January 2007

Somerset County Council and the Somerset Local Planning Authorities

Implications of ONS Household Projections for Somerset

BAKER associates

Contents

Executive Summary

Revised household projections issued by the Office of National Statistics show a significantly higher level of household growth over the next 20 years than the previous projections used to inform the draft Regional Spatial Strategy. The revised projections are based on retaining the existing population projections but reflect changing the assumptions around how we form households – particularly :

- Increases in the likelihood of elderly people living independently – caused by increasing longevity, improved general health and financial independence amongst older people
- A reassessment of the stability of co-habiting (as opposed to married couple) households and identifying that co-habiting couples on average, are more likely to split up into separate households than married couples.

This study considers the implications arising from a number of potential distributional scenarios for accommodating this additional housing growth. It tests the environmental, economic, social and transport implications of accommodating the additional housing growth and sets the conclusions in an appraisal framework based on the objectives of the Somerset Community Strategy.

The results of the study will be used to inform the debate of how to accommodate this additional housing growth at a regional level through the South West Regional Spatial Strategy Examination in Public programmed to take place during Spring / Summer 2007.

The study concludes that a hybrid of the tested scenarios which distributes the additional housing growth to reflect the current population distribution and local community ties whilst ensuring SSCTs remain the focus for accommodating the majority of development is the most appropriate.

The study recognises SSCTs have the greatest opportunities for employment and the greatest levels of accessibility to services but they also have limitations on their capacity to accommodate additional growth. Given the constraints on SSCTs and the scale of step-change required for three SSCTs (particularly Taunton) to deliver the draft Regional Spatial Strategy housing allocations, it is anticipated that Market Towns (Category B settlements within the RSS) should have a greater role to play in accommodating the additional growth arising as a result of the ONS household projections.

It is recommended that Somerset retain its percentage share of total development across the region and this is distributed according to the principles of the Regional Spatial Strategy but amended to take account of particular local circumstances in Somerset. Most notably, the constrained additional growth potential of Taunton, the policy requirement to balance the relationship between Taunton and Bridgwater and the environmental capacity of many of the more rural parts of the county.

The more prominent role of market towns in the recommendations relies on further work being undertaken to fully understand the functionality and potential many of these towns have to offer – economically, socially and environmentally - together with the implications for infrastructure or service delivery that would be required to plan for sustainable communities.

Part A – Process and Purpose

1 Background and Purpose

1.1 In March 2006, the Office of National Statistics (at sub-national level) and Department of Communities and Local Government (at a district level) issued revised household projections. These new projections show a significantly higher level of household growth over the next 20 years than previous projections (both the 1996 and draft 2002-based household projections) due to changing assumptions around social and demographic trends.

1.2 The evidence base for the draft South West Regional Spatial Strategy was based upon the earlier and significantly lower household projections. An assessment of the implications of the household projections for higher rates of housing delivery was requested by the Secretary of State for Communities and Local Government on receipt of the submitted Draft Regional Spatial Strategy. The results of this work will support the Examination in Public (programmed to commence in April 2007) and provide the Panel with the technical evidence they require to fully consider the issue.

1.3 To support the preparation of evidence to the panel, South West Regional Assembly wrote to all 4(4) Authorities (including Somerset County Council) to formally request that they consider the implications of planning for the additional households arising from the revised household projections and test five distributional scenarios.

1.4 Baker Associates were commissioned by Somerset County Council to undertake a technical assessment to support the Somerset Authorities in providing formal advice to the South West Regional Assembly.

1.5 This study represents a technical appraisal of the issues associated with accommodating additional household growth only and has not been subject to consultation with wider stakeholders and the general public due to the length of time offered by to prepare evidence.

2 Methodology and Approach

2.1 This section of the report sets out the task that has been undertaken and the approach to assessing the implications of accommodating additional household growth.

The task

2.2 Substantial work was undertaken by the Somerset Authorities to support the development of the First Detailed Proposals and the Spatial Strategy (including distribution of homes) within the draft Regional Spatial Strategy (RSS). The draft strategy was signed off by the Regional Assembly, and not withstanding Mendip District Council's efforts to secure higher housing numbers, has been largely supported by the Somerset Authorities. This study is based on the premise that the draft spatial strategy is robust and therefore focuses solely on distributing the additional household growth that arises as a result of the revised household projections.

2.3 The formal request from SWRA asks the 4(4) Authorities to set out the impacts and requirements for planning for additional housing growth across:

a) Social impacts (including impacts on health and public service delivery)
b) Environmental impacts
c) Transport impacts
d) Economic impacts

2.4 The formal request from SWRA also sets out five scenarios for distributing the housing growth :

Scenario A - Retaining the scale of housing in the draft RSS (and assessing the implications of reduced population growth in 2026)

Scenario B - Distributing the additional housing on a pro-rata basis according to the draft RSS strategy

Scenario C - Distributing the additional housing on a pro-rata basis to Strategically Significant Cities and Towns (SSCTs) only

Scenario D - Distributing the additional housing on a pro-rata basis to all areas except SSCTs

Scenario E - Strategic 'best fit' scenario by SWRA based on spilt according to derivation of additional households and adjustments for local circumstances.

2.5 In addition, the Somerset authorities have also chosen to test a further scenario based on a pro-rata distribution of additional households according to current population distribution.

The study area

2.6 The study area is the five districts that comprise the Somerset County Council administrative boundaries excluding Exmoor National Park.

2.7 The scenarios for distributing the additional household growth are based on applying the differing assumptions on a regional basis to reflect the objectives of the Regional Spatial Strategy and / or where the additional housing demand is derived rather than a fixed figure identified for Somerset. This means that the total additional growth for Somerset differs between scenarios to reflect the differing approaches at a regional level.

Building on work to date

2.8 The South West Regional Assembly (SWRA) have commissioned Anglia University to test the implications of the revised household projections at a regional level. The work involves testing a number of 'top-down' scenarios for accommodating the projected levels of increased growth across the region and updating Chelmer population forecasts and the Cambridge Econometrics economic forecasts that comprise part of the evidence base which supports the draft South West Regional Spatial Strategy.

2.9 The study builds on previous work undertaken by Baker Associates through the Taunton Sub-Area Study undertaken to support the development of the draft South West Regional Spatial Strategy. However, this work focused on Taunton and the settlements that have a strong interrelationship – namely Bridgwater and Wellington – rather than the whole county. It also built upon the previous technical work undertaken to inform the Taunton Sub Area Study including the Taunton Vision, Taunton Urban Design Framework and the Taunton Urban Extension Study.

2.10 The Districts that comprise Somerset are currently at different stages in the preparation of their Local Development Frameworks. Therefore each District has undertaken differing levels of work on assessing functionality of settlements and in understanding how they propose to accommodate the existing levels of growth attributed through the Regional Spatial Strategy, beyond the allocations for Strategically Significant Cities and Towns (SSCTs). The assessment within this study therefore remains at a strategic level (reflecting an update on the work undertaken to establish the First Detailed Proposals) rather than an in-depth assessment of the ability of particular settlements to accommodate further growth. It reflects the identification of absolute constraints on the accommodation of additional households rather than detailed issues that could be resolved during the preparation of Local Development Frameworks at a District Level.

2.11 In addition, this work has been undertaken alongside the work to review the Taunton Transport Strategy. This work will continue beyond the period of this study and further testing to assess the transport implications of the scenarios will be undertaken, as the transport model is completed.

Developing an appraisal framework

2.12 In order to appraise the various scenarios and fully assess the implications, the study employs an appraisal framework to systematically consider the

implications from each scenario. The appraisal framework is based upon the Somerset Community Strategy Objectives – in order to reflect agreed objectives for Somerset and reflect the diversity of settlements within the County. The appraisal framework also links to the regional objectives as set out in 'Just Connect' – The Integrated Regional Strategy (2004) and the Draft Regional Spatial Strategy (2006).

2.13 The following table sets out the appraisal framework :

Somerset Community Strategy Objective	Links to 'Just Connect'(Integrated Regional Strategy(IRS)) and Regional Spatial Strategy (RSS)	Implications
Image and Influence – Building an Image for the Future	IRS Aim 2 – To enhance our distinctive environments and the quality of our cultural life IRS Aim 4 – To address deprivation and disadvantage to reduce significant intra-regional inequalities RSS – Section 3, 4, 7, 8 and 9	- Sieve mapping exercise to identify environmental constraints that effect capacity of particular settlements to accommodate further development - Ability to contribute towards delivery of Taunton Vision, Yeovil Vision, Bridgwater Challenge and Rural Regeneration Strategies
Business and Industry – An Enterprising Environment	IRS Aim 3 – To enhance our economic prosperity and quality of employment opportunity RSS – Section 4 and 8	- Assessment against economic projections and securing economic potential - Supporting jobs / homes balance and minimising commuting - Potential changes to supply of labour force
Skills and Training – Investing in Our Future	IRS Aim 3 – To enhance our economic prosperity and quality of employment opportunity IRS Aim 5 – To make sure that people are treated fairly and participate fully in society RSS – Section 4, 8, 9 and 10	- Access to education and training facilities or services
Culture and Leisure – Creating a Lifestyle	IRS Aim 1 – To harness the benefits of population growth and manage the implications of population change IRS Aim 2 – To enhance our distinctive environments and the quality of our cultural life RSS – Section 6 and 7	- Access to cultural and leisure facilities or services
Infrastructure, Access and Transport – Creating Sustainable Foundations	IRS Aim 1 – To harness the benefits of population growth and manage the implications of population change IRS Aim 3 – To enhance our economic prosperity and quality of employment opportunity RSS – Section 3, 4, 5 and 6	- Provision of utilities - Strategic implications on transport network and public transport provision - Assessing general accessibility to jobs, services etc
Our Communities – Sharing with Each Other and a Sense of Belonging (includes affordable housing, appropriate housing linked to work and access to services)	IRS Aim 1 – To harness the benefits of population growth and manage the implications of population change RSS – Section 3, 4, 5, 6, 8, 9 and 10	- Impact on affordability of housing - Social impacts on communities such as balanced age profiles, creation of dormitory settlements, retaining services as part of community spirit

Setting the parameters

2.14 The study assesses the implications of accommodating the additional housing arising for the ONS household projections, should the demographic projections be borne out over the 20 year period. However, there is a 'school of thought' which suggests that we should not provide for this level of household growth and should focus on fiscal or social policy interventions to reduce the number of smaller households forming. Whilst there are many valid arguments on the potential for such approaches, consideration of the implications of taking forward these alternatives does not form part of this study.

2.15 The study also assumes all other parameters (such as density, capacity of identified sites, average dwelling size etc) remain constant. It therefore does not focus on key policy tools to accommodate additional housing (such as increasing housing densities) or to mitigate against the impact upon communities (such as policies to control the mix of housing type and size or increasing affordable housing thresholds). These issues are considered to have a considerable bearing on how additional households should be accommodated and are discussed more fully in section 7.

Steering Group

2.16 The completion of the study has been supported by a Steering Group comprising representatives of :

- Environment Agency
- Highways Agency
- Mendip District Council
- Sedgemoor District Council
- Somerset Chamber of Commerce
- Somerset County Council
- Somerset Housing Officers Group
- Somerset Primary Care Trust
- South Somerset District Council
- South West Regional Assembly
- South West Regional Development Agency
- Taunton Deane Borough Council
- West Somerset District Council

2.17 In addition, a workshop was held with representatives of the development industry to discuss deliverability and implementation issues associated with the additional housing required to support the revised household projections.

Report structure

2.18 The report sets out the findings of the assessment in the following sections :

Part A – <u>Process and purpose</u>
Stating the background to the study and the methodology employed together with the reasoning behind the revision to the household projections. The various distributional scenarios to

accommodate the additional household growth are also set out in this section.

Part B - Establishing the evidence base
Setting out the evidence used and testing the scenarios against the appraisal framework.

Part C – Assessing the implications and a preferred approach S
A summary of the results of Part B by scenario and recommendations for a Somerset 'Best Fit' approach.

3 Understanding the Household Projections

National and Regional Projections

3.1 In March 2006, the Office of National Statistics and Department of Communities and Local Government issued revised household projections. These new projections show a significantly higher level of household growth over the next 20 years than the previous projections – including the projections that were used to support the development of the draft Regional Spatial Strategy (RSS).

3.2 The revised household projections are based on 2003 population projections, the same set of population projections used to inform the draft RSS population and economic models.

3.3 Population figures over the last 20 years show that Somerset's population is growing at a considerable pace. Figures show that across the county the population has risen by 68,000 between 1981 and 2001 - a rise of 8.2%. This compares with 6.9% for the South West region and 4.3% for England and Wales (Census, 2001). Somerset's population growth is almost entirely due to net inward migration which has ranged from 1,700 to 6,500 people per year over the last 20 years.

3.4 The 2003 population projections forecast a continuation of these trends with a growth in population of over 82,000 people in Somerset over the next 20 year period.

3.5 The population of Somerset is characterised by a higher than average proportion of persons aged 60 years and over (25%) and a lower proportion of 25 to 59 year olds (47%) compared to both the South West and national averages. Between 1991 and 2001 the proportion of 15 to 24 year olds within the total Somerset population fell by 12%. Key determinants for this trend include the out-migration of younger residents (particularly to access higher education and employment) against higher levels of in-migration within older age groups (ONS, 2006).

3.6 The population projections show that these trends are likely to continue with a continuing emphasis on an ageing population with nearly 29% of the Somerset population being over the current retirement age in 2026. The reverse of this trend is the reduction working age population as a percentage of the total population from 60% in 2006 to 55% in 2026 (ONS, 2006).

3.7 As the population projections remain constant under the new household projections, the increase in household numbers in the new projections is therefore due to increased rates of household formation. In simple terms, the increase in the probability of an individual in the population to form a separate household, given their circumstances such as age, gender, marital or cohabiting status.

3.8 At a regional level, the increase in household projections equates approximately to an increase from 23,000 dwellings per annum within the

draft Regional Spatial Strategy to 28,000 dwellings per annum as a result of the revised household projections.

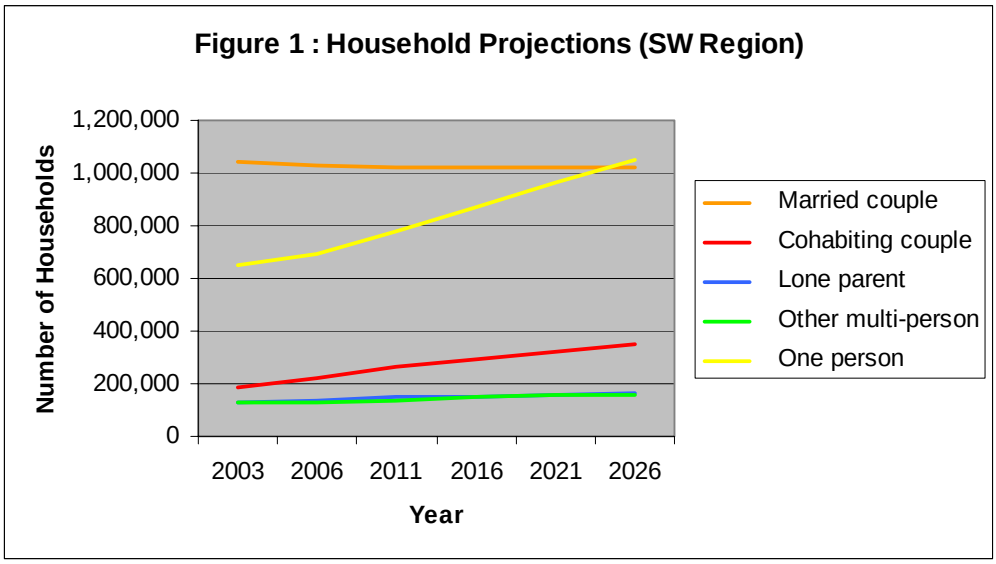
3.9 There are two main reasons for the increase in the new projections:

- Increases in the likelihood of elderly people living independently – caused by increasing longevity, improved general health and financial independence amongst older people

- A reassessment of the stability of co-habiting (as opposed to married couple) households and that co-habiting couples on average, are more likely to split up into separate households than married couples.

3.10 The projections show a decrease in average household size from 2.25 persons per dwelling in 2006 to 2.05 persons per dwelling in 2026 in the South West region.

3.11 The table below (figure 1) sets out the household projections for the South West region by type.



3.12 The table shows one of the key determinants of the increase in the household projections is a projected increase in one-person households - with 69% of additional households within the South West region being one-person households. 9 in 10 of the projected additional one person households are over 35 years of age and 1 in 3 are over 65 years of age.

3.13 The number of married couple households is projected to fall, although at a lower rate than the national average. This is offset by an increase in cohabiting couple households. However, the total number of married or cohabiting households is projected to fall from 56% of all households in the South West region in 2006 to 50% in 2026.

3.14 The number of lone parent households and 'other multi-person households' are projected to increase approximately in line with overall household growth.

3.15 The majority of the increase in the household projections can be attributed to population living within the South West region (approximately 70%) but net inward migration drives approximately 30% of the additional household growth. This is an important consideration as many of the additional households we are trying to accommodate will have economic, cultural and social (including family) links to a particular geographic area or settlement.

Somerset Projections

3.16 DCLG have prepared household projection figures to a District level. These are based on past trends only (as with population projections) and do not reflect the objectives of the draft Regional Spatial Strategy and other planning policy. Not withstanding this, the projections indicate the potential scale of the issue.

3.17 The table below (figure 2) shows the household projections for each Somerset District.

	2006	2016	2026	Average annual increase in households (2006 – 2026)
Mendip	46,000	52,000	58,000	600
Sedgemoor	48,000	56,000	63,000	750
South Somerset	68,000	78,000	87,000	950
Taunton Deane	48,000	57,000	65,000	850
West Somerset	16,000	18,000	20,000	200
Somerset Total	**226,000**	**260,000**	**292,000**	**3300 (rounded)**

Figure 2 : Household Projections by Somerset District (DCLG, 2006)

3.18 The Draft RSS makes provision for an increase of 2,435 dwellings per annum across Somerset. However, the revised household projections (2006) show an increase of 3,300 households per annum across Somerset. Adding an additional allowance of 3% to turn dwellings into households (taking account of vacant dwellings), this equates to a 3,399 additional dwellings per annum across Somerset. The total represents an increase of 965 dwellings or a 40% increase over the current RSS provision.

4 Devising the Scenarios

4.1 The household projections are an indication of the likely increase in households given the continuation of recent demographic trends. They essentially follow a 'Predict and Provide' approach where the trends in household growth are projected at source.

4.2 This approach does not take into account the policies of the draft Regional Spatial Strategy or other planning policy to focus development and investment in infrastructure in the cities and larger towns where employment, services and facilities are most accessible and greater economies of scale are achieved. In the draft RSS, these settlements are known as Strategically Significant Cities and Towns (SSCTs).

4.3 In order to assess the implications of accommodating the higher levels of household growth and reflect the objectives of the draft RSS, it is essential that a 'Plan, Monitor and Manage' approach is used to plan for the additional levels of growth. This enables additional housing growth to be planned for and accommodated in the most sustainable manner.

4.4 The remaining part of this section sets out the justification for each of the potential distributional scenarios that Somerset were asked to test by the South West Regional Assembly and the likely additional housing numbers this gives rise to in Somerset.

Scenario A – Retaining the scale of housing in the draft RSS (and assessing the implications of a reduced population in 2026)

4.5 Scenario A retains the housing allocation within the draft Regional Spatial Strategy - a net increase of 2435 dwellings per annum. This scenario considers the implications of not accommodating the anticipated increase in household requirement and the implications or knock-on impacts of the reducing population growth if the average household size falls to 2.05 persons per dwelling.

4.6 The difference in population under scenario A compared to the alternative scenarios anticipates a lower population growth of between 29,000 fewer people (Scenario D) and 20,000 fewer people (Scenario C). Based upon the age breakdowns for anticipated population age bands in 2026, this equates to lower population (under Scenario C for comparison purposes) of 4060 school age children (primary and secondary) and 13,340 economically active people.

4.7 The figures assume that the trends for decreasing household size are borne out; however with a lack of accommodation options it is likely that some people (particularly the young) will find alternative accommodation options such as house-sharing or living with family for longer periods. The population modelling by Anglia University makes some provision for a sharing factor however; there is no provision for this to increase over the period 2006 – 2026.

4.8 Recent reports into housing affordability show rural areas may retain their population at a higher rate as mobility is higher in urban areas and moving to an adjacent area is less likely (Joseph Rowntree Foundation,2006).

Scenario B - Distributing the additional housing on a pro-rata basis according to the draft RSS strategy

4.9 Scenario B distributes the additional housing on a pro-rata basis according to the housing allocations in the draft RSS. The scenario is based on the premise that the current spatial strategy set out in the draft RSS is robust, the existing provision could be fast-tracked over the earlier years of the implementation of the spatial strategy to make provision for the revised household projections on a similar distribution in later years.

4.10 Very simplistically, this would mean that the current spatial strategy would provide for the anticipated levels of housing growth in Somerset to 2022 rather than 2026. However this also includes fast-tracking the allowance for windfall which is unlikely to be realistic unless there is a considerable relaxation of policies.

4.11 The total figure over the 20 year period would equate the following allocations :

	Annual Average Net Dwelling Requirement (Draft RSS)	Annual Average Net Dwelling Requirement (Scenario B)
Mendip	360	438
Sedgemoor (of which Bridgwater)	420 (310)	511 (391)
South Somerset (of which Yeovil)	680 (320)	828 (379)
Taunton Deane (of which Taunton)	865 (700)	1053 (855)
West Somerset	110	134
Somerset Total	2435	2964

Figure 3: Scenario B - Pro-rata distribution according to RSS Strategy

Scenario C - Distributing the additional housing on a pro-rata basis to Strategically Significant Cities and Towns (SSCTs) only

4.12 Scenario C distributes the additional housing on a pro-rata basis to Strategically Significant Cities and Towns (SSCTs) only. The aim of this scenario is to further pursue the RSS objective of focusing development in Strategically Significant Cities and Towns (SSCTs) where employment and services are more accessible, infrastructure can be more effectively provided and the need to travel is minimised.

4.13 The table below illustrates the annual average net dwelling requirement under Scenario C :

	Annual Average Net Dwelling Requirement (Draft RSS)	Annual Average Net Dwelling Requirement (Scenario C)
Bridgwater	310	412
Taunton	700	931
Yeovil	320	426
Somerset Total	2435	2874

Figure 4: Scenario C – Pro-rata distribution to SSCTs only

Scenario D - Distributing the additional housing on a pro-rata basis to all areas except SSCTs

4.14 Scenario D distributes the additional housing on a pro-rata basis to all areas except SSCTs. The aim of this scenario is explore the implications of accommodating additional household growth under the assumption that the SSCTs are currently taking their full capacity of development and additional housing will have to be accommodated elsewhere.

4.15 The table below illustrates the annual average net dwelling requirement under Scenario D :

	Annual Average Net Dwelling Requirement (Draft RSS)	Annual Average Net Dwelling Requirement (Scenario D)
Mendip	360	562
Sedgemoor (excluding Bridgwater)	420 (110)	482 (172)
South Somerset (excluding Yeovil)	680 (360)	822 (562)
Taunton Deane (excluding Taunton)	865 (165)	958 (258)
West Somerset	110	172
Somerset Total	2435	3056

Figure 5: Scenario D – Pro-rata distribution to non-SSCTs

Scenario E - Strategic 'best fit' scenario by SWRA

4.16 SWRA have developed a 'best fit' scenario based on upon distributing 70% of the additional housing growth according to the existing population patterns to reflect the derivation of additional household growth within the existing population. The remaining 30% reflects the household growth derived from inward migration and is distributed according to the RSS Strategy.

4.17 The table below illustrates the annual average net dwelling requirement under Scenario E :

	Annual Average Net Dwelling Requirement (Draft RSS)	Annual Average Net Dwelling Requirement (Scenario E)
Mendip	360	517
Sedgemoor	420	561
South Somerset	680	868
Taunton Deane	865	1070
West Somerset	110	140
Somerset Total	2435	3156

Figure 6 : Scenario E - Strategic 'best fit' scenario by SWRA

4.18 The South West Regional Assembly have also factored in a number of localised circumstances or assumptions – some places (urban extensions) only have a strategic component while others (such as National Parks and the Isles of Scilly) are only assigned local household growth. For example, in Somerset, the allocation for Exmoor National Park reflects its constrained nature and nominally allocates part of this growth to West Somerset District.

Scenario F - Pro-rata distribution of additional households according to current population distribution

4.19 The final scenario has been developed by the Somerset Authorities and reflects a distribution of additional housing growth according to the current population distribution. The Somerset Authorities wished to test this additional option to reflect the derivation of household growth and perceived issues around maintaining balanced communities across the Districts.

4.17 The table below illustrates the annual average net dwelling requirement under Scenario F :

	Annual Average Net Dwelling Requirement (Draft RSS)	Annual Average Net Dwelling Requirement (Scenario F)
Mendip	360	465
Sedgemoor	420	527
South Somerset	680	833
Taunton Deane	865	969
West Somerset	110	146
Somerset Total	2435	2940

Figure 7: Scenario F - Pro-rata distribution according to existing population

Part B - Establishing the Evidence Base

Part B sets out the evidence required to assess the implications of each of the scenarios against the headlines of the appraisal framework.

5 Image and Influence – Building an image for the future

Environmental capacity

5.1 This section aims to asses the environmental constraints that effect capacity of particular settlements and particular parts of settlements to accommodate further development.

5.2 In order to undertake this task, some basic assessments have been made using Environment Agency and Multi-Agency Geographic Information for the Countryside (MAGIC) data to asses each named settlements capacity to accommodate development under the scenarios. All scenarios except Scenario A require an increase in housing numbers over and above the draft Regional Spatial Strategy therefore are likely to result in further development as an extension to settlements.

5.3 The assessment considers indicative flood zones, including coastal flooding zones and higher level environmental constraints, these include amongst others :

- National Parks
- Areas of Outstanding Natural Beauty (AONB)
- Sites of Special Scientific Interest (SSSI)
- Special Protection Areas
- Scheduled Ancient Monuments
- Registered Parks and Gardens

The maps to support this section are presented in Appendix B.

5.4 The basic sieve mapping exercise is useful in making assessments as to which settlements will find it hardest to accommodate higher levels of development due to their restricted environmental capacity. However, it should be reiterated that the assessment is only undertaken at a strategic level and local designations or locally specific issues will be addressed through the preparation of Local Development Frameworks at a local level.

5.5 This exercise has been undertaken for the SSCTs (Category A Settlements under the draft RSS) and a series of towns that could potentially be classified as Category B settlements – Market Towns within draft RSS development policy. The RSS leaves defining Category B settlements to the Districts to undertake as part of their assessment of settlement 'role and function' within their LDFs. However, work by Roger Tym and Partners, Joint Structure Plan Review (2000) and an informal steer from some Districts from their existing evidence base has defined a potential list.

SSCTs

5.6 *Bridgwater*
Bridgwater's potential is defined by the indicative flood areas within and around the town. A good deal of the settlement lies within the flood plain and the entire northern edge is constrained by areas liable to flooding. However the District Council and the Environment Agency are currently promoting long-term flood risk alleviation measures in the form of a tidal sluice on the River Parrett.

5.7 The settlement is bounded by the M5 to the west. The motorway would be a major barrier in practical terms to growth in terms of noise and pollution from the road and would represent a barrier in accessibility in accessing the rest of the town.

5.8 The landscape on all sides of Bridgwater is of high quality, although very little of it is statutorily protected. The South West regional landscape character assessment shows Bridgwater to be located within the Quantock Hills & Quantock fringes to the west and south west and the Somerset Levels area to the north and east. The Quantock Hills AONB is about 5 km away from the western edge of the town.

5.9 Land between the railway line and M5 motorway including the former 'Innovia' cellophane site is likely to be considered for significant mixed-use development. Any further growth will require the consideration of additional greenfield urban extensions. Potential sites could include land to the west of Bridgwater, further development at south Bridgwater and land between the eastern edge of the town and the M5 which is currently identified as a green wedge. The development potential will be fully assessed through the preparation of the Local Development Framework.

Taunton

5.10 Taunton has a number of constraints to its development. Three green wedges reach far into the built up area forming an important part of the character of the town, and in effect represent the main constraints from flood risk. Two of these three sections are to the eastern and the western side of the town and consist of the River Tone and about 500m either side of the river as more or less undeveloped space. The third wedge consists of open land, some agricultural and some used as a golf course between the Sherford and Dowslands areas of Taunton, known as the Vivary Green Wedge.

5.11 The setting of town is important to the wider area and views over Taunton from the Blackdowns and Quantock Hills. The town lies within the regional landscape character of the Vale of Taunton and Quantock Fringes a landscape characterised by a large flat vale with views out ringed with low hills. The AONB of the Blackdown Hills lies about 5 km to the south of Taunton. The Quantock Hills AONB lies about 6 km to the North.

5.12 There is the potential for growth outside of these areas, avoiding specific parts of the surrounding area such as the Ancient Monument in the north of Norton Fitzwarren, and the parkland to the north of the Wellsprings area. The M5 and proposed A358 link road provides a barrier to development to the east in terms of accessibility, noise and pollution.

5.13 The Taunton Urban Extension Study concludes a strategic urban extension could be accommodated in environmental terms firstly at Monkton Heathfield and then if required at Comeytrowe, together with the potential for smaller urban extensions to the North of the town.

Yeovil

5.14 The majority Yeovil is unaffected by flood areas, with the largest area south of Penn Mill between the railway and the A30 and south of New Town along the River Yeo. The town lies within the regional landscape area known as the Yeovil Scarps an area characterised as a varied landscape of hills, wide valley bottoms, ridgetops and combes.

5.15 The major constraint in Yeovil is the steeply sloping land on parts of its northern, eastern and southern edges which represent a practical and landscape constraint to development. Some of the steepest sloping land lies directly south of the town centre, preventing expansion of the town in all directions around the town centre. This constraint is reflected in the way the town has grown up to now and the predominance of recent growth on the Western edge of the town, although this does raise issues in regard to proximity and access to the town centre.

5.16 There are also four large registered parks and gardens around Yeovil; gardens at Newton Surmerville, Barwick Park, and Brympton D'Evercy House, and farther afield, National Trust land at Montacute Ho.

5.17 Opportunities for outward growth in Yeovil are therefore constrained but not precluded.

5.18 There is clearly the opportunity for development in the three SSCTs but a there are also a number of constraints and limitations placed upon the scale of this growth. Bridgwater is significantly constrained in flooding terms, from both the River Parret and from coastal flooding. Flood defences do exist for the existing built up area, detailed work carried out by the local planning authority shows that there is some potential for growth in areas less constrained by flooding. The Taunton Sub Area study identified a number of locations where development could take place, subject to detailed assessment and Yeovil is constrained by landscape considerations but there are potential opportunities.

<u>Potential Category 'B' towns by District</u>

Mendip

5.19 Frome is the district's largest town and is constrained by hilly land to the west and flood areas to the south east. Frome falls within the regional landscape designation of the Cotswolds; an area defined by rolling hills and plateaux's. The landscape to the north and west is hilly and development could have landscape and settlement setting implications. There is capacity east of the town centre on the 'Garsdale' former industrial site as the regeneration scheme develops out. Significant increases in house building would need to be accommodated elsewhere however.

5.20 Beyond the existing built up area land to east of the town centre and west of the A361 would have little effect on the wider landscape and setting. A significant employment development north west of the town towards the

A361 (at Colway Lane) is already being built out. Possibilities to the south of the town are more limited, but limited development here would have less impact than development up the hillsides around the north and west.

5.21 The towns of Glastonbury and Street are severely limited by their location within the Somerset levels the risk of flooding in this area, especially in light of global climate change. Glastonbury is especially constrained given the iconic Glastonbury Tor and surrounding important historic landscape. In effect greenfield growth around Glastonbury is entirely restricted to a narrow strip south of the A361 and to the north east at Old Wells Road of approximately 9 ha.

5.22 In Street, development could be located to the west and south east of the town without being within the flood plain or effecting the landscape character of the town significantly. Sports fields and facilities associated with the Millfield School could restrict the scale of growth in this area.

5.23 Shepton Mallet lies central to the Mendip District and is constrained at the north, south west and south east by rising land - the effect of building on which would have a negative effect on the character and setting of the town. This aside, Shepton would be able to physically grow directly south, without prejudicing the fundamental landscape setting of the town and this approach is supported by Shepton 21 Community Strategic Action Plan.

5.24 Wells is an historical cathedral city set within a narrow vale. The Mendip Hills AONB immediately bounds the urban area to the north, constraining growth considerably. Although there are fewer statutory designations to the south of the city, steeply sided hill slopes represent a practical and landscape constraint to growth. The cathedral gardens severely impede growth directly to the south of the Town centre.

5.25 Development to the west is restricted, again by landscape and topology. The Sewerage works will require a cordon zone to protect new development from odours restricting growth on the south western side. The only opportunities for some development may be to the north west and south west of the town and any greenfield development would have to be small in nature, or risk changing the setting and landscape of the town.

West Somerset

5.26 Minehead is the largest town in West Somerset and is a major tourist destination for seaside, the national park and attractions such as Dunster and the West Somerset railway. The town is surrounded by the Exmoor national park on the west and south and very steeply sloping topology. To the east of the town, the risk of coastal flooding is a major constraint to development. There is no obvious direction for growth given these constraints and any growth potential is likely to be accommodated within the existing settlement boundary.

5.27 Williton is one of the smallest towns investigated and has a limited range of services and transport links but due to the constrained nature of Minehead, it should be considered. The town is also heavily constrained by flood risk on the northern and eastern side and lies close to the Quantock AONB (less than 2 km). There is potential for limited development to the south and east of the town.

Taunton Deane

5.28 Wellington is the second largest town in Taunton Deane and well located in transport terms. The main constraints are the flood zone either side of the River Tone and the M5 motorway. In terms of landscape, the town lies within the wide Vale of Taunton Deane and the Blackdowns AONB lies beyond the M5. An area of separation between Rockwell Green and Wellington limits growth on the western side.

5.29 Wellington may be capable of a higher level of growth then many of the Category B settlements in Somerset, without severely prejudicing the character or landscape setting of the town. The local plan currently allocates a large development area immediately east of the town, up to Taunton Rd and there is potential for a mixed-use expansion north of this road.

5.30 Wiveliscombe lies to the far west of the district, about 10 km from the Dartmoor National Park. Steeply sloped hills rest right up to the western edge of the built up area. Although of obvious high quality, the landscape to the east and immediate north could potentially be considered for development if necessary.

Sedgemoor

5.31 The towns of Burnham-on-Sea and Highbridge are entirely surrounded and within the indicative flood zone for coastal flooding, however significant sea defences against flooding exist in these locations.

5.32 The M5 also acts as another constraint to the west, whilst to the south west of Highbridge, the Bridgwater Bay SSSI extends along the river Brue. If the flooding issue could be mitigated then there are no further major landscape constraints immediately around the two towns.

5.33 Cheddar lies to the east of the district at the foot of the Mendip Hills AONB, which constrains the village to the north and east as well as the south. Not only is this surrounding countryside hilly and AONB, much of it is Special Scientific Interest and Special Areas of Conservation. The town is also constrained by the Somerset Levels to the immediate south which are liable to flooding and a sewerage works to the south west for which a development buffer zone will need to be retained. There is little opportunity to develop the village, although infill development to the west and north west may be acceptable in landscape and environmental terms.

South Somerset

5.34 Wincanton is well located on the A303 which runs alongside the settlement boundary on the south. South and east of the A303 lies an area at risk from flooding. Wincanton is surrounded on its north east and west side by low hills. However, land to the north does not significantly contribute to the landscape and setting of the town.

5.35 Crewkerne is unaffected by flooding, but is heavily constrained by sensitive landscape and the proximity of the Dorset AONB a kilometre to the south. Steeply sloping hills border the urban edge on the north east, east and south. Woodland in the west of the town and the AONB to the south and

west further constrain where potential development could be accommodated.

5.36 Ilminster is bounded to the north by the A303, a major strategic route. Localised flood risk along the river Isle exists to the north and the east. Woodlands stretching from Dillington to Ashwell in the north east will contribute to the overall character of the area. Steeply sloping land to the west limits growth and landmark hills such as Hern Hill and Pretwood Hill limit growth to the south and south west. The areas immediately to the south east and immediately north of Pretwood Hill and north of the Black Down view area could potentially be considered as having less of an impact on the setting of the town.

5.37 Chard is located between the Blackdown AONB, about 2 km to the west and the Dorset AONB about 4 km to the south east, and lies in attractive countryside. The rising Blackdown Hills to the west present an obvious constraint to growth, although without any significant flooding areas Chard would be able to expand to the north east and south east without severely prejudicing the character of the landscape or setting as already set out in the local plan.

5.38 There is clearly potential for development in many of the category B market towns without severely prejudicing the environmental or landscape assets of these settlements. Many of the settlements further inland are also relatively free from flood risk, which is a major constraint in the north and coastal regions of the county.

5.39 Particular settlements with significant scope in environmental terms include Frome, Shepton Mallet, Street, Williton, Wellington, Burnham & Highbridge, Wincanton, Ilminster and Chard. In contrast, settlements such as Glastonbury, Wells, Minehead, Wiveliscombe, Cheddar and Crewkerne offer less opportunities due to their landscape and flooding constraints.

5.40 With careful design and layout the impact upon local constraints can be minimised. Development can be designed in such as way as to be appropriate and sensitive to landscape concerns. In relation to flood constraints, these can be mitigated subject to often expensive and complicated measures such as strengthening defences immediate to development and protecting flood storage areas. Where coastal flooding is an issue, ensuring that sand dunes other natural defences are properly cared for and man-made defences are built and maintained in a way to be effective and minimise environmental impact may make development acceptable so long as there are no practical alternative sites.

Ability contribute to regeneration strategies

5.41 The SSCTs (Bridgwater, Taunton and Yeovil) are all taking forward town centres focused design frameworks to support their identified role as an SSCT and ensure that the town centre opportunities for accommodating the levels of growth are maximised.

5.42 In Taunton, the Urban Design Framework focuses on four key areas of the Town Centre – Firepool, Cricket Club / Morrisons, Tangiers and High Street

together with improving linkages and transport connections across the town. The Taunton UDF makes provision for 2200 dwellings across the area.

5.43 The Yeovil Urban Development Framework takes forward the Yeovil Vision and Town Centre Strategy through a spatial framework, with specific urban design guidance for key strategic sites. The framework is based around a series of Urban Quarters – focusing on taking forward key development opportunities and improving connections to the reminder of the town and into the Country.

5.44 The focus of the Bridgwater Challenge is to promote town centre redevelopment and enhancement, maximise brownfield redevelopment opportunities and to improve the perceptions of Bridgwater town centre as a place to live and work. It provides support for key projects such as a rural business centre, Northgate regeneration scheme, Parrett Sluice Project, North East Bridgwater (former Innovia site), investment in secondary education and the implementation of the south Bridgwater housing allocation. The Bridgwater Challenge is currently in the process of commissioning further evidence to support taking forward their proposals, this work will commence in Spring 2007.

5.45 Although the frameworks are at different stages of development or implementation and comprise differing priority projects or investment priorities, all three frameworks share a similar approach. The focus is on supporting the town centres of each of the settlements to expand and fulfil their increased role – through addressing inadequacies in service provision for a growing population (for, example, recreational retail or educational), raising the standard and quality of the public realm and promoting the redevelopment of key sites that offer capacity for re-use (including housing).

5.46 For the purposes of this study, it has been assumed that the Frameworks maximise the opportunities available within the town centres and their housing capacity is already reached. However, given the nature of the sites and their propensity to deliver the highest densities there maybe some further potential although this would have to be assessed on an individual site by site basis.

5.47 The focus of investment into facilities, infrastructure and the public realm in SSCTs supports the current approach for SSCTs to accommodate much of the projected housing growth. A movement away from the predominance of SSCTs will require the focus of efforts and funding to ensure that wider focused spatial planning or 'visioning' (either through the UDF type of process or through Area Action Planning as part of the Local Development Framework) is taken forward for the next tier of Category B – Market Town settlements.

5.48 A number of the potential Category B settlements are recipients of regeneration funds and programmes. Examples include Townscape Heritage Funds or HERS which focus on town centres or wider ranging programmes such as Market and Coastal Towns Initiative. The eligible MCTi towns include Burnham-on-Sea & Highbridge, Chard, Crewkerne, Minehead, Shepton Mallet, Wiveliscombe and Wincanton.

5.49 Some local level work has been undertaken with a number of MCTI Strategic Action Plans highlight the potential benefits of accommodating housing growth and linking this to the regeneration of the towns – particularly if this linked to supporting viability of services, enhancing or diversification the economy or provision of contributions towards infrastructure. A clear example of this is the Shepton 21 Community Strategic Action Plan which identifies suggested directions and location for housing growth. However, others settlements are much more focused on socio-economic or community objectives and do not reflect community aspirations for accommodating housing growth.

6 Business and Industry – An enterprising environment

The Somerset economy

6.1 Somerset has witnessed continued economic growth for more than a decade. However, most economic growth is generated by existing businesses and indigenous business formation (SCC, 2006). Somerset's economy continues to be dominated by the small business sector with only one in seven businesses in the county employing more than 10 employees (ABI, 2004).

6.2 In sectoral terms, energy and water, manufacturing and distribution, hotels and catering sectors are more important in Somerset than regionally and nationally. Sectors with a significant under-representation include banking, finance and insurance, transport and communications and other services. This confirms the importance of tourism to Somerset's economy and reflects the strength of Somerset in manufacturing activities such as advanced engineering, aerospace and food and drink production (SCC, 2006).

6.3 The sectoral analysis also there has been limited growth in higher value added businesses within Somerset meaning that Somerset is below the national and regional average in terms of productivity, business growth and earnings (SCC, 2006).

6.4 Somerset has a large and growing workforce. The Labour Force Survey (June 2004 to May 2005) indicates that the economically active population in Somerset is 247,000 persons meaning that Somerset has a higher economic activity rate (84.6%) than the regional (81.6%) and national (78.7%) averages. Over the past decade Somerset's rate of economic activity has continued to grow while national rates have remained static and Somerset's economic activity rate ranks second highest of the South West sub-regions (SCC, 2006).

6.5 Unemployment rates have been historically low in Somerset in comparison to regional and national trends and recent figures show that this is currently 1.3 % (ONS, 2006). However, there are hot spots of unemployment (particularly Minehead, Glastonbury, Bridgwater and Taunton) and areas particularly effected by the seasonal nature of tourism and agriculture (predominately in West Somerset and Sedgemoor).

6.6 The occupational profile of Somerset shows a relatively high proportion of the workforce employed in traditionally low-skilled occupations and a correspondingly low proportion of people in higher skilled occupations – reflecting the low added value and productivity characteristics of Somerset's economy. The earnings profile of the county also shows that Somerset has the third lowest annual earnings of the seven South West sub regions (SCC, 2006).

6.7 For the past decade, Taunton's economy has outperformed the national average. There has been substantial employment growth within Taunton since 1995 with particularly good performance in the business service, education, distribution and health sectors. Business services has grown by over 100% which equates to 3,780 new jobs during the period 1995 – 2003

(ONS, 2003). Taunton has a strong public sector base reflected by the presence of a number of major organisations such as the Charity Commission, the UK Hydrographic Office, the County Council and the South West Regional Assembly Secretariat. It is also the most successful retail centre within Somerset (ranked 76 out of 1,672 centres across Great Britain).

6.8 Bridgwater has performed well over the last decade and this level of growth is set to continue into the future with Bridgwater transforming its industrial base to a more mixed economy. The main growth sectors have been construction, transport and communications reflecting the success it has had in attracting distribution and warehousing. However, significant declines have been witnessed in manufacturing, hotels and restaurants. Bridgwater also has one of the highest levels of unemployment within Somerset with Bridgwater Victoria Ward at 3.9% - three times the county average (ONS, 2006).

6.9 Yeovil is a freestanding employment centre which is reasonably self contained and yet serves a wide hinterland – particularly over the southern border into Dorset. It had 23,421 jobs in 2002 with a 4% employment growth between 1998 and 2002, but two of the top five employers are in declining sectors. Generally, the economy is dominated by a few large employers, these include GKN Westland, Royal Naval Air Station, Screwfix Direct and the hospital.

6.10 The economic structure of Yeovil is heavily reliant on advanced engineering and food processing, employing over 30% of the workforce. The aerospace cluster centred on helicopter manufacture has over the years spun off high technology expertise, research and development skills into the local economy and steps are being taken to focus towards a more knowledge driven economy.

6.11 Category B settlements – Market Towns also have a key role to play in the Somerset economy. They act as key local business centres containing a number of Somerset's largest and most established businesses and playing an important employment and service role for their surrounding rural areas. Figures show that a high proportion of economic activity is located in Somerset's market towns and rural centres, with 77% of the county's business are based outside the major towns of Bridgwater, Taunton and Yeovil (ABI 2003). Although job growth has been slower outside SSCTs (20 % increase in SSCTs compared to 13% increase outside SSCTs between 1998 – 2004), over 50% of the actual increase in job numbers has been outside SSCTs with market towns playing a major role (ABI, 2004).

6.12 However in many of the market towns economic prospects are finely balanced. A number of Somerset's towns are heavily dependent on a particular industrial sector, large employers or a narrow range of key firms (SCC, 2006). Often these are in sectors where future decline is predicted and the Somerset Economic Assessment (2001) identified four potential category B settlements (Chard, Crewkerne, Ilminster, and Wiveliscombe) where at least half of firms and employment are in sectors expected to decline in the next decade. In addition, the Somerset Economic Strategy (2005) considers the concentration of business activity and service provision in larger centres to have undermined the competitiveness of the market

town local retail and service role, leading to physical and functional decline of their town centres.

6.13 Restructuring of the economy has led some towns to have performed better than others. However generally, the Market Towns have very low levels of unemployment with employers reporting problems recruiting into low wage or unskilled occupations (Lin Cousins and Assocs, 2004). The report also found that this is requiring larger employers to invest in training and to improve the skills of their workforce – the 'grow your own skills' response'.

6.14 Into the future, the economy of Somerset is projected to grow and perform fairly well. Key indicators such as low unemployment, good accessibility to much of the county and the stability of key companies and public sector employers reinforce this. However, there are significant challenges around the impacts of economic re-structuring and focusing on higher value added sectors with higher than average rates of pay that will need to be addressed. In addition, recent statistical releases also refer to the beginnings of a softening of the labour market (SCC, 2006) with increased competition for job vacancies and greater indications of lower employment rates and a slowing down in earnings growth.

Balancing housing with economic potential

6.15 Bringing housing provision in balance with economic potential was one of the key drivers (particularly for maximising the role of SSCTs) in determining the housing allocations under the draft Regional Spatial Strategy. This was achieved through an economic-led approach which projects economic growth to 2026 and relates this to population change. Hence, the number of households and the requirement for housing to ensure homes are planned for at a rate that balances the economic growth projection.

6.16 A housing-led approach could be employed to take account of the additional housing growth projections however there is a concern that the economy of a number of areas would not be able to reach the required growth levels to balance without a 'step-change' in economic fortune or significant public intervention outside the current targeted approach for areas with specific issues - neither approach is currently considered a realistic alternative.

6.17 The economic projections that were used to inform the Taunton Sub-Area Study to support the First Detailed Proposals for Yeovil have been updated to take account of standard NOMIS updates and the availability of ABI data for 2004. In addition, comparable forecasting undertaken by Mendip District Council to inform their Core Strategy has been utilised and simplistic projecting of trends has been undertaken for the Minehead TTWA.

6.18 It is noted that the economic projections prepared for this work are below past rates. However, the consultation amongst stakeholders with to support the development of the First Detailed Proposals suggested there is no obvious reason to foresee any significant change in its economic circumstances in the future. Nevertheless, the projections err on the side of caution, not least because the study is forecasting over a very long period, in which the later stages becomes very difficult to predict.

Forecast demand for jobs and housing

Taunton TTWA

6.19 Over the period 2006 to 2026, the economic forecasts undertaken for this study project a total of 14,568 additional jobs (including self employed) to be generated across the Taunton TTWA. Taking an economic-led approach, and with the aim of matching additional jobs with additional homes, this equates to a maximum ability of Taunton Deane to accommodate 18,183 dwellings (or 909 dwellings per annum), which shares a similar geographical area as the TTWA.

6.20 The study has arrived at the figure of 18,183 dwellings, firstly by considering the increase in the population expected to arise from the additional jobs in the area, and further by calculating the subsequent number of new homes needed to house this rise in the population – to reflect assumption changes in the revised household projections. Other projections such as the stability of in-commuting levels, unemployment levels, proportion of working age population and proportions of economically active people and uplift for vacant dwellings remain constant with the Taunton Sub-Area Study (Baker Associates, 2005).

Taunton TTWA Jobs	2006	2026
Employees	54724	67503
Self employed	7661	9450
Jobs filled by in-commuters	2500	2500
Employed workers (total employed – in-commuters)	59885	74453
Economically active (total employed + unemployed)	60660	75288
Working age population	69234	85861
Taunton Deane total population (limited by economic projections)	**109979**	**136391**

Figure 8 Economic led scenario - Taunton Deane population 2026

6.21 The additional population attracted to the area for employment, will need to be housed. Working on projections of 2.05 persons per household for Taunton Deane, including a 3% uplift to take account of consistent vacancy rates, for the total population this amounts to the need for an additional 18,183 dwellings for the District.

6.22 On the basis of past rates of employment growth, 81% of all job growth in the TTWA will be created in Taunton. However, the Sub-Area Study took the policy decision to increase this to 86% to support the increased urban focus of the RSS strategy and reflect the proposed delivery of large scale employment sites within the town centre and at Monkton Heathfield. For Taunton, this would create demand for an additional 14,728 dwellings over the period 2006 - 2026.

Households	**2006**	**2026**
Taunton Deane total population	109979	136391
Total no. of households	48879	66532
Taunton Deane additional dwellings 2006 – 2026	18183	
Taunton town housing requirement at 86% of District provision	15637 (or annualised average of 781 dwellings per annum)	
Wellington housing provision at 11 % of District provision	2000 (or annualised average of 100 dwellings per annum)	

Figure 9 Economic led scenario – Taunton Deane and Taunton town housing requirements to 2026

Bridgwater TTWA

6.23 Over the period 2006 to 2026, the economic forecasts undertaken for this study project a total of 8910 additional jobs (including self-employed) to be generated across the Bridgwater TTWA. Taking an economic-led approach, and with the aim of matching additional jobs with additional homes, this equates to a maximum ability of Bridgwater TTWA to accommodate 10,308 dwellings (or 515 dwellings per annum).

6.24 The study has arrived at the figure of 10,308 dwellings, firstly by considering the increase in the population expected to arise from the additional jobs in the area, and further by calculating the subsequent number of new homes needed to house this rise in the population – to reflect assumption changes in the revised household projections. Other projections such as the stability of in-commuting levels, unemployment levels, proportion of working age population and proportions of economically active people and uplift for vacant dwellings remain constant with the Taunton Sub-Area Study (Baker Associates, 2005).

Bridgwater TTWA Jobs	2006	2026
Employees	35394	42522
Self employed	8849	10631
Jobs filled by in-commuters	-10679	-5349
Employed workers (total employed – in-commuters)	54940	58502
Economically active (total employed + unemployed)	55865	59427
Working age population	71833	76413
Bridgwater TTWA total population (limited by economic projections)	**114890**	**122215**

Figure 10 Economic led scenario - Bridgwater TTWA population 2026

6.25 In addition, the study retains the objective to reduce out-commuting from Bridgwater as currently nearly one in three of the resident working age population travelling out of Bridgwater to work. The original JSA study aimed to reduce this by 40% however, through the ONS study this has been increased to a 50% reduction to reflect the on-going need to balance the relationship between Taunton and Bridgwater so they are complementary rather than competing. This is essential to reflect the differential in issues of house prices and qualitative issues regarding the type of job opportunities, average levels of pay or availability of higher skilled positions.

6.26 The additional population attracted to the area for employment, will need to be housed. Working on projections of 2.05 persons per household for Bridgwater, including a 3% uplift to take account of consistent vacancy rates, for the total population this amounts to the need for an additional 10,308 dwellings for the TTWA area.

Households	**2006**	**2026**
Bridgwater TTWA total population	114890	122215
Total no. of households	49309	59617
Bridgwater TTWA additional dwellings 2006 – 2026	10308	
Bridgwater town housing requirement at 75% of TTWA provision	7731 (or annualised average of 387 dwellings per annum)	

Figure 11 Economic led scenario –Bridgwater town housing requirements to 2026

6.25 On the basis of past rates of employment growth, 65% of job growth in the TTWA will be created in Bridgwater. However, the JSA study took the decision to policy decision to increase this to 75% to support the increased urban focus of the RSS strategy and to reflect the economic potential of Bridgwater.

Yeovil TTWA

6.26 Over the period 2006 to 2026, the economic forecasts undertaken for this study project a total of 13,500 additional jobs (including self employed)to be generated across the Yeovil TTWA. Taking an economic-led approach, and with the aim of matching additional jobs with additional homes, this equates to a maximum ability of Yeovil TTWA to accommodate 7,941 dwellings (or 397 dwellings per annum).

6.27 The study has arrived at the figure of 7941 dwellings, firstly by considering the increase in the population expected to arise from the additional jobs in the area, and further by calculating the subsequent number of new homes needed to house this rise in the population – to reflect assumption changes in the revised household projections. Other projections such as the stability of in-commuting levels, unemployment levels, proportion of working age population and proportions of economically active people and uplift for vacant dwellings remain constant with the work towards preparing the First Detailed Proposals (Somerset County Council, 2005).

Yeovil TTWA Jobs	2006	2026
Employees	49,428	60,153
Self employed	8181	9956
Jobs filled by in-commuters	4594	4594
Employed workers (total employed – in-commuters)	53,015	65,515
Economically active (total employed + unemployed)	54,683	67,183
Working age population	75,272	92,479
Yeovil TTWA total population (limited by economic projections)	**106,366**	**130,680**

Figure 12 Economic led scenario – Yeovil TTWA population 2026

6.28 The additional population attracted to the area for employment, will need to be housed. Working on projections of 2.05 persons per household for Yeovil TTWA, including a 3% uplift to take account of consistent vacancy rates, for the total population this amounts to the need for an additional 11,861 dwellings in the Yeovil TTWA.

6.29 On the basis of past rates of employment growth, 60 % of all job growth in the TTWA will be created in Yeovil. However, the ONS study has increased this to 65% to support the increased urban focus of the RSS strategy.

Households	2006	2026
Yeovil TTWA total population	106,366	130,680
Total no. of households	51,886	63,747
Yeovil TTWA additional dwellings 2006 – 2026	12,216	
Yeovil town housing requirement at 65 % of TTWA provision	7941 (or annualised average of 397 dwellings per annum)	

Figure 13 Economic led scenario –Yeovil town housing requirements to 2026

Balancing jobs to homes

6.30 A clear objective of the Regional Spatial Strategy is to balance jobs to homes – to create a sustainable mix of uses in all our settlements and to reduce the need to travel. Assessing the additional dwellings that arise as a result of the economic projections within the SSCTs leads to a number of clear conclusions around the level of housing required to support SSCTs in realising their economic potential and the viability or desirability of the scenarios.

6.31 Under scenario A, the population growth of the SSCTs is restricted therefore the supply of available labour force is also constrained. With a fairly tight labour market and little unemployment, a reduction in households to this

level would equate to putting a significant and undesirable brake on the economy across the County.

6.32 The table below provides a summary of the net additional dwellings as a result of the revised economic projections against the various distributional scenarios.

	Additional Number of Dwellings by Economic Projections	Existing RSS Allocation	Scenario B	Scenario C	Scenario D	Scenario E	Scenario F
Taunton	781	700	855	931	700	920	743
Bridgwater	387	310	391	412	310	401	353
Yeovil	397	320	379	426	320	403	345

Figure 14 – Summary of dwellings arising as a result of economic scenarios

6.33 The additional levels of dwellings that arise as a result of the economic projections for Taunton show the town's economy would be able to support the levels of dwelling arising from scenarios D and F but scenarios B and C would result in a supply of dwellings over and above the available job supply. This equates to 74 dwellings per annum for Scenario B and 150 dwellings per annum for Scenario C.

6.34 Scenario E (the SWRA best fit) does not break down the figures to a Taunton town figure and a figure for the remainder of the District. However, if we revert back to the JSA split of 86% of the total District figure, this scenario also leads to a significant shortfall of jobs to potential homes of 139 dwellings per annum.

6.35 The additional levels of dwellings that arise as a result of the economic projections for Bridgwater show the towns' economy would be able to support the levels of dwelling arising from scenarios D, F and approximately B but scenario C would result in a supply of dwellings over and above the available job supply of 25 dwellings per annum. It is considered that the accuracy of the economic projections and the margin of difference mean that if this scenario was adopted the difference could be overcome.

6.36 Scenario E (the SWRA best fit) does not break down the figures to a Bridgwater town figure and a figure for the remainder of the District. However, if we revert back to the JSA split of 48% of the District total and equate this to the TTWA, this scenario also leads to a shortfall of jobs to potential homes of 14 per annum but it is felt that the difference can be discounted due to the accuracy of economic projections.

6.37 The additional levels of dwellings that arise as a result of the economic projections for Yeovil show the towns economy would be able to support the levels of dwellings arising from all the scenarios, except Scenario C. Despite the positive signals this sends, there are further issues around quality of employment opportunities or average wage rates that may impact upon the level of commuting patterns from Yeovil. The towns economy is also very dependant upon a small number of key employers – their economic fortunes are much harder to project into the future than a wider business

base as it is much more related to the growth of individual sectors (many of which are identified as declining) and investment decisions.

6.38 In addition to the work undertaken to revise the economic projections for the SSCTs, other work has been taken forward for some of the more rural TTWA focused around market towns. This assessment is not comprehensive and further work should be undertaken to assess the functionality of the market towns as part of each Districts work to take forward their local development framework. However, the initial economic profiling and projections for Mendip, Wellington, Minehead and Crewkerne (within the Yeovil TTWA) show that the market towns have further economic potential to support additional dwelling growth and actually require additional dwellings to meet their full economic potential and maintain their jobs-homes balance.

6.39 Work undertaken to support the development of the Mendip Local Development Framework shows the economies of the Mendip market towns are constrained by restricted housing potential. Even with build out rates of 450pa (90 dwellings per annum over the RSS allocation), it is anticipated that the economic potential of the Districts market towns will either be constrained by 2,500 jobs or will encourage in-commuting from surrounding areas. Based on this assumption, it is concluded that the Mendip towns could accommodate the dwelling figures set out under scenarios B, C, E and F. Scenario E may have a negative impact upon commuting patterns and Scenario D would result in a higher out-commuting relationship, particularly emphasising the current relationship with Bristol and Bath.

6.40 The economic projections for Wellington show that the town has the potential to accommodate 100 additional dwellings per annum. Based on the likely capacity of other towns in the remainder of Taunton Deane District, it is anticipated that Wellington could support housing figures in the region of Scenarios B, C, E and potentially F although the commuting relationship between Taunton and Wellington would have to be carefully monitored to balance housing growth with a commensurate increase in jobs to ensure the out-commuting from Wellington is not exaggerated.

6.41 The main exception to the conclusions around market towns is Minehead where economic growth is fairly erratic and difficult to trend given the reliance on hotels & catering and the difficulty of capturing reliable numbers in this sector dominated by casual and seasonal work. Overall, economic growth has remained fairly static in this location.

6.42 Further work is currently being undertaken to assess the jobs homes balance of the SWRA scenario across the region. This will be published in early 2007 and will provide useful comparators for the potential jobs homes balance in Somerset.

7 Skills and Training – Investing in our future

Current education provision and trends in Somerset

7.1 In Somerset County there are a total of 233 Primary Schools, 9 Middle Schools, and 30 Secondary Schools. There are also six further education colleges in Somerset, in Yeovil, Street, two in Taunton and two campuses in Bridgewater that offer post 16 and adult education or skills opportunities.

7.2 The County Council have a policy of 'local schools for local children', and this is the policy objective that will be tested in considering the impacts of the housing projection scenarios for the County.

7.3 The data from the Somerset School Population Forecast 2005 shows an expected change in the education population of the County for all the maintained schools in Somerset.

Primary Schools

7.4 The 2005 Somerset School Population Forecasts (Jan 2006) indicate that current predictions show a continued decline in the number of primary school pupils (4-10 years) in the County, in line with national trends. This downward trend, caused by falling birth rates, is predicted to continue in Somerset from by 2010 there are likely to be over 1400 fewer primary pupils than in 2005.

7.5 Somerset is characterised by having many small primary schools, with schools with less than 100 pupils around twice the national average, reflecting the rural characteristics of the County. 70% of primary schools of the county by 2010 are expected to have fewer pupils than in 2005. Also since the 1990s the number of schools with fewer than 100 pupils fell, now shrinking number of pupils has led to an associated rise in small schools as school size falls below the 100 pupil mark. Very small schools are also increasing with schools of under 30 pupils rising to double figures. The number of large primary schools with 200 or more pupils has also declined.

Secondary and Middle Schools

7.6 The number of pupils in Somerset secondary and middle schools (11-15 years) did show a general increase, although this has now reached a plateau and is expected to decline under current predictions (although some individual schools may increase due to parental choice). This is shown in the 2005 Population School Forecasts for Somerset as falling primary school pupils feed through into secondary schools. The number of pupils in the Country aged 11-17 is forecast to fall by over 3300 from 2005 to 2014.

7.7 By 2009 is expected that all apart from 7 of the 30 secondary schools are expected to have fewer pupils than in 2004 and this will mark the beginning of a longer downward trend. Although it is likely to be the case, that some secondary schools will remain full due to parental preference, with poorer performing or less popular schools experiencing a greater proportional reduction in pupil numbers.

Post 16 provision

7.8 This is centred in four 13-18 schools, four 11 -18 schools and six Further Education Colleges. The number of learners aged 16 plus receiving education in the eight schools was 1,690 in 1999, 1,641 in 2000 and 1,625 in 2001 representing a slight downward trend which is anticipated to continue, subject to national policy interventions to overturn this.

7.9 The six incorporated Further Education Colleges are situated in Taunton, Yeovil, Bridgwater and Street, with a sixth form college in Taunton and a specialist agricultural college at Cannington. The colleges in Bridgwater, Street and Yeovil are tertiary colleges, providing the full range of post-16 education and training opportunities to local 11-16 schools, and to the wider community.

7.10 Trends for further education students in Somerset are expected to show a gradual increase. Although statistics show, as noted in the Somerset Community Strategy, Somerset has a lower proportion of young people entering full time post-16 and higher education than the South West average and accessibility to training providers is considered to be one potential reason for this.

Identifying the impacts of the Scenarios

7.11 The Schools Organisational Plan 2005-2009 (non-statutory) prepared by Somerset County Council gives some details on the capacity of schools and the number of available places, allowing some identification of what the scenarios may mean for school places in the County.

7.12 The Schools Organisational Plan does not include further education matters where this is outside secondary schools. However it is unlikely the revised housing growth will have much impact on these as students already travel further to access these facilities and initiatives such as concessionary fares are more likely to impact upon these services. Similarly adult education is unlikely to be impacted greatly as this type of education can take place outside normal education facilities and is likely to remain available throughout the County independent of population size or location.

7.13 Finally, in-work training is also less likely to be impacted by the distributional scenarios as this is often provided on-site. Low skills levels are cited as an issue across the Somerset economy, however seem to impact disproportionately upon market towns and rural areas with the ability to attract higher value skills into market towns being cited as a key issues in Labour Market Strategies for Market Towns (Lin Cousins, July 2004). However, the report concludes that employers in market towns are more likely to tackle their skills shortage by up-skilling the local population rather than attracting higher skilled in-migrants.

7.14 Under scenario A, lower population levels are likely to impact on local schools, particularly where this changes the demography of the population as younger families are priced out of parts of the more desirable parts of the County. Even though incoming people may include families there may be fewer school aged children attending local schools. For example, Wells already experiences lack of affordable family homes and is clearly showing

a decline in school age children, with pupil numbers of secondary school age decline more rapidly than any other local education area. This may be an existing example of what pursuing this scenario may mean for the other Somerset towns, however 'parental choice' is also distorting the distribution and take up of school places across the county.

7.15 Under a declining pupil population, smaller primary schools will have an ever increasing proportion of surplus school places and may result in a need for re-organisation of schools in some education areas. The local education areas that currently have higher proportions of smaller primary schools, and may be worst hit by a shrinking population size include :

- Chard, Huish Episcopi, Shepton Mallet and Wincanton education areas primary school populations are likely to drop by 10% from 2005 to 2010

- Ansford, Bridgwater, Burham-on-Sea, Cheddar/Blackford, Glastonbury, North Mendip, Stoke-sub-Hamdon, Wellington, West Somerset and Yeovil education areas are likely to have a drop of 5-10% of primary school population from 2005-2010

7.16 These areas are characterised as being rural, including much of the Bridgwater education area, and therefore the shrinking school sizes may require some planning and re-organisation of school provision in these areas. This may have some implication on accessibility to primary schools for local children, contrary of policy objectives of the County.

7.17 Impacts on secondary schools are likely to be less pronounced as these serve larger catchment areas. Although some secondary schools, such as in Wincanton, already have quite large surpluses and this situation may be exacerbated by falling populations, which may impact on the viability of the current secondary schools in the education area. All secondary schools in the county are located in either SSCTs or the identified Category B towns therefore reinforcing their roles as local service centres, reinforcing their role and function as important service centres to surrounding area.

7.18 The differences in housing distribution between Scenario B, Scenario E and Scenario F are not sufficiently pronounced to enable the differentiation of possible impacts on education due to the uncertainties involved. Therefore these scenarios are treated as one, with the presumption being that this approach would see the distribution of housing more or less in line with existing population to the SSCTs, other towns of Somerset and the to the rural areas of the County.

7.19 The impacts of this approach would be to support the status quo of existing education needs and the predictions from the existing Schools Organisational Plan, allowing implementation of existing school management plans. The levels of housing would increase, but without an associated increase in population.

7.20 Scenario C focuses all of the additional growth on the SSCTs, with the other parts of the County having housing growth at existing RSS levels. The outcome of this is likely to be the same shrinking populations outside the SSCTs as in scenario A, but with population growth in the three main towns. This approach is also likely to see local people from the parts of Somerset

outside the SSCTs move into the SSCTs to find more affordable housing, this could have impacts of the demographic make up of these three towns with proportionally more of the population under 16. The impacts on schools would be from a more rapid reduction in rural populations impacting the total rolls in some schools outside the SSCTs, including those mentioned under scenario A and as well as the Frome area. With similar impacts as for Scenario A relating to greater need for school rationalisation and reorganisation, with increased spare capacity in more schools.

7.21 Fortunately many of the schools in the SSCTs have surplus places, particularly at primary level. In Bridgwater five primary schools in the urban area (part of the local education area of a total of 12) have surplus places, as do three of the five secondary schools (including technical college).

7.22 Taunton is currently predicted to have a quite rapid drop in secondary school pupil rolls by 2009. Therefore implementation of this scenario may help reverse this with local families moving to the town to find more affordable housing, and filling surplus spaces. It has been identified that North Taunton has a surplus of primary places, although this it is expected that existing proposed house building will result in these places being filled, therefore there is the potential that population increase may cause a deficit of primary spaces in this location. Throughout the rest of Taunton there is also a surplus of primary places which will mean population growth in the town can be accommodated under these scenarios. Taunton is also likely to have quite plentiful unfilled capacity in the secondary schools to accommodate additional growth.

7.23 Scenario D sees new housing projections solely accommodated outside of the SSCTs in the other towns of Somerset and the rural area. It is likely the majority of this growth will be directed to the Category B or identified market towns. For almost all of these areas shortfall in existing school rolls and a surplus of places is a bigger issue than deficit of places and oversubscription. Therefore additional growth directed to these areas will help counteract existing shrinking roll sizes at schools and should be able to be accommodated. Although there are some pockets of the County where there are already school place deficits, such as in Cheddar where the Fairfields secondary school has reached capacity or Crispin School in Street has little room for expansion. In Wellington education area the secondary school is also at capacity with a deficit of spaces and this matter will need to be addressed if there is further growth in this area.

7.24 This option would also see a potential reduction in populations in the SSCTs, with impacts on the existing schools. It is noted under Scenario C many primary schools in the SSCTs have many surplus places, and this reduction in population may exacerbate these issues. The result may be that it is necessary for some school re-organisation, however as very few of these schools are under 100 pupils there is not such a risk of schools having to shut due to lack of pupils, and therefore it should be possible to maintain local schools to serve the local need. The population decline may also help relieve pressure on the secondary schools, reducing the space deficit although this is also likely to be distorted due to parental choice.

7.25 The final issue relates to the review of the current method of calculating pupils per household. This is worked out as being for every 100 dwellings in the County there will be about 2.8 pupils per school year group. This approach will need to be reviewed in light of ONS housing prediction changes in order to reflect smaller household sizes and therefore fewer students per household. This will be necessary in order to get an accurate picture of the impacts of new housing and to ensure the educational facility needs are not overestimated.

8 Culture and Leisure – creating a lifestyle

8.1 The Community Strategy sets the goal for the cultural future for Somerset and the culture and leisure assets of the county, this is:

'Somerset 2025 will have a broad and stimulating range of cultural opportunities that enhance our quality of life in many ways. It is an exciting, vibrant county that enjoys the benefits of multi-cultural communities; values people of all ages and walks of life and is proud of its diverse landscape and historic legacy'.

Therefore this consideration of the relative effects of the scenarios considers whether there will be a movement towards, or away from, meeting these goals.

8.2 A Cultural Strategy for the County of Somerset was prepared for the county in 2002, and this sets out the current state of cultural facilities and assets in the county, and the future goals for provision. This sets out the existing situation for Somerset as being characterised by having no single town that acts as the main focus for the County's cultural life. The cultural strategy for the County notes that while the physical location of facilities in the county means that people will seek many of their cultural experiences in a SSCT or market town, they will not always choose the nearest one, choice will depend on personal preference and facilities available.

8.3 There are many cultural and leisure facilities provided throughout the county but detailed data gathering on these facilities was not undertaken as part of this exercise. However, background information gathering revealed a range identified a range of cultural and leisure facilities in the county, including theatres, cinemas, museums, libraries and leisure centres. Some types of facility such as theatres, museums and arts venues are focused in the SSCTs, but other Market Towns (Category B settlements) are also clearly a focus of various cultural facilities, such as Wells, Frome, Street, and Minehead. However, leisure centres are more widely found throughout the county, including in relatively small towns such as Castle Cary or Chard.

8.4 The other focus of cultural and leisure activity will be town and village halls, and other community meeting places, as the focus for local clubs and events. As noted in the Cultural Strategy peoples' own homes will also be the focus for many cultural and leisure activities, in particular watching television and films, listening to music, internet use and reading.

8.5 The landscape is also a key component to the culture and heritage of Somerset, and the Cultural Strategy identifies that when asked what people would like to preserve about Somerset, residents consider rural traditions, village life and the beauty of the countryside as the most important things.

8.6 In order to assess what the likely impacts may be of proceeding with any of the scenarios for housing development it is therefore necessary to define those matters that may be considered for each. Therefore the consideration of effects is limited to the impacts upon :

- open spaces for formal and informal recreation – open areas within towns and villages may be under increased pressure for development depending on the quantity of development that is required and land needs

- access to cultural and leisure facilities – proximity and availability, precise information on this matter may not be possible due to the uncertainties remaining in location of development and impacts are expressed in general terms.

8.7 In deciding what the relative impact of the scenarios would be on cultural and leisure facilities the following have to be kept in mind, and the key features of making changes to the housing requirement in Somerset:

- The greater the housing requirement the more land will be needed to accommodate this development. Where insufficient previously developed land is available this will have to be accommodated on greenfield with potential impacts on cultural **landscapes** of Somerset. The urban fringes of some towns are much more sensitive than others as illustrated in section 5. These impacts may also put pressure on open space within towns and villages for development, such as playing fields and other open space, and may impact on peoples' ability to meet their recreational needs locally.

- **Population growth** under all scenarios, with the exception of A, is likely to be more or less the same, and that envisaged originally by the RSS. Therefore it is the distribution of development under the scenarios will impact on the ability of the various settlements to support cultural facilities. Most investment in culture and leisure provision is targeted at the SSCTs and larger market towns as part of their service role for their rural hinterland. However, rural facilities and services often also require a catchment population of a particular level to make them viable although many rely on public sector funding to determine their viability. A key issue to consider here is also the changing demand for leisure and cultural facilities across Somerset – for example, the demand for multi-screen cinemas is only likely to be met at SSCTs due to population catchment areas but cinema-goers are prepared to travel the increased distances for a increased range, choice and different type of facility to the local provision. The converse approach to this is that local communities are seeking new ways to deliver cultural and leisure facilities to more rural areas – for example, the 'Flix in the Stix' programme delivers cinema productions at local venues.

- **Access** to cultural and leisure facilities - the main towns, including but not exclusive to SSCTs, will remain the focus of cultural and leisure facilities – both for services delivered by the private sector and also increasingly the public sector. However the drive towards centralisation of facilities due to the desire to increase the offer, make the most of limited funding opportunities and locate them in the most accessible locations is recognised. However, local cultural needs will continue to be met more locally in community centres, village halls, schools and other meeting places, although these are often delivered by volunteers or community groups whose survival is

predicated on not undermining the community spirit of our rural settlements.

- The distribution of new development will impact on the accessibility of these services, particularly where the increased housing numbers lead to the need to develop large areas of greenfield land on the periphery of existing settlements. In these areas it will be necessary to incorporate new facilities to encourage the development of local community identity, such as cultural facilities such as community centres and other meeting places even including local pubs and shops.

- The scenarios that allocate significant levels of development to smaller settlements have the propensity to impact on the settlement form and character, particularly where the growth would be proportionally large to existing settlement size. New development would also need to be of high design quality in all circumstances in order to ensure it enhances existing built character and cultural value of settlements. Both these issues will need to be addressed on a settlement by settlement basis through the preparation of Local Development Frameworks.

- There may be some positive implications on the historic environment, if competition for land means that increased land values makes possible the restoration of listed buildings and other derelict buildings in the county.

- Larger amounts of development in the county are likely to be able to secure a greater level of financial contributions from **planning obligations**. Where suitable this could be sought from all new development for cultural and leisure facilities. Although these obligations would primarily be used for meeting the needs of the new development, they may also be influential in bringing about overall improvements to the towns and villages. This could include improvements to local museums and libraries, development of new community centres and provision and maintenance of open space. Contributions would have to be secured at appropriate levels to ensure that there is a not a deficit in cultural and leisure facilities, from new housing.

8.8 In reference to the scenarios, Scenario A will result in a population reduction that is likely to particularly impact on the more rural areas. The imbalance in the population and age structure as a result of increasing house prices will result in major issues for community character and the viability of cultural facilities due to a reduced catchment population. As younger people priced out of the property market in the county there may be a loss of some local connections to the areas or undermining of traditions. An aging population will also resulting in a change in type and need of cultural facility to meet these needs.

8.9 The land requirements for accommodating development are least under this scenario.

8.10 Lower levels of planning obligations would be secured from lower levels of new housing but this may be offset by lower population growth and a lower demand for leisure and cultural facilities.

8.11 Some settlements, where regeneration objectives are sought from increased housing levels bringing new residents to the area, may lose out on these potential benefits. This may particularly be the case in towns outside the SSCTs, such as Shepton Mallet where cultural and leisure facilities are currently low.

8.12 Scenario C reinforces the role of SSCTs as the focus for cultural and leisure facilities in the county, although there will be a need to ensure cultural and leisure facilities continue to grow at a commensurate level to meet the needs of the growing population - particularly with significant investments proposed in Taunton. Limited expansion potential for Bridgwater and Yeovil due to environmental constraints may put pressure for open space within these towns to be used for housing. Expansion beyond the boundaries of the town may result in impacts on the cultural landscape and loss of character.

8.13 The rural area and towns outside the SSCTs will have housing growth at the levels set in RSS. This may result in a loss of community character of these areas, as housing becomes increasingly less affordable to people trying to buy their first home, these younger people and families may have to move to the next nearest SSCT to find affordable homes. Therefore there may be an impact on these areas in terms of the need and accessibility of community resources, due a possible aging population. The impacts for these areas are likely to be the same as for scenario A, this will include loss of regeneration benefits for towns not included in the three SSCTs.

8.14 Under scenario D there is a danger that this approach may reduce the proportion of the population contained in the SSCTs and this may have an impact on the provision of cultural and leisure facilities in the county, with a greater need for those outside of these main towns to travel resulting in increased trip generation. However, as the SSCTs are likely to remain the more accessible locations for all it may that their role as centres for these services remain. The level of housing development required for this approach may have a greater impact on the landscape character of the county than any of the other scenarios. As the increased growth would have to be accommodated in smaller towns and villages there may be less previously developed land for development, and therefore much of the growth will have to be through urban extensions. This may lead to impacts on areas of more sensitive landscape, and also on the setting of smaller towns and villages in the countryside.

8.15 The remaining scenarios (B, E and F) are likely to have similar impacts on culture and leisure provision with the likelihood that none of these scenarios will act against the objectives of the Cultural Strategy or the Community Strategy objective. Under these scenarios, the provision of services is likely to follow a business as usual approach by continuing to provide centralised services in the SSCTs and other larger towns, whilst continuing to support the community character and cultural value of the smaller communities. Impacts on the landscape may also be less severe as

development could be directed towards locations that would be suitable for higher density development, and on to previously developed sites.

9 Infrastructure, Access and Transport – Creating sustainable foundations

Utilities provision

9.1 The revised scenarios are based upon a reduction in household size and increased number of households rather than population growth. Reductions in household size will have a net increase on energy use regardless of total population as larger households have a tendency to use less energy per capita then smaller ones by pooling energy expenditure such as household appliances (particularly space heating). This is true for all types of energy and includes water use.

9.2 The effect of household growth on the provision of utilities is likely to require a much more detailed analysis at a site by site basis as part of LDF preparation. However, using common assumptions and knowledge of utilities provision it is possible for the utilities providers to make some basic statements on the likely effects of the various distributional scenarios for additional housing growth.

9.3 Two separate types of companies generally provide utilities in Somerset; privatised suppliers and generators, and distributor companies. The distribution of utilities at the local level, and to individual properties, is the responsibility of *statutory undertakers* whose pricing structures are heavily influenced by the various government utilities and telecoms regulators.

9.4 In Somerset the main statutory undertakers are;

- Western Power Distribution, (electricity distribution)
- Wales and West Utilities, (gas distribution)
- Bristol Water, (in some areas, water supply and distribution)
- Wessex Water, (sewerage and in most areas supply)
- BT, (conventional telecoms provider)
- Telewest, (local licence holder for digital cable telecoms).

9.5 Most of these companies are *obliged* to provide services to new homes and businesses under the various acts, regulatory arrangements, or their specific licenses.

9.6 In terms of telecoms providers, the key determinant of provision is the business case rather than the ability to supply connections. Informal advice suggests that the business case for additional development distributed through the various scenarios is likely to make a viable case for investment, subject to Local Planning Authorities following the most sustainable distribution of additional housing growth. The ability of rural businesses and households to access Broadband is a key consideration in the drive to support economic growth and take forward more flexible working patterns but this is not considered to be a major issue under any of the scenarios.

9.7 Gas and electricity supply is subject to demand management pressures through price and especially in the case of gas supply relies upon international supply chains which it is difficult to affect at the sub regional level.

9.8 The Gas Network consists of High Pressure mains which form the backbone to the national grid and Intermediate Pressure mains at the more local level. Wales and West utilities are the Local Network Operator (LNO) for gas in Somerset. The LNO take gas out of the higher pressure national network and distribute it at lower pressures to individual sites and homes within the region. The local operator maintains infrastructure between 3.5 Bar and 7.5 Bar.

9.9 Broadly speaking, most homes will on average use about 30kW of gas an hour. A very rough estimate of half again for schools, employment and other development can be factored in. With reducing household sizes its likely this figure will be disproportionately reduced per household as the single biggest consumption of gas in the home is space heating, which will use the same quantity of gas regardless of the number of people in the household. This issue effects gas supply more than other utilities.

9.10 Wales and West Utilities (WWU) currently factor in a demand growth rate of 3% per annum, and are constantly re-enforcing the network to satisfy demand and projected demand. All six of the scenarios are above this level of growth, but WWU believe this will not pose a significant issue which would threaten the viability of servicing any development. Without more site specific detail it is difficult for the LNO to form a more detailed opinion, however there are no significant specific issues that effect any of the SSCTs or Market Towns in the county.

9.11 Off-site reinforcement of the overall network is not normally paid for by the developer unless the development timescales are very small, or one very large development such as a small gas power station or large factory complex is constructed. However, detailed site connections to individual premises and homes are paid for by developers.

9.12 Western Power Distribution are the licensed local 'Distribution Network Operator' (DNO), in Bristol, Somerset and across the wider South West. They provide the local medium and lower voltage lines running to individual houses and commercial properties taking power from the national grid at sub stations.

9.13 The national grid uses very high voltage major lines with between 225kV and 400kV lines. The DNO handles lower voltages typically 11kV down to 400 and 230V cables and overhead power lines, providing individual buildings and premises with power.

9.14 Electricity distribution companies are statutory undertakers and are obliged to provide electricity to new developments. They charge a connection fee on a per dwelling basis which is set by the regulator (OFGEM). Developers are expected to pay a connection fee per dwelling of between £20 - £200 based upon a number of factors outlined in the company's; *"Statement of the Connection Charging Methodology and Basis of Charges"* note. The most significant cost to developers is the cost of medium substations, which can cost well over £1 million and be required for as few as 5000 houses.

9.15 Experience of this subject suggests that the electricity supply network rarely requires re-enforcement that precludes growth, the electricity supply

industry have detailed and complex tools to project electricity demand, and the high voltage network generally has capacity. This is confirmed in Western Power Distribution's detailed responses Mendip and Sedgemoor District Council's Core Strategy consultations.

9.16 Most of Somerset's water and drainage is supplied by Wessex Water under a single tier system, with the company acting as both water supplier and sewerage undertaker. Mendip and Sedgemoor are supplied with water from Bristol Water, a water supply only company, and Wessex Water as sewerage undertaker under a two tier system.

9.17 Water and sewerage companies have duties under the Water Industry Act 1991 (WIA91) to make connections to their networks. Charges vary depending on whether the supply is for domestic purposes or non-domestic purposes and are regulated by OFWAT. The end cost is likely to be a negotiated figure with around £230 per dwelling a common figure for smaller developments.

9.18 Bristol Water have responded in detail to Mendip's LDF Core Strategy issues and options documents. The company is confident that it will be able to provide water to new development, and remain within its water extraction license agreements with the Environment Agency. There are some very specific local issues in villages which can be mitigated relatively easily, and which the company will deal with through its planned network re-enforcement programme.

9.19 Wessex Water will provide further information regarding water supply and sewerage treatment for the three strategic and category B settlements across the county following further research and modelling. However, at this stage Wessex Water are confident they will be able to supply water to new development in Somerset and stay within their Environment Agency extraction agreements, and that there are no major bottlenecks or issues that may preclude development.

9.20 Initial issues raised reflect that the smaller household sizes will result in only a small reduction in use per household, but water metering in new housing is leading to reduced demand per person generally. It is generally more economic to pool resources in central locations (ie. through strategic urban extensions) rather than spread infrastructure across a wider area but at this strategic level there is no anticipation of significant constraints to development in any named location across the county.

9.21 The investigations regarding infrastructure to date show there are no significant issues arising at the strategic level that this study considers. However, local planning authorities will be required to work closely with infrastructure providers to address more localised issues – particularly in preparation of their Core Strategies.

9.22 Although not a determining factor for the Regional Spatial Strategy, the cost of infrastructure provision is important in assessing the scenarios against each other. The utilities regulators set standard connection charges which are borne by the developer however large pieces of infrastructure relating to specific developments may be paid for in part or entirely by either the developer or statutory undertaker.

9.23 The utilities regulators expect that in most cases the cost of providing wider infrastructure to new development will be recouped through normal service charges. However, development on a strategic scale (eg. urban extension), the development will be expected to meet a proportion of the cost of the provision. If housing development is built out on a more incremental basis or in smaller schemes, it is likely the overall cost to the developer will be much reduced.

Transport infrastructure

9.24 The implications of the various scenarios for accommodating additional household growth that arise of the ONS household projections will have differing impacts upon the requirements for transport infrastructure across the county. Given the non-site specific nature of the scenarios, it is difficult to fully assess these impacts fully however the following paragraphs begin to set out areas where there maybe significant issues arising.

9.25 The transport model to support the second review of the Taunton Transport Strategy is currently being developed. The model will test the existing Regional Spatial Strategy housing distribution and the impacts of the additional housing growth arising from the revised ONS projections. However, in the short term the initial results of the modelling that we used to support the Taunton Sub-Area Study provide an insight into the likely impacts and 'pinch-points' in the road network :

- Significant increases in traffic congestion due to increased traffic. The traffic demand is forecast to increase by 65-75% by 2026 compared to 2001. However this would lead to trip suppression in the peak hours resulting in retiming of trips, change of mode, change of destination or some trips not taking place. Once trip suppression is accounted for traffic growth is around 45%.
- Average peak hour speeds in the Taunton area are likely to reduce from around 60kph to 40kph.
- In the light of the overcapacity queuing time the results suggest congestion may increase by a factor of 15.
- The forecasts also suggest that future congestion and average speeds in the interpeak period, which broadly represent off peak conditions between the hours of 6am to 8pm in 2026, will be similar to current peak hour conditions across the network.

9.26 The impacts of the existing Regional Spatial Housing Allocations on the M5 show that there are forecast to be problems associated with junction 23 arising from a lack of capacity on the local road network and traffic blocking back onto the M5. Significant delays would also occur at the end of the northbound on-slip at junction 25 (at the merge with main line traffic), and queues would block back through junction 25 and into Toneway. The reverse is also forecast to occur with queues at the Creech Castle junction blocking back to junction 25. The impacts at junctions 24 and 26 would be slight with the ratio of flow to capacity being in the region of 75%.

9.27 On the basis of this assessment, the draft RSS development strategy would have little impact on the M5 motorway, except at Junction 23 (due to constraints in the local network), and Junction 25 (where the northbound

on-slip merge may cause problems). The main threat to through movements on the M5 would occur at Junction 23, where queues may block back onto the motorway without improvements to the local road network.

9.28 The results of the earlier modelling should be treated with caution at this stage as they do not include explicit modelling of development in Bridgwater and there are significant changes and updates arising as a result of the draft RSS. Additionally, the transport models use a standard trip generator per dwelling and as the number of persons per household falls, there will be an impact on the number of likely trips associated with the dwelling. This issue is currently being considered at a national level to address the implications of the revised household projections across the country.

9.29 In addition to the working currently being taken forward to review the Taunton Transport Strategy, a simple modelling exercise was undertaken by Somerset County Council to understand the impact of the additional housing on local road networks. A 2001 census travel to work data was used to produce an Origin-Destination matrix and the number of trips generated from the allocations were derived from TRICS. These trips were then allocated pro-rata to the matrix and a basic road network of 65 links connecting settlements was produced. Finally trips from the matrix were assigned manually to the network.

9.30 The methodology makes the assumptions that journey to work trips are representative of all other travel and all travel between settlements only has one route option. Although these assumptions could be challenged, the methodology does allow for a simplistic assessment which identifies the likely critical areas and considers the relative impacts between the scenarios.

9.31 The table overleaf sets out the additional traffic loading trips per day per year in line with yearly housing forecasts for a 10 year period 2006 to 2016. For example, for the A38 south of Walford Cross (link 9) the growth over 10 years from scenario A would be 3140 vehicles per 24 hour day. This approximates to about 314 vehicles/hr in the peaks. The difference between scenarios A and C on this link therefore accumulates to nearly 1000 vehicle/per peak hour over 10 years.

Link	Road Link Description	Scenario A	Scenario B	Scenario C	Scenario D	Scenario E	Scenario F
9	A38 s of Walford Cross	314	389	413	321	348	404
10	A38 s of Monkton Elm	309	383	407	317	341	396
11	A38 n of Wellington	227	279	256	309	286	279
17	A358 Henlade	160	195	191	199	200	200
18	A358 n of A303	157	191	187	196	197	197
19	A358 Donyatt	115	140	121	171	164	145
31	A303 w of Podimore r/bout	89	108	115	95	98	113
34	A3088 Cartgate link	47	57	63	47	51	59
35	A37 n of Yeovil (A303)	89	108	115	95	98	113
36	A37 s of Shepton Mallet	55	67	72	56	59	68
37	A37 n of Shepton Mallet	75	91	91	89	85	96
39	A39 Walton	74	91	90	88	86	98
40	A39 Wells – Shepton Mallet	64	79	66	97	82	91
43	A361 e of Shepton Mallet	63	77	71	84	77	87
48	A30 w of Crewkerne	67	81	71	96	94	85
49	A30 w of Yeovil	91	110	103	118	118	115

Figure 15 : Additional traffic loading trips per day per year

9.32 Generally, the greatest impact arising from the additional housing is limited to a small number of critical links radiating from Taunton or Yeovil and a small number of other links such as parts of the A361 and A37.

9.33 The most critical links are those of the A38 on the corridor between Wellington and Bridgwater. This is the area with the greatest potential for modal change from the car and this is being modelled in more detail through the review of the Taunton Transport Strategy. On the basis of this preliminary assessment, it is clear that with regard to the A38 corridor:

- Scenarios C and F would have a significantly greater impact than scenarios A or D north of Taunton.
- Scenario D has the greatest impact of all scenarios south of Taunton.
- Overall Scenario A, the RSS option would have the least impact on the A38

9.34 The table overleaf provides a summary of the likely relative impacts of the various scenarios upon the Somerset road network. Further background data from the transport modelling also provided in Appendix D.

Scenario	Likely Impacts
Scenario A	Least overall impact on all major links – least impact on A38 corridor
Scenario B	Relatively high impact on A37/A39 and northern radial routes out of Yeovil
Scenario C	High impact on A38 north of Taunton – moderate impact A38 south of Taunton.
Scenario D	Relatively low impact on A38 north of Taunton Highest impact south on A38 south of Taunton
Scenario E	Relatively high impact on A38/A39
Scenario F	Relatively high impact on A39 and road network near Shepton Mallet High impact on northern radial routes out of Yeovil

Figure 16 : Generalised assessment of relative impacts on critical links

9.35 In all scenarios' the emphasis is still upon concentrating development within the Strategically Significant Cities and Towns and meeting the RSS objectives of reducing trip generation by private car. This objective emphasises the importance of compact towns and cities, where development densities encourage use of other forms of transport than the provide car and distances of services and employment can potentially be reached by walking or cycling. Additionally, in larger settlements growth can potentially lead to better public transport options through economies of scale.

9.36 Other significant issues which will influence the demand for movement by motorised modes will be the emerging consensus, at least at a national level, on CO2 emissions. The need for some form of carbon rationing or trading seems inevitable to ensure that the costs of carbon use, which to date have been externalised, are understood by the travelling public. This is the principle that lies behind the concept of road user charging, which may also be implemented in the sub-region in the period up to 2026. On this basis the significant changes in journey times and congestion which have been forecasted by the transport models may not materialise to their full extent. However, given the significance of transport in people's daily lives, and in particular the role of transport in the economy, a prudent approach seems reasonable.

9.37 A critical area for investment for the County Council is the Smarter Choices agenda. With the infrastructure proposals in Taunton only likely to reduce congestion by less than 10%, the need to address daily travel habits and particularly to reduce the use of the car for short distance journeys is fundamental. The willingness of the travelling public to change will be heavily dependant on the availability of alternatives such as public transport. To this end the revised transport strategy for Taunton will include a high speed, high capacity service along the A38 corridor. Both the Smarter Choices agenda and public transport are likely to require increased levels of revenue funding, at least in the short term.

9.38 The focus of infrastructure funding is currently aimed at provision with SSCTs. It is essential that the investment criteria for future transport proposals (both hard infrastructure and public transport) are matched to

the spatial strategy and areas that are accommodating additional housing growth.

Accessibility planning

9.39 Accessibility has become firmly established as a mainstream policy goal in achieving better social inclusion by ensuring that people (individuals and communities) have access to the opportunities that give the greatest impact on life chances. Such opportunities may include healthcare (hospitals, surgeries and dentists), education (colleges and schools), employment (jobs), affordable healthy food, leisure and culture.

9.40 In March 2006, Somerset County Council submitted its accessibility strategy as part of LTP2. This following paragraphs present evidence from the LTP2 strategic accessibility assessment to help inform the assessment of the housing growth scenarios. More specifically, this section discusses :

1) Describes the broad levels of accessibility within each of the key district settlements as determined by work on the recent LTP2 submission;
2) Highlights the broad implications of accessibility levels for supporting new development including housing; and
3) Provides an overview of the potential impacts of each scenario described above for levels of multi modal accessibility to key services such as health education and employment.

Existing accessibility issues

Strategically Significant Cities and Towns (SSCTs)

9.41 Despite all of the SSCTs being served by a range of conventional and demand responsive transport services, there are still pockets within these towns that can be regarded as having poor levels of accessibility. The accessibility strategy identifies a number of existing accessibility issues in each of the SSCTs, these are described as follows.

Bridgwater

9.42 Initial strategic accessibility mapping for Somerset suggests that transport provision is less likely to be a barrier to accessing key services in Bridgwater than in its surrounding rural areas which are less well served by mainstream public transport services. Long travel times to hospitals, post 16 education and evening classes were identified as key issues, particularly in the rural surrounds of Bridgwater. In addition, long bus journey times to hospitals in Taunton and Weston-super-mare are likely to be an issue, even for those living in the urban parts of Bridgwater. Whilst Bridgwater has strategic transport links with Taunton via the Quality Bus Partnership Route 21 and rail, its transport connections with other parts of Somerset are more limited e.g. lack of direct/regular routes between Bridgwater and towns in the eastern areas of Somerset.

9.43 Urban social deprivation (HSNAG (2004)/IMD (2004) indicators), low car ownership, poor levels of educational achievement and high benefit dependency (14.4% of unemployed are aged under 19 years) were regarded as just some of the underlying causes of social exclusion and poor accessibility in the Bridgwater area. An accessibility action plan is currently being developed for Bridgwater to ensure that future accessibility to key

services is improved by not just improving transport services but also by improving local service provision.

Taunton

9.44 Despite Taunton being a key provider of services in the county, there are still communities and geographical areas that are vulnerable to exclusion from key services and opportunities. Where residents live outside of the town or away from the main transport corridors, levels of accessibility may be reduced for some residents as a consequence of increased travel costs and journey times and the reduced availability of local services. There are a number of issues affecting Taunton in terms of accessibility and social exclusion, these include:

- Rural/peripheral areas of Taunton suffer from poor access (long public transport journey times) to adult evening education and employment (particularly during unsociable working hours) due to limited public transport availability;
- Pockets of high social deprivation in terms of low car ownership, health and multiple deprivation (IMD);
- 30% of residents living in the peripheral areas of Taunton have to travel further than an hour or have no bus service at all to their nearest general hospital;
- There is an ongoing need to facilitate journeys made between Taunton and other major market towns in Somerset such as Bridgwater and Yeovil;
- A need to improve the connectivity of services with housing estates by improving walking and cycling routes;
- A need to manage traffic growth by improving accessibility to key services using sustainable transport modes;
- A general need to improve information regarding the availability of public transport and key services such as healthcare and education; and
- A need to further develop transport solutions that help form the concept of a seamless journey.

9.45 In comparison to other towns within Somerset, Taunton has relatively good connections with other major settlements as it forms a major transport hub in the county. Taunton is connected to Minehead, Bridgwater and Yeovil by quality bus partnership (QBP) routes. Its transport links with Mendip and South Somerset are likely to be further enhanced through additional QBP routes over the next 10 years. SLINKY services (demand responsive transport) also provide an essential form of transport for those without access to the core public transport network.

Yeovil

9.46 As is the case in Taunton and Bridgwater, Yeovil is a major hub for key services and transport in Somerset. The town has rail links with Exeter and London, and is linked to Taunton, Street, Glastonbury and Wells via QBP routes. Accessibility mapping produced to date shows the following key accessibility issues:

- 30% of residents currently living on the fringe of Yeovil have to travel longer than 30 minutes or have no conventional bus service to their nearest supermarket;

- 17% of residents currently living on the fringe of Yeovil have to travel longer than 30 minutes or have no conventional bus service to their nearest GP;
- Approximately 1 in 6 residents living on the rural fringe of Yeovil have to travel longer than one hour to their 'nearest' employment centre;
- Access to adult learning in Yeovil is problematic for those living in deep rural areas outside of Yeovil.

9.47 Improving access to employment and post 16 education been identified as the greatest priority within Yeovil. Socio-demographic data relating to Yeovil indicates that part of the town suffers from high social deprivation, poor health amongst the elderly and young, benefit dependency and low car ownership. Whilst accessibility may be good within the centre of Yeovil there is a need to ensure that any future development is supported by appropriate transport improvements that ensure access for those residing on the periphery of the town or away from the core bus network.

Market Towns (Possible 'Category B'settlements)

9.48 A summary of the more specific accessibility trends identified in LTP2 for each of the Category B towns is provided below:

Taunton Deane (Wellington and Wiveliscombe)

9.49
- Wellington North Ward has high levels of elderly and child poverty (HSNAG, 2004);
- Access to Taunton Hospital from Wellington by public transport with a majority of the population being able to access the hospital within 45 minutes;
- Access to the main service centres is best along key transport corridors linking Wellington and Wiveliscombe with Taunton (A38 and B3227 respectively);
- Access to adult learning from Wiveliscombe was identified as an area of concern

South Somerset (Crewkerne, Wincanton, Chard and Ilminster)

9.50
- Public transport journey times from the urban areas of Chard, Ilminster and Wincanton to the nearest general hospital (Taunton or Yeovil) typically vary from 45 minutes in central areas to 90 minutes in more peripheral areas;
- Community Hospitals are a crucial provider of local health care facilities in these small towns;
- Anecdotal evidence suggests that access to employment for the long term unemployed in Wincanton and rural areas around Ilminster and Chard is problematic;
- Of the four category B towns in South Somerset, Chard appears to have the best levels of public transport accessibility;
- Public transport availability for students living on the periphery of Chard and Crewekerne requires improvement (although this may have partially been tackled through a new SLINKY service);

West Somerset (Minehead and Williton)

9.51
- There are pockets of high child and elderly poverty in both Minehead and Williton;

- Public transport journey times from Minehead to Taunton and Somerset hospital exceed 60 minutes, whilst times from the centre of Williton vary from 30 minutes to 60 minutes.
- Local community hospital facilities are a crucial provider of local healthcare facilities in West Somerset;
- Anecdotal evidence from Job Centre Plus suggests that the long term unemployed in Williton have difficulties in accessing employment due to transport difficulties;
- Accessibility mapping shows the best levels of public transport accessibility are typically focused along the A358 corridor;
- There is a general need to improve access to education for residents of West Somerset in Taunton, Minehead and Bridgwater;

Sedgemoor (Burnham on Sea, Highbridge and Cheddar)

9.52
- Highbridge, Cheddar and their rural surrounds were identified as areas with poor accessibility to hospitals with journey times by public transport exceeding 60 minutes;
- Anecdotal evidence from Job Centre Plus suggests that the long term unemployed in Cheddar have difficulties accessing employment due to transport difficulties;
- Cheddar has relatively good public transport links with Wells in Mendip;
- Highbridge is served by and hourly rail service between Taunton and Bristol and therefore also has rail links with Bridgwater. It therefore has an important role to play in providing access to employment opportunities;

Mendip (Glastonbury, Wells, Shepton Mallet, Frome and Street)

9.53
- There are pockets of high health and social need in all of the above Category B settlements;
- With the exception of Frome, journey times to a general hospital from these Mendip towns by public transport exceed 60 minutes;
- Anecdotal evidence from Job Centre Plus suggests that the long term unemployed in Street, Glastonbury and Shepton Mallet have difficulties accessing employment due to transport difficulties;
- Claimant Count data supplied by Job Centre Plus shows that the number of benefit claimants is higher in Frome and Wells in comparison to other category B towns;
- Whilst accessibility by public transport, walking and cycling to local job opportunities may be good for residents living in all of these settlements;
- Work based learning curriculum's are restricted in the Mendip area and hence around 33% of students were found to be commuting to colleges outside of the county; and
- Evidence from the Somerset Strategic Area Review of 14-19 Education suggests that students have difficulties accessing educational opportunities at Strode and Frome.

Summary

9.54 The Somerset Accessibility Strategy identifies a number of broad accessibility issues of relevance to the county's 'category B' towns and SSCTs, these include:

- Levels of accessibility to key services are typically best in the centre of the major settlements and along key public transport corridors;

- Poor transport availability in rural areas and on the periphery of Market towns away from the core bus network makes accessing key health, education and employment service by public transport difficult;
- A general need for better interchange within town centres to access key services by public transport;
- There is evidence to suggest that some of the key market towns are suffering from economic decline;
- Lack of existing mainstream public transport to cater for travel during unsociable hours e.g. late evenings and early mornings can restrict access to health care appointments, evening education and employment;
- Reduced travel horizons amongst those living in deprived urban areas are often more limited hence job opportunities need to be brought closer to the individual in order to reduce the need to travel;
- A need to provide more localised learning facilities in order to encourage participation in further education (A Learning and Skills Council survey (April 2004)); and
- Public transport affordability, availability and reliability require improvement.

Implications of housing distribution scenarios

9.55 The remainder of this paper sets out the broad implications of each development scenario upon accessibility to key services.

Scenario A

9.56 The existing RSS specifies a major role for SSCTs and key market towns as the primary locations for future new housing in Somerset. Such an approach seems reasonable from an accessibility perspective given that accessibility mapping in LTP2 would suggest that these towns have the best levels of transport and service provision. Scenario A would minimise the pressure placed on greenfield sites and therefore support accessibility agenda by ensuring that where possible new housing is located in more accessible brownfield locations.

Scenario B

9.57 The accessibility implications of Scenario B would also broadly apply to those identified in Scenario A. Furthermore Scenario B is likely to be more dependent upon securing additional transport infrastructure and key service improvements at a rate in line with housing growth. Consequently such a scenario would rely heavily upon the receipt of developer contributions and other sources of funding to deliver the necessary transport and service improvements needed to support additional housing.

9.58 A faster rate of housing growth as suggested through this scenario may help to support the case for earlier transport or service infrastructure improvements (and consequently improve accessibility) given that the critical mass needed to make services viable will be achieved over a shorter period of time. In the short term, pressure to provide new housing quickly may result in developers using brownfield sites as a preference to greenfield sites given that they can be implemented at a quicker rate.

Scenario C

9.59 In principal, focussing housing in the SSCTs seems appropriate given that these towns offer the best levels of access to key services (healthcare, education and employment) and transport infrastructure. By focussing housing in the SSCTs, access to key services could be maximised or improved as new developments could take advantage of existing infrastructure and also contribute towards making improvements through financial contributions from developers. Often new service provision is dependent upon a critical demand and therefore by focussing additional housing (and hence additional demand) in the SSCTs a stronger case for improved services may be derived. New housing in the SSCTs will also contribute towards regeneration objectives in Taunton, Yeovil and Bridgwater by encouraging inward investment by businesses. Better service provision in these main settlements will improve the business case for new transport routes (QBPs) between the SSCTs and other category B towns.

9.60 Whilst Scenario C offers some benefits in terms of accessibility, it could have a number of more negative implications, these can be summarised as follows:

- The focus of housing development opportunities in SSCTs is unlikely to support the desired regeneration and economic viability of 'category B' market towns (a key objective of the LTP2 accessibility strategy);
- Concentrating all additional housing in the SSCTs is unlikely to contribute towards improving accessibility for residents in rural Somerset;
- Housing development is likely to place strain on existing transport, educational, health and commercial infrastructure in these towns at a time when there is an ongoing need to increase the capacity of such services in other market towns;
- Whilst brownfield sites offer a more sustainable solution to new housing they are unlikely to cater for projected housing growth. Consequently future housing is likely to be squeezed outwards through urban extensions. Ensuring accessibility from such developments will require ongoing improvements to the transport system and local services via developer contributions;

9.61 Overall a wider dispersal of new housing (across all new Category B towns and SSCTs) would be more beneficial in accessibility terms given that it would contribute towards developing economically sustainable market towns and consequently reduce the distance that people living outside the SSCTs have to travel to access good quality key services. The focussing of development in SSCTs alone will potentially increase the inequalities of accessibility between residents living in rural and urban Somerset. Unless new housing in the SSCTs is supported by significant investment in key services, focussing housing solely in SSCTs is unlikely to be sustainable in accessibility terms.

Scenario D

9.62 The accessibility strategy highlights poor access to housing as a key issue in rural Somerset, consequently the provision of new housing in rural market towns would help to alleviate such an issue. The wider dispersal of housing across Somerset is also likely to offer some benefits to accessibility in terms of providing the critical mass required to establish new services such as

GP's, schools and supermarkets. Demand pressures on services in the SSCTs will also be reduced by spreading future demand across the county.

9.63 Such a housing strategy is dependent upon on increased economic development of the market towns; if housing growth is not accompanied by new employment opportunities then long distance commuting may increase as new residents have to travel further for work. Growth of rural market towns may also result in the establishment of improved public transport links between key settlements given that people in specialist employment fields may still need to travel to centres such as Bristol, Taunton, Yeovil and Bridgwater. An increased skills base in category B towns such as Street, Glastonbury and Frome may help attract new employers and hence slow or reverse the decline of these important market towns by improving their functionality as centres of employment.

Scenario's E and F

9.64 Scenario's E or F would maintain a future role for both Category B towns and SSCTs for accommodating future housing growth. Such a strategy is appropriate for a number of reasons and is best placed to:

- Ensure that future housing provision compliments the aims of the accessibility strategy including reducing urban and rural social exclusion by enhancing access to employment, health and education opportunities 'across' the county;
- Direct possible new housing development towards Brownfield site locations across 'all towns' that are supported by good quality existing sustainable transport linkages to enhance accessibility to key services by modes other than the private car;
- Encourage the development of transport improvements across the county by creating the necessary critical demand needed for new transport services to be commercially sustainable;
- Ensure sustainable use of greenfield sites by first identifying those sites that are served by appropriate transport facilities and ensure that developers make contributions to new transport and key service infrastructure where necessary to ensure new residents have access to the services they most need;
- Distribute new housing in a balanced way such that the scale of future housing provision is in keeping with the overall nature of the settlement in which it is located;
- Utilise funding opportunities for transport and accessibility improvements where they support wider regeneration schemes or objectives;
- Build a business case for new services such as schools, healthcare facilities and retail/commercial services particularly where capacity is currently limited or not yet provided by ensuring a critical demand is generated;
- Distribute housing outside of the SSCTs in order to retain the labour force and improve the economic sustainability of market towns. Hence maintaining service provision across the county which enhances accessibility at the local level;
- Ensure that key services such as schools and hospitals have sufficient capacity to cater for new demand generated by additional housing; and

- Permit the small amount of housing that is necessary in rural areas to retain the population, stem the decline of rural services and promote rural economic growth in the market towns.

10 Our Communities – Sharing with each other a sense of belonging

Affordable housing

10.1 Securing sufficient appropriate and affordable housing is a key goal of the Somerset Community Strategy. The Somerset Housing Market Assessment Countywide Report, carried out by ARK consultancy and completed in January 2006, concluded a need for just over 2,550 affordable homes per annum across the county. Based upon projections, for the period of 2006 - 2011 the maximum number of additional affordable dwellings would be 705 per annum, leaving a shortfall of 1,466 per annum.

10.2 In addition to this the ARK study concluded that for four of the five Somerset districts, the affordable housing requirement exceeds the total projected supply of new housing. For the remaining area, Taunton Deane, the requirement is 66% of total supply.

10.3 The issue disproportionately impacts upon the younger and working locally population due to lower income levels. The Joseph Rowntree Foundation (2006) has carried out research into the specific difficulties younger working households face (aged 20 - 39). The table below illustrates the average housing cost against average household income.

District	House price to income ratio
Mendip	4.78
Sedgemoor	4.39
South Somerset	4.83
Taunton Deane	5.32
West Somerset	6.17
South West Region	4.88

Figure 17 : Affordability of Housing

10.4 The implications of the scenarios on affordable housing have been noted throughout the assessment as they reflect other concerns – for example, access to services or retention of the labour market. However, it is worth restating the likely impacts in summary.

10.5 Scenario A restricts the supply of housing and increases the mis-match between likely demand and available units. Constraining the supply is likely to increase the cost of housing, impacting disproportionately on the young and working locally population. This may be off-set to some extent by higher potential contributions that may be sought from the housing industry.

10.6 The affordability of housing is likely to exaggerate the impact of an ageing population as generally those in the higher age bands have greater ability to purchase a home. This leads also to social impacts in communities – for example, type of leisure and recreational provision, education, healthcare provision or community spirit. Those with greatest incomes are also more likely to travel from rural areas to SSCTs to access higher skilled employed thus adding to the dormitory status that some our settlements are now facing.

10.7 The remaining scenarios focus on a similar total number of new homes across the County but have a greater or lesser focus on the SSCTs. Scenarios B and C have a greater predominance on SSCTs therefore rural areas will face similar affordable housing issues to discussed in Scenario A. Whereas, Scenario D is likely to tip the balance too far in favour of rural areas and may restrict the ability of SSCTs to secure their affordable housing targets.

10.8 The scenarios illustrate there is a fine balance to tread between focusing growth on the SSCTs to achieve the RSS objectives whilst enabling rural areas to retain enough housing allocations to restrict the increase in housing costs that undermine the character, viability and availability of labour force. It is envisaged that Scenarios E and F are best placed to achieve this.

Community links

10.9 The Somerset Community Strategy aims to ensure that residents feel a sense of belonging to their community. 70% of the additional household growth is derived from the existing population and those people are likely to have existing ties into their community – either family, social, cultural or employment. Given the strength of existing community links, there should also be consideration to retaining these links as part of promoting viable and sustainable communities, when assessing the most appropriate scenarios to accommodate additional housing growth. Scenarios E and F reflect the derivation of household growth and the ability to retain those community links whilst the remaining Scenarios would not support this Community Strategy objective.

11 Market and Deliverability Issues

A market summary

11.1 The market for residential development land across Somerset area is in high demand, because of buoyant and continuing demand for all types of housing in all areas of the County. This high demand is exaggerated by a short supply of immediately available land with permission for housing. Discussions with national and regional house builders have indicated that the majority are actively securing development land for housing across the County to meet short and longer-term demand.

11.2 High demand is reflected by relatively high house prices, which support high land values. The greatest demand and highest prices are achieved in the M5 corridor, particularly at attractive settlements close to the larger towns and cities. Thus the highest house and land prices are around Wells, which is both environmentally appealing, easily accessible to the M5 motorway, and within easy reach of the Greater Bristol area for employment opportunities. Here, house prices for new homes achieve about £2500/sq.m. supporting 'clean' land values for open market housing of about £4.2m per hectare.

11.3 The market is strong for all house types across the County, with demand for flats being stronger in town centres particularly the larger towns like Taunton and Yeovil, whilst suburban developments have more evenly spread demand for family housing in 2 - 5 bed units in traditional 2-storey construction, as well as 3-storey town houses.

11.4 A summary of new house prices and 'clean' land values for open market housing that can be expected in Somerset is set out below:

Settlement	New home selling price £/sq.m.	Land value £ million/ha
Wells	2500	4.2
Taunton	2400	4.0
Wellington, Yeovil	2250	3.5
Frome, Glastonbury, Street	2150	3.2
Bridgwater, Shepton Mallet, Chard, Crewkerne	2050	3.0
Minehead, West Somerset	1850	2.5

Figure 18 : Summary of Somerset Housing Market

Delivering the housing requirement

11.5 The planning process generally considers the most appropriate way to accommodate additional growth rather than the delivery and implementation tools required to ensure the level of housing that is required is built out on the ground. Traditionally, the South West region has been under-delivering new housing completions and it is considered that this gap between demand and supply may have contributed to the affordable housing issues that we currently face.

11.6 The shift from the level of housing that is currently being delivered to those within the draft Regional Spatial Strategy requires a step-change in provision in a number of key areas. This step-change impacts most notably

upon Taunton which requires uplift in completions from the current level of 320 per annum to the draft RSS figure of 700 dwellings per annum before we even consider the impact of the revised ONS projections.

11.7 Detailed deliverability issues for the level of housing considered viable in Taunton were considered for the Taunton Sub Area Study. The study concluded that delivery options to implement 900 dwellings per annum post 2011 would require 13 – 16 developers simultaneously on-site – which is the maximum the development industry believe possible, but does not allow for any economic recessions, delays caused by land assembly, legal processes, provision of infrastructure etc. The report concluded this level of development not to be feasible.

11.8 If we equate this to the scenarios currently being examined as a result of the ONS Household projections, this would conclude that the level of housing attributed to Taunton under Scenario C (931 dwellings per annum) and Scenario E (circa 920 dwellings per annum) would not be deliverable due to the capacity of the market.

11.9 There is a further issue in the likely timings in the delivery of housing. This is particularly because this figure is an annualised average over the 20 year period but delivery rates over the next 3 – 5 years will fall below the RSS delivery rate, requiring the market to play catch-up over the following years.

11.10 The levels of housing attributed to Mendip under Scenario D are unlikely to be feasibly delivered by the market, given the existing levels of demand in the area and the shift from current levels of provision to the required build rate.

11.11 In addition, the house builders workshop concluded that Scenario A would not be viable given the forecast level of housing demand. It would result in a scarcity of housing supply which would force house prices to rise considerably, constraining economic growth and furthering concern around affordable housing. Increased expectations for affordable housing delivery through the planning system could constrain housing delivery further.

11.12 It was considered that on a general level, the other scenarios could be feasibly delivered by the market, subject to consideration of :

a) land assembly
b) infrastructure provision
c) lead-in time to delivery
d) resources within public sector to enable and support implementation of schemes

11.13 The Taunton Sub Area Study and the developers workshop held to support this study highlighted the importance of the number sites being developed at any one time – both in terms of smaller sites being easier to develop and a wider range of sites offering the market a number of different products therefore increasing the likelihood of higher completion rates.

11.14 This issue offers a significant conundrum for local Planning Authorities who are taking forward comprehensive approaches to large scale development proposals – such as town centre regeneration strategies or large scale urban

extensions. 'Proper' planning to deliver sustainable communities requires the larger scale developments to be taken forward comprehensively and to address the community and infrastructure needs of the resident population. However, it is these sites that are currently not delivering the required level of housing completions due to a series of complex issues related to resources, investment decisions of house builders and the potential for reduced levels of profitability due to significant infrastructure costs.

11.15 It is particularly important that this issue is addressed at either sub-regional or regional level, as a small number of housebuilders dominate the Strategic Housing Land Market on a region wide basis. With a restricted number of housing sites being taken forward each year, it becomes a competition between urban extensions and potentially which Local Planning Authorities are requesting less contributions towards infrastructure provision.

Housing size matching household size ?

11.16 The house builder workshop discussed whether the participants had witnessed trends in changing demand for properties to reflect changing household structures. The participants stated that there were an number of trends :

- A reduction in the demand for 4 bedroom houses but increasing demand for 3 bedroom properties, which in part seems to be a reflection of the stability of couples and the likelihood of parents separating but both wanting to retain a house where the children can live or spend time.
- A general increase and strong market for 2 and 3 bedroom properties.
- A continuing demand for 1 bedroom properties, primarily aimed at first-time buyers whose options are limited by affordability or investors.

11.17 There was a general consensus that whilst trends were being witnessed across the industry at a national level, the demand for housing size does not reflect household size and this in more likely to be determined by affordability issues. However, developers recognised there is likely to be a finite proportion of the population who would currently be prepared to live at higher densities (particularly within SSCTs) and a cultural shift is required to influence this further.

Part C – Assessing the Implications and a Preferred Approach

12 Summary of Implications

12.1 The aim of this section is to summarise the implications of scenario and make recommendations regarding which scenarios could feasibly be delivered in Somerset. In the first instance it considers the extreme retention, concentration and dispersal options for the additional households – Scenario A, Scenario C and Scenario D.

Scenario A - Retaining the scale of housing in the draft RSS (and assessing the implications of a reduced population in 2026)

12.2 This scenario considers the implications of not accommodating the anticipated increase in household requirement and the knock-on impacts of the reducing population. The difference in population under scenario A compared to the alternative scenarios anticipates a lower population growth of between 29,000 less people Scenario D) and 20,000 less people (Scenario C) under Scenario A. Based upon the age breakdowns for anticipated population age bands in 2026, this equates to lower population under (Scenario C for comparison purposes) of 4060 school age children (primary and secondary) or 13,340 economically active people.

12.3 Market demand for housing is likely to continue therefore the cost of housing is likely to rise at a steeper rate than the national average due to a market perceived lack of supply. The increase in housing cost will disproportionately impact upon local residents, particularly those in the younger (and therefore economically active) age groups adding to the affordable housing issues that the county faces. With higher land prices and housing costs, affordable housing targets and thresholds could be increased to mitigate against the impact upon affordable housing. However, the house building industry have warned this is unlikely to be a feasible solution.

12.4 Restricting the number of households that the RSS makes provision for is likely to also impact upon the economy of the county and mean that local business could struggle to recruit their workforce locally – impacting on both our objectives of reaching the County's economic potential and minimising the need to travel. This is a particular issue in our market towns where although economic growth is slower, in absolute terms, its importance to the vitality of our rural areas cannot be underestimated.

12.5 The affordability of housing is likely to exaggerate the impact of an ageing population as generally those in the higher age bands have greater ability to purchase a home. This leads to social impacts in communities – for example, type of leisure and recreational provision, education, healthcare provision or community spirit. Those with greatest incomes are also more likely to travel from rural areas to SSCTs to access higher skilled employed thus adding to the dormitory status that some our settlements are now facing.

12.6 The implications of a lower population leads to issues around service delivery – both within the private and public services. This is particularly the case in rural areas where services rely on a catchment population to ensure their continued viability – particular services which maybe harder hit by a falling local population include primary schools.

12.7 Scenario A does represent the smallest land take, given there are not additional dwellings proposed over above the existing RSS levels. Therefore the impact upon the landscape is reduced and there are no further concerns (over and above those arising as a result of accommodating RSS levels of growth) regarding the environmental capacity to accommodate development. In addition, this scenario also has the least impact on the transport network.

12.8 In conclusion, it is considered that Scenario A delivers neither feasible or desirable implications for accommodating additional household growth and should not be considered as a potential option.

Scenario C - Distributing the additional housing on a pro-rata basis to Strategically Significant Cities and Towns (SSCTs) only

12.9 The aim of this scenario is to further pursue the RSS objective of focusing development in Strategically Significant Cities and Towns (SSCTs) where employment and services are more accessible, infrastructure can be more effectively provided and the need to travel is minimised.

12.10 However, the evidence base shows that there are limitations in the level of additional development (over and above the RSS allocations) that Somerset SSCTs can accommodate. In terms of economic projections, Taunton, Yeovil and Bridgwater cannot accommodate this level of housing within their economic growth forecasts. The differential between the levels of growth and the projections could potentially be overcome in Bridgwater and Yeovil but there are a number of more qualitative issues which mean that this less desirable in Yeovil – particularly related to vulnerability of the predominance in the economy of a small number of key employers. Further emphasis should progress should be made on improving the quality of employment offer to reduce commuting levels before growth levels of this spectrum should be considered.

12.12 All SSCTs have environmental capacity to grow however there will be pressures on environmental assets and potential impacts upon the landscape at this level.

12.13 The market and deliverability analysis highlighted concerns around the feasibility of the Taunton housing market to deliver the level of housing required under this scenario. All SSCTs are experiencing a slower take-up of their strategic greenfield allocations than anticipated. In terms of overall housing completion figures this is less of an issue as windfalls are being developed at a higher rate than forecast but it does signal a key deliverability issue for the future and will impact upon the potential of the SSCTs to deliver their housing trajectories.

12.14 The transport modelling also begins to identify significant issues around the existing hotspots around Junction 23 of the M5 and to a lesser extent

Junction 25, which may also preclude this level of further development within Taunton and Bridgwater. The scenario is also shown to have a high impact upon the A38 north of Taunton and a moderate impact A38 south of Taunton.

12.15 The areas outside SSCTs will retain their existing housing allocation within the draft RSS. Therefore the arguments presented under scenario A shall apply here regarding loss of population and knock-on impacts upon house prices, the economy and viability of service delivery.

12.16 Finally, this scenario takes no account of where household growth is derived and existing links into communities – whether they be for education, employment, family or social ties.

12.17 For the reasons outlined above, this scenario is not considered feasible or deliverable.

Scenario D - Distributing the additional housing on a pro-rata basis to all areas except SSCTs

12.18 The aim of this scenario is explore the implications of accommodating additional household growth under the assumption that the SSCTs are currently taking their full capacity of development. However, it is considered that this is not a realistic assumption based on the evidence base presented.

12.19 The environmental sieve mapping exercise show there is physical capacity for all the Somerset SSCTs to grow and the considerable town centre opportunities may offer increased potential when assessed on a site by site basis. It also shows that while market towns (Category B settlements) offer much opportunity to accommodate increased growth there are considerable underlying difficulties with accommodating the levels of growth set out through this scenario. In particular :

- Mendip will have difficulties from both an environmental capacity and market deliverability angle.
- The level of development proposed for West Somerset will not be able to be accommodated in Minehead and Williton therefore would lead to a very rural focused dispersal of housing growth.
- The potential options for accommodating growth in Taunton Deane (outside Taunton) are limited and are unlikely to yield the required levels without significant rural dispersal of development.

12.20 The economic projections show that all the SSCTs will be required to accommodate additional housing growth if they are required to reach their economic potential without considerable implications for commuting patterns. This differs considerably across the SSCTs but shows that without additional housing growth we would be either constraining economic growth due a lack of labour supply or encouraging increased trips from rural areas to access both employment and service opportunities (including post 16 education, health and leisure & cultural facilities).

12.21 The focus of infrastructure funding (transport, community and affordable housing) reflects the RSS focus on accommodating development in the SSCTs. A move away from this focus of development would leave a

significant mis-match between the locations accommodating growth and the priorities for infrastructure expenditure. This moves away from the policy approach of the RSS through Policy SD 4 which aims to ensure that supporting infrastructure is delivered in step with development.

12.22 However, the option does recognise concern raised in regard to the number of housing completions that will be delivered over the next 5 – 10 years within SSCTs and the significant enabling role that local authorities will be required to perform if housing completions are to reach their desired outcomes – particularly on town centre regeneration sites and greenfield urban extension locations. The converse argument is that this scenario is likely to offer a range of smaller sites across the County which would be easier for the development industry to develop and achieve higher housing completions but would result in a less comprehensive approach to planning sustainable communities and securing contributions to infrastructure and community facilities.

12.23 Finally, this scenario also takes no account of where household growth is derived and existing links into communities – whether they be for education, employment, family or social ties.

12.24 The SSCTs in Somerset have undertaken considerable work to move towards the step-change required to deliver their new role (particularly through the work on the Visions and UDFs) and this is supported across the County. In conclusion, this option is considered to undermine the focus that the RSS places on SSCTs and their future role as the focus for new development therefore is not considered desirable.

12.25 The summary of the scenarios so far conclude that none of the extreme retention, concentration and dispersal options are considered appropriate or feasible ways for accommodating the addition household growth that arises as a result of the ONS Household Projections. The three remaining scenarios base the allocation of additional housing on either the draft Regional Spatial Strategy to reflect the supported approach to accommodating growth or the existing population distribution reflecting the derivation of the population growth. In many cases, the actual numeric difference between the scenarios is quite small although there a number of indicators which make two approaches more preferable.

Scenario B - Distributing the additional housing on a pro-rata basis according to the draft RSS strategy

12.26 Based on the premise that the current spatial strategy set out in the draft RSS is robust, the existing provision could be fast-tracked over the earlier years of the implementation of the spatial strategy to make provision for the revised household projections on a similar distribution in later years.

12.27 In theory, this approach should be supported as it reflects the agreed aspirations of the Somerset authorities. Generally the economic projections (except Taunton) would support this level of growth and there are no considerable environmental capacity issues which could preclude this level of growth from being accommodated. The market considers that generally, this level of growth would be feasible but again identifies significant issues

around the capacity of Taunton to achieve these levels of additional housing completions over and above the existing allocation in the draft RSS.

12.28 However, in practice there are a number of conditions that indicate this scenario may not be feasible particularly related to the allocation for Taunton of 855 dwellings per annum and the associated feasibility or deliverability issues. The potential housing figures are significantly higher than the economic projections would support for the town and house builders have raised doubts over the limitations in delivering the additional levels of housing in the town without significant investment in infrastructure (particularly to resolve the Junction 25 concerns) or increasing the enabling functions of public sector authorities.

12.29 Taunton cannot be considered in isolation. With limitations placed on Taunton's ability to take this level of additional growth, the requirement to balance housing growth in Taunton and the other settlements, most notably Bridgwater has to be considered and maintained within the settlement hierarchy.

12.30 The RSS strategy prioritises accommodating household growth at SSCTS to reflect their employment opportunities and their accessibility with Scenario B taking this approach further. However, there is a growing recognition that in areas that are predominantly rural (such as Somerset) that market towns (or Category B settlements) should have an increased role in accommodating this additional housing growth.

12.31 This is particularly an issue for the Districts in eastern Somerset (South Somerset and Mendip) where the distance from SSCTs means that many of the significant market towns take on part of the envisaged role of SSCTs in providing employment opportunities and acting as a local service centre for both the town and local rural hinterland. However, some of these towns are vulnerable – particularly to economic re-structuring and need to be able to grow in order to maintain their existing level of population, reach their economic potential, or to retain their vitality and their service offer as part of a balanced approach to growth. This scenario does not offer the opportunity to take this forward as it places a too greater focus on SSCTs.

12.32 In addition, this scenario does not reflect the derivation of much of the household growth within the existing population. Taking forward this strategy would result in a significant population reductions and impacts on housing affordability outside the SSCTs. The housing growth under this scenario will not be sufficient to meet the needs of the existing population as their average household size decreases – restricting household supply and resulting in increased housing costs. Increased housing costs in rural areas will disproportionately impact upon the young and working locally population. This is the key group of people we are looking to retain in our market towns to support economic growth, retain a balanced age profile and support their vitality. In addition local ties – such as family, employment, training – do play a role in determining housing need therefore it is considered that this should be reflected within the strategy.

Scenario E - Strategic 'best fit' scenario by SWRA

12.33 Scenario E is the SWRA 'best fit' approach and aims to find a balance between the derivation of household growth and reinforcing the housing allocations within the draft Regional Spatial Strategy. To devise the scenario, the South West Regional Assembly have also factored in a number of localised circumstances or assumptions – some places (urban extensions) only have a strategic component while others (such as National Parks and the Isles of Scilly) are only assigned local household growth. For example, in Somerset, the allocation for Exmoor National Park reflects its constrained nature and nominally allocates part of this growth to West Somerset District.

12.34 One of the key issues which as arises as a result of factoring in localised circumstances or assumptions is a shift in the proportion of growth accommodated to be accommodated in Somerset. The table below show the percentage changes between the level of development distributed through the existing spatial strategy and that distributed through SWRA scenario. Generally, levels held stable across the 4(4) areas however, Dorset face a 1 % fall in their allocation which is attributed to Somerset and the West of England. This equates to an increase of 3920 dwellings over the 20 year period in Somerset.

	% of development accommodated under RSS	% of development accommodated under Scenario E
Cornwall	9.8%	9.6%
Devon	21.8%	21.8%
Dorset	14.1%	13.1%
Gloucestershire	10.5%	10.6%
Somerset	10.6%	11.3%
West of England	20.1%	20.5%
Wiltshire	12.9%	12.9%

Figure 7 - % Share of development according to RSS and Scenario E

12.35 Whilst it is recognised that local circumstances differ across the region, the difference in the total number of homes that Somerset would be required to accommodate under the two scenarios does cause some concern and it is recommended that Somerset retain their current pro-rata allocation of 10.6% of the regional total - equating to a total of 2968 per annum.

12.36 Overall, the scenario is viewed as meeting many of the objectives set out in the appraisal framework – particularly against securing affordable housing and supporting the retention of population in rural areas, supporting existing community links together with making the most efficient use of land whilst reinforcing the role of SSCTs as the main employment and service centres for the County.

12.37 The Scenario is considered to have a relatively high impact upon the A38 / A39 and the concerns around the M5 junctions 23 and to a lesser extent junction 25 are likely to be borne out under this Scenario. In accessibility terms, the Scenario is considered (alongside Scenario F) to be the most appropriate in achieving a balance between improving accessibility to employment and services in urban and rural areas.

12.38 The scenario also raises concerns around the ability to balance jobs and homes in Taunton with dwellings required to support economic projections significantly lower (139 dwellings per annum) than the scenario.

12.39 In summary, it is considered that this Scenario offers much potential for meeting the objectives set out in the appraisal framework. However, the levels of economic growth and the capacity of transport infrastructure are likely to limit the ability of the SSCTs (particularly Taunton) to accommodate this level of additional housing growth.

Scenario F - Pro-rata distribution according to existing population

12.40 Overall, the scenario is viewed as meeting many of the objectives set out in the appraisal framework – particularly against securing affordable housing and supporting the retention of population in rural areas, supporting existing community links and recognising the role that market towns currently play as centres for employment and access to services.

12.41 However, it does not fully maximise the role of that SSCTs play in accommodating the additional housing growth or support them in reaching their economic potential.

12.42 Scenario F is viewed to have a high impact upon the northern radial routes out of Yeovil and a relatively high impact upon the A 39 and the road network near Shepton Mallet.

12.43 In summary, it is considered that this Scenario offers much potential for meeting the objectives set out in the appraisal framework. However, the SSCTs have greater capacity to accommodate additional housing growth and should remain the focus of accommodating additional household growth, where this is feasible and appropriate.

Somerset Best Fit Approach

12.44 It is considered that Scenario E and Scenario F offer the greatest potential for accommodating additional household growth in Somerset as they balance :
a) retaining SSCTs as the focus for accommodating housing growth
b) reflect the derivation of household growth and the requirement to support the continued vitality of Somerset market towns – a key character of the county.

12.45 Theoretically, Scenario E takes forward this approach in a more consistent manner than F. However, the additional levels of growth attributed to Taunton under this scenario are deemed too high due to economic projections, concerns around infrastructure provision and ability to deliver. Constraining Taunton to the levels of housing appropriate to the economic potential also requires constraining and balancing the level of housing growth in Bridgwater to reduce the potential for commuting relationships. This issue was closely examined through the Taunton Sub-area Study (Baker Associates, 2005) and the housing allocation for Bridgwater within the draft Regional Spatial Strategy is lower than it might have otherwise been to support this policy approach. When considering the additional household

growth arising as a result of the ONS projection, the initial policy approach to reduce commuting between Bridgwater and Taunton has been continued but this will need to be monitored and managed into the future as Bridgwater role changes shape.

12.46 By providing housing in locations close to key service centres (whether they be SSCTs or market towns), accessibility will inevitably be improved and the need to travel reduced. Such an approach will also help to make best use of existing service and transport infrastructure so that housing is provided in areas of need and not solely where an opportunity for development arises.

12.47 Spreading the distribution of housing over a wider area will reduce the negative implications of additional development on the existing transport network particularly in locations such as Taunton, Yeovil and Bridgwater where spare capacity on the network is already limited.

12.48 The difference in the total number of homes that Somerset would be required to accommodate under the two scenarios does cause some concern and it is recommended that Somerset retain their current pro-rata allocation of 10.6% of the regional total - equating to a total of 2968 per annum.

12.49 It is therefore recommended that Somerset adopt a hybrid approach to accommodating household growth that combines elements of both Scenario E and Scenario F.

12.50 The table below sets out the anticipated Somerset best fit scenario :

	Annualised average additional dwelling completions (2006 – 2026) in draft RSS		Annualised average additional dwelling completions (2006 – 2026) as a result of ONS Projections	
	Number	% Share	Number	% Share
Mendip	360	15%	465	16%
Sedgemoor (of which Bridgwater)	420 (310)	17% (13%)	548 (380)	18% (13%)
South Somerset (of which Yeovil)	680 (320)	28% (13%)	830 (370)	28% (12%)
Taunton Deane (of which Taunton)	865 (700)	36% (29%)	985 (780)	33% (26%)
West Somerset	110	5%	140	5%
Somerset Total	2435	100%	2968	100%

Further considerations

12.51 Further considerations that Local Planning Authorities will be required to address include understanding the potential to increase housing densities on identified sites to accommodate an increased number of dwellings within current housing capacity. This approach would be subject to not compromise the ability to deliver a sustainable mix of uses or result in unacceptable impacts upon character, amenity or design.

12.52 Local Planning Authorities should also explore policy controls on the type and size of new dwellings to mitigate against the disproportionate impact of affordable housing on the local or 'working locally' population. This could be taken forward through the joint working that Somerset Authorities are undertaking on their Development Control Development Plan Document.

12.53 The current focus of infrastructure (particularly transport) investment by public authorities is directed towards SSCTs. With market towns taking a greater number of homes, it is considered that the investment criteria for many sources of funding would need to be reviewed to recognise the potential role of market towns, particularly in very rural Districts.

12.54 Deliverability issues around bringing forward large scale sites need to be tackled within all the SSCTs to ensure that the housing allocations are implemented.

13 Conclusions

13.1 The study concludes that a hybrid of Scenarios E and F are the most appropriate options for allocating additional housing growth in Somerset.

13.2 It is recommended that Somerset retain its % share of total development across the region (10.6%) but this is distributed according to the principles of the SWRA scenario but amended to take account of particular local circumstances in Somerset. Most notably, the constrained additional growth potential of Taunton, the policy requirement to balance the relationship between Taunton and Bridgwater and the environmental capacity of the county. The table below sets out the anticipated Somerset best fit scenario :

	Annualised average additional dwelling completions (2006 – 2026) in draft RSS		Annualised average additional dwelling completions (2006 – 2026) as a result of ONS Projections	
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West Somerset	110	5%	140	5%
Somerset Total	2435	100%	2968	100%

13.3 The conclusions are based upon SSCTs remaining the focus for accommodating the majority of development arising in Somerset as they are considered to have the greatest opportunities for employment and the greatest levels of accessibility to services. However, recognising both the geographic location of the SSCTs, the rural character of the County and the scale of step-change required for three SSCTs to deliver the level of housing within the draft RSS, it is considered that Market Towns (Category B settlements within the RSS) should have a greater role to play in accommodating the additional growth arising as a result of the ONS household projections.

13.4 The role of market towns in the recommendations relies on further work being undertaken to fully understand the potential many of these towns have to offer – economically, socially and environmentally - together with the implications for infrastructure or service delivery. Market towns offer a sustainable option but only if this growth is part of an approach that balances housing growth with the economic potential of settlements and that is the appropriate levels of infrastructure commensurate with housing growth are implemented.

13.5 Districts will pursue the most sustainable strategy for accommodating development through Core Strategy for Local Development Framework. Their strategies will be informed by a detailed consideration of some of the broad issues raised in this study, assessment of settlement functionality and further on-going work particularly based upon the economic potential of market towns and the transport implications associated with accommodating higher dwelling numbers in these settlements.

13.6 Finally, it should be reiterated that this study represents a technical appraisal of the issues associated with accommodating additional household growth only and has not been subject to consultation with wider stakeholders and the general public due to the length of time offered to prepare evidence.

Appendix A

Data Sheet – Annualised Average Net Dwelling Requirement (By Scenario)

South Somerset		Scenarios				
	Existing RSS Allocation	B (RSS Pro-rata)	C (SSCTs Only)	D (Non SSCTs Only)	E (SWRA Scenario)	F (Pro-rata based on existing population)
Yeovil	320	379	426	320	*	345
Non-SSCT	360	452	360	562	*	488
South Somerset District Total	680	831	786	882	868	833

Taunton Deane		Scenarios				
	Existing RSS Allocation	B (RSS Pro-rata)	C (SSCTs Only)	D (Non SSCTs Only)	E (SWRA Scenario)	F (Pro-rata based on existing population)
Taunton	700	855	931	700	*	743
Non-SSCT	165	202	165	258	*	226
Taunton Deane Borough Total	865	1057	1096	958	1070	969

Sedgemoor		Scenarios				
	Existing RSS Allocation	B (RSS Pro-rata)	C (SSCTs Only)	D (Non SSCTs Only)	E (SWRA Scenario)	F (Pro-rata based on existing population)
Bridgwater	310	391	412	310	*	353
Non-SSCT	110	122	110	172	*	174
Sedgemoor District Council	420	513	522	482	561	527

Mendip		Scenarios				
	Existing RSS Allocation	B (RSS Pro-rata)	C (SSCTs Only)	D (Non SSCTs Only)	E (SWRA Scenario)	F (Pro-rata based on existing population)
Mendip District Total	360	440	360	562	517	465

West Somerset		Scenarios				
	Existing RSS Allocation	B (RSS Pro-rata)	C (SSCTs Only)	D (Non SSCTs Only)	E (SWRA Scenario)	F (Pro-rata based on existing population)
West Somerset District Total **	110	134	110	172	140	146

* No SSCT or Rest of District breakdown supplied by SWRA
** Excludes National Park

Appendix B

First set of settlement maps produced by MAGIC as of December 2006.
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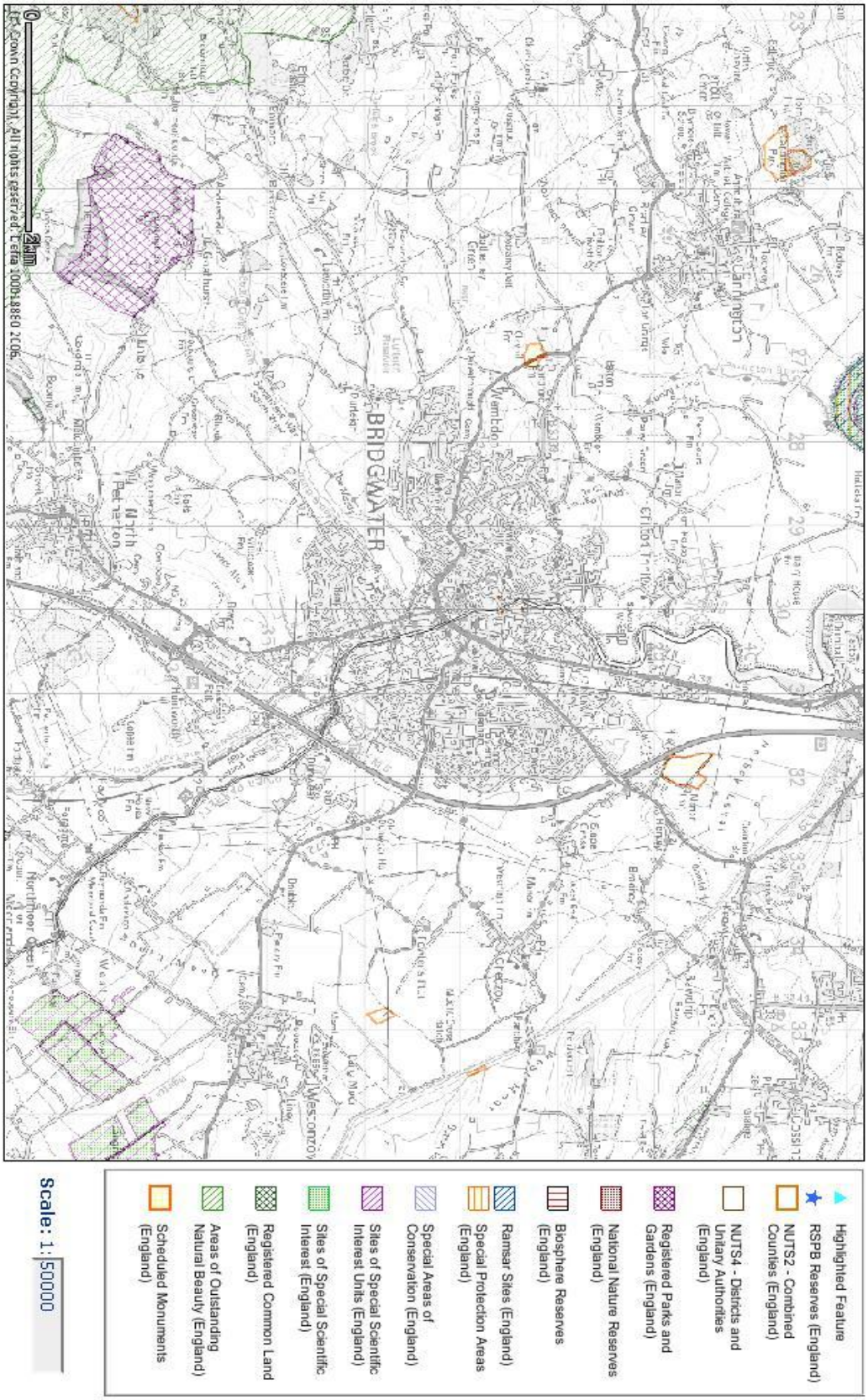
Some information in MAGIC is a snapshot of information being maintained or continually updated by the originating organisation. Please refer to the documentation for details, as information may be illustrative or representative rather than definitive at this stage.

Second set of flood mapping, are indicative flood maps from the Environment Agency (December 2005).

Bridgwater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Highlighted Feature
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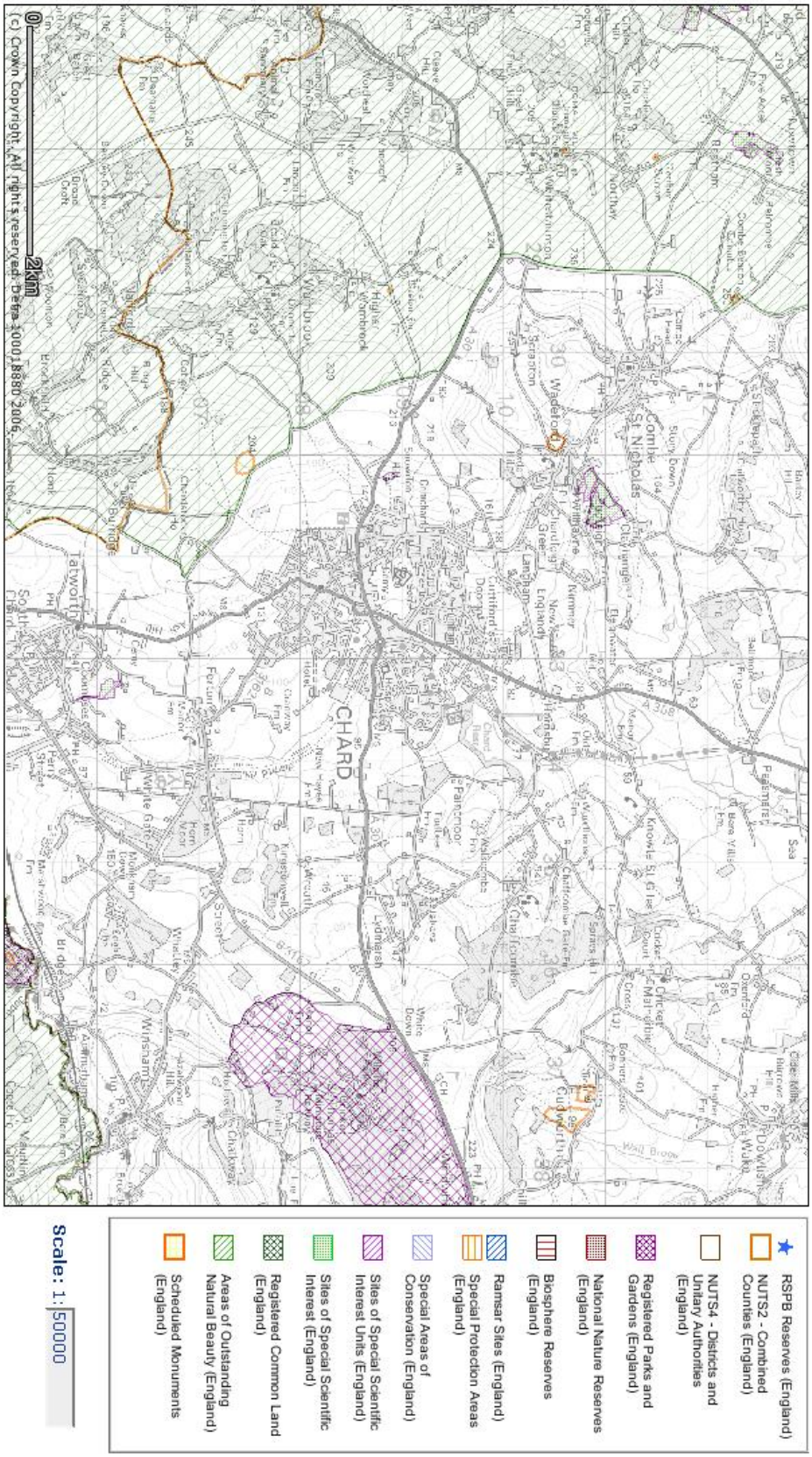
NUTS2 - Combined Counties (England)
NUTS4 - Districts and Unitary Authorities (England)
Registered Parks and Gardens (England)
National Nature Reserves (England)
Biosphere Reserves (England)
Ramsar Sites (England)
Special Protection Areas (England)
Special Areas of Conservation (England)
Sites of Special Scientific Interest Units (England)
Sites of Special Scientific Interest (England)
Registered Common Land (England)
Areas of Outstanding Natural Beauty (England)
Scheduled Monuments (England)
Scale: 1:50000

Chard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Areas of Outstanding Natural Beauty (England)
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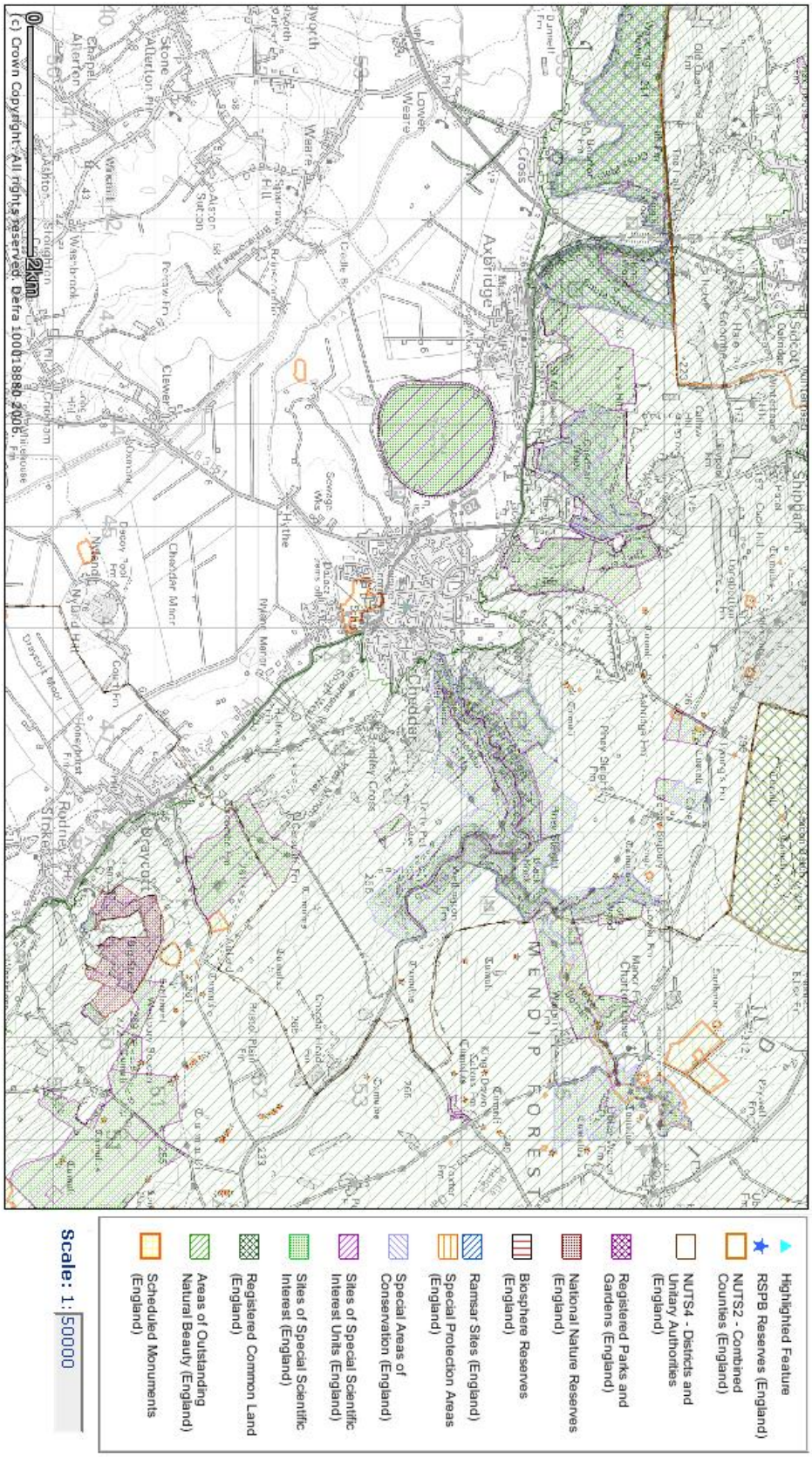
Cheddar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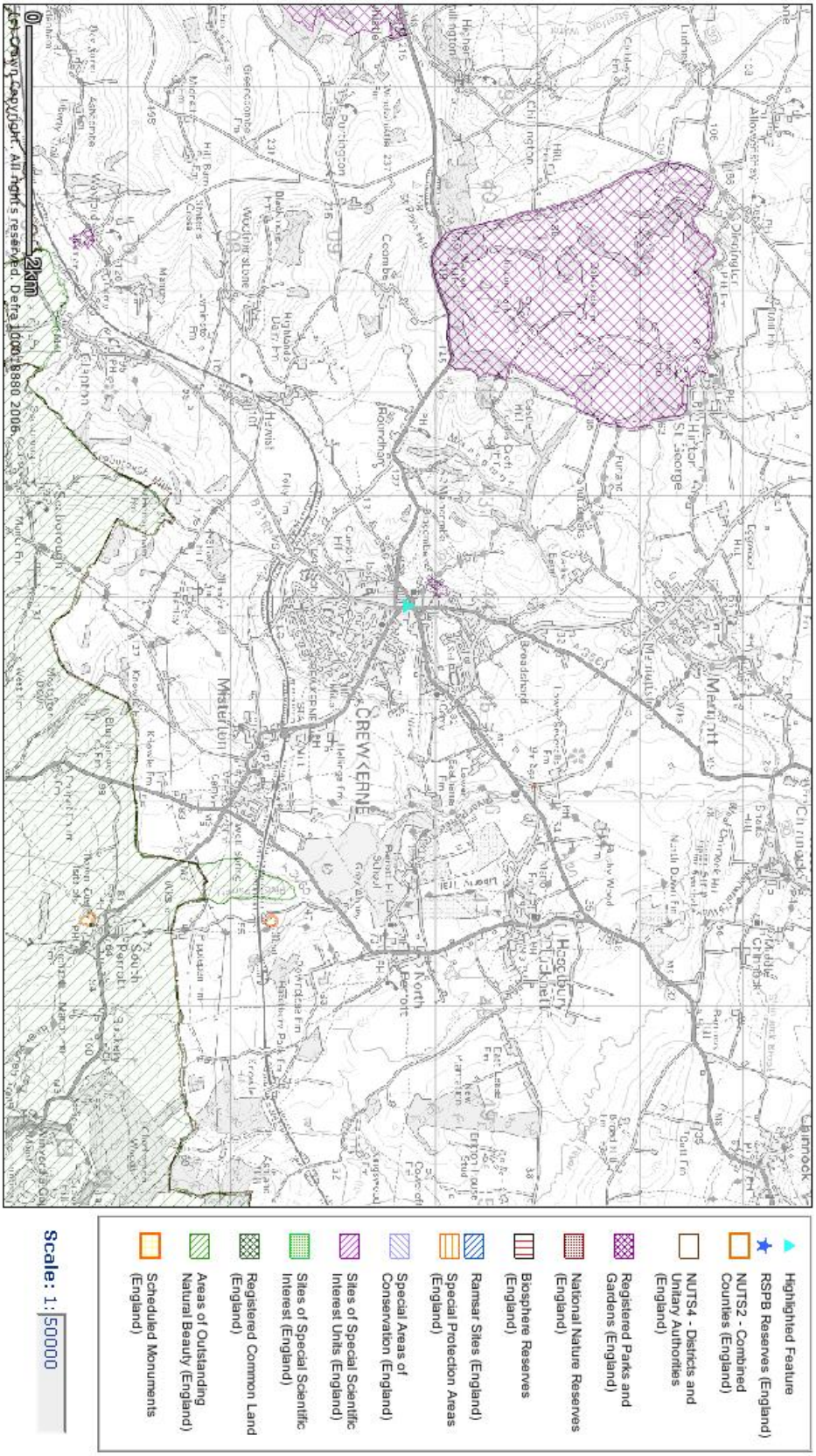
Crewkerne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Merriott
Hewish
Puncknowle
Chillington
Chiselborough
Haselbury Plucknett
North Perrott
South Perrott
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Broadshard
Blackdown
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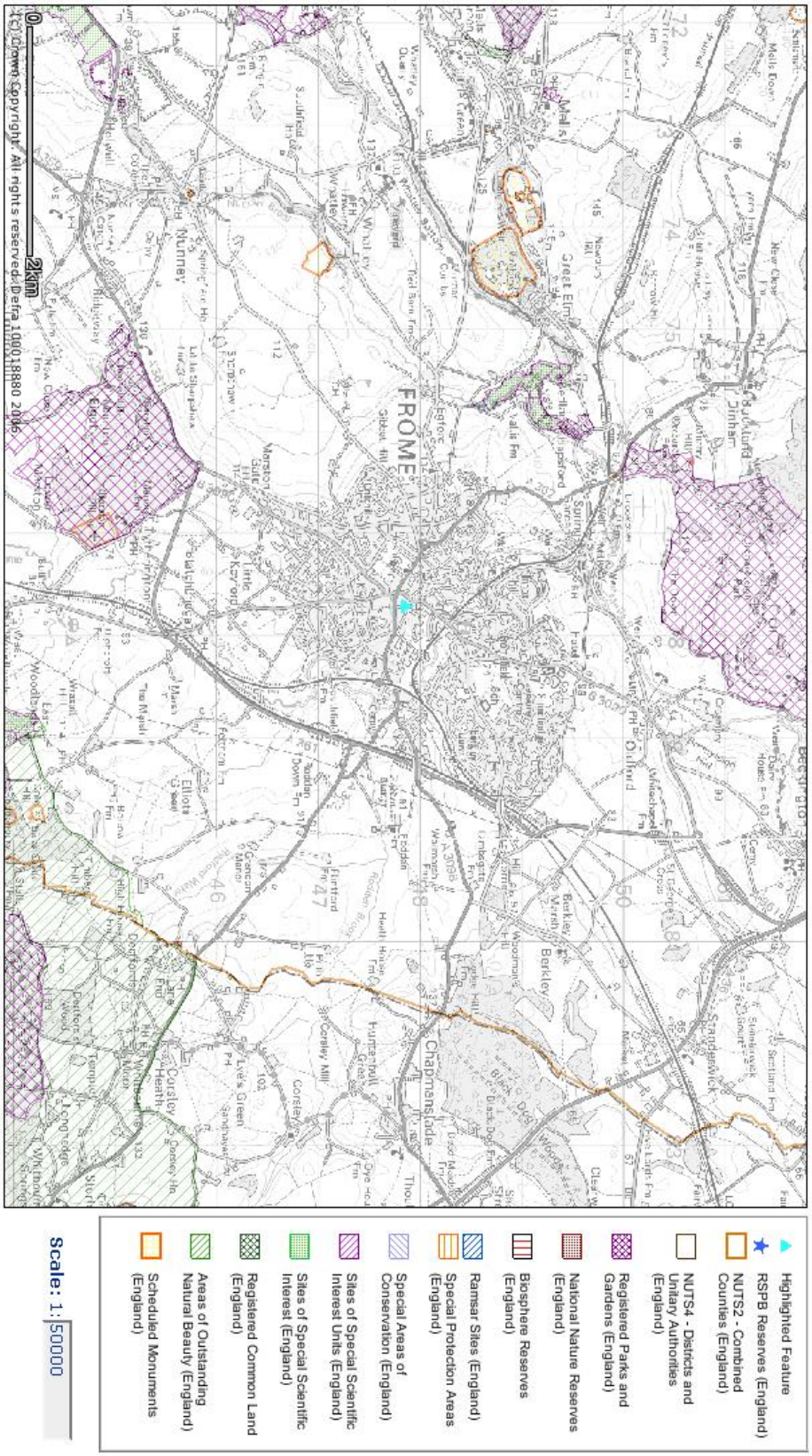
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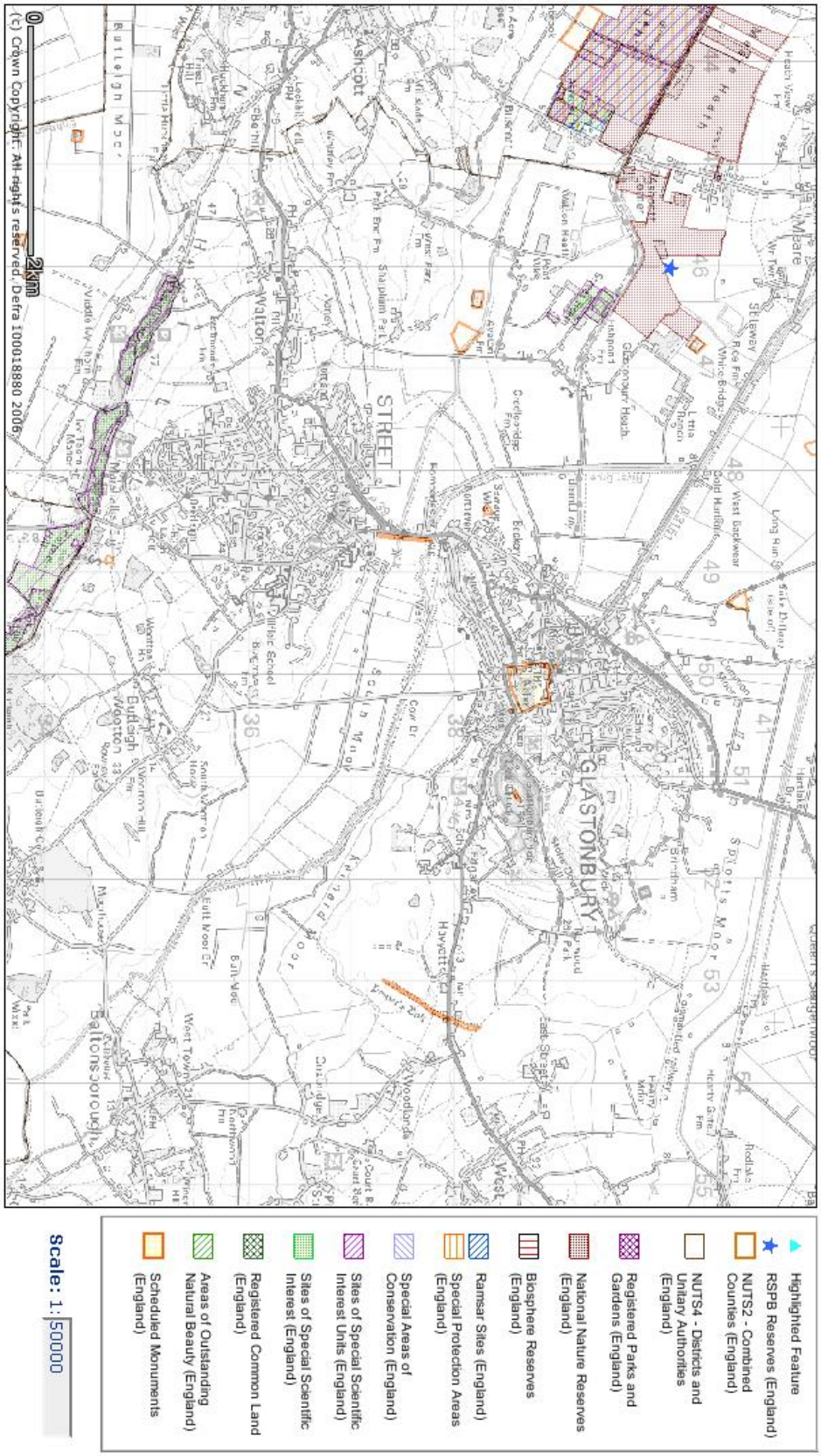
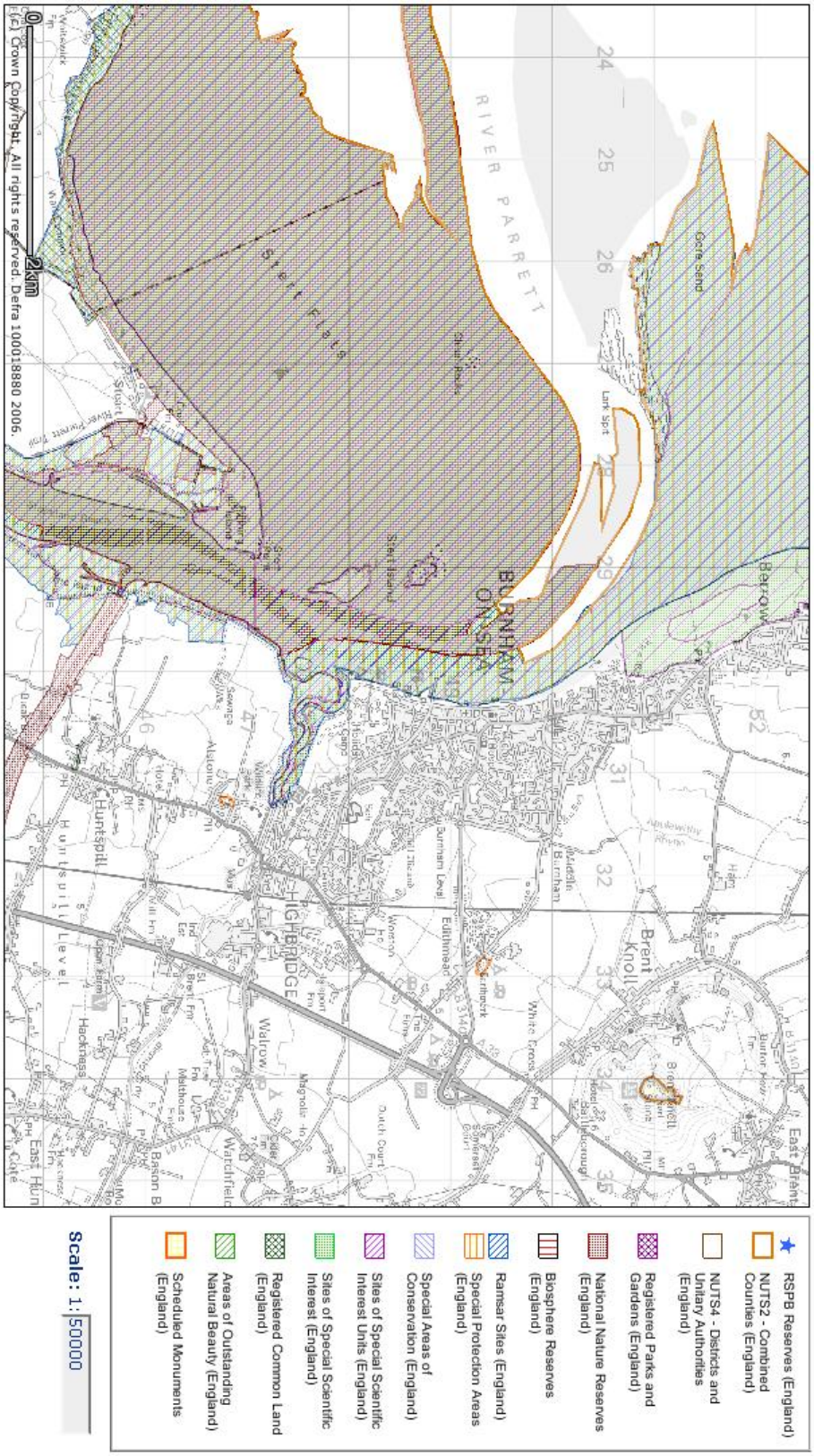
Glastonbury and Street



Highbridge and Burnham-on-sea



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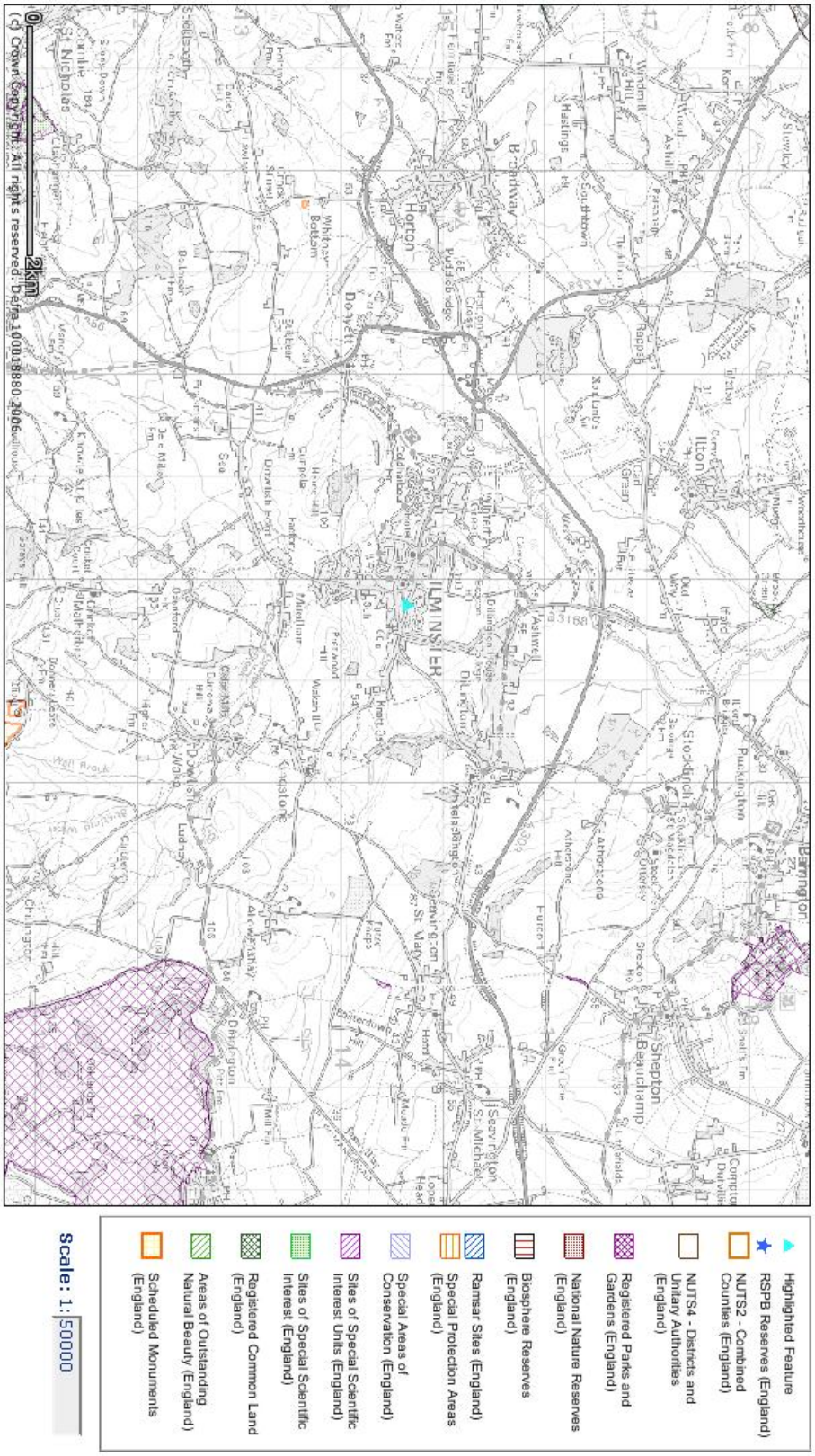
Ilminster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Broadway
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Ilton
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Dinnington
Ashwell
Atherstone
Hastings
Southtown
Rapps
Whitney Bottom
Broadway Hill
Kenny
Sea
Dillington
Herne Hill
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Scheduled Monuments (England)
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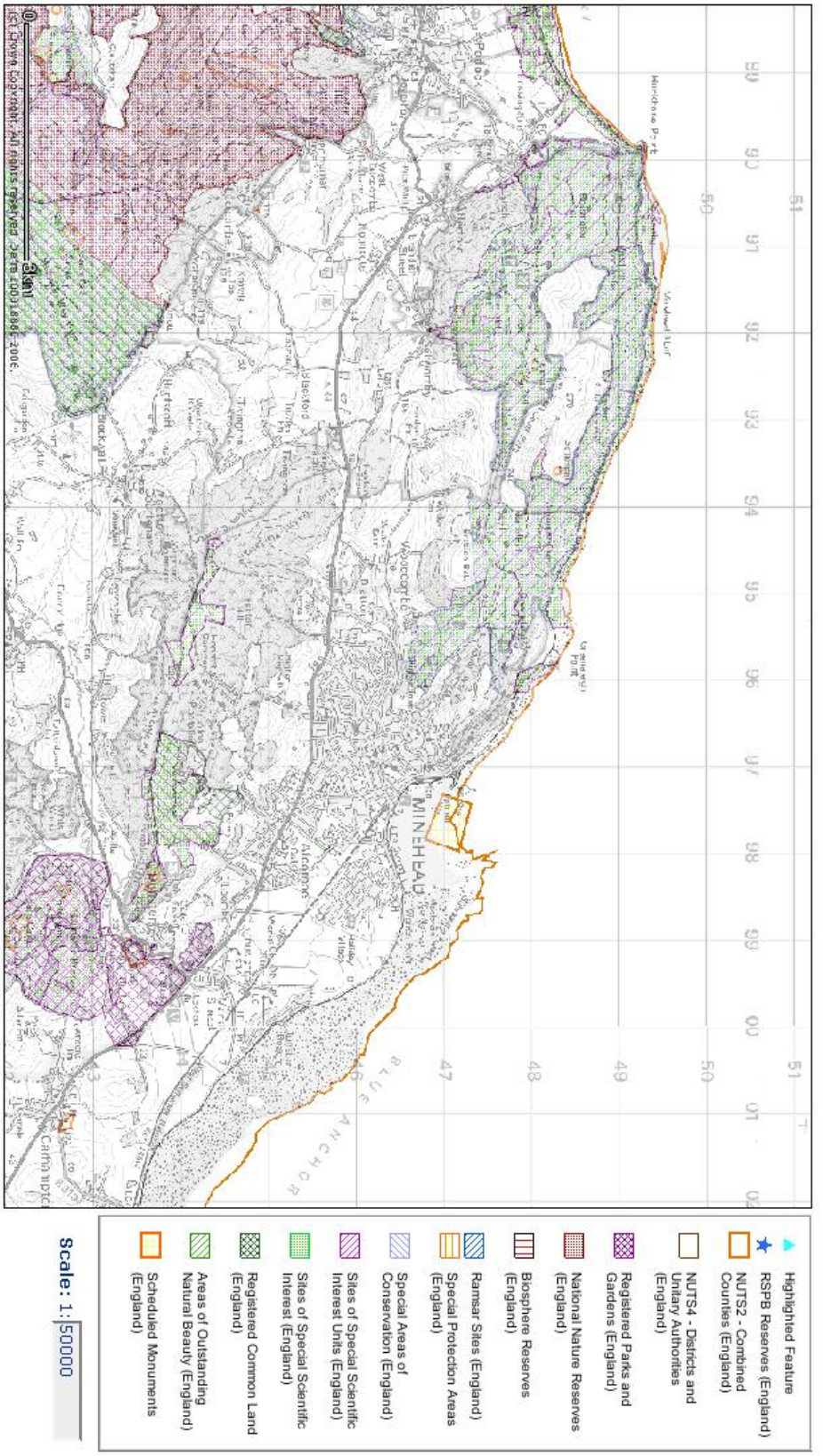
Minehead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BLUE ANCHOR
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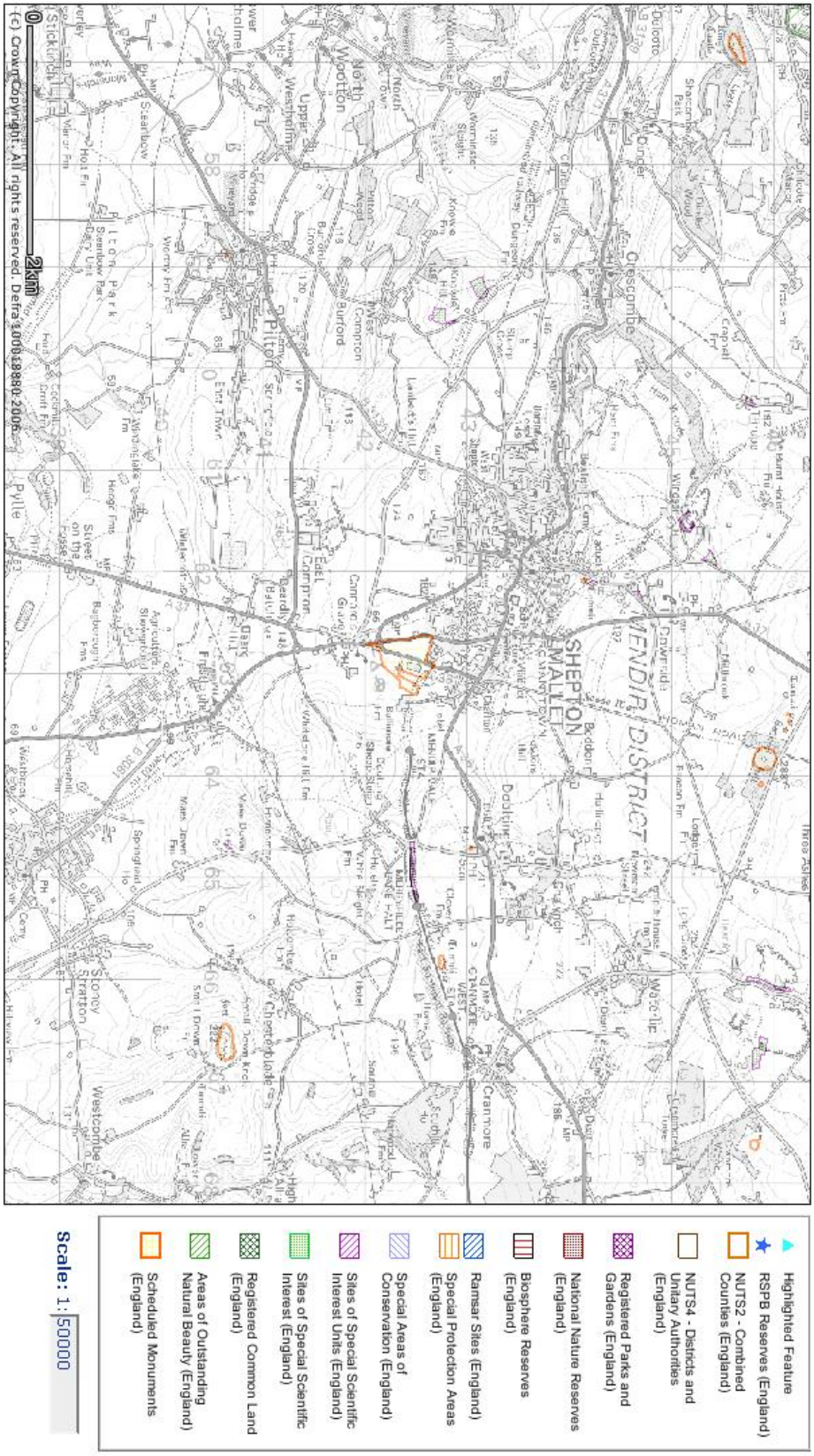
Shepton Mallet



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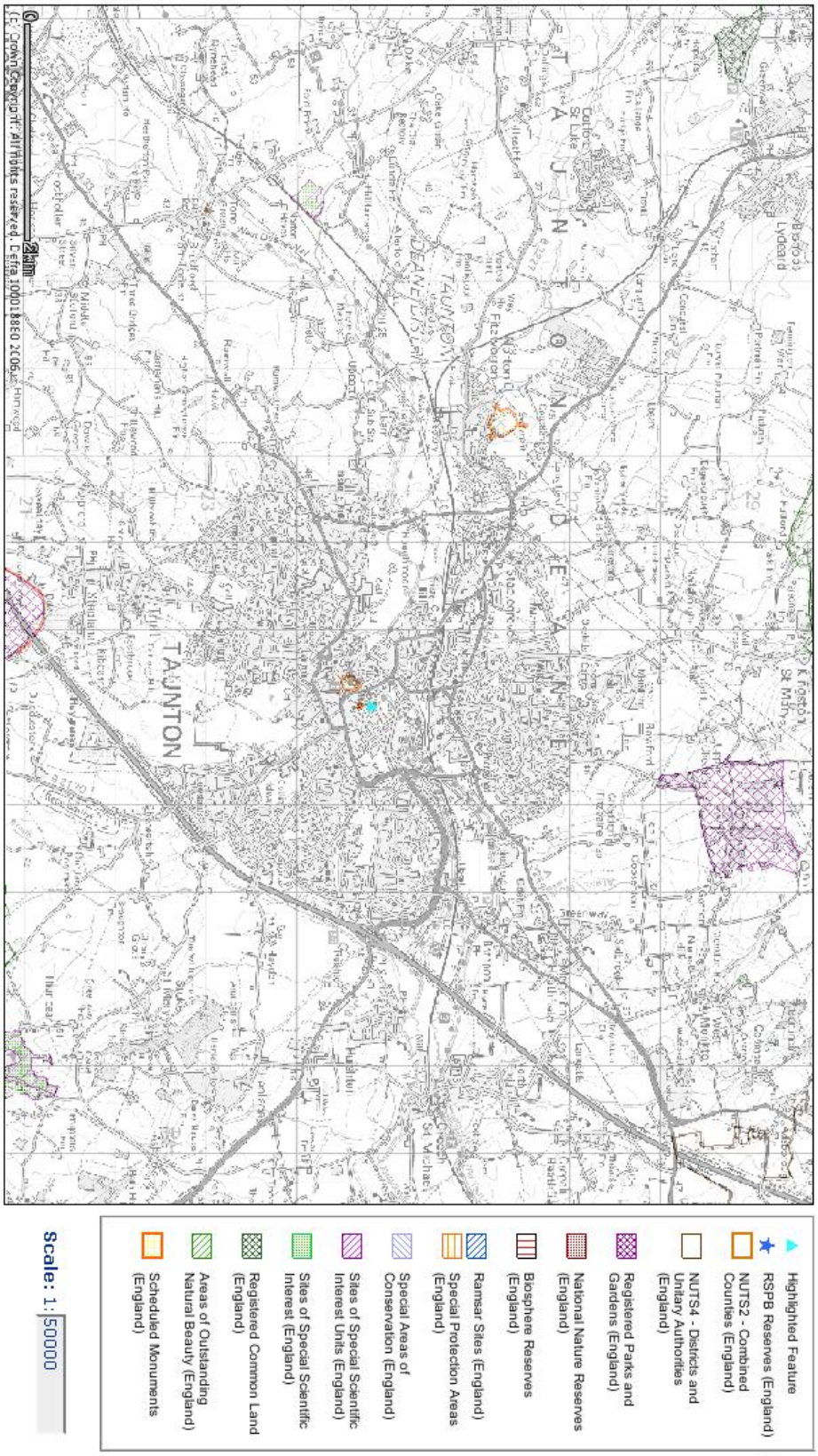
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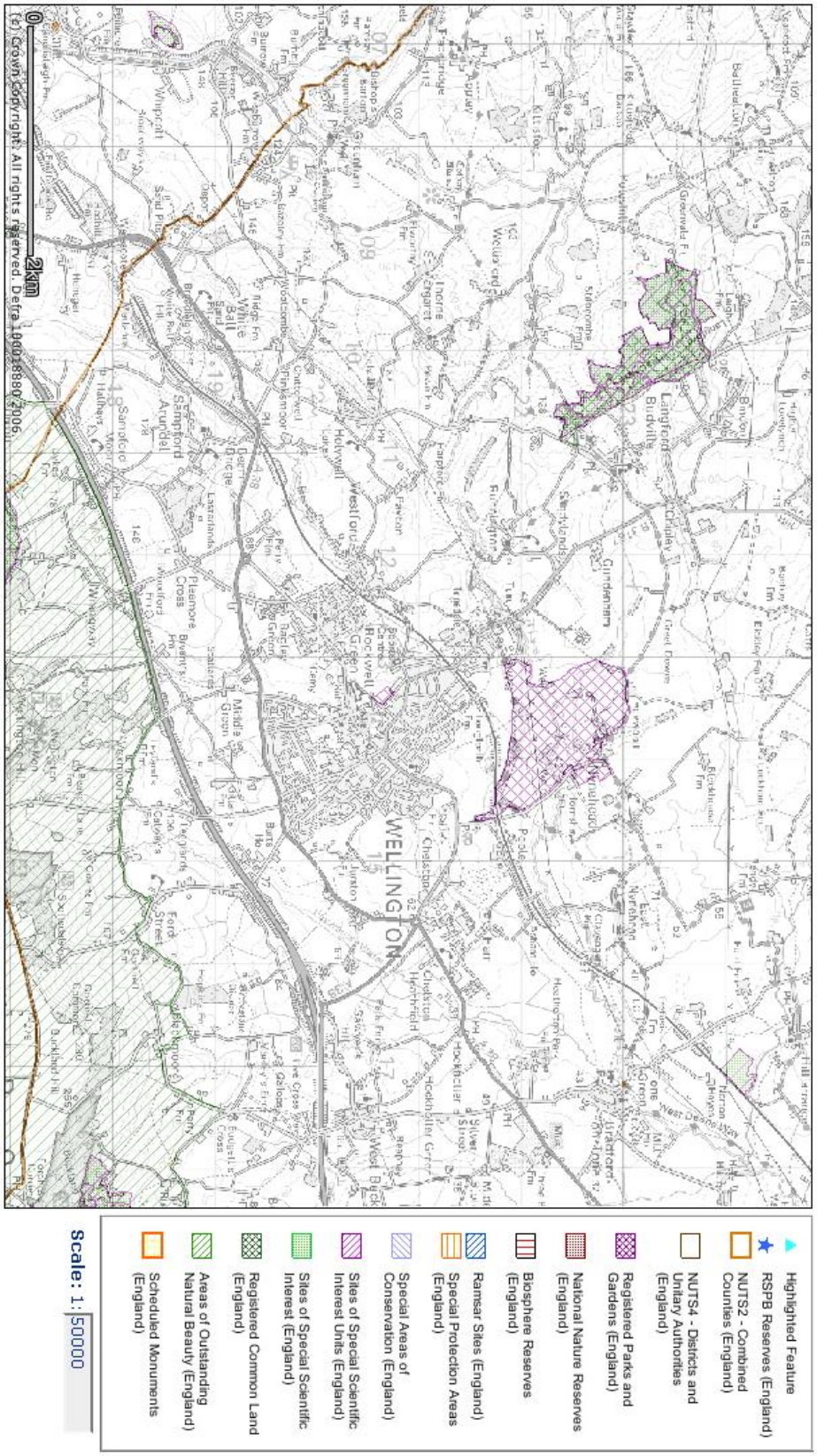
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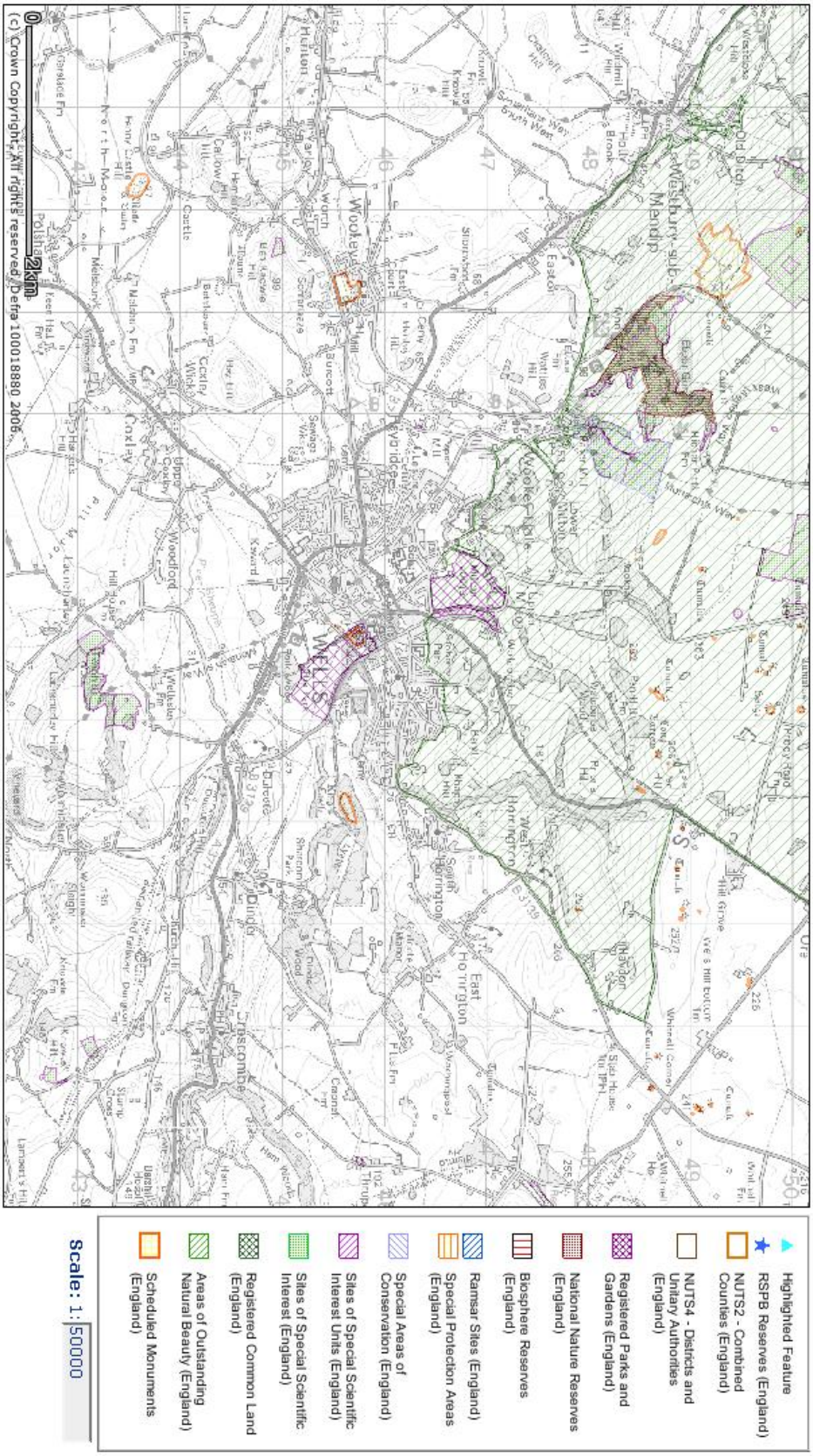
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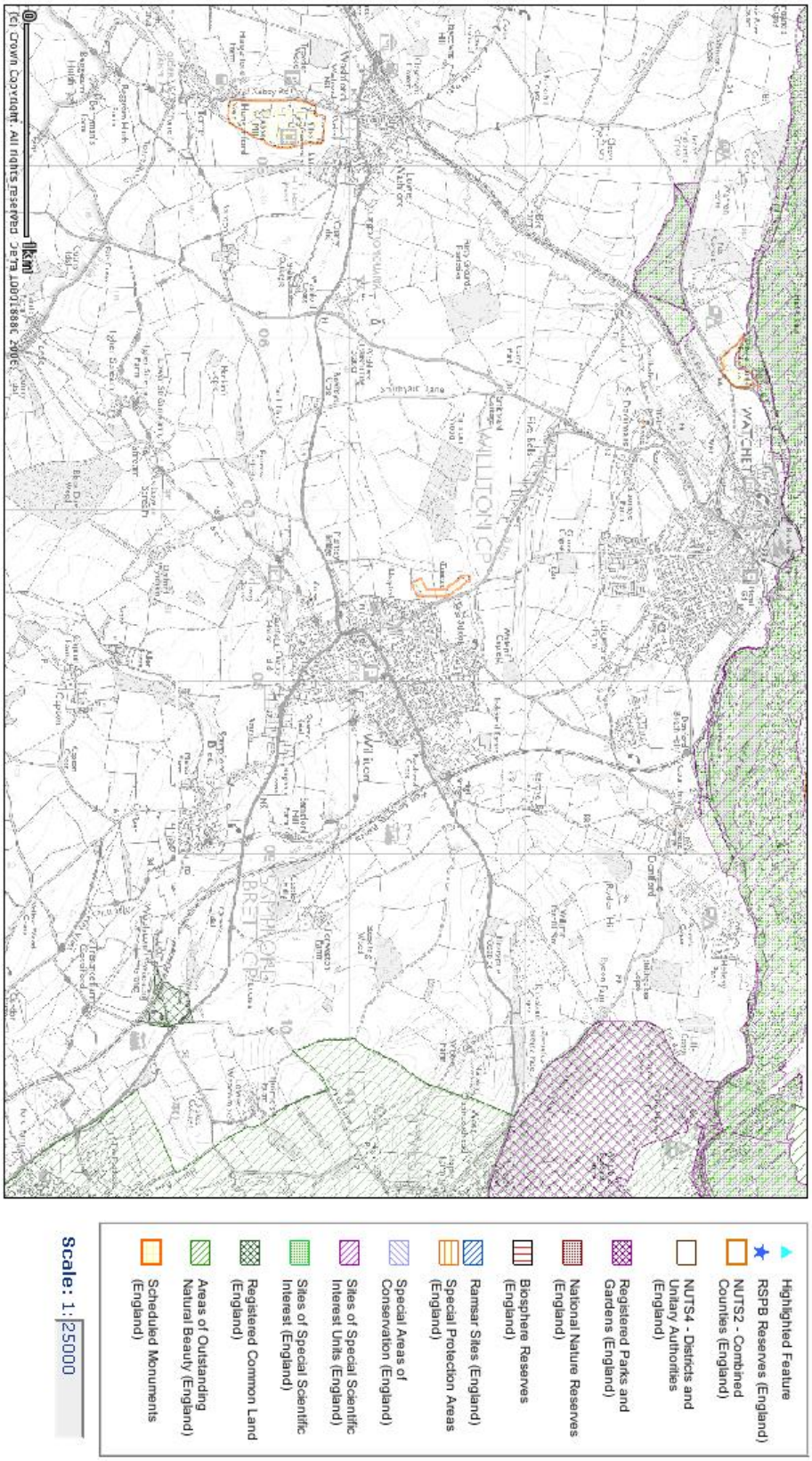
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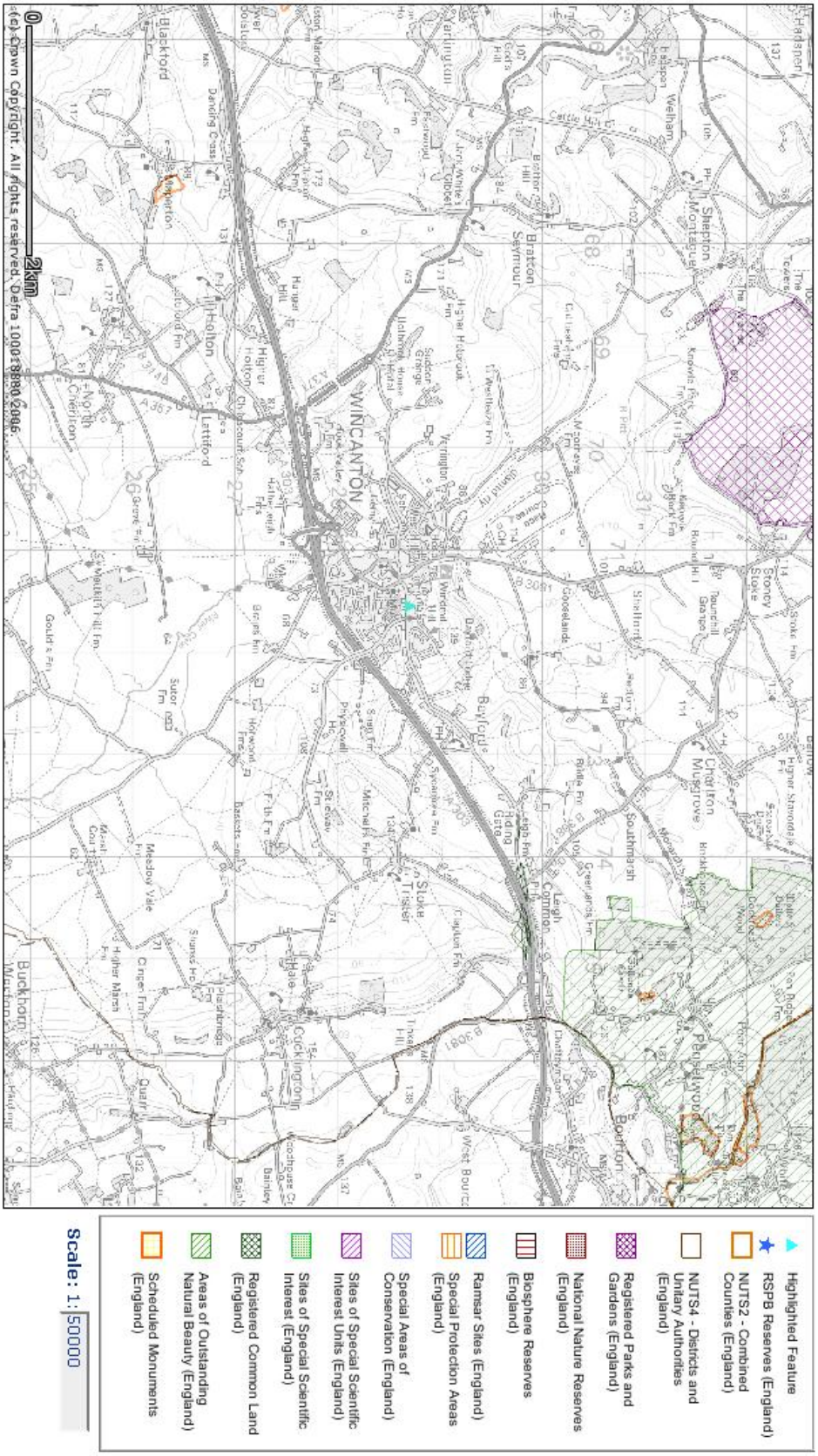
Wincanton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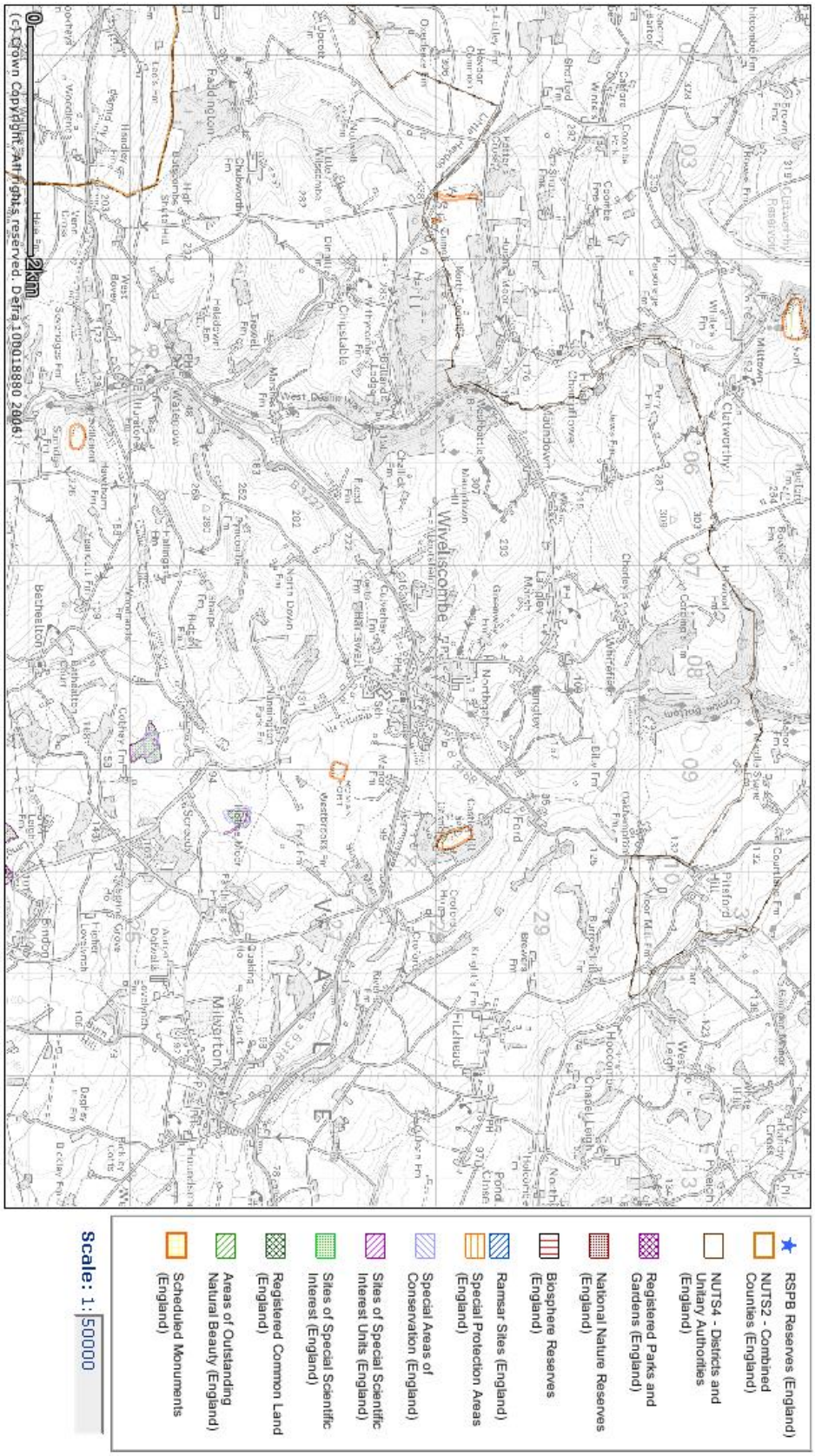
Wiveliscombe



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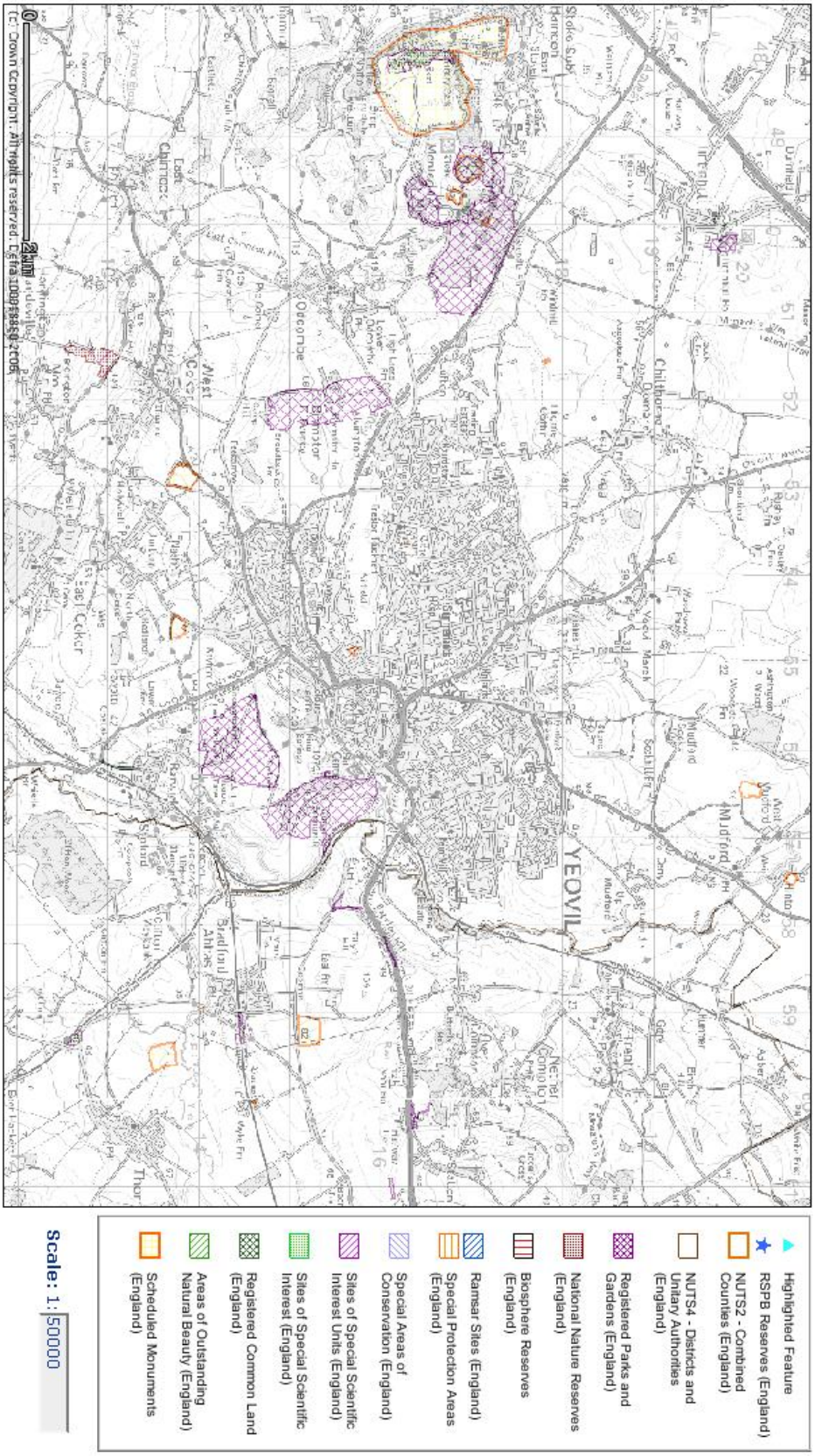
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YEOVIL
Chilthorne Domer
Stoke Sub Hamdon
Odcombe
Mudford
Bradford Abbas
Thornford
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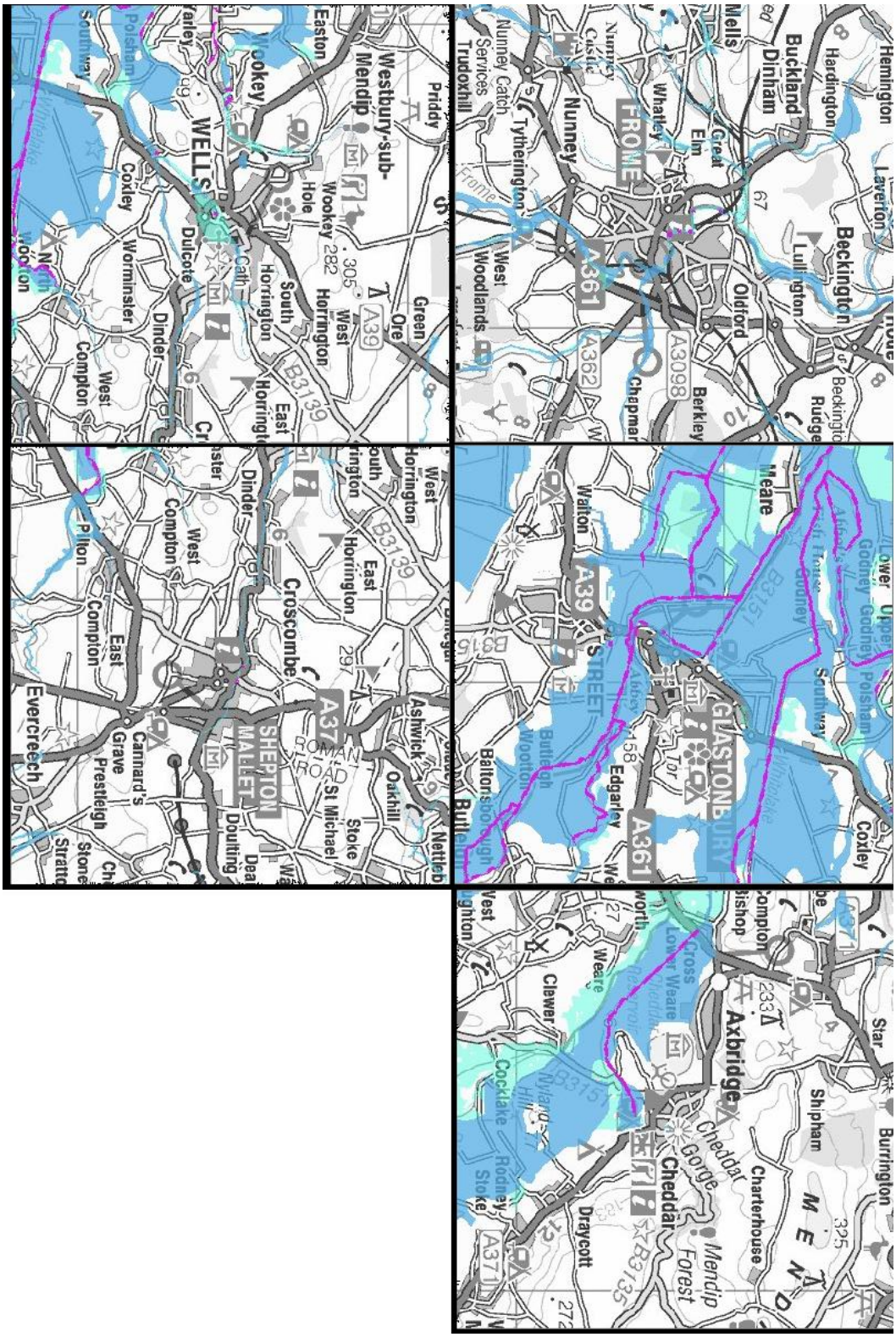
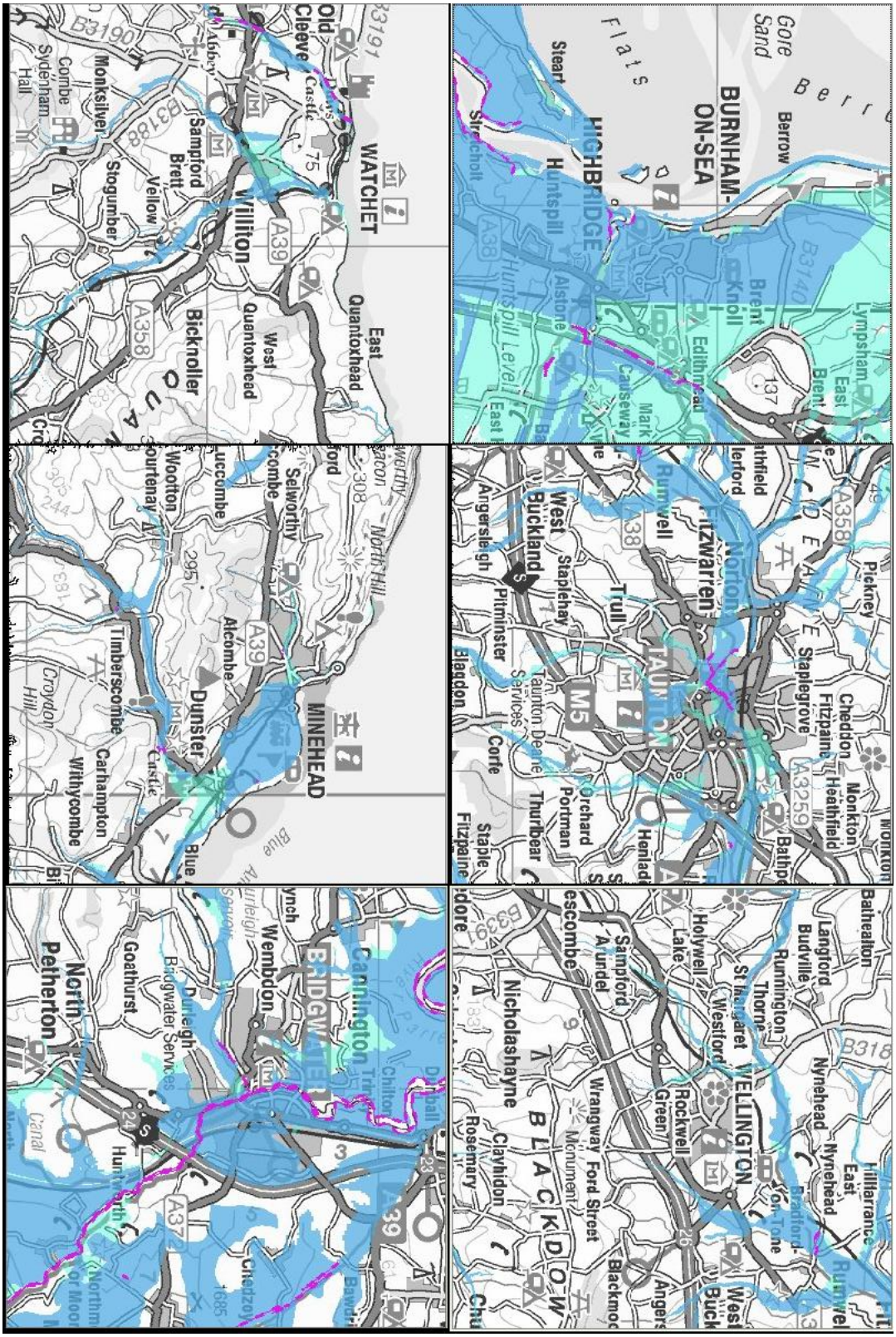
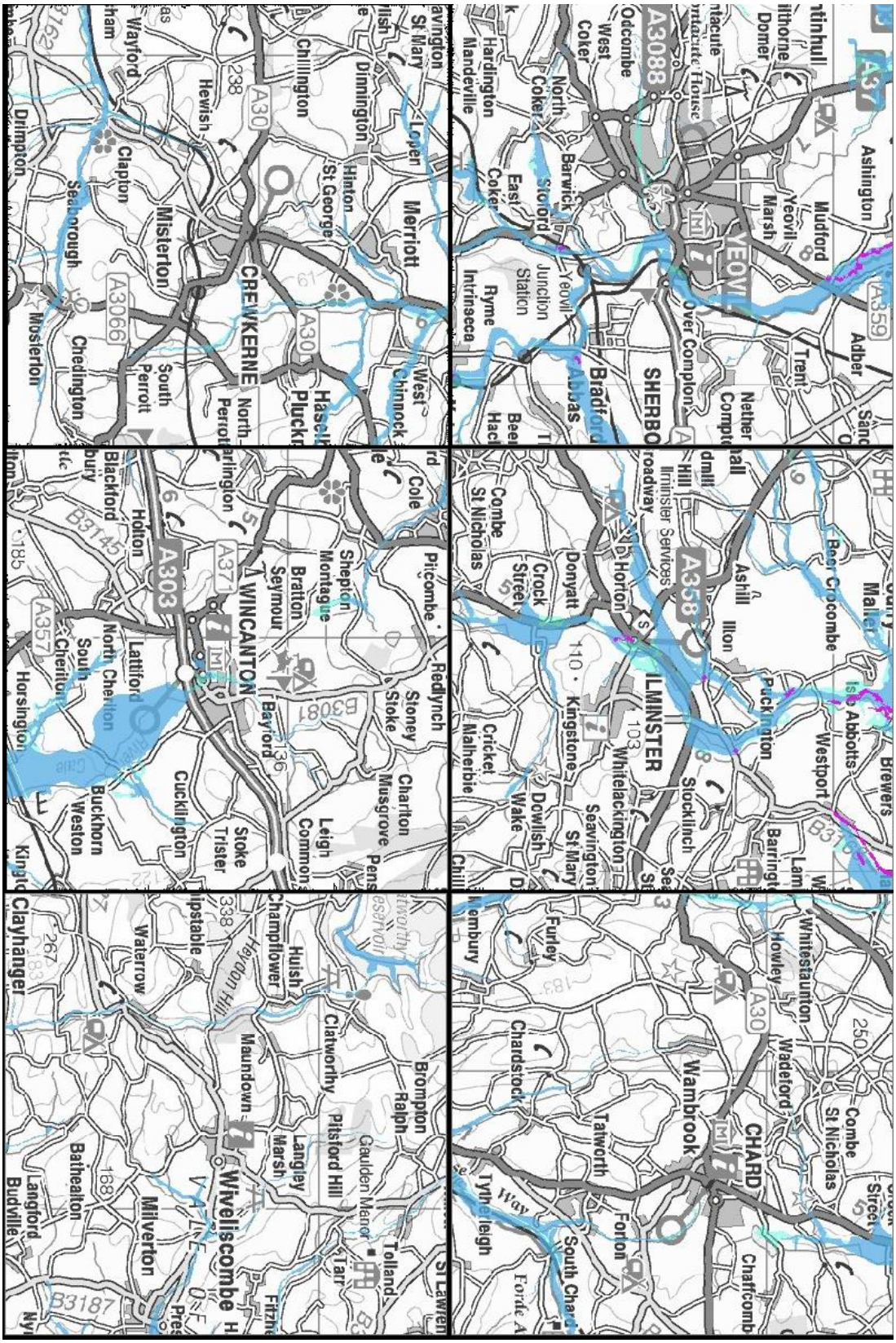
Indicative Flood Map 1:
Frome, Wells, Glastonbury and Street, Shepton Mallet



Indicative Flood Map 2:
Highbridge and Burnham-on-sea, Williton, Minehead, Taunton, Bridgwater, Wellington



Indicative Flood Map 2:
Yeovil, Crewkerne, Ilminster, Chard, Wincanton, Wiveliscombe



Appendix C

Notes from Developers Workshop – Friday 8th December

A workshop was held with active housing developers in Somerset to ascertain their views on the ability of Somerset to accommodate and deliver the levels of additional growth set out by the ONS household projections. This appendix sets out the findings of the workshop and the results that have been used to inform the conclusions of the study.

Changing household structure equals changing housing demand ?

The workshop discussed whether the participants had witnessed trends in a changing demand for properties to reflect changing household structures. The participants stated that there were an number of trends :

- A reduction in the demand for 4 bedroom houses but increasing demand for 3 bedroom properties, which in part seems to be a reflection of the stability of couples and the likelihood of parents separating but both wanting to retain a house where the children can live or spend time.
- A general increase and strong market for 2 and 3 bedroom properties.
- A continuing demand for 1 bedroom properties, primarily aimed at first-time buyers whose options are limited by affordability or investors.

There was a general consensus that whilst trends were being witnessed across the industry at a national level, the demand for housing size does not reflect household size and this in more likely to be determined by affordability issues. However, developers recognised there is likely to be a finite proportion of the population who would currently be prepared to live at higher densities (particularly within SSCTs) and a cultural shift is required to influence this further.

Feedback on Scenario A

The workshop concluded that Scenario A was not a feasible approach from the point of view of the housing industry – particularly because it would result in a scarcity of housing supply which would force house prices to rise considerably, constraining economic growth and furthering concern around affordable housing. It is anticipated that the housing industry would be required to respond to through unrealistic expectations for affordable housing delivery through the planning system which would constrain housing delivery further.

Rates of housing delivery within SSCTs

Concern was raised over Taunton's ability to accommodate the levels of growth set out in the draft Regional Spatial Strategy before the additional household projections are even considered. The workshop attendees considered that further 'enabling' resources and a pro-active approach to securing housing completions was required from the public sector before completions would be delivered. Specific issues that would restrict the capacity of Taunton to accommodate the further growth that the various scenarios set out included the need to tackle the issue of M5 Junction 25 capacity and the requirement to establish an agreed approach to flooding levels and the constraints this places on development in central Taunton.

Bridgwater and Yeovil were seen to have further potential to accommodate the additional housing growth. The dependence of Yeovil on a small number of major employers and their economic fortunes was seen to be a key determinant of the

housing market in this areas. However, subject to the resolution of highway issues the town was perceived to have significant locational advantages. The Western side of the town was seen as the most suitable direction for growth.

Higher growth levels for Bridgwater were again thought to be based around the ability of the town to grow its economy and reduce its economic dependence upon Taunton. Work is currently being undertaken (both through the Bridgwater Challenge and through developers promoting sites) to challenge the employment market in Bridgwater and promote the town as a location for office development – this is seen as a cultural shift and a step forward in improving the image of Bridgwater as a business location. The outlook for Bridgwater was generally viewed as very positive with a shift in the employment structure, lower house prices and perceived reputation as an easier District to deliver housing however, some concern was raised over the potential for greater competition with Taunton into the future and the balancing of their relationship.

Role of market towns

The role of market towns in delivering smaller sites was also recognised and considered to have a major part to play in the delivery of housing completions required through the revised ONS projections. The group considered that the potential Category B settlements were generally able to:

a) accommodate growth,

b) use this growth to support their role in service delivery (including to the rural hinterland),

c) ensure that the local or working locally population are able to maintain their family or work links and

d) enable the market towns to retain their share of the population addressing the need to 'grow to stand still'.

The group particularly discussed the role of Wellington and the potential to increase in the importance of the town within the Taunton Deane Spatial Strategy and the potential of Mendip towns to deliver higher housing numbers.

Size of sites

The participants were concerned that there is a tendency for local authorities to 'put all their eggs in one basket' and allocate a small number of significant greenfield housing sites across the SSCTs. Many of these sites are taking a comprehensive approach to development but are not delivering housing numbers required through the Regional Spatial Strategy. Each site has differing issues but there are common focuses around land assembly, the front funding of significant development work and the much longer-term financial commitment required to deliver. The group also highlighted that local authorities are putting the emphasis on large scale Greenfield sites delivering comprehensive infrastructure provision which is funded through the development and many do not stack up financially.

Optimum site size for greenfield sites obviously differs according to location and developer (ie. whether a national housebuilder or regional / local company) but currently no site within the South West (even in the very strong housing markets) has been able to deliver completions over 500 dwellings per annum.

The group identified that smaller sites are easier to deliver and can make a greater contribution to delivering the levels of housing required. A range of sites under control of different developers also makes it less likely that the deliver of housing

completions will be 'held to ransom' by one or two major housebuilders and that other complementary issues such as diversity of design may be reflected.

Impact of changing land values

Land values for housing vary considerably across Somerset, however there was a general recognition that the difference between land values for residential and office space was decreasing. This trend could be seen to put greater pressure on the ability of the housing market to deliver housing completions of the levels set out in the scenarios and should be monitored into the future.

Planning for the economy

Concern was raised over the dominance of planning for housing without planning effectively to secure economic growth. The group felt that the levels of economic growth should be a key determinant in assessing the implications of the revised household projections and where possible to support economic growth where the population is currently focused – particularly emphasising the role that market towns could play in accommodating the additional housing growth. The discussion groups also highlighted concern that too much emphasis was being placed on office based growth rather addressing the needs of other employment sectors or those which fall out of the priority sectors within the Regional Economic Strategy.

Appendix D

Background Data from Transport Modelling