditions. Such sources have raised completion rates to a peak of some 4,670 (net) in 2003/04, but this is still well below 7,400. The feasibility of an immediate doubling of housing completions to 2011 also raises questions about levels of demand, including the need to deliver affordable housing in proportion to market demand, and the ability and willingness of the house building industry to deliver at that rate, which exceeds the highest recorded levels achieved in the West of England, even in periods with high levels of construction by local authorities.
Beyond the Main Urban Areas

51. Urban development potential will be realised gradually over the plan period. Sources for the supply of housing and employment in the short and medium term can broadly be identified from known sites, local plan commitments, and reasonable assumptions on small sites. Beyond that time, however, existing commitments will be exhausted and current information suggests that the supply of urban sites may diminish. Past experience shows that large urban regeneration areas can take many years to implement, and a falling rate of development in the urban areas would also require other solutions.

52. Increasingly beyond 2011, the scope for further development to meet the continuing needs of the area will largely depend on new opportunities and areas, including greenfield development areas. Some of these will depend on the timely provision of new infrastructure, including transport provision, which will require long lead-in times for preparation.

53. The identification of long term development opportunities and related infrastructure requirements will therefore be required as part of the sub-regional strategy, in order to ensure the planned development of sustainable communities beyond existing urban areas. This section considers, in light of national and regional guidance, how additional development beyond the urban areas could best be located.

The search sequence for development locations

54. Current national and regional policies emphasise a sequential approach towards development. PPG3 on Housing, for instance, states that “local planning authorities should follow a search sequence, starting with the re-use of previously-developed land and buildings within urban areas identified by the urban housing capacity study, then urban extensions, and finally new development around nodes in good public transport corridors.”

55. Current regional guidance, RPG10, in Policy SS2, states that “development should take place primarily within the defined PUAs. Where this is not possible, development should be in the form of planned urban extensions to the PUA in sustainable locations with good access to the urban area by public transport, cycle and foot … Policies should also resist the continuing substantial planned expansion of residential development of small dormitory towns within easy commuting distance of the PUAs that has occurred historically.”

56. Guidance on the definition of Principal Urban Areas was issued by the Regional Assembly in 2003 and is attached (Appendix 4). Broadly, the PUA is taken to be either the urban settlement boundary defined in an adopted local plan, or, where this has not been defined, the continuous built-up area of the urban area. The PUAs as provisionally defined through this process, are set out on the map following Appendix 4.

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2 PUAs – Principal Urban Areas, defined in RPG10 to include the Bristol conurbation, Bath, and Weston-super-Mare.
57. The Partnership’s document “Directions for Change” stated that: “if development for homes and jobs is needed beyond the main urban areas, the next best option is for sustainable urban extensions”. The locations canvassed for possible greenfield development beyond the main urban areas included extensions to some of the smaller towns in the sub-region, particularly those on relatively good public transport corridors such as Yate and Keynsham, as well as extensions to the main urban areas.

**The smaller towns**

58. Seven smaller towns in the sub region are important local centres, ranging in population from about 12,000 to 35,000. These smaller towns largely function as commuter settlements.

59. Apart from the continuing major regeneration scheme at Portishead, most recent housing development in these towns has been limited to infill and small scale redevelopment. Modest employment growth has been largely focussed on Yate/Chipping Sodbury, Clevedon and Portishead. Towns such as Keynsham, Thornbury, Clevedon and Nailsea, which experienced negligible recent housing development, recorded a declining or static population in the decade to 2001.

60. Future development within these areas has been taken into account in the preceding section on urban areas. Consideration needs to be given to whether such development within the existing built-up areas would meet the future local needs of these towns, including the need to maintain the viability of town centres and community facilities such as schools, or whether some additional development adjoining them should take place.

61. Whilst the existing regional strategy discourages substantial growth to meet strategic development needs, the sub-regional strategy needs to address the future roles of these towns and their local needs.

**Urban fringe areas and the Forest of Avon**

62. In considering areas for urban extensions, it is necessary to look at the future of areas adjoining urban edges in the round. Positive planning policies will need to be developed for urban fringe areas both currently within, and beyond, the Green Belt. A recent publication by the Countryside Agency, “Unlocking the potential of the rural urban fringe” (2004), highlights some of the wider issues to be addressed in the rural urban fringe. Specific policies may also need to be developed on the positive use and management of land within the Green Belt.

63. The Forest of Avon is one of a number of Community Forests that have been established across England. It extends around the Bristol urban area, as far out as Thornbury, Yate, Saltford, Yatton and Clevedon. It is funded by the Countryside Agency and the Forestry Commission, and is a partnership with local authorities and voluntary organisations. Its aim is to be a multifunctional working forest providing not only a rich mosaic of managed mixed wooded landscape but also a working and recreational resource for the residents of the
sub-region. The land area of the Forest of Avon extends to some 37,500 hectares. It is proposed to increase the woodland cover by 18% to 10,126 hectares. The Forest partners have set a baseline planting rate of 175 hectares of new woodland per year, on average for the next 10 years.

**Review of the Green Belt**

64. The general extent of the Bristol and Bath Green Belt, first given ministerial approval in the mid 1960s, has changed over the past fifty years. The area now designated as “Green Belt” is shown below; detailed changes are currently proposed in some emerging Local Plans.

65. The Green Belt covers some 47% of the total area of the West of England. Its influence on spatial planning policy extends to the whole of the sub-region and beyond, and its outer boundary extends into Wiltshire and Somerset. It tightly surrounds the Bristol and Bath PUAs, but does not extend to Weston-super-Mare. Apart from Keynsham, the area’s smaller towns lie beyond the Green Belt.

66. Reviewing the Green Belt needs to take into account a variety of national, regional and local policy considerations. In particular :-

- National planning policy guidance on green belts – PPG2 - was last revised in 1995, with references to the need to promote sustainable development in defining green belt boundaries, and to the positive
management of green belt land to promote specific objectives. A new national planning policy statement to replace PPG2 is expected during 2005.

- Guidance on planning for housing – PPG3 - states that there may be a case for reviewing green belt boundaries to allow the development of urban extensions, where this would be the most sustainable of the available options.
- Current regional guidance – RPG10, now the Regional Spatial Strategy – continues to support the purposes of green belt designation, and also states that a review of the Bristol/Bath green belt should be undertaken to examine whether alterations of the inner and outer boundaries are needed to allow for long term sustainable development needs.
- The Sustainable Communities Plan, launched by ODPM in 2003, calls for each region to maintain or increase the current area of land designated as green belt.

67. The preparation of RSS provides the opportunity to examine whether alterations to the general extent of the Green Belt are required so as to allow for the long term sustainable development requirements of the sub-region. Any proposals to change the general extent will need to reflect the fundamental aim of green belt policy, to prevent urban sprawl by keeping land permanently open. Proposals must also consider the purposes of including land in the Green Belt.

68. To meet national and regional guidance, the review needs to consider:
   - the implications for the efficacy of green belt policy of proposals that remove land from the Green Belt to enable the development of sustainable urban extensions around the Bristol PUA, and possibly Bath and other towns;
   - the green belt purpose(s) served by proposals to extend the Green Belt into land not currently designated “Green Belt”, including the implications for green belt policy as a whole, and
   - the need to show good reasons for proposals that change the general extent of the Green Belt, and if “exceptional circumstances” apply, to clearly identify them, recognising legal precedents.

69. There is no simple relationship between green belt designation and sustainable development. Many local communities view the protection of the Green Belt as an effective and essential planning policy. This view is based on a variety of considerations, including the protection of open areas of countryside near to urban areas, maintaining community identity, and maintaining residential amenity. Conversely, there is an argument that, by forcing development away from city centres and employment areas, green belts add to road travel distances and are therefore inherently unsustainable. Both arguments must be taken into account.

70. For areas of Green Belt, it is necessary to:
   - Examine all parts of the existing Green Belt to assess the extent to which they contribute to essential Green Belt purposes and objectives as set out in PPG2,
   - Consider whether exceptional circumstances apply, at the strategic level to justify proposing the removal of broad areas of land from the Green Belt, to meet development requirements over the long term
Assess whether additional areas could meet Green Belt criteria and contribute towards more sustainable patterns of development across the sub-region and the region as a whole; and – in the event that they need to be shown - to identify whether exceptional circumstances exist to justify changing the general extent of the Green Belt to include them.

71. PPG2, PPG3 and RPG10 all encourage local planning authorities to take account of the need to promote sustainable patterns of development by considering the need for urban extensions in areas currently protected as Green Belt. In line with the SWRA study brief, the locations for change included in the spatial scenarios set out in “Directions for Change” were selected on the basis of sustainability criteria. It was explained that in some cases development in these areas would require changes to existing Green Belt policy. In undertaking further appraisals of areas adjoining the main urban areas, an outline assessment of green belt roles, has been taken as part of the criteria.

72. Although all parts of the Green Belt perform some Green Belt functions, such as protecting the countryside, different parts perform different functions or meet different purposes. For example, it is possible to differentiate between areas that prevent coalescence between the urban areas of Bristol and Bath; areas that prevent coalescence between the Bristol urban area and smaller towns beyond the Green Belt; and areas that perform a more general function of keeping the countryside open. It is also possible to identify areas that act as important green “gateways” to the urban areas; areas that are traversed by key public transport corridors; areas with national and international environmental designations; and areas that provide opportunities for quiet rural recreational activities in close proximity to urban areas.

73. PPG2 suggests that wherever practicable a Green Belt should be several miles wide, so as to ensure an appreciable open zone all around the built-up areas concerned. Parts of the currently designated Green Belt around Bristol are relatively narrow, and the current Structure Plan states that a strategic policy review should consider the case for including land north of Yate in the Green Belt.

74. Precedents elsewhere suggest that the best case for extending Green Belt over new areas of land is where land is or has been removed from the Green Belt at the inner edge within the same sector. Most of the land removed from the Bristol-Bath Green Belt since the 1960s has been north and east of Bristol. Further work needs to be done to assess whether additional areas could meet Green Belt criteria and contribute towards more sustainable patterns of development across the sub-region and the region as a whole; and to identify whether exceptional circumstances exist to justify changing the general extent of the Green Belt in this way, for example in relation to the future roles of towns such as Yate.

Areas of search for urban extensions

75. “Directions for Change” emphasised the role of the urban areas in contributing additional housing, employment, community infrastructure and
related uses. It also suggested where urban areas might expand through the
development of sustainable mixed communities, to meet the sub-region’s
requirement for development for housing, employment and related uses to
2026.

76. To identify these areas, assessments were undertaken of areas of search for
urban extensions: initially through a sieve mapping technique, which identified
areas close to both the PUAs and smaller towns which were relatively
unconstrained by national and international environmental designations,
floodplain, or topography.

77. Map ..... below shows these areas in relation to key environmental resources
and constraints.

78. Areas of search were then assessed, using broad sustainability criteria drawn
from Draft PPS1 and Green Belt criteria drawn from PPG2. Hypothetical
development capacities of these areas for housing, employment and related
uses were generated from broad density assumptions and land use budgets,
and were used in “Directions for Change” to suggest broad areas with the
potential for various levels of mixed development.

79. Continuing work, including the strategic sustainability assessment, is in hand
to refine the assessments of the broad locations identified, to take account of
other potential constraints that had not considered, and emerging outputs from
the GBSTS.

80. This assessment takes into account a range of criteria for assessing the
appropriateness of development in different strategic locations, including :-

- The intrinsic environmental characteristics of the location
- Its functional characteristics
- Its locational characteristics
- The implications of potential development for adjoining urban and rural
  areas
- The strategic implications of potential development
- Alternative future uses in the area; and
- Relationships with major new capital investment

81. Further studies will be necessary in some of these areas, to identify the scale
and phasing of possible development, in particular by identifying and costing
strategic infrastructure requirements, identifying how much development
could be supported by existing infrastructure or through normal provision
through Section 106 Agreements, and whether there are critical thresholds
that would require significant capital investment. In particular, strategic
locations will need to be assessed in the context of emerging
recommendations of the Greater Bristol Strategic Transport Study.
Rural Areas

82. Previous sections have addressed the potential role of areas immediately adjoining the main urban areas in accommodating future levels of development that may be necessary to meet the future requirements of the sub-region as a whole. This section focuses on the need for regional and sub-regional strategies to take into account the intrinsic needs of rural areas, and wider changes to its role and functions.

83. Much of the West of England - some 75% of the sub-region’s area - consists of open countryside with scattered towns and villages. Many of the challenges facing the rural parts of the sub-region – such as in service provision, the management of change in the environment, falling farm incomes, employment provision – are the same as those found in other parts of the South West.

84. However, the inter-relationships between the countryside and the main urban areas of Bristol, Bath and Weston-super-Mare, with their combined populations of some 700,000 and considerable continuing growth pressures, give rise to specific issues and opportunities. Most rural parts of the area are close to major urban centres, with almost all within 20 miles of Bristol city centre. Almost half of the non-urban area of the sub-region is defined as Green Belt.

85. Many of those who live outside the main urban areas rely on towns and cities for a variety of services – jobs, leisure retail and health/welfare services. Whilst the urban areas offer these benefits they have the reverse effect of drawing both expenditure and skills and expertise away from the rural areas, making it more difficult to retain vital services. Conversely, many urban residents look to the countryside as a source for recreational and leisure activities. Such activities provide opportunities for rural economic diversification, and proximity to the sub-region’s major towns and cities offers the opportunity for local food and other produce initiatives – such as, farmers markets. The role of smaller settlements in the study area will need to be compared with findings of the Assembly’s study of the ‘Functionality of Settlements’, which has examined those parts of the region more distant from large urban areas.

86. Accessibility to public transport, services and facilities within the rural areas is a key issue both within the West of England and nationally. Public transport accessibility is particularly an issue outside of peak travel times. Few of the areas have good accessibility to the main urban areas, although the corridors along the A370 Backwell – Bristol; the A4 Bristol – Bath and the A367 Norton Radstock – Bath stand out as having better public transport than other areas.

87. In the rural areas a constrained supply of suitable housing coupled with the desire of people to wish to relocation to a rural situation and population and household growth has led to a continued rise in rural house prices and unsatisfied demand that is expected to continue into the foreseeable future. The highest rural house prices are to be found in those villages to the east and south of Bath; in the Chew Valley and the Mendips; in parts of North
Somerset; in the Cotswolds, and to a lesser extent in some villages in the Green Belt north and east of Bristol.

88. Employment opportunities continue to rise in the rural areas of the sub-region despite the continued decline of the numbers employed in agriculture and associated activities. In common with the UK as a whole, the farming industry in the West of England area has undergone major changes in recent years, although there remains a significant amount of agricultural land use providing an important source of locally produced food. Agricultural diversification is allowing a widening range of smaller businesses to be accommodated in the countryside, often as a result of relocations from the nearby urban areas. Whilst creating opportunities for local people, this expansion is also encouraging increased commuting from a wider and wider area with a consequent rise in traffic volumes on rural roads. Self-employment is a key characteristic of rural employment. An increasing problem is the availability of suitable employment land in the right locations as more is given over to new housing developments. There is a continuing trend of the under-utilisation of people with high skill levels, particularly in the older population.

89. Key changes affecting the West of England rural areas which will be addressed in developing spatial strategy, are:

- Changing patterns of retail and commercial services which affect both the viability of rural enterprises and hence access and potential isolation by the rural community.
- The demands to accommodate more housing and related services, particularly as extensions to the main urban areas, where they cannot be acceptably accommodated within those areas.
- The growth of road traffic along the main transport corridors through the rural areas, with pressures for infrastructure improvements and further development.
- Changes in the structure of the agricultural industry, including declines in farm employment and incomes, as well as in some other traditional rurally based economic activities.
- Changes to the rural environment – including perceived or real loss of quality – resulting from the structural decline in the viability of traditional activities.
- The diminishing availability of affordable housing for local people in rural areas.
- The dependence on private transport in rural areas, and the related decline in rural service provision (particularly public service provision).
- The increased recognition of the effects of isolation from services in rural areas, and of the potential of information and communication technologies for meeting future needs.
- The increased recognition of the importance of environmental protection, for instance of key habitats, and the different characteristics of different rural areas as reflected in their landscape.
• The increased need for management of the wide demands on the countryside including food production, nature conservation, rural enterprise, recreational and leisure activities.

• The implications of these changes for the Green Belt which surrounds and separates Bristol and Bath and which extends over much of the rural area.
IMPLEMENTATION

1. Some of the most important questions to be addressed in the sub-regional spatial strategy will be questions of implementation:
   - How can development be co-ordinated so that new housing is associated with other uses, including employment and essential services in balanced communities?
   - What scale of investment is required to remedy existing deficits in transport and other infrastructure and service new development properly?
   - How much is currently being invested in infrastructure? Is it enough and, if not, how can it be increased?
   - How much can new development contribute to investment in infrastructure?
   - How can the quality of new development be improved, in terms of its appearance, its impacts on neighbouring communities and ‘sustainability’ in the wider environment?
   - How can the mix of development be improved to meet changing needs including the affordability of new housing?
   - How will infrastructure affect the phasing of major developments?

2. The Government’s ‘Sustainable Communities’ agenda emphasises the need to co-ordinate homes, other uses and essential services that have sometimes followed well after the completion of new housing. The solutions are partly about using the planning system and partly about funding.

3. The South West Region’s Communities Plan bid, The Way Ahead’, referred to earlier in this report, discusses various new tools for delivery. New mechanisms may also need to be considered at a sub-regional level within the West of England: for example to raise and co-ordinate additional funding for strategic investment in infrastructure from central and local government, other public agencies and the private sector, including Section 106 planning obligations.

4. The Government has consulted on changes in the policy for planning obligations (Section 106 Agreements). It has also set up special funds for growth areas in the South and East of England, through the Communities Plan, including a Regional Infrastructure Fund, and has established ‘local delivery vehicles’ (urban development corporations, urban regeneration companies, partnership committees and other structures) to improve co-ordination between the private sectors, local government, central Government and other agencies of major development and infrastructure investment. Other regions, including the South West (in ‘The Way Ahead’) are also bidding for Government assistance to implement growth. These discussions are proceeding in parallel with the development of the Regional Spatial Strategy and will need to be brought together.

5. Information on needs and the gap between needs and provision will come from a number of sources, including the Greater Bristol Strategic Transportation Studies, the Sub-Regional Housing Needs Study and the work of the Partnership’s Culture, Leisure and Tourism Group. Further work will be required as the Regional Spatial Strategy develops, including
consultations with statutory agencies, infrastructure providers and utility companies on implications of the recommended spatial strategy for the West of England. Studies elsewhere suggest those social and cultural infrastructures are an important part of the total infrastructure costs of major development areas.

6. The West of England Partnership and the unitary authorities will be considering further, with central Government, national agencies and regional bodies the means required to fund the recommendations on sub-regional spatial strategy that will follow from this report. Special delivery mechanisms have already been suggested to implement the Weston Area Development Framework and the Regional Development Agency is involved in implementing a number of projects in the West of England. The Regional Assembly has proposed a revolving Regional Infrastructure Fund. There are also various ideas about how to secure greater contributions to strategic infrastructure from the uplift in land values that follow planning permission (including a planning gain supplement recommended by the Barker Review of Housing Supply). It remains to be seen what new mechanisms will be appropriate at sub-regional level to achieve planned growth with higher quality and more sustainable development.

7. Investment in the West of England will require priority from central Government, national agencies and regional bodies. The Regional Spatial Strategy will need to support identified investment priorities that will be required to implement the sub-regional spatial strategy, and include necessary strategic priorities in the Regional Transport Strategy. Support will also be required from the Regional Economic Strategy and the investment plans of the Regional Development Agency; the Regional Housing Strategy and funding allocations made by the Regional Housing Body; the investment plans of the Highways Agency, the Strategic Rail Authority (and Secretary of State for Transport); the Environment Agency; the funding agencies for culture, leisure and sport; and other agencies.

8. Implementation will also rely on the Local Development Frameworks of the Unitary Authorities, supported by the Regional Spatial Strategy. In some cases area action plans may be required to progress priority projects. There will need to be inter-authority co-operation on cross-boundary issues in the Local Development Frameworks and consideration should be given to joint area action plans where appropriate.

9. An Implementation Plan for the West of England Joint Study Area will be prepared following the agreement of ‘first detailed proposals’ within the sub-region as part of the final Joint Study Area submission, in accordance with the Regional Assembly’s brief. This will include assessments of infrastructure requirements, the roles of established agencies and funding sources and the need for new sources of funding and delivery mechanisms.
APPENDICES

APPENDIX 1A

“Your Area, Your Vision: Directions for Change”

The Consultation Document “Your Area, Your Vision: Directions for Change” invited responses to eight questions and three indicative Scenarios. A summary of the response is set out below. This summary is intended to indicate the wide range of views expressed, but cannot reflect all opinions and should not be taken as indicating the weight of support for one view over another. A summary of all the responses received is available on the West of England Partnership Website.

1. **What sorts of new jobs and businesses should be encouraged – and where?**

A number of respondents wished to see encouragement given to jobs that were suitable for graduates and a highly skilled workforce and jobs that were high-value, high-tech and in the defence sector. It was also suggested that jobs relating to “sustainable development” should be promoted in waste disposal, energy production and businesses concerned with reducing the impact of climate change. Some new jobs should be in small businesses, promoting home working and community businesses.

Respondents suggested that new jobs should be located in settlements that currently have an imbalance, in higher quality business park / science parks in south and south west Bristol to encourage regeneration, in the North Fringe and on brownfield sites for example, in Weston-super-Mare.

2. **What sorts of new homes are needed – and where should these be built?**

Affordable housing for first-time buyers and the retired was seen as important to a number of respondents. They also suggested that empty properties including offices could be utilised. At the same time, self-build and co-housing should be promoted but overall it was considered that there was a need for a good mix of housing sizes and types with homes. In rural areas the emphasis should be on providing for local needs with dwellings of good quality at low cost.

Urban extensions and town expansions were suggested by some in south, south west, to the east of Bristol and along the A4 corridor between Bristol and Bath. Modest-sized sites on the edge of villages in rural areas were also promoted as was land in the North Fringe in order to minimise travel distances. Many considered that brownfield land within Bristol, North Somerset, including Weston-super-Mare should be used first. Generally, locations that enhance public transport, cycling, waterways, improve affordability were suggested as being important by for example, promoting high-density urban developments.
3. Where will transport improvements be most needed?

There was support for improved linkage to the Ring Road at Hicks Gate, a new Avon bridge linking Avonmouth with Royal Portbury, and a link between the A38 and A370. Others felt that improved public transport in Bristol and with commuter settlements and better use of the rail network was important. But the completion of the Ring Road, especially around South Bristol and to Keynsham, was considered a priority by others. There was a suggestion for a new motorway junction at Locking in order to open up Weston Airfield and RAF Locking. This could be south-bound only while the existing junction at Worle could be north-bound only. Generally there was support for improved links to the Bristol International Airport, and to improve the present cycling infrastructure.

4. What would make towns and cities more attractive places in which to live and invest?

The proper application of planning, landscape and improved quality of urban design was suggested as a way of creating towns and cities that people wanted to live in. It was recognised that the areas around settlements make an important contribution to a “sense of place”. In this regard the Forest of Avon was seen as having an important role to play in creating better access to parkland, green spaces and open countryside as well as improving air quality and promoting carbon neutrality through tree planting. Attractive towns and cities are also places where there are good employment prospects and community safety, and where the community is inclusive and cohesive, where diversity is valued and respected and education and lifelong learning are important. They are also places where better cycling facilities are provided and less road traffic promoted.

5. What types of good quality higher density housing would be acceptable – and where?

A number of respondents suggested that mixed high density housing schemes should be provided in urban areas clustered around suburban and town centres and additionally at the edge of Bristol at Ashton Vale and Hicks Gate. Any high density housing in rural areas should be “in character”. High density housing should not merely replicate existing housing, but should be designed to a high standard and have adequate parking. High density developments may not always be the answer, although there is a need for lower cost housing, with the question of initial housing land being an issue in the final cost. Good quality housing would be eco-friendly with good energy conservation measures having regard to likely future climate change and making good use of recycled building materials and with better integration with transport.
6. **What are the implications of growth for areas adjoining the towns and cities, including the Green Belt?**

Responses ranged from a request for a comprehensive review of the Green Belt in order to identify the most sustainable options for growth to a request for no Green Belt Review at all. Some, who supported a Review, considered that urban extensions should be commenced sooner rather than later. Many respondents drew attention to the likelihood that a Review would involve the development of greenfield land and land of landscape value. In mitigation, it was suggested that any loss of “Green Belt” land should be made good by proportionate additions elsewhere, such as land between Clevedon and Weston-super-Mare and land to the north of Yate/Chipping Sodbury.

7. **What are the needs of communities for new facilities for shopping, education, health, sport, the arts and tourism?**

There was a generally recognised need for good local services, and some respondents pointed out that communities need schools, shops, health centres at their heart. Some respondents considered that it was necessary to recognise that services – doctors, hospitals, schools, shops, leisure facilities, youth clubs and public transport – are lacking in many existing areas. A small number considered that new services should be provided in advance of new development, and there was support for allotments for those without gardens. As far as larger scale facilities are concerned there was support for a concert hall to replace the Colston Hall and for a new South Bristol hospital.

8. **What unique qualities of the area’s environment should be protected and conserved?**

Respondents provided a list of unique assets. These included the Green Belt; the Severn Estuary (which was an internationally important area for nature conservation); The Downs (which should be protected from further tree planting); the Mendip Hills and the Cotswolds Areas of Outstanding Natural Beauty; gaps between settlements; canals and waterways; parks and trees; the Avon Gorge; the River Frome in Bristol; Ashton Park and Blaise Castle Estate; common land; ancient woodlands; Historic Parks and Gardens; river valleys and floodplains; and the area to the south of Bath, (which is considered as being important for wildlife).

The level of future growth was an issue that attracted a wide range of comments. Some respondents questioned the assumptions for the level of growth, and requested that higher and lower growth levels should be planned for. Some questioned the ability of the urban areas to accommodate 2,000 dwellings per annum on the basis that this would damage the mix of uses within urban areas. Others considered that under-provision of dwellings contributed to high house prices. A number of respondents considered that it would be difficult to achieve 3,700 dwellings per annum, and that building
5,500 dwellings per annum may cause serious environmental damage in rural areas. Others suggested that housing growth should be concentrated on renewal and higher densities in existing urban areas and restricted to only affordable, essential housing in rural areas.

Scenario 1
Those who supported a scenario which focussed major development and infrastructure improvements in South Bristol and North Somerset felt that it would build upon the regeneration needs of South Bristol where there is previously developed land, and would facilitate integration with much needed new transport links to for example, the Airport and to the M5 motorway. It would also reduce the pressure in the North Fringe. Others pointed to the dependence on early investment on infrastructure and any delays would add to congestion in and around Bristol. Those who opposed Scenario 1 suggested that to concentrate development on south west Bristol may reduce development at Weston-super-Mare and so limit rail use, would focus more traffic on a single congested road across the River Avon. Development at Easton-in-Gordano/ Portbury would increase dependence on over-congested M5, overloaded Junction 19 and A369.

Scenario 2
This scenario envisages the development of new sustainable communities to the north and east of the Bristol built-up area, such as north of the A4 and east of the Ring Road. Some respondents suggested that this scenario conflicted with RPG10 and would result in unsustainable patterns of growth because there would be a high reliance on the use of the car, long distance travel, rising congestion and would undermine the regeneration of South Bristol and Weston-super-Mare. However, other respondents supported the identification of specific areas for growth as part of a more dispersed strategy. Others suggested that such a strategy would in effect be a “do-nothing” option or otherwise did not support the further development north of Bristol.

Scenario 3
This scenario proposes a more dispersed pattern of development around the smaller towns, which offers the potential for improving public transport, particularly in the key corridors linking Bristol, Bath and Weston-super-Mare and north of Bristol. Some saw this as less damaging than Scenario 1, but others considered this would simply repeat existing patterns of poor development, spreading growth to centres away from the City risking the creation of dormitory suburbs. This would be exacerbated by improvements in transportation corridors to accommodate dispersed growth, which could result in increased travel and congestion. Supporters of the more dispersed strategy pointed to the advantages in terms of quality of life of living in smaller settlements in the countryside, and the advantage of reducing pressure on the North Fringe.
APPENDIX 1B

STAKEHOLDER CONSULTATIONS UNDERTAKEN AS PART OF THE PUBLIC CONSULTATION PROCESS ON “DIRECTIONS FOR CHANGE”

In Bath & North East Somerset, a briefing for Members of Bath & North East Somerset Council took place on 3 December 2004, addressed by the Director of the Joint Strategic Planning & Transportation Unit. Meetings and other opportunities suggested by the Local Strategic Partnership’s lead officer included:

- LSP briefing on 6 December 2004 (which was addressed by the Director of the Joint Unit);
- LSP’s BE Influential Panel Meeting on 15 November 2004;
- Encouragement was given to the following key and other strategic partnerships to include Sub-Regional Spatial Strategy consultation on their agendas:
  - Economy Conference – 5 November 2004
  - Rural Transport Partnership Forum – 1 December 2004
  - Learning Partnership – 6 December 2004
  - Children & Young Peoples Strategic Partnership – 16 Dec 2004
  - Housing Key Partnership – 21 December 2004
- Web links were distributed to contacts on the stakeholder database with email.

In South Gloucestershire, the following opportunities for dissemination were identified:

- 6 November 2004 - consultation event with stakeholders on preparing Supplementary Planning Guidance; involving developers, agents and Parish Councils;
- 30 November 2004 - Parish Council Charter meeting, at which all Parish and Town Councils were invited. Although consultation on the development of the Sub-Regional Spatial Strategy was not a main item, it was raised;
- 4 December 2004 - CPRE meeting, at which it was planned to raise consultation on the Sub-Regional Spatial Strategy;
- 9 December 2004 - LA21 meeting. The Sub-Regional Spatial Strategy was a main item, and was addressed by the Director of the Joint Unit; and
- 8, 16 and 21 December 2004: a series of Member briefings on the new planning system to include a briefing on the Sub-Regional Spatial Strategy.
In **Bristol**, the following action was taken:

- Reports to the City Council, Cabinet and Scrutiny Commission on the developing agenda, with a full response to the consultations from the Cabinet.
- Bristol Partnership, which submitted a full response to the consultations:
  - Presentation and discussion of the three consultation leaflets and the work of the West of England Partnership.
  - Facilitated workshop to draw together the views of the public, private, voluntary and community organisations on the Bristol Partnership.
- Networking and discussions organised by members of the Bristol Partnership, particularly the business, voluntary and community sectors.
- Officer presentations to several community partnerships and organisations.
- Information on *Directions for Change* and participation in sub-regional spatial planning was displayed at the stakeholder event on the Local Development Framework on 16 December 2004 held at the Create Centre.

In **North Somerset**, the following events took place:

- 10 December 2004: a member workshop was held to discuss and identify issues arising from the proposals contained in the consultation document. The workshop included presentation of the community strategy, and analytical work undertaken by Local Futures, which mapped out some of the key socio-economic and quality of life factors affecting North Somerset.
- 16 December: Local Parish Councils were given a presentation on the consultation documents and their views were sought.
- 20 December: Policy & Scrutiny panel considered the consultation document together with the issues identified from the workshop sessions and made recommendations to the Executive.
- 21 December: the Council’s Executive discussed the proposals outlined in the consultation and agreed a response.
- The Executive’s response together with the consultation proposals provided the basis for further discussions with other key stakeholders, including the North Somerset Partnership, Business West Board and North Somerset Initiative.
APPENDIX 2

EXCERPT FROM “THE WAY AHEAD: DELIVERING SUSTAINABLE COMMUNITIES IN THE SOUTH WEST”

BRISTOL AND WEST OF ENGLAND

3.21
The West of England sub-region, based on Bristol and containing about 1 million people, in particular has an excellent track record in innovation, productivity, employment and sustainability. The sub-region contains three Universities and an HEI of which Bristol is a world class research university renowned for embracing enterprise and innovation. While it is the most economically successful area in the South West and makes the strongest contribution to GDP of the English Core Cities, the sub-region still does not perform to its full economic potential. The West of England Partnership, comprising the Unitary Authorities and socio-economic partners, is committed to a long term vision and actions designed to increase further the competitiveness of the sub-region and to close the gap between disadvantaged and other communities. However it does require the support of government investment to complement its own efforts. Not only does the West of England require improved transport infrastructure but it also has a major housing affordability problem, as evidenced by the recent independent Housing Market Study. In one of the most prosperous parts of the region, 75,000 households with a working adult aged 20-40 are unable to afford the cheapest house and 23,000 households need social housing.

3.22
Actions to improve productivity, increase housing supply and address regional inequalities and deprivation must include:
– Securing a more effective strategic transport network that improves accessibility within the sub-region and connections to Bath, Bristol, Weston-super-Mare and Bristol International Airport.
– Promoting the development of the Science Park at Emersons Green north of Bristol and improve its accessibility.
– Building on excellence in knowledge-based sectors and the research quality in our universities to extend the sub-region’s contribution to national GDP.
– Supporting and benefiting from the growth of Bristol International Airport, in accordance with the Air Transport White Paper, and the Port of Bristol.
– Increasing economic opportunities in South Bristol, an area of concentrated deprivation.
– Accelerating the development of major mixed-use schemes in Bath, Bristol and Weston-super-Mare to deliver employment, housing health and leisure opportunities.
– Creating better local transport links to improve access to jobs, education and training opportunities.
– Building on the West@Work initiative to support key sectors and sites by increasing basic and vocational skills and to ensure shared economic prosperity through economic inclusion.
– Building on the HomesWest housing association consortium recently launched by the West of England Partnership to increase significantly the volume and rate of production of affordable homes especially in the intermediate market.
Such action would be of regional significance. It would materially increase the growth of GDP in the sub-region and reduce profound disadvantage in South Bristol and Weston. Among other things, the West of England Partnership is consulting on matching an annual growth in jobs of 3,200 with an annual supply of 4,700 homes. This would amount to the provision of 50,000 homes from now to 2016, subject to the provision of associated investment in social and physical infrastructure.
APPENDIX 3

EXAMPLES OF AN AREA APPROACH TO URBAN RENEWAL AND REDEVELOPMENT

Opportunity Areas

These would be the areas that are identified on the basis that they are capable of accommodating a substantial new number of dwellings and/or jobs, perhaps a minimum of 1000 dwellings and/or 2-3000 jobs or a mixture of both.

The existing area would generally be a significant area of unused or under-utilised land and buildings, mainly arising from a declining (or restructured) industrial, manufacturing, or transport base.

Action to bring forth the development potential would be likely to be underpinned by, at the minimum the involvement of a body such as the Regional Development Agency, to clear derelict sites, fund infrastructure and acquire sites, and/or the local authority using compulsory purchase powers to remove uses and assemble land, as well as involving a partnership of other stakeholders including the private sector. They would be areas where it was possible to:

(a) maximise access by public transport, based on the accessibility potential derived from the areas relatively good location, if adequate investment was committed, even if the area currently had relatively poor accessibility and

(b) re-provide new community facilities and

(c) provide pedestrian access to facilities most frequently used by a residential population (normally within the new development or on the edge).

They would be areas where the private sector alone would be unlikely to achieve the scale of development and where planning policies would need to be amended to allow for the change.

Intensification Areas

These would be areas where there is a significant potential for increases in dwellings increasing both the residential component of an area and net densities, together with some increase in employment through a selective re-use of sites and buildings. Existing areas would typically consist of current mixed commercial/retail uses, with a smaller element of existing housing, where the original commercial uses were re-locating and/or declining, but where developer interest had been maintained. The area would be well linked to, and have good pedestrian accessibility to, existing city/town/district centres and to good public transport routes. It could cover existing commercial areas.
Intensification would rely primarily on the market with occasional outside help being needed to fund the re-use of derelict buildings or sites. New housing would arise through (a) the re-development of existing buildings, where existing uses were becoming marginal, and could be equally well provided for elsewhere, and where housing was likely to become an option attractive to the market (b) the conversion of existing uses to residential without extensive internal or external demolition maintaining the building fabric (c) infilling the occasional vacant site and (d) bringing the odd derelict/ void property back into use.

The end result would be likely to be a change in the land use mix of the area towards housing but still retaining a commercial/retail element.

Regeneration Areas

These areas would be those that suffered particularly high social and economic deprivation, as shown by the index of multiple deprivation, typically, but not exclusively, consisting of high levels of social housing, and not simply concentrated in inner areas of towns and cities. ( See Urban Areas Information Report ). The key emphasis in these areas is likely to be on improving the quality of life, the level of skills, and such services as education, health care, policing, housing and transport and access to work.

In some cases regeneration areas may be found close to opportunity areas and links between the two may benefit the other, but the factors driving development are likely to be different and the two should not be confused in their potential contribution to housing numbers.

Housing development in these areas is likely to rely on public intervention and public funding otherwise the market would probably be already undertaking the project. There are likely to be two main strands of change:

(a) Within the public sector stock this development is likely to derive from the need to meet the Governments Decent Homes Standard by 2010, leading to stock that is uneconomic to repair, and/or unlettable, to be redeveloped. An example of this in Bristol is the replacement of ‘concrete cancer’ dwellings in Upper Horfield.

However, given the public cost and shortage of affordable housing there is no good reason to suppose that resources will be devoted to mass clearance of the existing estates of social housing stock unless it becomes unlettable. Any contribution to future dwelling supply from redevelopment would need to reflect the fact that the net housing gain arising from this, following demolition, would be limited, or even negative in areas of existing high density housing. The density of any new housing would also need to reflect the accessibility of the area. Unless regeneration through public funding succeeded in improving access to jobs, other facilities and transport, increasing densities may simply increase the numbers subject to social and economic isolation

(b) Incremental change via smaller scale regeneration projects including
• increasing the tenure mix and type of housing through selective demolition,
• improving existing housing,
• redeveloping the neighbourhood shopping centres to improve facilities, perhaps providing a housing element
• redeveloping land where uses have ceased e.g. a surplus school, or unused open space, and where there may be more opportunity of introducing different types of housing area.

Within the current financial regime the private sector is likely to be involved but the scale of its involvement in housing projects, is likely to be influenced by the location. If the demand for property is weak in a particular regeneration area then developers may favour a mix of other uses generating higher returns.

Housing Densification Areas

These might be primarily focused on existing established residential areas with reasonable access to facilities, where the majority of housing was in private ownership but where net residential densities were relatively low and where the form and size of existing houses and plot sizes in general offered scope for a mixture of sub division of existing dwellings, infill development, and the selective redevelopment of individual buildings. Appropriate development control policies would need to safeguard the important characteristics of neighbourhoods and the townscape in general and ensure that the scale and form of new development was appropriate to the locality, creating a local planning framework for what would essentially be a set of private development initiatives which in many cases would consolidate development trends that were already taking place.
APPENDIX 4

Determining the Boundaries of Principal Urban Areas

Extract from South West Regional Assembly Technical Note (2003)

Definition

3.1 The definition of a PUA boundary comprises two stages:

3.1.1 Where a clear continuous outer settlement boundary to the urban area (identified in RPG10 Policy SS5 as a PUA) has been defined in the adopted local plan, or contiguous local plans, then this will be taken to represent the boundary of the PUA. For monitoring purposes, development occurring within this area will be regarded as at the PUA, although it may be physically detached. Proposed urban extensions to the PUA will only be included for monitoring purposes as being “at” the PUA once the extension has been incorporated into an adopted local plan (or Local Development Document under the reformed planning system).

3.1.2 Where no clear outer continuous settlement boundary has been defined in an adopted local plan, the PUA boundary will be taken to be the line enclosing the continuous built-up area of the urban area, where the maximum gap between buildings in urban uses does not exceed 150 metres. Ideally the situation in 1996, the base year for RPG10 monitoring, should be used. However, the practical problems of back-tracking seven years from the present to establish this theoretical starting position are considerable in many areas. It is therefore proposed that the working date for establishing the urban boundary under this statistical definition 1 April 2001 should be used.

3.2 The narrow definition given above does not cover the situation where there is a defined settlement, located close to the main PUA but separated from it by more than 150 metres of undeveloped land, greenbelt (or non urban uses normally acceptable in a greenbelt), and that can be demonstrated to function essentially as

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1 150 metres is the maximum gap originally allowed by OPCS for the DoE when defining the boundaries of urban areas for the purpose of 1991 Census analysis. This exercise is planned to be repeated during 2004 by ONS for the ODPM for the 2001 Census.
2 This date also usefully coincides with the Census based work of ONS (see above). The date also approximates to the actual publication date of RPG10 (actually September 2001) which is the date at which its policies can realistically be held to start taking effect.
3 PPG2 Green Belts paras. 3.4 - 3.5 states:
part of the PUA. This detached functional relationship cannot be assumed to automatically include the settlement in the PUA unless the case has been tested either at a Structure Plan Examination in Public, a Local Plan Inquiry, or at an LDD examination. In the meantime, the RPB and RPWG will commission work to identify a set of standard criteria to determine whether a detached settlement can realistically be defined as being part of a neighbouring PUA. These criteria will include the need to be consistent with the objective of producing compact urban forms (RPG10 policy SS5), and whether a thorough examination of the case for maintaining a strategic gap between the settlement and the PUA has been made (for example as part of a greenbelt review and an urban capacity/urban extension study).

The inverse of this situation – i.e. the presentation of a case for excluding a settlement that has some apparent physical attachment to a PUA – would be subject to the same tests and examination outlined in 3.2.

The construction of new buildings inside a Green Belt is inappropriate unless it is for the following purposes: agriculture and forestry (unless permitted development rights have been withdrawn); essential facilities for outdoor sport and outdoor recreation, for cemeteries, and for other uses of land, which preserve the openness of the Green Belt and which do not conflict with the purposes of including land in it; limited extension, alteration or replacement of existing dwellings; limited infilling in existing villages (under the circumstances described in the box following paragraph 2.11 of PPG2), and limited affordable housing for local community needs under development plan policies according with PPG3; or limited infilling or redevelopment of major existing developed sites identified in adopted local plans, which meets the criteria in paragraph C3 or C4 of PPG2 Annex C. Essential facilities should be genuinely required for uses of land which preserve the openness of the Green Belt and do not conflict with the purposes of including land in it. Possible examples of such facilities include small changing rooms or unobtrusive spectator accommodation for outdoor sport, or small stables for outdoor sport and outdoor recreation.

Depending on a number of other criteria being met (e.g. relating to commuting patterns), an example of this might conceivably occur the case of an historic village, covered by a conservation area designation, that is detached from the main PUA built-up area by an area public open space.