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South Gloucestershire Urban Localities: Review of Potential

Description, Context and Principles

November 2017
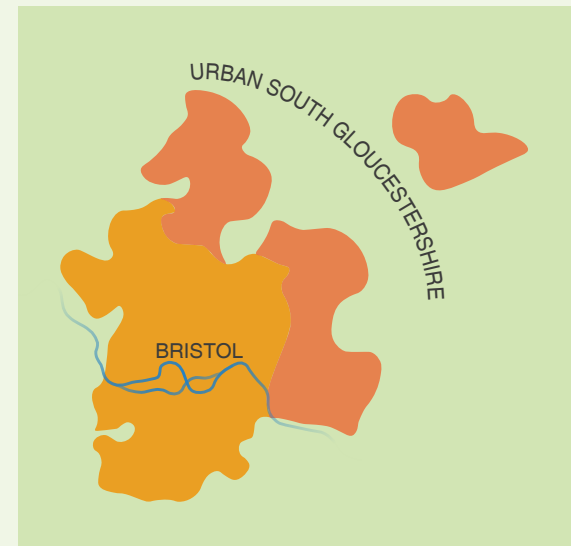
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Executive Summary

Introduction

South Gloucestershire Council is one of the four West of England authorities (Bristol City Council, Bath and North East Somerset Council and North Somerset Council) working on a Joint Spatial Plan for the period 2016-2036. This will set out a framework for strategic development as the context for the Local Plans of each authority. It will include proposals for further development within the established urban areas.

Alongside this, the West of England Combined Authority (Bristol, South Gloucestershire and Bath and North East Somerset) has entered into a devolution deal with Central Government.

Within this context, South Gloucestershire Council has identified the importance of its urban areas performing to a high level to both enable local communities to enjoy a good quality of life and to contribute to the wider prosperity and sustainability of the West of England. Related to this, there is also a need to maximise the potential of existing urban areas in order to meet the need for new homes and jobs.

Currently, within urban South Gloucestershire there are some very significant assets. However, the nature and pattern of development that has occurred over recent decades appears to be failing to optimise the potential of a number of localities. The Council has recognised that a continuation of predominantly suburban and standard development models is unlikely to provide the type and quality of urban environments that will enable communities to thrive and best contribute to the growth ambitions of the West of England.

Consequently, South Gloucestershire Council has commissioned this review of seven urban localities that appear to have a need and potential for significant positive change.

The report covers seven localities:

- Patchway and Filton Airfield
- Harry Stoke
- Emersons Green, Science Park and Environs
- Staple Hill
- Kingswood
- Hanham and Environs
- Yate Station and Environs

All of these, with the exception of Yate, directly adjoin the Bristol City Council administrative area, forming the north and east fringe of the wider urban area.

Each stage of the work has been undertaken in close consultation with, and benefiting from invaluable contributions from the South Gloucestershire officer team.

The Strategic Context

Patchway and Filton Airfield, Harry Stoke and Emersons Green, Science Park and Environs are areas of relatively recent development, with a good deal of what exists built post-1990. Staple Hill, Kingswood and Hanham and Environs are longer established, mature urban localities whilst Yate is a stand-alone settlement that, from its village origins, began to grow as a result of quarrying and a railway connection into Bristol and was subsequently expanded in a planned manner in the 1960s.

The socio-economic profile of the urban South Gloucestershire localities is broadly reflective of a centre/suburb spatial structure. The central area of Bristol is typified by younger people, high levels of educational qualification, higher level occupations, apartment living and movement by walking and cycling. In the South Gloucestershire, urban fringe there is some variation, but the area is typified by an older population, lower qualification levels, lower level occupations, a high proportion of detached and semi-detached properties and movement dominated by the private car. This is also broadly true of Yate.

Proposals for further development in central Bristol, to create new, high density mixed use urban environments pose a potential challenge to urban South Gloucestershire in terms of retaining and attracting well qualified people, businesses and investment.

In addition to the broad socio-economic picture, there are a number of societal trends that also form part of the context for considering the future of urban South Gloucestershire. These are:

Economic Development

There is a discernible increase in calls for an alternative to the dominant economic model based on pursuit of GDP growth, in favour of a more sophisticated model

that takes account of a wider range of components for a successful and sustainable economy. This is sometimes termed inclusive and sustainable growth.

Climate Change

There is a consensus of majority scientific opinion that human activity is contributing to a sustained increase in world temperatures. Mitigating this requires action at local level.

Digital Technology

The pace of change and development in digital technology is having effects across urban life, including work, business and travel.

The Spatial Structure of Cities

City areas are often based on a spatial; structure that comprises a central area surrounded by suburbs. However, many cities are now pursuing a multi-centre model in order to better relate housing to employment locations, reduce travel, enable more mixed communities, provide greater lifestyle choice and enhance the overall performance of the urban area.

Demographics

The ageing nature of the population and the growth in city centre living driven by younger people are key trends.

Housing

The inadequate supply of homes is a constraint on people's life chances and the economy. Diversification of the supply side is an objective of Government and increases in custom-build and build for rent development is evident. The ageing population, alongside generally better health and independence amongst older age groups also gives rise to a need for different forms of housing provision.

Economic Inequality

The UK has a high level of inequality and this inhibits the potential for communities and local economies to thrive.

Health

Current lifestyles present a threat to health and the built environment is a contributory factor.

Employment

Automation has and is forecast to continue to have a major impact on employment. The impact on job numbers is uncertain but some commentators envisage new jobs being created to offset the automation of more routine tasks. Working patterns are changing too as people in many occupations are freed by digital technology from the ties of a physical workplace.

Retail and High Streets

The growth of out of town shopping centres and on-line retailing has had a significant impact on shopping patterns and high streets and is forecast to continue to do so.

Transport

There has been a fall in distance travelled per person over recent years and developments in automated vehicles are likely to have significant impacts on future travel behaviour.

Strategic Investment

Investment in strategic infrastructure also has the potential to impact on the future of urban South Gloucestershire. Hinkley Point C Nuclear Power Station will provide a major source of jobs and is likely to draw people from across a wide area. Provision of another potential new nuclear power station is being explored at land next to the existing power station at Oldbury, which could be built towards the end of the Local Plan period and have similar benefits. Modernisation of the Great Western Mainline will enhance services between Bristol Parkway Station, which is located in urban South Gloucestershire, and London and South Wales. The High Speed 2 railway project also has the potential to enhance competitor urban areas, particularly Birmingham.

The broad socio-economic picture, combined with the these trends and the strategic investments suggest that, whilst there are existing 'hotspots', urban South Gloucestershire has the potential to perform at a higher level in terms of quality of life and economic activity. These factors point towards a need for an urban structure based around stronger centres of uses, facilities and activity. They also highlight the need for new forms of development, diverse high streets, environments that facilitate walking, cycling, sports and recreation and a major enhancement in public transport.

Planning and Transport Policy Framework

The planning policy framework at national, West of England and local level and consideration of approaches in other European cities suggests a number of things:

Vision

The overarching vision for the West of England is to be one of the fastest growing areas in Europe but this is not defined. The evolution of existing urban areas as places of strong identity that provide for a good quality of life are fundamental to sustainable growth and this needs to be seen as a top priority. Growth needs to be inclusive, bring quality of life benefit, across the community.

Transport

This is a primary determinant of the quality of places and their productivity. Significant improvements are underway and these need to be built upon. Compared to some UK cities and many European competitors, the wider Bristol urban area has a lot of catching up to do.

Placemaking

Flowing from the vision, the quality of places is important to the success and sustainability of the urban localities. Further planning policy and guidance, alongside other measures may be needed to achieve this.

Homes

The policy framework requires a variety of types of homes as this is important to meet needs and enable diverse and thriving communities. To achieve this a range of housing models is needed.

Jobs

Consideration needs to be given to the future of existing areas of employment and where there are redevelopment opportunities, how this can best contribute to development of the local economy.

Energy

In addition to measures to reduce energy demand, provision of renewable and low carbon energy needs to be planned.

The Story of Place

Patchway and Filton Airfield

This locality has grown substantially over the past 50-60 years and includes mature residential neighbourhoods, the Cribbs Causeway regional shopping centre, significant areas of industry and the disused Filton Airfield. A high proportion of the population work in routine and semi-routine occupations.

The Airfield and the wider new neighbourhood that is planned offer the potential for transformational change to enhance the overall sense of place, quality of life offer and integration between the somewhat fragmented components of the locality.

Harry Stoke

Most of Harry Stoke has developed over recent decades. It contains significant assets, including Bristol Parkway Station, a Ministry of Defence Establishment and the University of the West of England.

Residents in the area have higher qualifications levels that all of the other localities except for Emerson Greens) and a corresponding higher proportion of people working in higher and lower managerial and professional occupations.

Despite its significant assets, Harry Stoke currently lacks any real sense of place. The opportunity for the future is to develop a stronger sense of urban structure and scale and better integration across the locality.

Emersons Green, Science Park and Environs

The expansion of Emersons Green around the original settlement is relatively recent and includes the Bristol and Bath Science Park. Residents here have higher qualification levels and a higher proportion work in managerial and professional roles compared to the other localities.

Capitalising on the presence of the Science Park and, again, enhancing the sense of place is an important objective for the future, particularly given the competition that will be offered by planned new development in central Bristol.

Staple Hill and Environs

Staple Hill grew following the introduction of a station on the Bristol and Gloucester railway and the introduction of industry, including motorcycle manufacture. Today its centre, around a traditional High Street, is surrounded by suburban housing. Its socio-economic profile is broadly in line with the average across the localities and for the wider Bristol area as a whole.

Its future lies in building up its sense of character and status as an urban centre. Pockets of under-performing industrial and commercial use provide potential for a more dynamic economy through mixed use redevelopment.

Kingswood

Kingswood is a mature urban centre that developed around a strong manufacturing economy. It retains a sense of character and identity, albeit diluted through some modern development in the centre. Its residential neighbourhoods are, again, generally of a generic suburban character. Residents tend to have lower levels of qualifications and to work in lower level occupations. A significant proportion however work in skilled trades. A significant proportion of households also experience some level of deprivation.

Kingswood has the potential to develop its urban centre identity as a place to live and work. It needs also to develop a clearer and stronger role as part of the wider urban economy.

Hanham

Originally a rural hamlet, Hanham still retains a sense of village character within the urban area. However, its housing offer is again relatively ordinary and unvaried.

It has the oldest population profile amongst the localities and the highest level of housing that is owned outright. Much of the housing stock is also under-occupied. The proportion of people working in mid-level occupation categories is relatively high.

In the future, it can build on its attributes as an urban village by introducing new housing offers, new business space and perhaps some modest additional retail provision in the centre to help offset the draw of the out of centre Longwell Green shopping centre.

Yate

Yate is linked to Bristol by the mainline railway and has grown significantly from the 1960s. Today it provides a mature family living environment that has been enhanced over recent years through new amenities, including a cinema.

Qualification levels are generally relatively low and this is reflected in a high proportion of people working in routine and semi-routine jobs.

Yate is at a pivotal point in defining its future. It has the potential to grow in status as a town, appealing to households looking for proximity and connection to employment whilst enjoying the lifestyle offered by a free-standing small town in a rural setting.

Principles for Development and Change

The seven localities contain significant accumulated assets. However, whilst there is variation between them, the prevailing character is of sprawling suburbia where a strong sense of coherence and identity is lacking, inefficient patterns of land use and development forms are a significant feature and a dominance of travel by car is reflected in busy roads that separate as well as connect and create negative impacts on environmental quality.

For the localities to better realise their potential as places where communities and economic activity can thrive, there is a need for a new direction in terms of development and change in the built environment.

The strategic context, policy framework and the story of place suggest a number of principles to guide future development and change.

Mutability

The ability of urban areas to change and adapt is of fundamental importance. Where there is this potential it is important that it is acted upon.

Mixed Communities

The creation of urban environments that are attractive to a more diverse and stronger community mix can bring benefits in creating thriving, sustainable communities and economies.

A Network of Strong Centres

A multi-centre spatial model can help to diversify local economies, reduce travel, strengthen identity and raise overall productivity for the urban area as a whole.

Sense of Place and Liveability

Ultimately economic activity and economies are created by people and people are attracted to places with good qualities of liveability. This requires a sense of character and identity, a strong green infrastructure, proximity to a range of services and amenities that are accessible by means other than the car, places that enable interaction, diverse local economies and a good standard of public service provision.

An Eco-System of Business Premises

A strong economy requires a range of premises to cater for generation of ideas, research and development and making of products and provision of services.

Diverse High Streets and District Centres

Diverse and thriving centres are essential to a good quality of life offer.

New Types and Models of Housing

New types of housing have a role to play in diversifying the offer and enhancing the attractiveness of the localities. To achieve this, new delivery models need to be considered.

Leadership and High Ambition

Whilst there are great opportunities, the challenges in delivering are significant. Leadership and high ambition are therefore essential.

Purpose

1.1   South Gloucestershire Council is working with the other authorities that collectively comprise the West of England (Bristol City Council, Bath and North East Somerset Council and North Somerset Council) to prepare a strategic planning framework for the West of England – the Joint Spatial Plan 2016-2036 (JSP). This is considering strategic options for development and as part of this process the role and suitability for growth of towns and urban areas of South Gloucestershire will be considered.

1.2   Following closely alongside this, evidence work is underway on the South Gloucestershire Local Plan to provide an up to date district level planning framework up to 2036, replacing the current Core Strategy.

1.3   These planning initiatives are progressing alongside the West of England Combined Authority and its devolution deal with Government.

1.4   In relation to these initiatives South Gloucestershire Council has identified the importance of its urban areas, which account for well over half the district's population, in enabling communities to thrive and in contributing to the wider prosperity and sustainability of the West of England. Within this context, the Council has recognised that, against a legacy of overwhelming suburban style development, a "business as usual" approach is not likely to result in the urban areas becoming a focus for the type of growth and investment that would enable their communities to prosper and share the benefits of growth and which make the best and most sustainable use of land within established urban areas.

1.5   The Council has therefore commissioned this report to review the capacity of urban localities to support the growth and quality of place ambitions of the authority and the wider West of England, the challenges and requirements for delivery. It covers seven localities, selected for their significance as neighbourhoods with centres or clusters of activity and community focus and where significant change is currently proposed or where there appears to be the potential for such change.

1.6   This study examines the development history and the potential contribution that could be made, to the future of the wider JSP area, by the South Gloucestershire urban area immediately contiguous with the northern and eastern boundary of the Bristol City Council area and the western portion of Yate to the north east.

Methodology

1.7   This review focuses on seven locality areas. The starting point for identifying these was consideration of:

- Transport hubs/interchanges or locations where investment could provide a more efficient and attractive service to the surrounding area.
- Potential catalysts for transformational change.
- Areas subject to some degree of market failure where housing-led regeneration could improve the performance of places.
- Areas of poor/inefficient use of land with potential to perform better.
- Areas with potential for the most significant increase in gross value added.

1.8   The project brief produced by South Gloucestershire Council identified seven localities based on these criteria. These have been retained with some modification. The locality of Stoke Gifford and Abbeywood Retail Park and Environs has been combined with Bristol Parkway Station and Environs to create one locality that we have called Harry Stoke. We have extended the area covered by this locality by a minor amount in order to encompass all the quadrants of land defined by the railway lines to the west of Bristol Parkway station. Also, Patchway and Filton Airfield has been added to the project as an additional locality.

1.9   The boundaries to the localities were defined through discussion with the South Gloucestershire project team and sought to establish coherent and logical physical areas that broadly align with Census Output Areas. The correlation is not exact and the study areas are therefore shown in red with the closest amalgamation of census super-output areas outlined in blue on the area maps in chapter 2 below.

1.10 Having defined the localities, the review of the potential of these seven urban localities to establish principles for future development and change has been undertaken through:

- Describing the strategic context for the localities in terms of the established pattern of development that has evolved through growth of the wider Bristol urban area, the broad socio-economic profile of this area and the "big picture" societal trends that may have a bearing on the future of the localities.

- A review of the existing and emerging planning and transportation policy frameworks and their potential implications for future development of the localities.

- An understanding of the "story" of each of the localities – how they developed, their current characteristics and future needs and potential.

- Drawing on the above, the identification of a set of principles to guide and inform future development and change.

Consultation

1.11 Each stage in the review of the seven urban localities has been undertaken in close liaison with the South Gloucestershire officer team who have provided invaluable advice and input.

1.12 The review of potential within the identified urban localities is the first step in a process towards formulating proposals for more fully realising the potential of these places. As such it has not, at this stage, been the subject of widespread consultation. However, discussions have been held with a number of key stakeholders and these have helped inform the information and conclusions set out in this report. The following have been engaged with:

- West of England Local Enterprise Partnership
- Bristol and Bath Science Park
- University of the West of England
- South Gloucestershire Council Officers

- Studio Hive (regarding Filton Airfield)
- Merlin Housing Association

Presentation of the Review of the Urban Localities

1.13 The localities are presented in this report in a west to east order running around the north and east fringe areas as follows:

- Patchway and Filton Airfield
- Harry Stoke
- Emersons Green, Science Park and Environs
- Staple Hill
- Kingswood
- Hanham and Environs
- Yate Station and Environs

The Project Team Skillset

1.14 Nash Partnership was established in 1988 and our consultancy team comprises geographers, planners, regeneration expertise, historians, urban designers, and architects.

1.15 Much of our project work is directed to understand why and how the built environment comes to be the way it is and how this knowledge can be used to build and regenerate places through policy making, design intervention and delivery models.

1.16 Working across the urban change spectrum from spatio-economic research to the execution of construction projects we understand how each part of the delivery chain works and how change mechanisms can be improved where desirable.

2   The Localities

2.1   Six of the seven localities sit within the South Gloucestershire urban area that fringes Bristol and in aggregate comprise around 50% of this fringe area. The seventh locality is Yate, situated to the north-east of this fringe area. Each of the localities is set out below, depicted by red shading with the Census Output. Areas that most closely correlate with the locality outlined in blue.

Patchway and Filton Airfield

2.2   This area has a natural boundary formed by the M5 in the north boundary to the A38 that, together with the Bristol - Cardiff railway line, forms the eastern boundary. The freight railway line (serving Avonmouth) forms the southern boundary creating the triangle that forms this locality.

2.3   It was initially considered that there may be potential to include areas to the east of the A38 and rail line. However, the area at Bradley Stoke is a fairly new development and provides little scope in the way of transformation or capacity within the foreseeable future.

2.4   The area is already large with apparent capacity for additional development. It includes Cribbs Causeway regional shopping centre and Filton Airfield (disused). The allocated Cribbs/Patchway New Neighbourhood (Policy CS26 in the adopted Core Strategy) will also create significant change in the area and increase urban development. These proposals potentially create a dynamic that may provide further potential for development and change.

Key   Locality area   Census output area
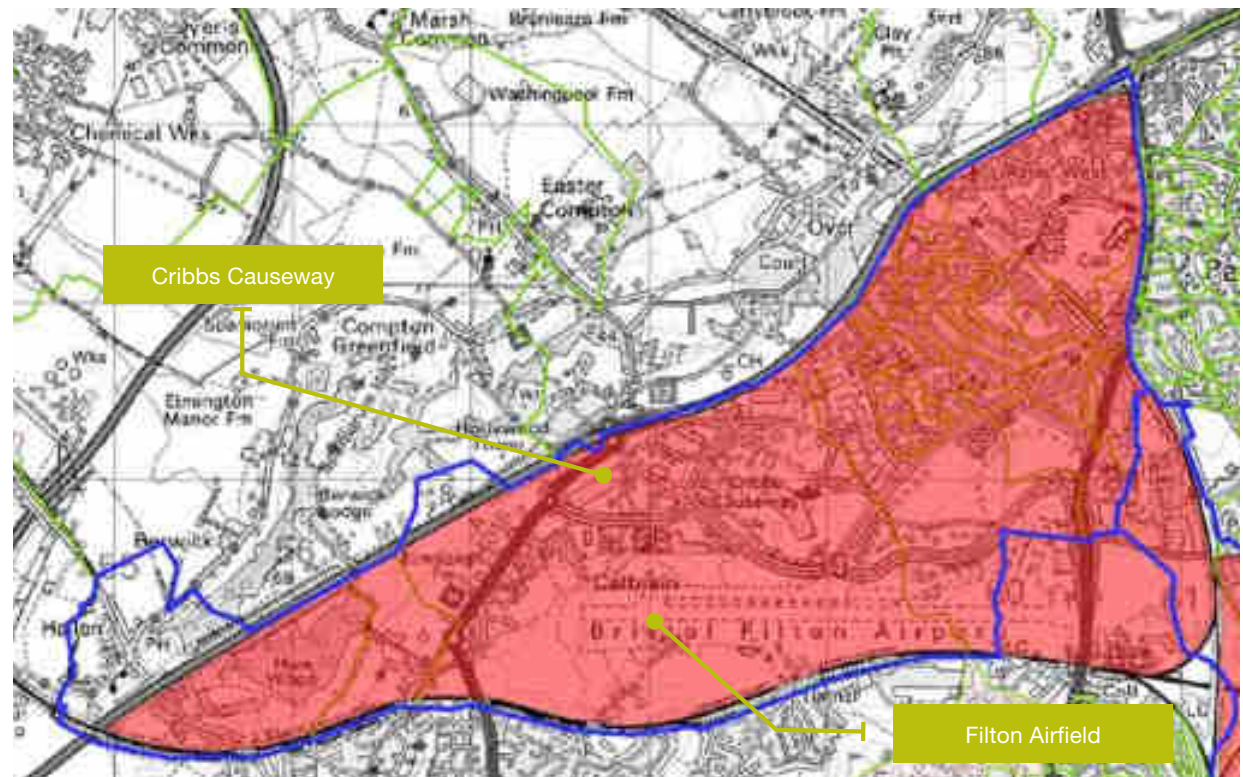
Figure 2.1: Patchway and Filton Airfield Locality

Harry Stoke

2.5   This area combines Bristol Parkway station and a series of institutional and business assets. It includes the New Neighbourhood East of Harry Stoke (Core Strategy Policy 27) and the University of the West of England Frenchay Campus which is likely to be further developed (Core Strategy Policy 28). Again the existing assets and proposals for growth potentially create opportunities for further development.

MOD

University of the West of England
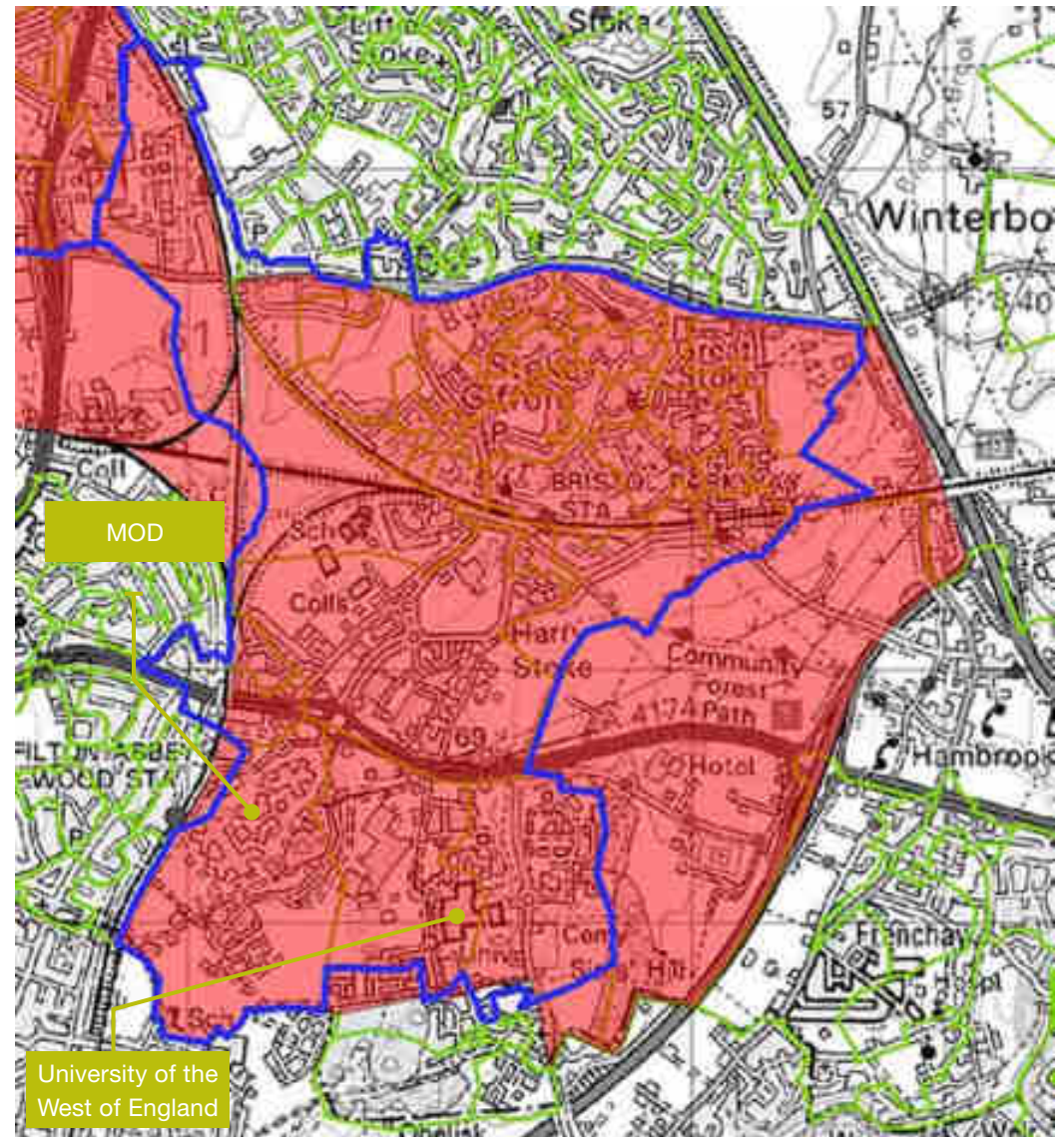
Figure 2.2: Harry Stoke Locality

Emersons Green, Science Park and Environs

2.6 The locality is the home of the Bristol and Bath Science Park (the Science Park) which is forecast to provide 3,000 jobs. Creation of a new residential neighbourhood is well underway at Lyde Green next to the Science Park and the locality also includes Emersons Green Retail Park. A new junction on the M4 is a possibility in the future.

Bristol and Bath Science Park
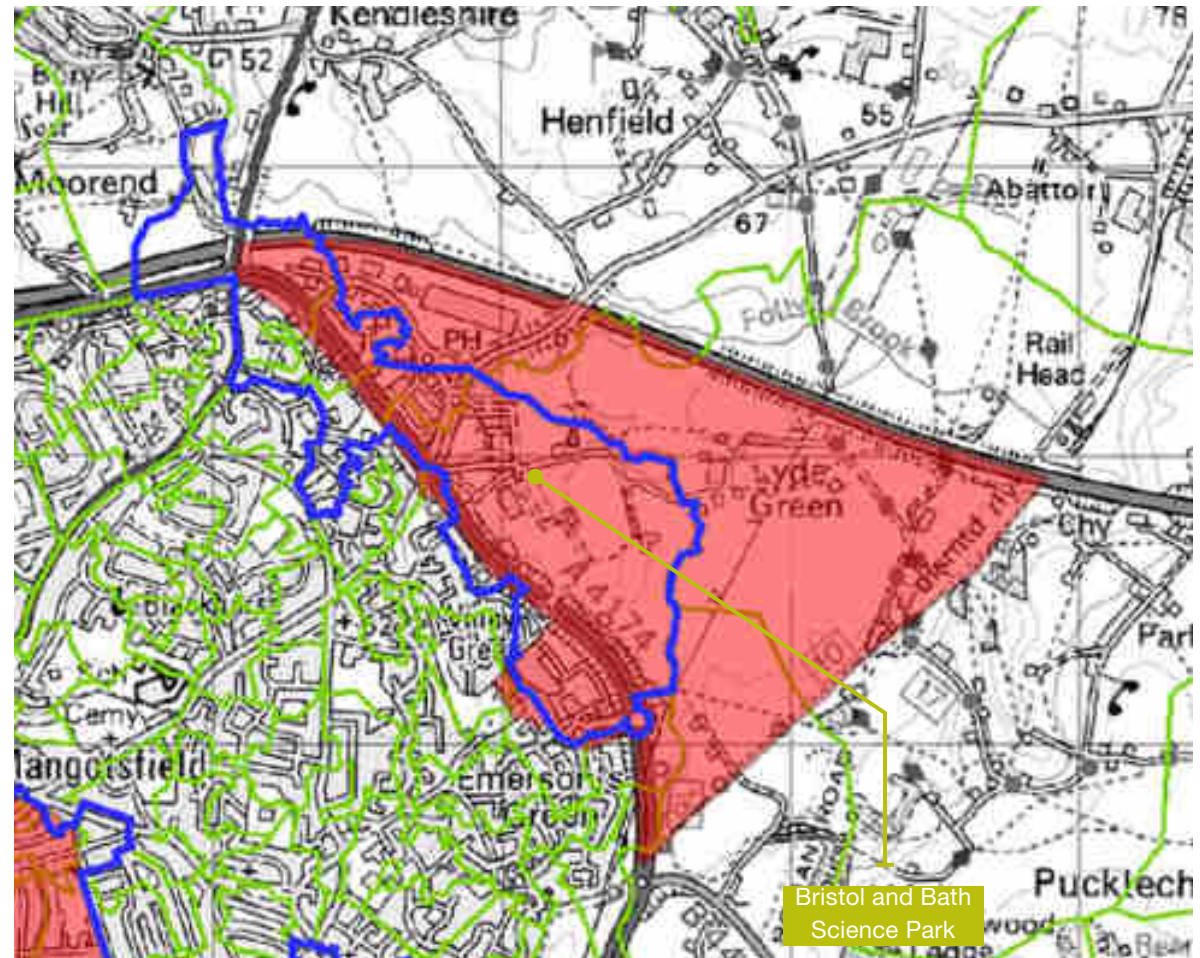
Figure 2.3: Emerson's Green Locality

Staple Hill

2.7 The Staple Hill area includes two nodes that act as local centres and this is reflected in the boundary. The first is in the north-west of the area around Downend Road with the second on the High Street and Broad Street. Also included is the area around Rodway Hill.
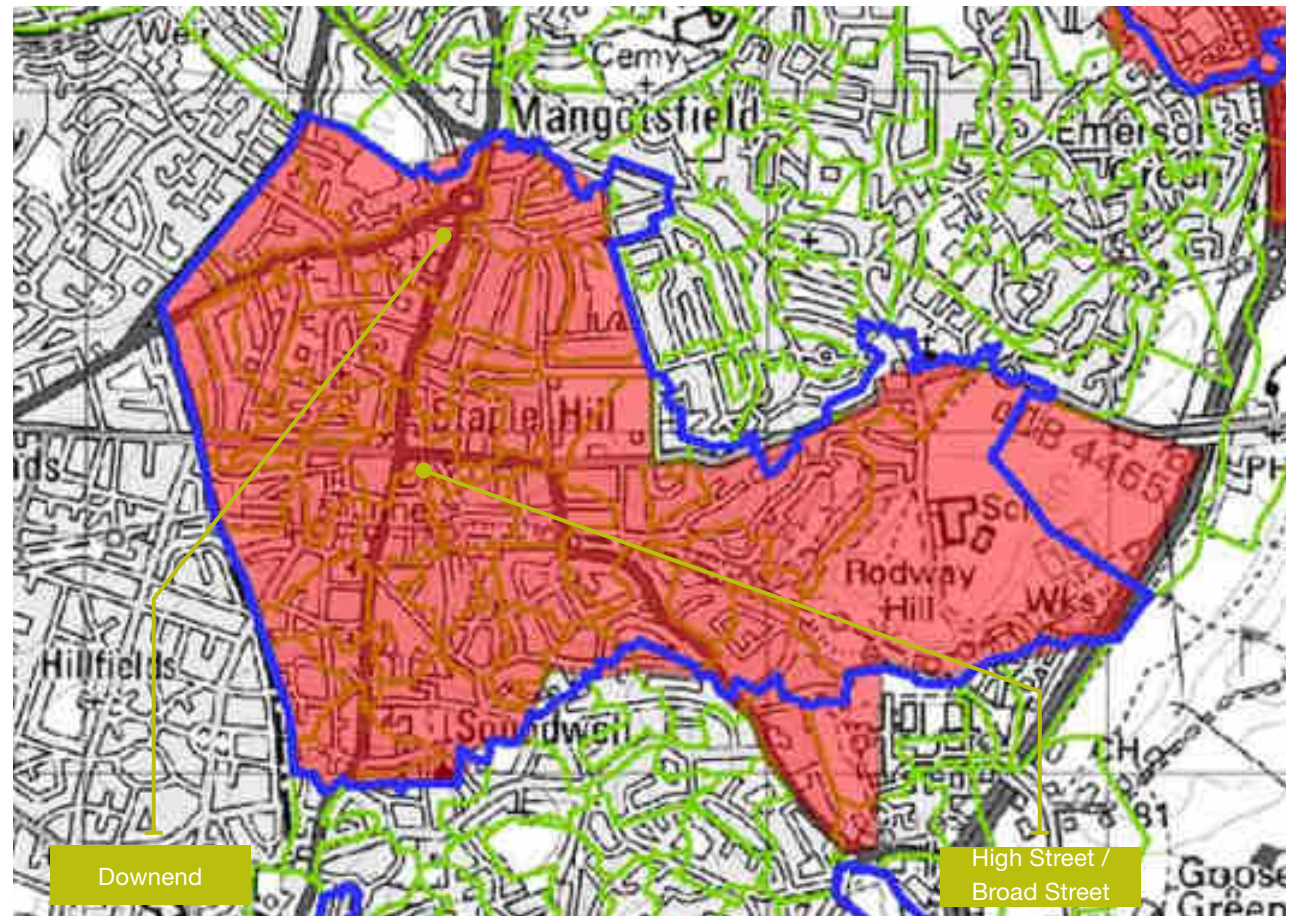
Figure 2.4: Staple Hill and Environs Locality

Kingswood

2.8 Kingswood locality is centred on its High Street, which includes Kings Chase Shopping Centre, with older industrial and storage premises to the south of the High Street. It includes the eastern side of Warmley, characterised by a concentration of industrial and storage premises and significant green spaces.
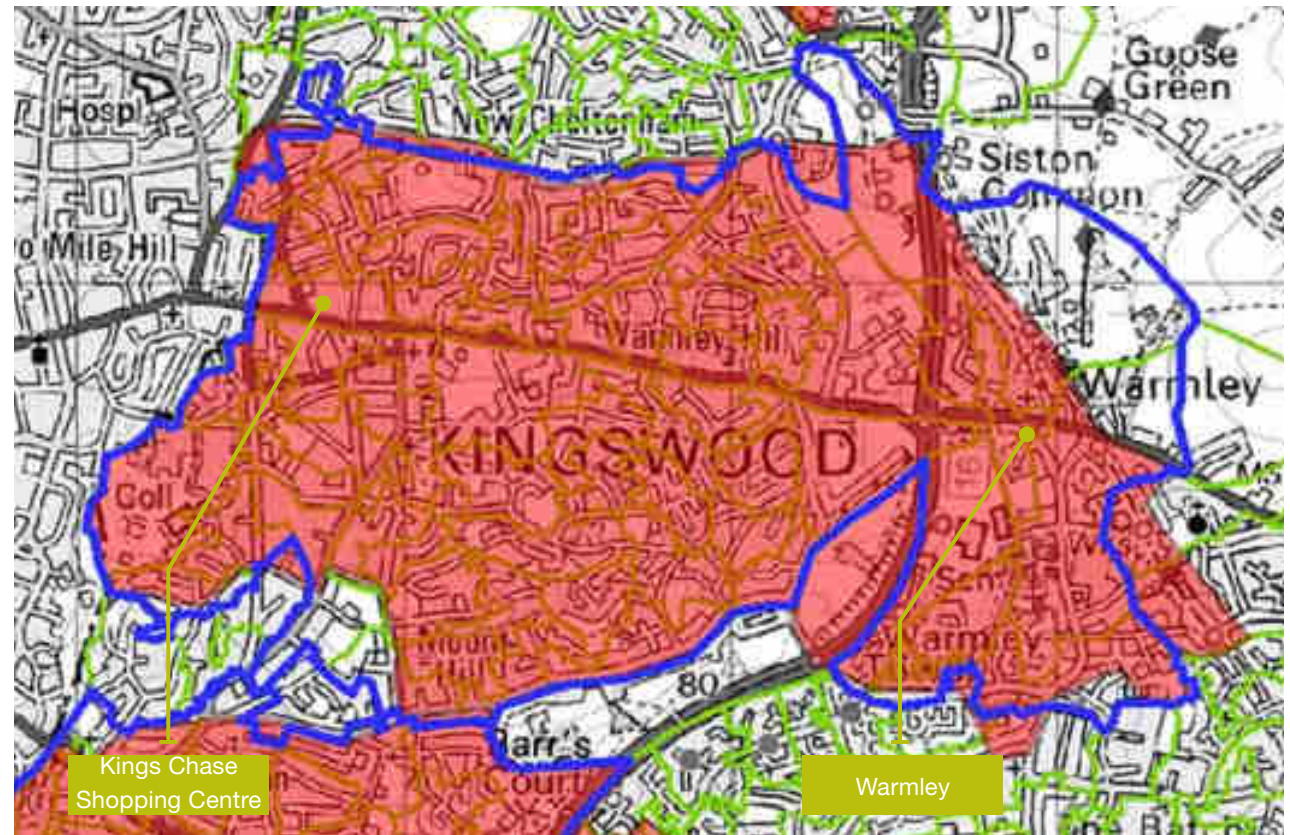
Figure 2.5: Kingswood Locality

Hanham and Environs

2.9   Hanham has a natural boundary following the River Avon and the A4174 to the east.

2.10   It includes both Longwell Green Shopping Centre and Hanham High street. Although not generally perceived as part of Hanham, the Longwell Green Shopping Centre has been included as this has a significant bearing on the functioning of the area.
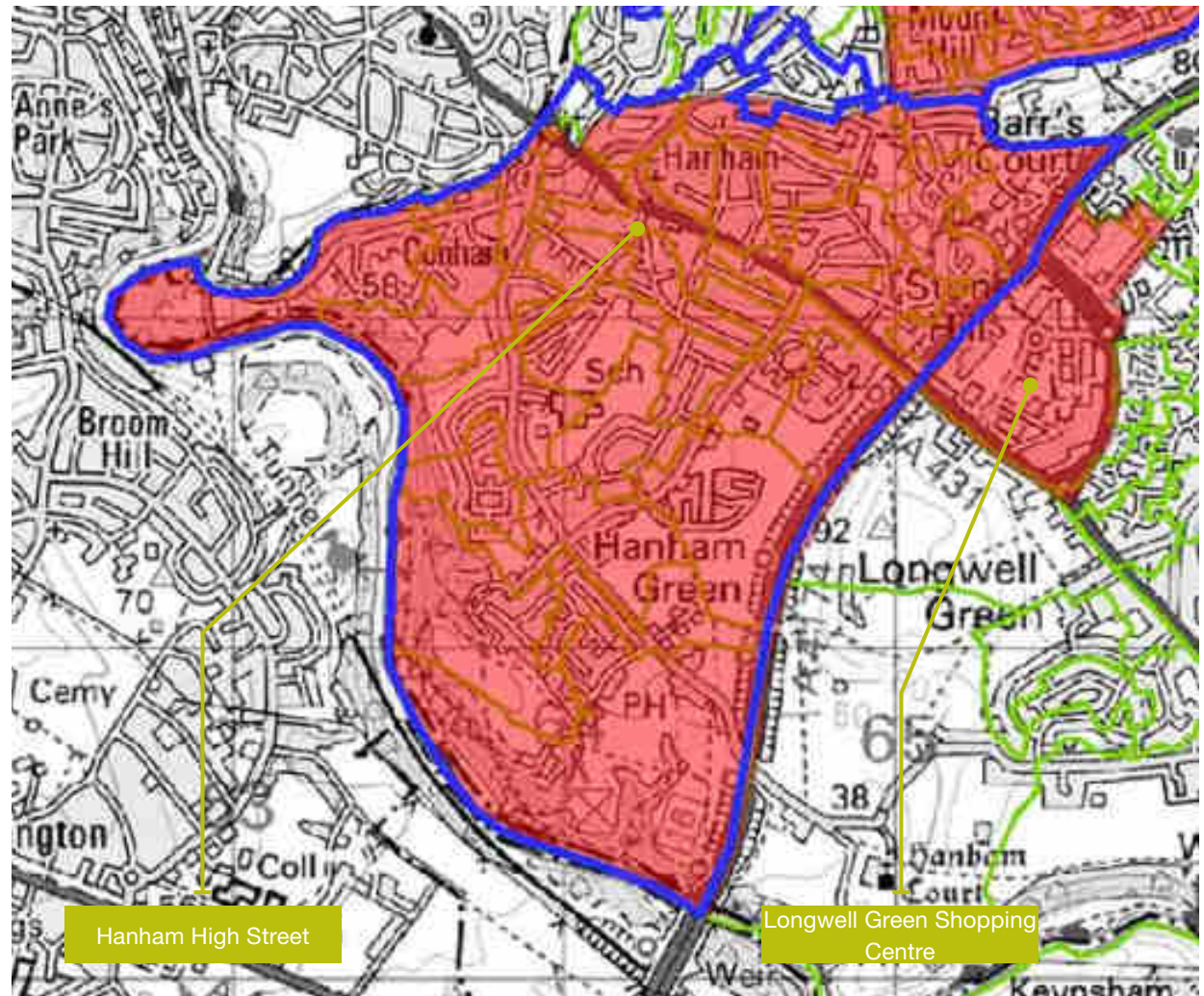
Figure 2.6: Hanham and Environs

Yate Station and Environs

2.11   This area focuses on the area around the train station as a key gateway into central Yate. It includes the Beeches Industrial Estate and adjoining industrial, commercial and storage premises.

2.12   To the south is mainly 1970s housing designed using Radburn principles.

Figure 2.7: Yate Locality

Station Gateway Area

Town Centre

3   Strategic Context

The Growth of Bristol and Urban South Gloucestershire

3.1   Much of the area that is now urban south Gloucestershire was undeveloped until relatively recently. The sequences of development and recent urbanisation is illustrated in Figure 3.1 to Figure 3.3.

3.2   Even until World War 2 the city of Bristol was very compact, almost entirely within four kilometres of the centre's harbour. The growth points 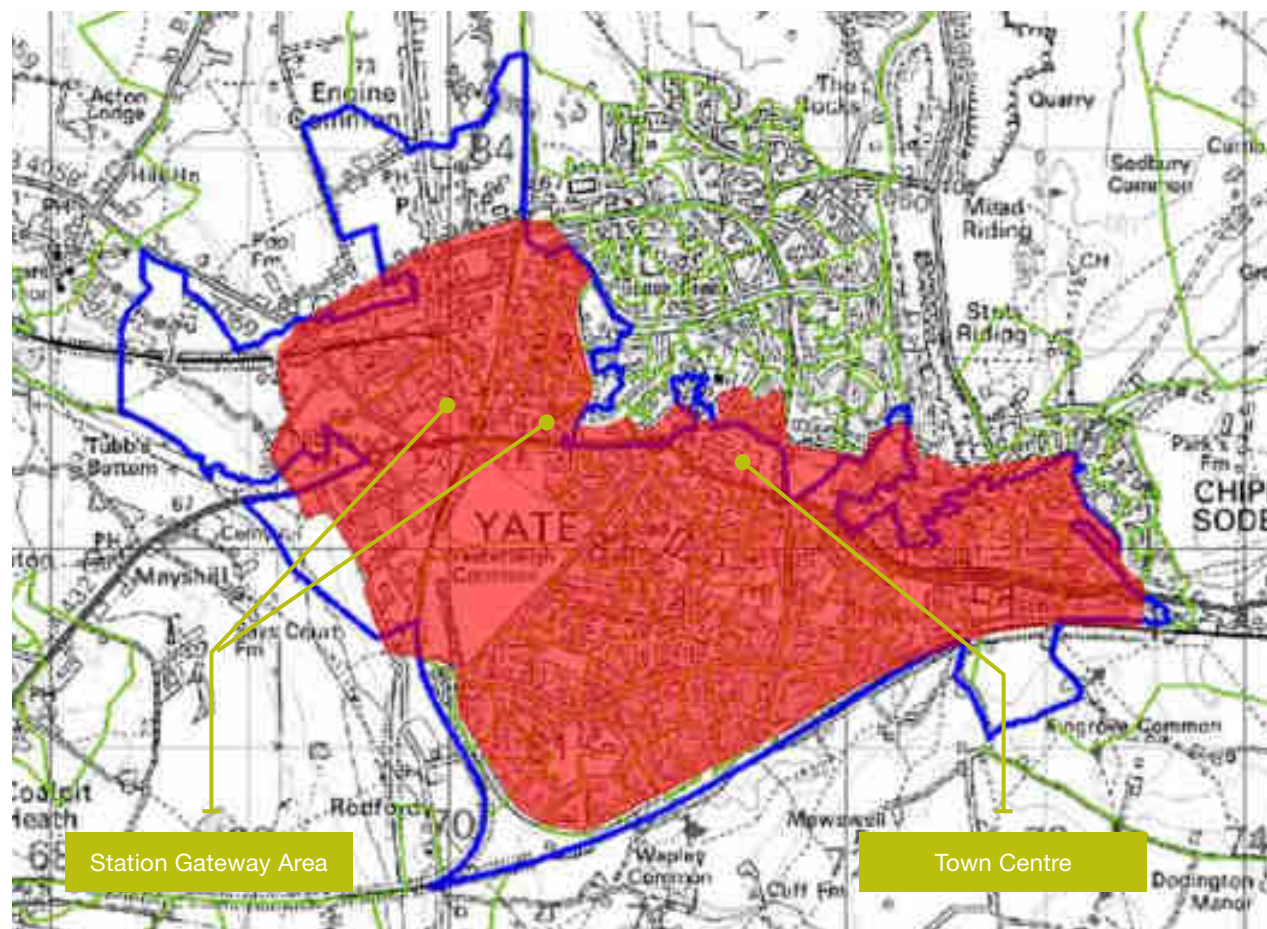of the city that went beyond this radius followed the railway lines leading to Gloucester, and west into Wales, snaking from Temple Meads around the east of the city, through the stations at Ashley Down, Horfield, Filton and East Woods to Fishponds, Staple Hill and Rodway. Development beyond this compact pre-war city was pushed by housing demand from the centre, but also pulled by new employment opportunities in the aero industry factories at Filton and Fishponds. In addition, the strong and diverse post mining era economy of the Kingswood coal field, including metal founding, railway and motor vehicle manufacturing, food, ceramics and packaging, gave Kingswood an unusual degree of economic independence alongside the economy of Bristol.

3.3   After 1945 rapid further expansion of Bristol was driven by a number of factors:

- Continuing rapid development of the north Bristol aero industry through the cold war era and the rapid development of civil air transportation that generated a need for more homes to serve the growth in employment.

- Significant programmes of resettlement housing for Bristol residents displaced by war time bombing or a desire to rehouse the families of retuning servicemen in better conditions.

- Continuing evolution of the Kingswood area mixed economy.

- In the 1970s, the opening of Bristol Parkway Station and the coming of the M4, M5 and M32 motorways, which gave considerable spatial economic advantage at the point where they come together, supported by the two bridge crossings of the River Severn estuary - the original Seven Bridge, opened in 1966 and the second Severn Crossing that came in 1996.

3.4   Expansion of Bristol within the city boundary in the post war years was characterised by suburban housing. Only in a few instances, such as the concentrations of employment at Fishponds and the expansion of Southmead Hospital, were new ingredients added to the economy of Bristol's periphery. However, the development of urban South Gloucestershire was characterised by strategic investments, through development of the Filton aeronautical industry and Frenchay Hospital. This has continued more recently with the development of the Cribbs Causeway regional shopping centre, Aztec West and associated business parks south of the M4, the coming of major new academic and office based employment at Harry Stoke and, more recently still, at Emersons Green with the development of the Science Park.

3.5   Major road infrastructure is a characteristic feature of the areas of urban South Gloucestershire fringing Bristol. In addition to the M32 running from the M4 into the centre of Bristol, the A4174 arcs east from Filton to Emersons Green and then south via Hanham to join the A4 just outside Keynsham, between Bristol and Bath, in effect performing the role of a ring road around the eastern and northern fringes of the city.

3.6   As the South Gloucestershire urban area fringing Bristol saw significant growth in the 1970s and onwards, central Bristol experienced a period of decline as its docks relocated to Avonmouth during the same period. However, the harbourside area has since seen significant regeneration, largely residential with mixed use elements, and related burgeoning of its waterside bar, restaurant and cultural offers. Around Temple Meads Station new office development occurred in the 1990s at Temple Quay, with more recent office buildings being constructed on the opposite side of the harbour, to the north of the station. In relation to the spatial dynamics of Bristol and the South Gloucestershire urban area fringing the city, it is important to note that major plans are currently in train for development across a large swathe of land around Temple Meads station, designated as an Enterprise Zone, to create a new and vibrant mixed-use quarter.

3.7   Much of the recent development in central Bristol has been at relatively high density and the intention is for high density mixed-use development within the Temple Quarter Enterprise Zone and on other central area land. The urban area of South Gloucestershire fringing the city is however characterised by low

density development. In part this reflects the location on the edge of the urban area, but also a car based infrastructure and estate based development models that have an inward looking, self-contained character that gives priority to vehicles, rather than contributing to a sense of place that is integrated and conducive to pedestrian activity.

3.8   Yate, north of the M4 and to the north east of Bristol prospered from the nineteenth century around extraction of the mineral deposits in the area – coal, limestone and Celestine (spar). It had the first railway into Bristol in 1844, for the transportation of coal with a subsequent line to Avonmouth Docks. The former village grew significantly following its designation as a development area in the 1960s, providing new homes, partly to accommodate overspill from Bristol and has seen further expansion in more recent decades.
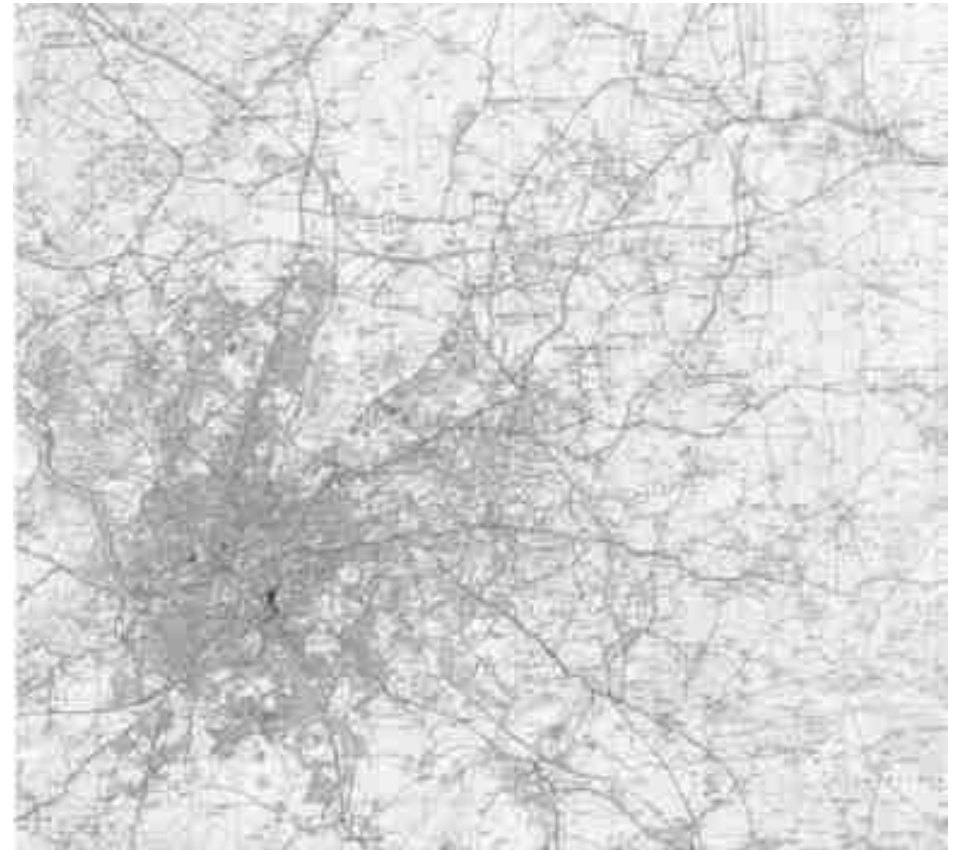

Figure 3.1: Wider Bristol Area - Map 1955-61

Figure 3.2: North Bristol Fringe - Map 1990

Figure 3.3: Wider Bristol Area - Map 2015

Socio-Economic Profile of Urban South Gloucestershire

3.9 In broad terms, indicators of prosperity and well‑being are higher in the newer neighbourhoods of urban South Gloucestershire fringing the northern edge of Bristol, compared to the more long-established communities on the eastern fringe. To a significant degree, this reflects the housing stock, with the newer neighbourhoods characterised by a higher proportion of owner occupied detached houses which will attract households with higher incomes. In this connection the north fringe area benefits from railway links, the M4 motorway and a concentration of high value employment.

3.10 Within this broad picture there is however, a degree of variation and a fuller picture is outlined below. The maps in this section are based on the 2011 census and plot how parts of the Bristol Built-Up Area (BUA), including the urban South Gloucestershire study localities, perform relative to the average for the BUA (unless indicated otherwise). In general, these spatial variations across localities are not as marked as they are within the Bristol City.

3.11 General profiles for each locality based on comparative 2011 census statistics are provided in Appendix 1. It is important to note that the profiles are meant as comparative tools to highlight some of the variations between the localities. Therefore, the data presented reflect the performance of each locality against the average for all of the localities, and pick out where certain features are notably higher or lower than the average. They do not necessarily present the dominant characteristics of each locality. For example, car usage is by far the most common method of travel to work in all localities but to show a car symbol for all of the profiles would not identify the variations between localities.

3.12 All data used for the tables and maps that follow is from the 2011 census unless otherwise specified. Source census data is shown in Appendix 2.

Demographics

3.13 The population of the study localities relative to other geographical areas is shown in Table 3.1 below. Taken together the population of the localities areas combined make up approximately 15% of the total population of the Bristol Built-up area, 36% of the population of South Gloucestershire and 49% of the total population of the South Glos Urban Fringe and Yate combined.

3.14 Taken together, the age profile of the localities is broadly similar to the average for the BUA and South Gloucestershire, though with a slightly higher proportion of those in the 0-15 year old and 65+ groups. As a result, a slightly lower proportion of the localities' combined population is of economically active age compared with the Bristol BUA, but it has a higher proportion of people in this group than South Gloucestershire. (Table 3.2).

3.15 Across the localities there is some notable variation in age structure with Staple Hill and Hanham having a higher proportion of people aged 65 and above. (Table 3.4).

3.16 The spatial pattern of household representation by age is much as would be expected, with the main household representative under 35 very evident in central Bristol but much less so in the suburban areas including the localities. Conversely, household representatives over 65 are more evident in the suburban areas with notable concentrations in parts of Hanham, Staple Hill, Yate and, to a lesser degree, Kingswood (Figure 3.4 and Figure 3.5).

3.17 In terms of density of population the urban localities are very substantially below the average for the BUA (Table 3.2).

	Persons
Bristol BUA	617,280
South Glos	262,767
Urban fringe (South Glos Administration)	156,767
Yate & Chipping Sodbury	40,290
Study localities	95,739

Table 3.1: Study localities population totals

Percentage of Population by Economic Age Group
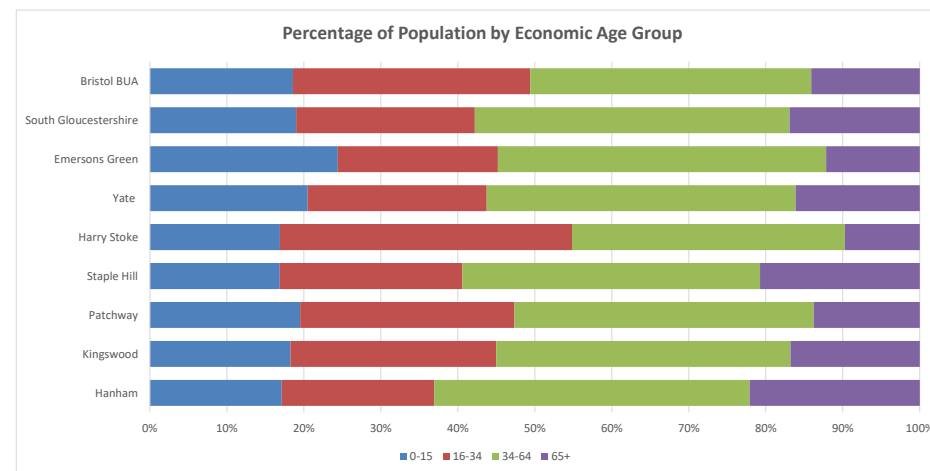
Table 3.3: Percentage of population by economic age group for localities

	Age Group			
	0-15 (%)	16-34 (%)	34-64(%)	65+ (%)
Study localities	19	26	39	16
Bristol BUA	19	31	36	14
South Glos	19	23	41	16

Table 3.2: Percentage of population by economic age group

	Area (Hectares)	Persons	Dwellings	Density (persons per hectare)	Density (dwellings per hectare)
Bristol BUA	14,442.50	617,280	268,297	42.7	18.6
S Glos	49,694.56	262,767	109,984	5.3	2.2
Study localities	3,518.80	95,739	40,555	27.2	11.5

Table 3.4: Population and Dwelling densities
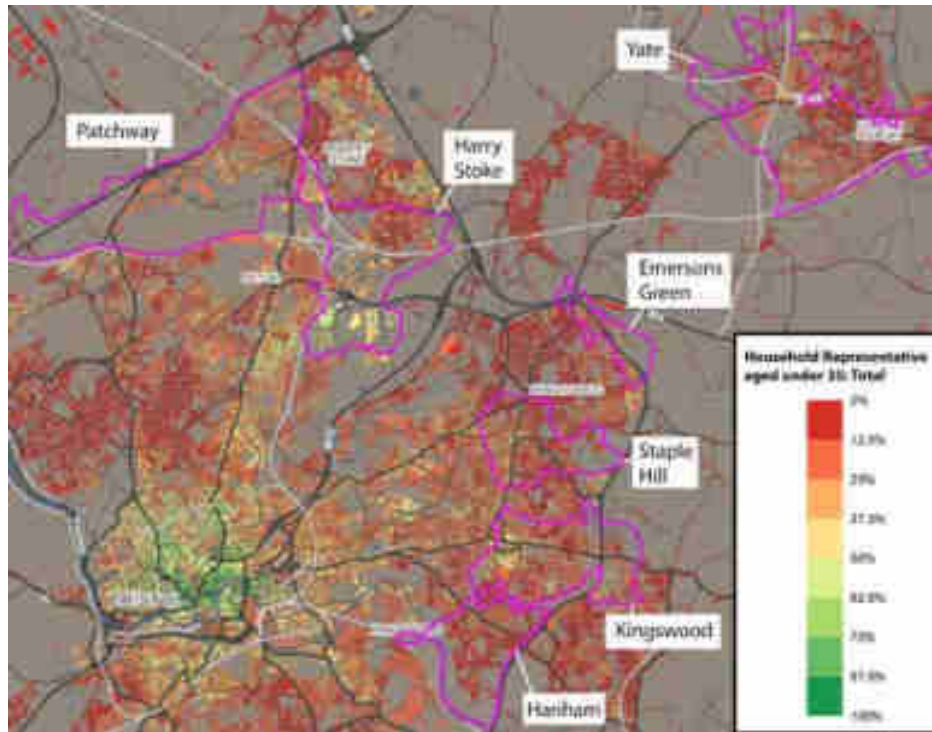
Figure 3.4: Map - Distribution of households with main representative aged under 35
Source: 2011 Census (as visualised at www.datashine.org.uk)
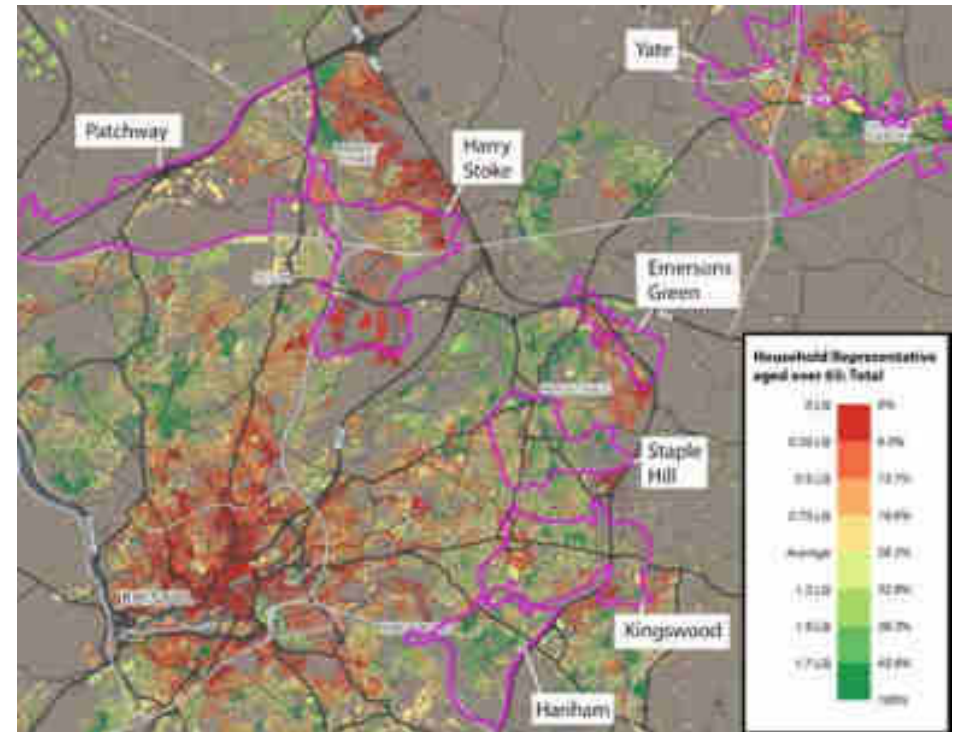
Figure 3.5: Map - Distribution of households with main representative aged over 65
Source: 2011 Census (as visualised at www.datashine.org.uk)

Housing

3.18 Urban South Gloucestershire has a low population density compared to the BUA and its housing stock is "under-occupied" in the sense that over 70% of households have one or more spare bedrooms. Under-occupancy with 2 or more spare bedrooms is particularly prevalent in the Stoke Gifford area of the Harry Stoke locality, in parts of Yate and Hanham (Table 3.5 and Table 3.6, Figure 3.6).

	Persons	Area (Hectares)	Density (persons per hectare)
Bristol BUA	617,280	14,442.50	42.7
S Glos	262,767	49,694.56	5.3
Study localities	13,753	546.95	28.3

Table 3.5: Approximate population densities

	+2 Or More	+1	0	-1	-2
Bristol BUA	33	33	29	4	0.51
S Glos	43	34	20	2	0.20
Study localities	40	34	23	2	0.22

Table 3.6: Average occupancy ratings (bedrooms)
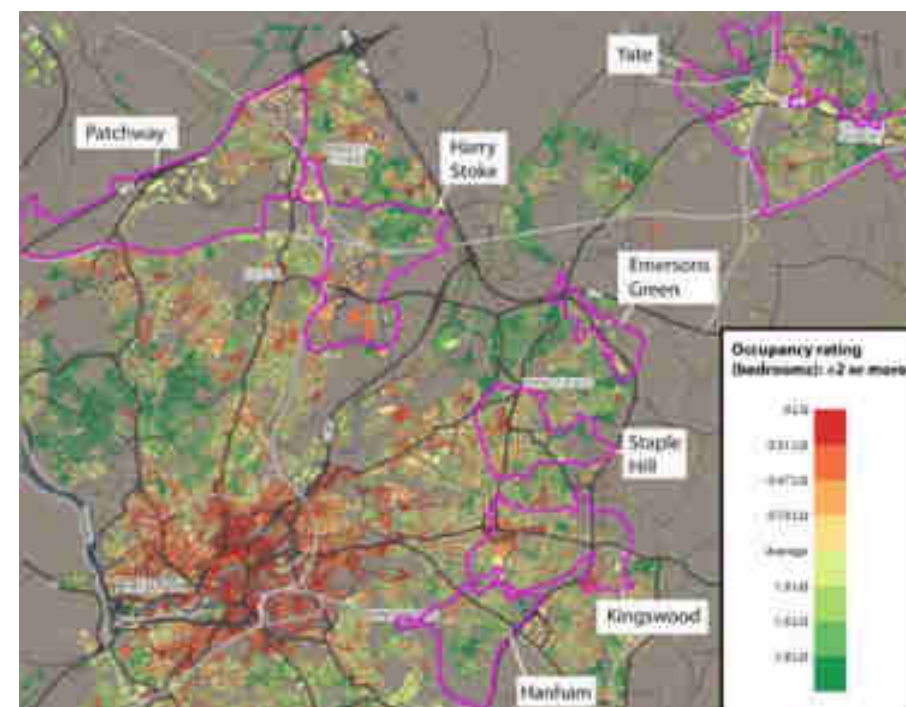
Figure 3.6: Map - Households with occupancy rating (bedrooms) of +2 or more (note colours denote relative figures compared with average for the Bristol built up area, not absolute percentages)
Source: 2011 Census (as visualised at www.datashine.org.uk)

3.19   Table 3.7 profiles housing tenure in the urban localities against the BUA and South Gloucestershire averages. Home ownership is higher in the urban localities than in the BUA, but lower than the district average. And, although having a significantly lower proportion of social rented accommodation than the BUA, the localities have a higher proportion of social rented accommodation than the district as a whole. Privately rented accommodation is significantly lower in South Gloucestershire and the localities than it is in the BUA.

Tenure	Bristol BUA (%)	S Glos (%)	Localities average (%)
Owned outright	27.1	34.5	31.9
Owned with a mortgage	32.7	40.5	40.5
Shared ownership (part owned and part rented)	0.7	0.5	0.5
Social rented from council	10.8	1.9	2.2
Social rented: Other	6.7	8.0	9.4
Private rented: Private landlord	19.3	12.2	12.6
Private rented: Employer	0.2	0.2	0.4
Private rented: Relative or friend	1.0	1.0	1.0
Private rented: Other	0.2	0.2	0.3
Living rent free	1.3	1.1	1.1

Table 3.7: Housing stock tenure

3.20   Figure 3.7 to Figure 3.9 show the variation in tenure types in the housing stock across the Bristol BUA. In broad terms, the South Gloucestershire urban area is dominated by home ownership. There are however significant areas of social rented housing in the northern part of Hanham, Kingswood, Staple Hill and Patchway. Also, there are pockets with higher levels of private renting on the High Streets of Kingswood and Staple Hill and to a lesser extent around the centre of Hanham, and in parts of Patchway.

Figure 3.7: Map - Distribution of homes owned outright
Source: 2011 Census (as visualised at www.datashine.org.uk)

Figure 3.8: Map - Distribution of privately rented housing stock
Source: 2011 Census (as visualised at www.datashine.org.uk)

3.21 The proportion of social rented housing is significantly lower in the South Gloucestershire urban localities than for the BUA as a whole. There are however, notable concentrations in Patchway, Staple Hill and Kingswood.

3.22 Maps have been prepared combining the residential ownerships of the five largest Registered Social Landlords (Housing Associations) that have stock in the localities and this is included at Appendix 3.

3.23 Table 3.8 profiles housing types in the urban localities against those in BUA and South Gloucestershire.
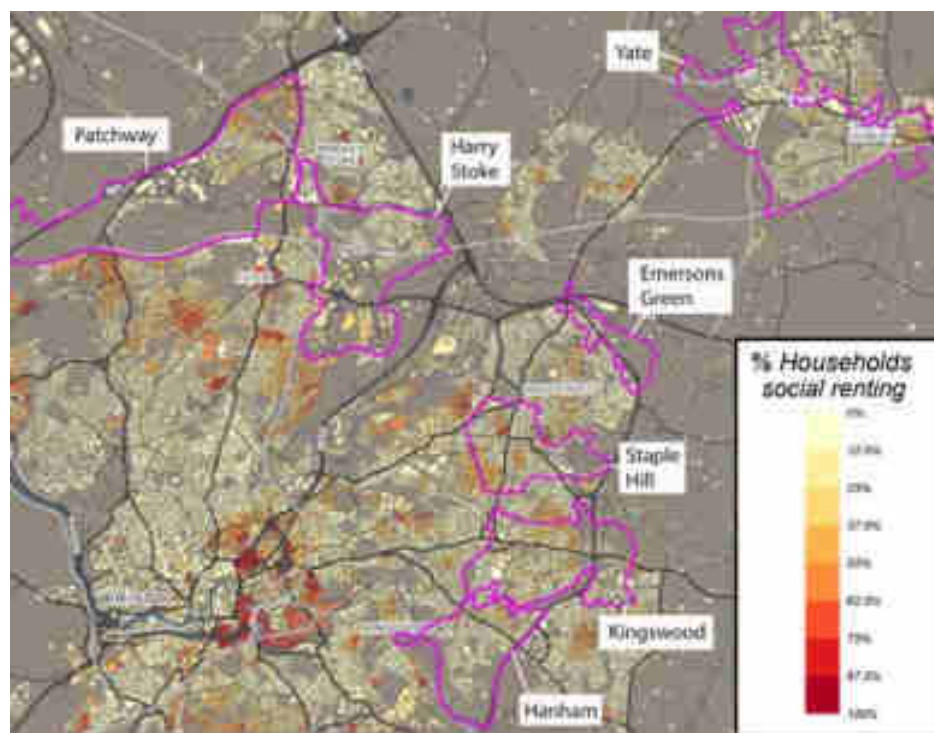
Figure 3.9: Map - Distribution of privately rented housing stock
Source: 2011 Census (as visualised at www.datashine.org.uk)

Dwelling Type	Bristol BUA	S Glos	Urban Localities
Detached	11	27	20
Semi-detached	29	34	32
Terraced (including end-terrace)	32	27	33
Purpose-built block of flats or tenement	18	9	12
Flat, maisonette or apartment: Part of converted or shared house (including bed-sits)	8	1	2
Flat, maisonette or apartment: In commercial building	1	1	1
Caravan or other mobile or temporary structure	0	1	1
Shared dwelling	1	0	0

Table 3.8: Dwelling type

3.24   The housing stock in the localities compared to the BUA, as would be expected for these less dense, more suburban locations, has a high proportion of detached and semi-detached homes and fewer flats. Interestingly there is a slightly larger proportion of terraced properties, reflecting the character of the older urban areas of Staple Hill and Kingswood and to some extent the Radburn style housing in Yate.

3.25   In general, there is a low presence of flats, maisonettes and apartments across the urban localities. Pockets are however evident in north Patchway, on Kingswood High Street and north of Rodford Way in Yate. However, the overall picture is one of a relatively unvaried and homogeneous housing stock, with a prevalence of typically suburban types and tenures (Figure 3.10 and Figure 3.11).
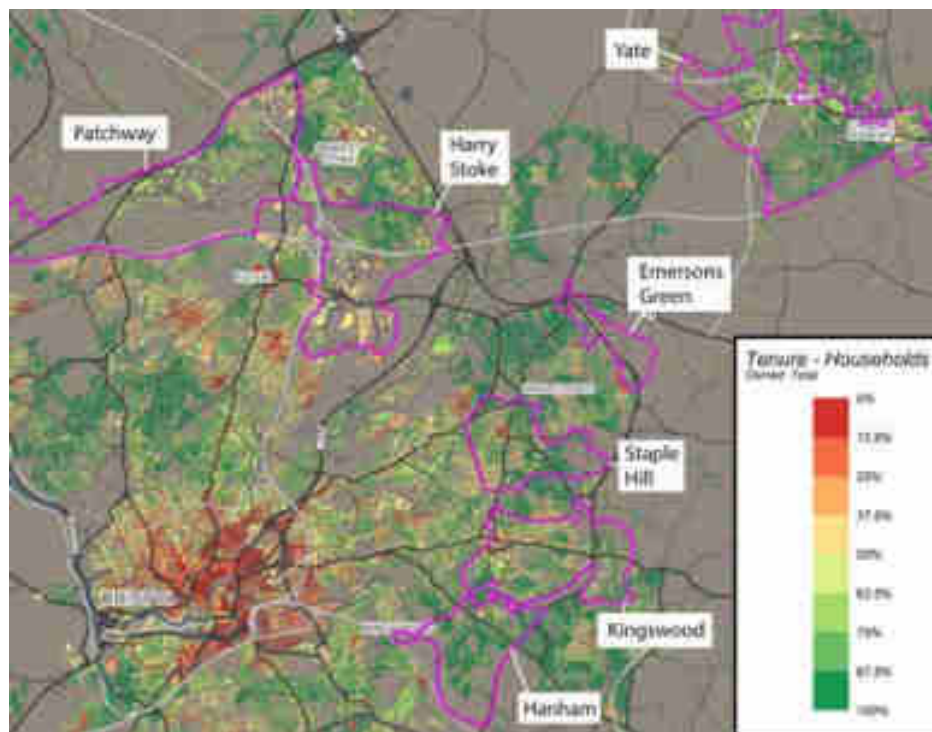

Figure 3.10: Map - Distribution of detached housing stock
Source: 2011 Census (as visualised at www.datashine.org.uk)

Figure 3.11: Map - Distribution of Flats, Maisonettes and Apartments
Source: 2011 Census (as visualised at www.datashine.org.uk)

Occupational Classification & Qualifications

3.26 The occupational composition of South Gloucestershire as a whole is similar to that of the BUA, with the main variances being in a higher proportion in intermediate occupations and small employers/ own account workers, off-setting a lower proportion in occupations that are "Not classified". Within the localities however, the proportion in managerial, administrative and professional occupations is slightly lower, with a corresponding higher proportion across the lower skilled occupations. (Table 3.9).

3.27 There are however, significant clusters of people in higher level occupations in Harry Stoke, Emersons Green, Hanham and Yate. In Patchway, Staple Hill and Kingswood there are pockets of higher level occupations compared to the general characteristic of lower level occupations in these areas (Figure 3.12).

3.28 Elementary occupations are most prevalent in Patchway and Yate, with significant concentrations in Staple Hill and Kingswood (Figure 3.13). Skilled trades are a strong characteristic of the eastern fringe communities, including the Staple Hill (Figure 3.14), Kingswood and Hanham localities, and also in Yate. It is also a significant feature of the occupational characteristic of Patchway.

National Socio-Economic Classification	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Higher managerial, administrative and professional occupations	12	12	10
Lower managerial, administrative and professional occupations	21	22	20
Intermediate occupations	13	16	16
Small employers and own account workers	7	9	8
Lower supervisory and technical occupations	6	7	8
Semi-routine occupations	14	14	15
Routine occupations	10	10	11
Never worked and long-term unemployed	4	3	3
Not classified	12	7	9

Table 3.9: Household Socio-Economic average comparison

Figure 3.12: Map - Households employed in managerial, director and senior official occupations
Source: 2011 Census (as visualised at www.datashine.org.uk)

3.29   At the southern end of the Harry Stoke locality there appear to be something of
        an anomaly in the data-visualisation, in that there is a significant concentration
        of people in elementary occupations, broadly coinciding with the University of
        the West of England campus. This may be due to a low number of on-campus
        maintenance and care-taking staff, or possibly in the way that occupants of
        student accommodation have been recorded.

Figure 3.13: Map - Households employed in elementary occupations
Source: 2011 Census (as visualised at www.datashine.org.uk)
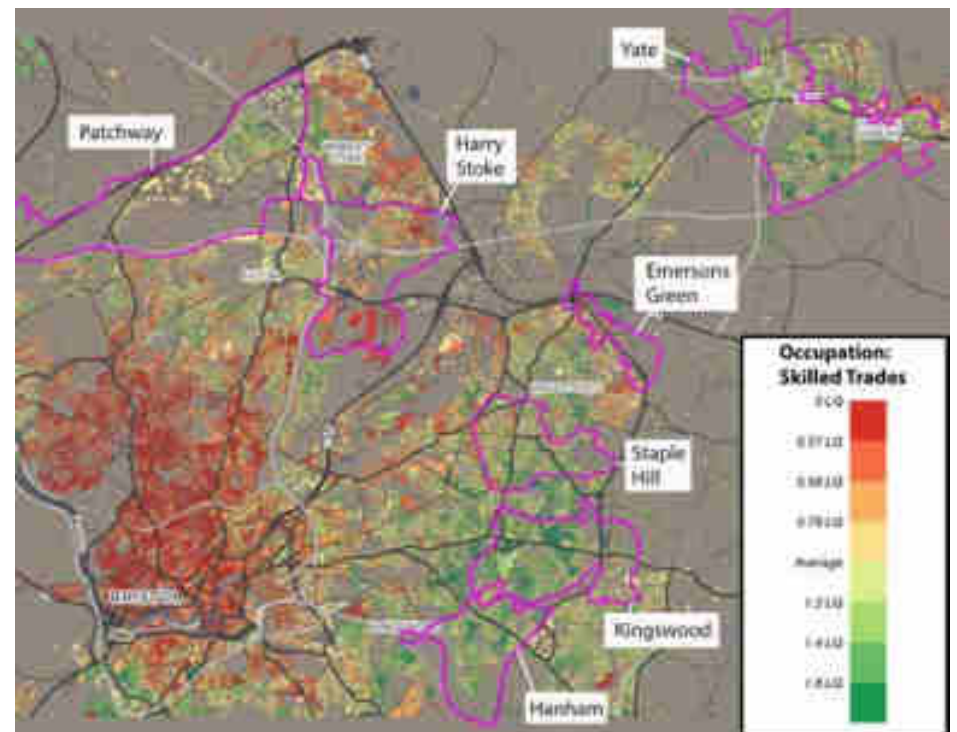
Figure 3.14: Map - Households employed in skilled trade occupations
Source: 2011 Census (as visualised at www.datashine.org.uk)

3.30 Table 3.10 shows that a lower proportion of households in South Gloucestershire and the study localities are highly qualified (degree / Level 4+), with a higher proportion with Level 3 (e.g. A-levels) and Level 1 qualifications compared to the BUA as a whole.

3.31 In spatial terms, there is a clear concentration of people with degree level qualifications in the most central area of Bristol, surrounded by a patchwork of neighbourhoods characterised by populations where between 37.5% and 0%

have degree level qualifications. Within the South Gloucestershire urban area, the highest proportion of people with degree level qualifications is to be found in the north fringe but even here the proportion does not reach 50%, in any discernible concentrations (Figure 3.15).

Highest Level Qualification	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Level 4 +	31	27	23
Level 3	14	14	25
Apprenticeship	4	5	6
Level 2	14	17	17
Level 1	13	15	15
None	20	19	20
Other	5	4	4

Table 3.10: Average Household Qualification levels

Figure 3.15: Map - Households with Degrees or higher degrees

Wage Levels

3.32 Data on resident-based earnings is only estimated from ONS Annual Survey of Hours and Earnings (which in itself only takes a 1% sample of employee jobs) and published at parliamentary constituency scale. But nevertheless, the available data does provide some indication of how the localities compare the wider local area, the south west and UK. It also provides an indication of the variation in wage levels between localities. (Table 3.11.).

3.33 As a unitary authority, South Gloucestershire's residents were, on average, on higher weekly pay than those in Bristol, the South West and the UK. However the trends for part-time workers is different, with Bristol's earning notably more and South Gloucestershire only being paid marginally more than the UK average.

3.34 In terms of South Gloucestershire's parliamentary constituencies, all have higher median weekly pay than Bristol, but Thornbury & Yate and Kingswood have lower weekly pay than the South Gloucestershire average. Both Full and Part-time workers in Filton and Bradley Stoke (which includes the Staple Hill locality) have especially high pay, well above the average for the UK, region and both local authorities at nearly £600.

3.35 Part-time earnings is an important issue because of the trends in the labour market, with an increase in less secure, part-time work as highlighted by, for example, the Inclusive Growth Commission (see para 3.48 below).

3.36 Part-time median earnings amongst residents in Kingswood was particularly low in 2016, at just £157.70 against the UK average of £175.50. In the other two South Gloucestershire parliamentary constituencies part-time pay is above the UK average.

3.37 In 2014 an article about the living wage was published by the TUC and this highlighted the Kingswood parliamentary constituency as having the highest proportion of workers in the country (48%) earning less than the then "living wage" of £7.65/ hr. The constituency area is much larger than Kingswood and includes, for example, Hanham and Longwell Green. However, a subsequent analysis by South Gloucestershire Council uncovered some important facts. One of these is that the TUC analysis was based on workplace-based

Area	Median weekly pay (gross) (£) Resident population	
	Full Time Workers	Part Time workers
Bristol City	£526.80	£182.30
South Glos	£550.40	£175.70
South West	£513.20	£177.40
UK	£538.70	£175.50
Bristol East	£477.70	£154.80
Bristol North West	£555.20	£188.80
Bristol South	£492.10	£190.70
Bristol West	£583.10	£182.40
Filton and Bradley Stoke - includes Staple Hill locality	£597.70	£186.40
Kingswood - includes Hanham and Emerson's Green localities	£547.30	£157.70
Thornbury and Yate	£531.30	£177.00

Table 3.11: Residential population median weekly pay (gross)
Source: ONS Annual Survey of Hours and Earnings (2016 data)

data i.e. where people worked rather than where they lived. The relevant resident-based data showed an average wage rate of £11.40/hr, placing the constituency in a mid-table position (out of 632). It also found that a high level of part-time employment was a contributing factor with 45% of employees working on a part-time basis (ONS UK Business Register and Employment Survey 2012). Excluding part-time workers raises the workplace-based rate to £10.06/hr but this still leaves the constituency in the lowest paid 8% nationally. Finally, the Councils analysis found that the structure of the local economy was a major factor in respect of low pay, with sectors that tend to pay relatively low wages accounting for a significant proportion of employment (Business administration and support – 17%, Retail – 14%, Health – 12%).

3.38   The distinction between workplace-based pay and resident-based pay is an important one. Nonetheless, the high proportion of part-time and low-paid jobs in this part of urban South Gloucestershire highlights a significant challenge in terms of the future resilience and sustainability of the local economy.

Travel-to-Work

3.39   Table 3.12 and Table 3.13 show that journey to work characteristics in the localities broadly reflect the picture for the wider BUA. Travel by car and van is overwhelmingly dominant, although slightly lower than for the BUA, and the average distance travelled is 13.5 miles, marginally higher that the BUA average. Travel by bus and bicycle are higher than the BUA average. However, comparison to the BUA average does not reveal the full picture.

3.40   The spatial pattern of travel to work modes is illustrated in Figure 3.16 to Figure 3.20 and reflects proximity and transport infrastructure, with very low levels of car use in the most central areas of Bristol and very high levels in the north and east fringe. Conversely walking and cycling is a common mode of travel to work in the central area and is low in the outer areas. Travel by bus is relatively high in Staple Hill and Kingswood and travel by train is of notable significance in the area around Bristol Parkway Station and, to a lesser degree, in Yate. (Table 3.14).

Average distance travelled	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Average distance	12.6	14.6	13.5

Table 3.12: Average distances travelled to work

Method of Travel to Work	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Driving a car or van	69.8	58.5	67.7
Work mainly at or from home	4.7	4.6	3.6
Underground, metro, light rail, tram	0.1	0.1	0.1
Train	1.3	1.8	1.4
Bus, minibus or coach	4.9	8.9	6.2
Taxi	0.2	0.3	0.2
Motorcycle, scooter or moped	1.4	1.3	1.4
Passenger in a car or van	5.1	5.2	5.5
Bicycle	3.9	7.0	4.6
On foot	8.2	16.4	8.9
Other method of travel to work	0.4	0.5	0.4

Table 3.13: Mode of Travel to Work

3.41   These patterns are mirrored by car ownership trends. The number of
households with no cars in the Bristol BUA (23%) is significantly higher than
those in South Gloucestershire (13%) and the localities (16%). Particularly
high levels of car ownership can be found in the more peripheral suburbs of
Emersons Green, Harry Stoke and Yate, but Hanham also has notably high
levels of car ownership.
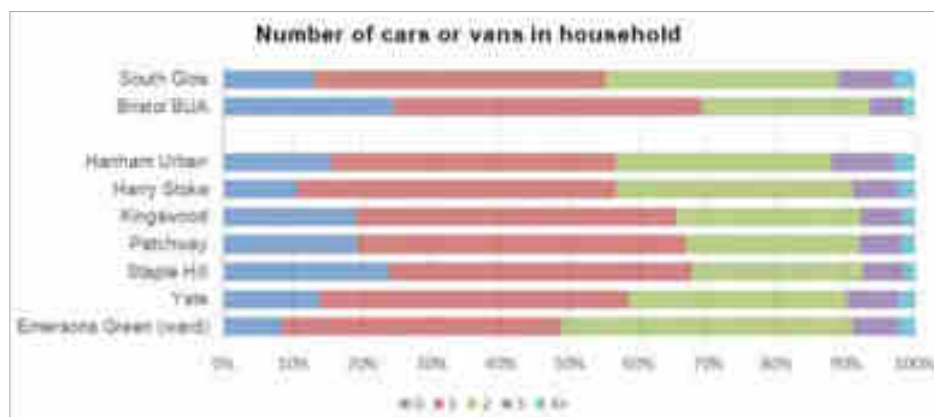
Table 3.14: Mode of Travel to Work

Figure 3.16: Map - Households travelling to work by driving a car or van
Source: 2011 Census (as visualised at www.datashine.org.uk)
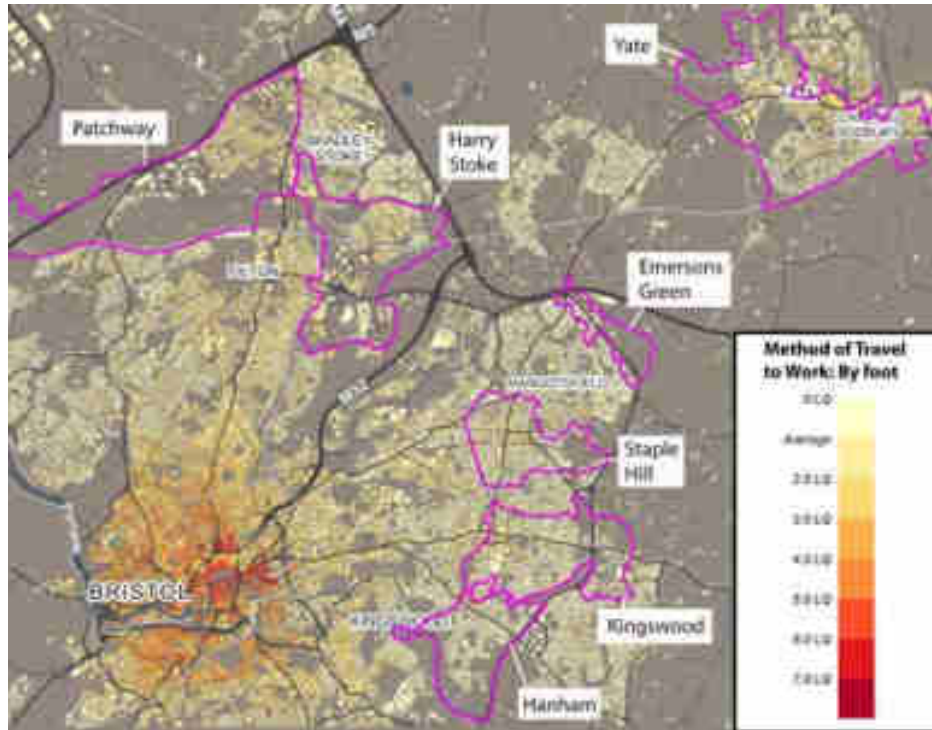
Figure 3.17: Map - Households travelling to work by foot
Source: 2011 Census (as visualised at www.datashine.org.uk)

Figure 3.18: Map - Households travelling to work by bicycle
Source: 2011 Census (as visualised at www.datashine.org.uk)

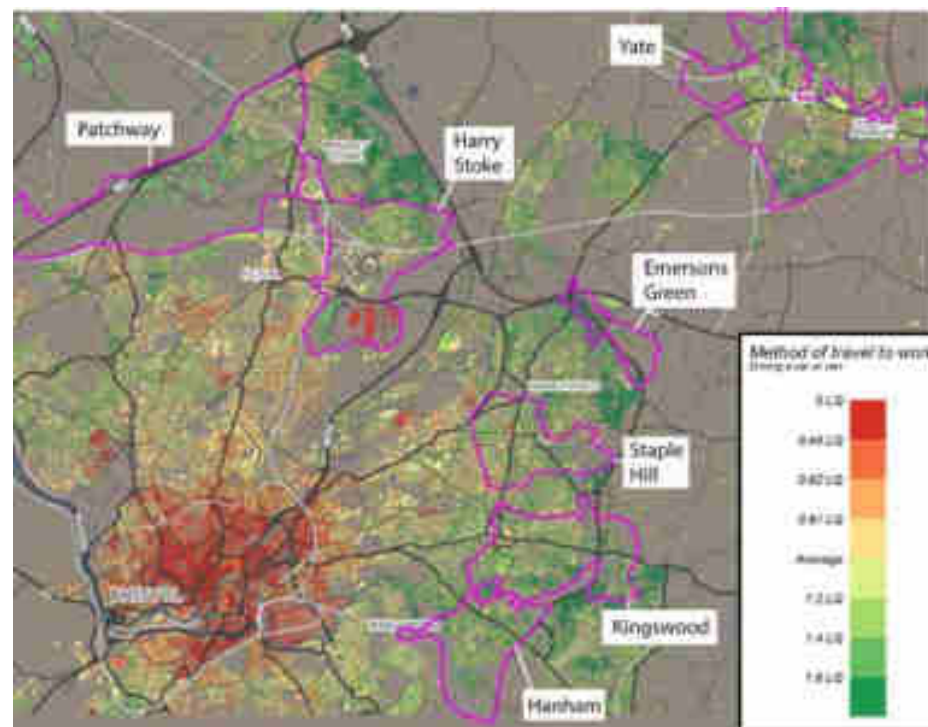*Figure 3.19: Map - Households travelling to work by bus, minibus and coach*
Source: 2011 Census (as visualised at www.datashine.org.uk)
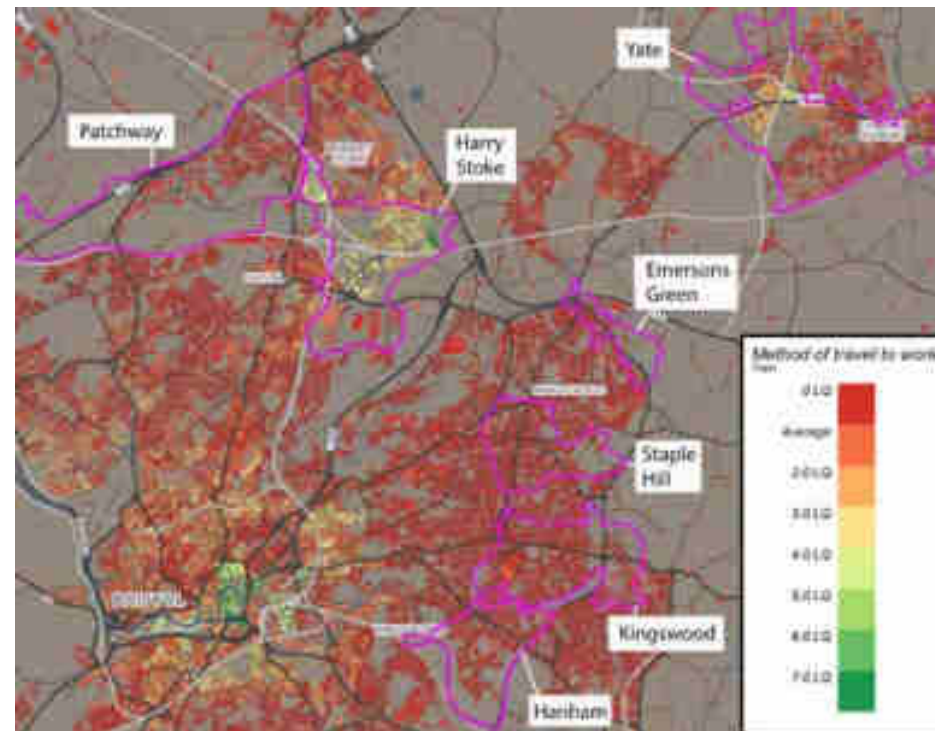
Figure 3.20: Map - Households travelling to work by train (note colours denote relative figures compared with average for the Bristol built up area, not absolute percentages)
Source: 2011 Census (as visualised at www.datashine.org.uk)

Deprivation and Health

3.42   From Table 3.15 and Table 3.16 and Figure 3.21 to Figure 3.22 it can be seen that urban South Gloucestershire as a whole is typically less likely to be affected by multiple deprivation than the BUA. However multiple deprivation across urban South Gloucestershire is also generally less polarised than in Bristol, and there is a lower proportion of households not deprived in any dimension. Despite this, Emersons Green and Harry Stoke are generally less deprived than the other localities and concentrations of higher deprivation can be found in Staple Hill, Kingswood, Patchway and Yate.

3.43   A similar spatial picture exist in terms of general health, as shown in Figure 3.22. However, taken as a whole, Table 3.16 shows that the urban south Gloucestershire localities' health profile is generally similar to the Bristol BUA.

Household Deprivation	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Not deprived in any dimension	45	50	48
Deprived in 1 dimension	32	32	32
Deprived in 2 dimensions	18	15	17
Deprived in 3 dimensions	5	3	3
Deprived in 4 dimensions	1	0	0

Table 3.15: Household deprivation average comparison

| Health	Bristol BUA (%)	S Glos (%)	Study Localities (%)
Very good	49	49	48
Good	34	35	35
Fair	12	12	12
Bad	4	3	4
Very Bad	1	1	1

Table 3.16: Household health average comparison

Figure 3.21: Map - Households not deprived in any
Source: 2011 Census (as visualised at www.datashine.org.uk)

Figure 3.22: Map - Households in very good health
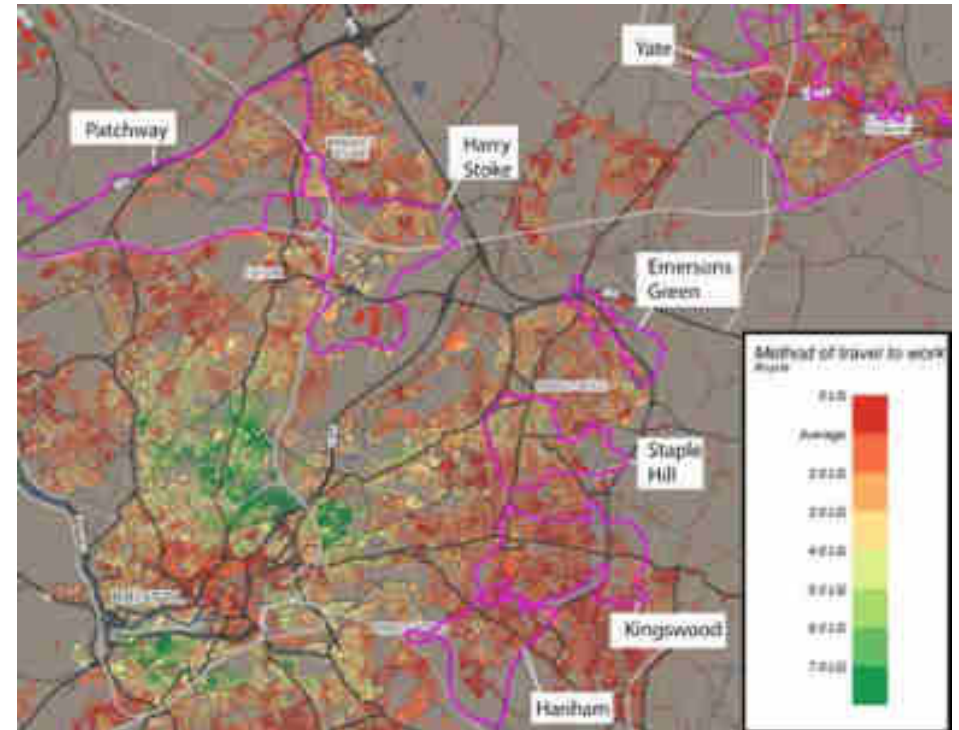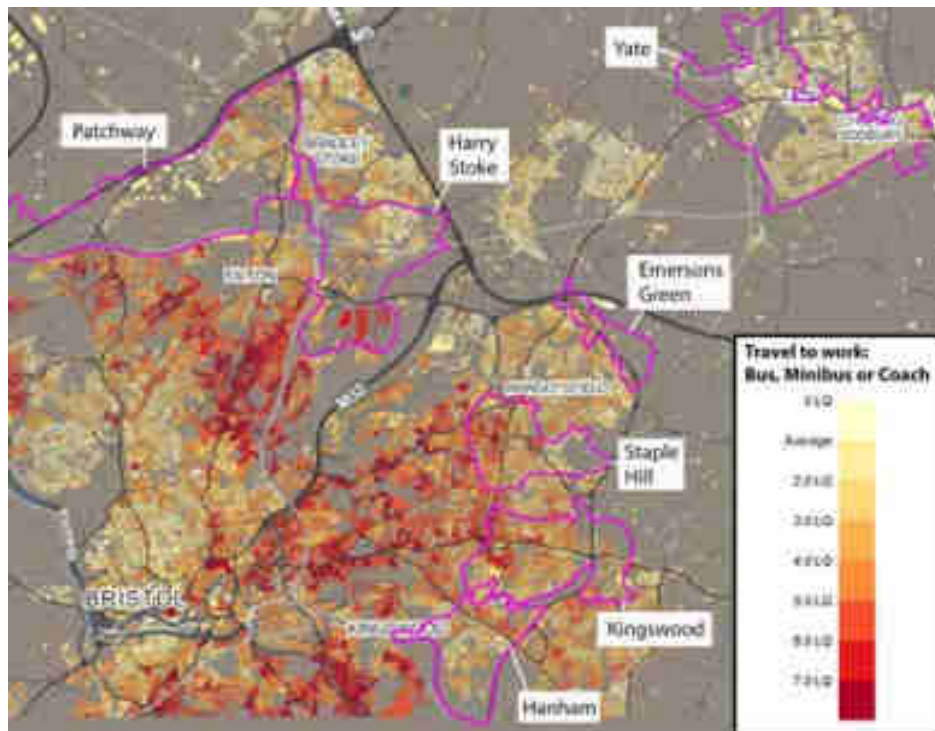*Source: 2011 Census (as visualised at www.datashine.org.uk)*

Mega-Trends

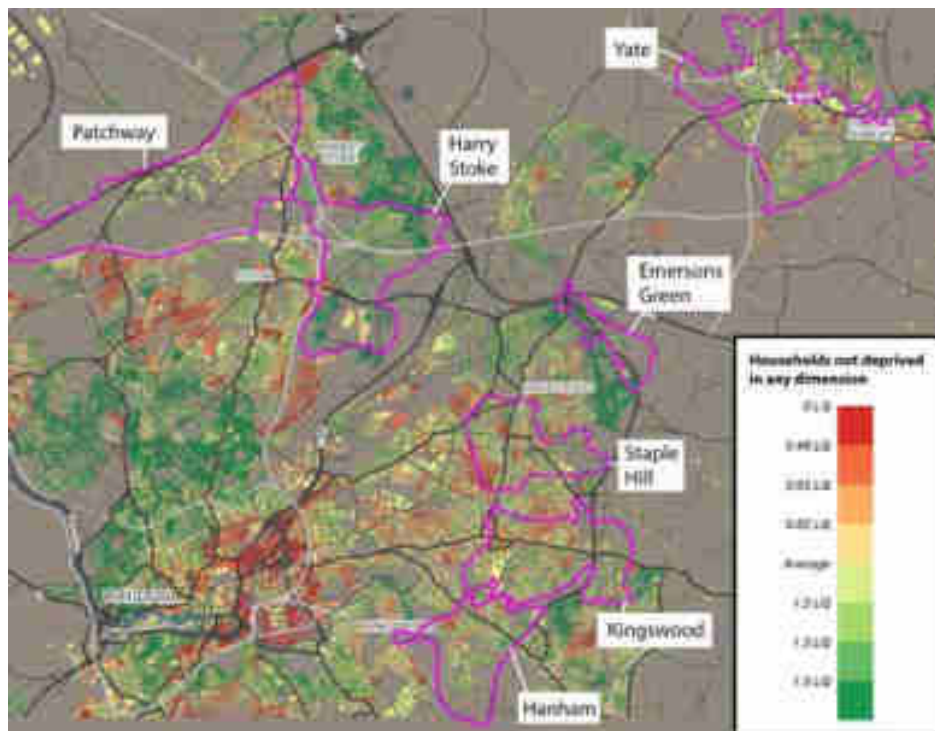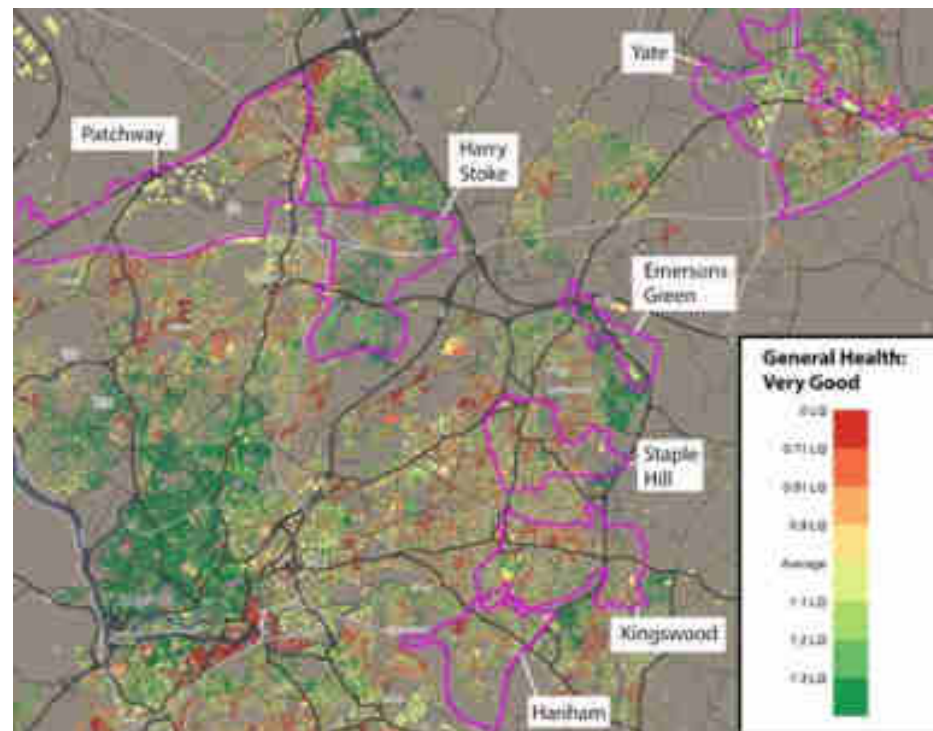3.44 Mega-trends are broad, sustained trends that impact on society, the environment, economy and culture. Often, they are expressed at global level but can be significant regionally or locally, taking account of national, or regional characteristics and features. Some of these trends will have a bearing on the future of the localities as change drivers or inhibitors.

Economic Development

3.45 The prevailing economic model, for over 70 years, has been one based on growth in Gross Domestic Product (GDP) as a primary measure of progress. This approach, whilst remaining prevalent, is however being questioned. Whilst it cannot, at present, be defined as a fully established mega-trend, concern over pursuit of this model is becoming more widespread. This concern is focused on the desirability, feasibility and sustainability of economic policies pursing a narrow measure of progress in a complex world, namely growth, on an apparently indefinite basis.

3.46 The relevance of this "mega-trend" is primarily at the national and global scales but it potentially has local implications and is worth noting in considering the future of the South Gloucestershire urban localities and the policy framework applying to them.

3.47 Economist Kate Raworth[1] has, for example, postulated a new economic model for the 21st century based on achieving a "safe and just space for humanity" that sits between a social foundation inner ring, within which the basic needs of all are met, and an ecological ceiling outer ring, beyond which impacts damage the living world on which people, society and the economy depend. Within the safe and just space between these rings sits a regenerative and distributive economy. She terms this the "doughnut" and proposes it as the basis for shaping and measuring economic development. It links to the mega-trend below.

3.48 In a similar vein, the Royal Society for Arts' Inclusive Growth commission[2] advocates a shift from a focus just on the quantity of growth to emphasise

the quality of that growth. It advocates a move away from the current model, described as 'grow now, redistribute later', to a new inclusive growth model.

Climate Change

3.49 This mega-trend is driven by the three prongs of rising CO2 emissions, global warming and the loss of biodiversity. Emissions from homes, commercial and public buildings account for 17% of the UK's direct greenhouse gas emissions, whilst domestic transport emissions account for about 25% (UK Committee on Climate Change, 2017). Biodiversity loss due to urban expansion remains a major issue as population increase puts pressure on releasing greenfield land for development.

3.50 In 2016 UN The Habitat III Conference reinvigorated the global commitment to helping address climate change through more sustainable urbanisation, focusing on the implementation of a "New Urban Agenda" which sets global standards of achievement in sustainable urban development and rethinking the way we build, manage, and live in cities. Spatial planning globally has a key role to play in addressing these issues by, amongst other things:

- Locating development and infrastructure so that the potential for sustainable transport use and living will be maximised

- Delivering a density of new development which minimises biodiversity loss

- Directing new build development towards integrating more sustainable design practices and sustainable technologies

3.51 To address climate change, 192 countries including the UK have now adopted the Paris Agreement, first initiated at the COP21 in Paris on 12 December 2015 and entered into force on 4 November 2016, although the USA has subsequently withdrawn. In the agreement, all countries agreed to work to limit global temperature rise to well below 2 degrees Celsius and given the grave risks, to strive for 1.5 degrees Celsius. It also included a commitment to *'increase the ability to adapt to the adverse impacts of climate change and foster climate resilience and low greenhouse gas emissions development, in a manner that does not threaten food production'*, and making '*finance flows consistent with a pathway towards low greenhouse gas emissions and climate-*

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[1] *Doughnut Economics – Kate Raworth, 2017*

[2] *Making our Economy Work for Everyone - Inclusive Growth Commission, RSA 2017*

resilient development'. But these goals cannot be achieved exclusively through top-down policymaking and decision makers at every level of governance are now charged with the duty to take positive action towards addressing climate change where they can.

Digital Technology

3.52   The proliferation of digital technology is now recognised as a global revolution on a similar magnitude to the agricultural or industrial revolution, albeit without the limitations of borders and boundaries. For urban communities, the impacts are already being felt, for example, in relation to internet shopping and how this affects high streets, and are likely to continue influencing travel and work patterns, housing for older people etc. It is a cross-cutting mega-trend that is incorporated within the trends outlined below.

The Spatial Structure of Cities

3.53   The concept model for modern service-economy based cities has often been founded on the centre/ periphery model. This seeks to protect central areas as the focus for agglomeration of business activity and cultural and leisure facilities. But in practice so much of how city centres work has been greatly affected by peripheral development of many kinds.

3.54   Research on European cities and development of policy at European level points to the merits of poly-centric city structures. Above a certain size, the health of cities is increasingly depending on developing a range of sub-centres with areas of strength acting as local centres capable of supporting most urban living needs.

3.55   A research paper in the Belgian Journal of Geography[3], which looked at seven metropolitan areas in continental Europe, concluded that simple centre-periphery gradients no longer seem relevant in understanding contemporary reconfigurations of metropolitan areas. It found instead a picture of emerging polycentric spatial patterns with the planning framework for Amsterdam most clearly resting on the polycentric concept, supported by investment in public transport.

3.56   A report by the European Commission Directorate for Regional Policy[4] sets out a shared vision for the European city of tomorrow, reached through an ongoing inter-governmental process marked by the Bristol Accord, Leipzig Charter and T Toledo Declaration. This vision envisages cities as:

- Places of advanced social progress with a high degree of social cohesion, socially balanced housing as well as social, health and "education for all" services

- A platform for democracy, cultural dialogue and diversity

- Places of green, ecological or environmental regeneration

- Places of attraction and engines of economic growth.

3.57   The report identifies a number of challenges facing cities, including urban sprawl and the spread of low density with negative impacts in terms of sustainable development, the viability of public services, over-use of natural resources and inadequate public transport resulting in over reliance on cars and resultant heavy congestion.

3.58   Based on the vision and analysis of the challenges and opportunities facing cities, the report sets out a consensus on principles for future city development. A key principle is a compact and polycentric urban structure with balanced growth.

3.59   The term poly-centric is a rather academic one. It is the opposite of disorganised urban sprawl and, in effect, describes urban areas with a development pattern characterised by a principle central area, around which are a network of 'secondary' centres serving distinct neighbourhoods. These 'secondary' centres can be substantial in scale and sometimes are home to clusters of a specific types of economic activity. A multi-centre model is a less academic description.

3.60   A spatial structure based on a network of centres can bring significant advantages in terms of better relating housing provision to employment, reducing travel and pressure on radial transport routes, enabling more diverse

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3   *Towards Polycentric Cities. An investigation into restructuring of intra-metropolitan spatial configurations in Europe – Belgian Journal of Geography.*

4   *Cities of Tomorrow – Challenges, Visions, Ways Forward - European Commission Directorate for Regional Policy*

and resilient communities, providing greater locational and lifestyle choice and enhancing the performance of the urban area as a whole.

3.61 Whilst the UK is leaving the European Union, the aim of Government is to retain strong and mutually beneficial links. European cities will also continue to provide competition for UK cities, including wider Bristol, for people, business and investment. Opportunities will remain for sharing knowledge on city performance and planning.

Demographics

3.62 The ageing nature of the UK population is well established. In mid-2014 the median age exceeded 40 for the first time, up from 33.9 in 1974. This trend is set to continue, with over 70% of population growth from 2014 to 2039 forecast to be in the over 60 age group[5]. There are however localised variations, with cities tending to have younger populations, particularly central areas, often bolstered by significant numbers of students and this is the case in Bristol.

3.63 Older people are living longer and the specialist housing offered today may not necessarily be appropriate in future years. The Government's reform of health and adult social care is underpinned by a principle of sustaining people at home for as long as possible. This has implications for future housing provision and is factored into the Strategic Housing Market Assessment carried out by the West of England authorities (2015).

3.64 Critical to any study on suburban neighbourhoods is the evidence that younger people are driving an 'urban renaissance' in city centres by choosing to live in centres at the expense of suburban living. Centre for Cities[6] found that between 2001 and 2011 the population of large city centres in England and Wales more than doubled, with the number of residents aged 22-29 nearly tripling to make up almost half of their total population.

3.65 The report found that population growth has been "primarily driven by the city centres of large cities", due to increases in the number of high-skilled jobs appealing to young, highly educated, single residents, referred to as 'millennials'. Most significantly, it found that city suburbs grew by 8% between 2001 and 2011 (from 28.5 million to 30.8 million), but city centres grew by 37%

(from 700,000 to 900,000 residents) and that much of this growth was amongst economically active groups.

Housing

3.66 The lack of an adequate supply of new homes in the UK and the consequential effects in terms of rising house prices and rents is well established. This has led to a number of significant trends around the diversification of models of housing supply.

3.67 Diversification of housing supply has become a key theme of Government policy and is reflected in the content of the 2017 Housing White Paper: 'Fixing Our Broken Housing Market'.
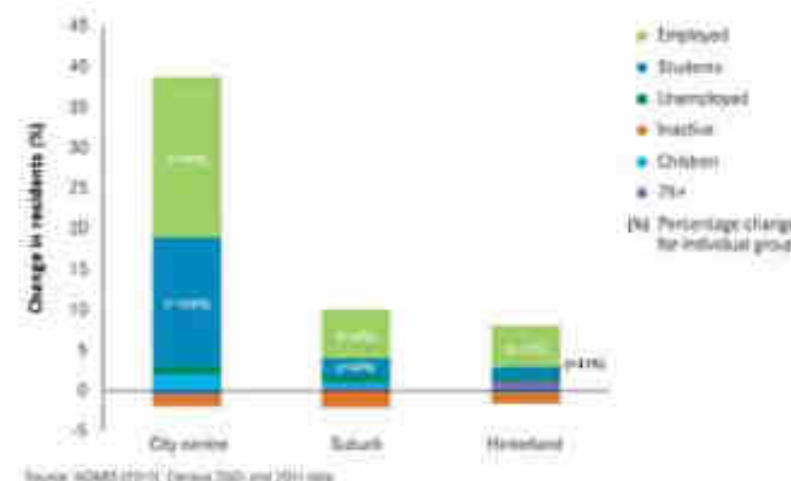

Figure 3.23: Change in economic activity within cities, 2001-2011.
Source: Urban demographics: Where people live and work (Centre for Cities, 2015)

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[5] *Future of an Ageing Population, Government Office for Science, 2016.*
[6] *Urban demographics: Where people live and work Report, Centre for Cities, July 2015*

3.68 Custom-build homes provide occupiers with a greater say over the design and specification of their home and in many European countries comprise 30% or more of total housing supply. In the UK, the proportion is around 8-9% but the Government is seeking to significantly scale up custom-build provision and there are a number of large scale schemes emerging.

3.69 Local authorities are also responding to the lack of supply, including inadequate provision of affordable homes, through the creation of housing delivery companies to build new homes, often in conjunction with a private sector partner.

3.70 Housing built for rent has emerged rapidly as a strong sector in response to need and within this there is a co-living sub-sector that is providing compact, contemporary self-contained accommodation with inclusive services and shared facilities such as gyms, cafés and lounges to meet demand from younger people seeking city living and unable or disinclined to enter the home ownership market.

3.71 The ageing population also creates a requirement for forms of housing that embrace a range of needs, from those who require care provision to active older people who wish to minimise domestic upkeep responsibilities whilst having access to a range of services and facilities and participating in community life. Between family household stage to older resident's models there is now a diversity of intermediate typologies of need and desire.

Wages and Cost of Living

3.72 Another recent mega-trend now being experienced is the UK's apparent entry into a period of uncertainty and volatility in growth wages and cost of living. When looking at real wage growth, by and large, between the post-war period and 2008, it has generally been positive and grown at a trend rate of approximately 2% per annum. This is indicative of a general improvement in disposable income and living standards over that period.

3.73 The recession 0f 2007-2012 marked a significant change in fortune and since 2008, the UK has seen periods of negative real wage growth, as shown in Figure 3.24. Between 2014 and 2016, inflation fell and wage growth increased,

leading to the first period of positive real wage growth since pre 2007[7]. However, this improvement is now being overturned by the depreciation of the pound in the wake of the EU referendum and a continued period of low-growth in nominal wages.

3.74 Tied into these trends, studies have highlighted an increasing intergenerational divide whereby those aged between 15 and 35 are earning significantly less (approximately £8000 in real terms) than their parents did during their 20s. Today's young employees are cited as being the first generation of workers in modern times to see their lifetime earnings fall[8].

3.75 Overall these trends are indicative of the UK having entered a period where it can no longer be 'taken for granted' that the cost of living and standards associated with this are constantly improving.
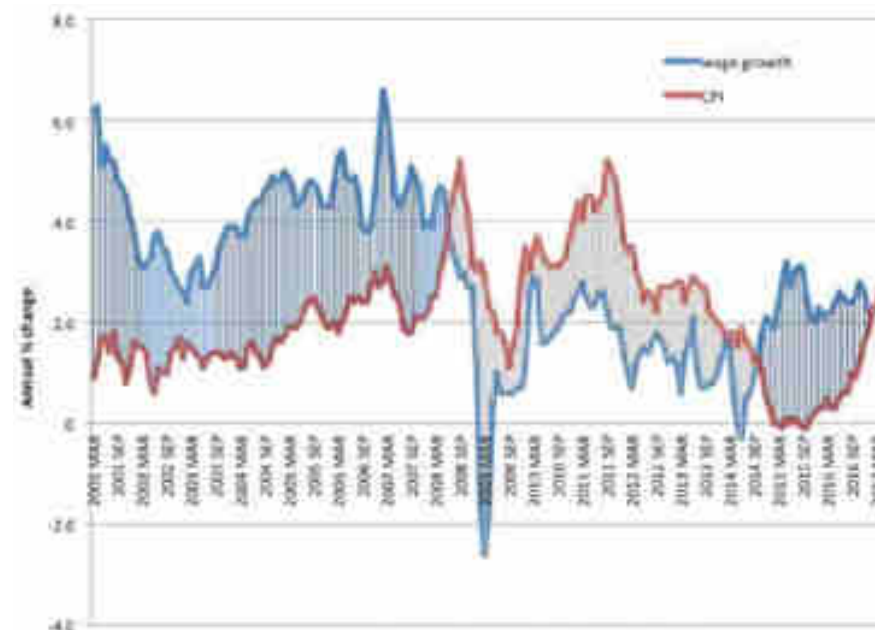

Figure 3.24: UK real wage growth

7   http://www.economicshelp.org/blog/6994/economics/uk-wage-growth/
8   Resolution foundation, 'As Time Goes By: Shifting incomes and inequality between and within generations'

Economic Inequality

3.76   The UK has a very high and growing level of income inequality compared to other developed countries. Much of this disparity has occurred in the last 30-40 years to the point at which it can now be considered a significant mega-trend. Out of 30 OECD countries in the Luxembourg Income Study, the UK is the seventh most unequal, and the fourth most unequal in Europe. There are differing views on its impact but inequality has the potential to constrain economic output and social wellbeing.

3.77   Nationally, the gap between the 90th (top 10%) & 10th (bottom 10%) percentiles of the "Total Gross Weekly" earnings grew at £24.2 per year prerecession, and post recession at £5.9 per year. As a result the gap grew from £4763 in 1997 to £7924 in 2015. In all, the gap between the 90th (top 10%) & 10th (bottom 10%) percentile grew by 66.4% between 1997 and 2015 (equivalent to about £42,000 per year)[9].

3.78   Cities with higher average wages, knowledge based economies and a relative lack of reliance on the public sector for employment tend to be more unequal. Bristol is amongst those cities where this is the case and there is a strong likelihood that the existing inequalities evident in the socio-economic profiling detailed above will become bigger in the coming years without effective policy intervention. Whilst there are debates around how to most effectively reduce inequality whilst maintaining beneficial economic performance, there is an increasing acknowledgement of a requirement to ensure that less skilled workers are able to share in the gains of successful urban economies, by improving the skills of those at the bottom of the labour market, ensuring low-wage workers have opportunities for promotion and advancement, and growing the number of 'good jobs' locally[10].

3.79   Local cost of living is particularly likely to be a problem, and low-waged workers may face higher housing costs.

Health

3.80   The Kings Fund[11] found that prevailing lifestyles present a serious threat to health. This is linked, in particular, to poor diet and lack of physical activity. A symptom of this is the global growth in levels of obesity, especially in the western world. This trend is marked in the UK, with a report by the Academy of Medical Royal Colleges[8] dubbing the UK the 'fat man of Europe'. This report too identified diet and sedentary lifestyles as primary causes, with a culture and transport infrastructure that encourages car use a contributory factor. In the UK 27% of adults are obese and 36% overweight, whilst for children aged 10-11 the corresponding figures are 20% and 14%[12].

3.81   A recommendation of the Academy of Medical Royal Colleges report was that planning applications should be subject to a health impact assessment.

Employment

3.82   Automation and development of artificial intelligence are already affecting the role of people in the workplace, with the car production industry being a long-established example. It is a trend that will inevitably continue and is likely to accelerate. One estimate, in a report by McKinsey Global Institute, is that 60% of jobs have 30% of constituent parts that are susceptible to automation and that by 2055 about half of today's work activities could be automated[11]. However, this report also considers that the requirement for human work will remain high in order to address growing demands arising from an ageing population and in order to reap the productivity and economic growth potential. This trend raises implications for skills development and the nature of business premises.

3.83   The transformation of the workplace by communication and other technologies in recent decades has been well documented. For office-based employment, the internet and wireless technologies have allowed employees to work more easily from home, remotely and on the move. Office for National Statistics (ONS) figures show that the number of employees who say they 'usually' work from home has increased by almost a fifth over the past decade, passing 1.5

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9   *Earnings gap for Bristol residents: November 2016 (Bristol City Council)*
10   *Joseph Roundtree Foundation, Wage inequality an employment polarisation in British cities – The Work Foundation, May 2013*
11   *Future Trends 2012 - 32 Kings Fund*
12   *Measuring Up - Academy of Medical Royal Colleges, February 2013*

million, though the overall take-up rates for home working may be slowing. Research carried out by the TUC[13] has found that 1.52 million employees classed themselves as working from home in 2015, up 241,000 (19%) on 2005 figures, with millions more regularly or occasionally following suit. The south west and the east of England saw the highest growth of home working.

3.84   The same technologies have also allowed small and medium size and start-up businesses quicker and easier access to markets as well as freeing people from the ties of a fixed workplace. This has contributed to the increase in both home-based businesses and the popularity of co-working spaces where businesses can rent small offices or work in shared spaces alongside other businesses and with access to professional office facilities, as well as seminars, networking events and on-online services.

3.85   For industrial businesses, advances in technology are continually changing business needs in terms of size, quality and character of premises. There is more demand for industrial premises to deliver the sorts of services, amenity and quality of life benefits typically associated with city centre employment, and there is a blurring of boundaries in terms of where these premises are located. Many light industrial businesses can now potentially be accommodated alongside other uses in more central locations, including residential and retail. Opportunities are likely to arise for redevelopment of areas characterised by low density "industrial" sheds to provide new mixed use quarters including light industry which, as land values are increased, might be accommodated in multi-storey buildings, a practice common in some other countries.

Retail & Local High Streets

3.86   The nature of retail activity has been transformed by a number of mega-trends in recent years, to dramatically alter the way our high streets and retail centres function. The 2011 government-commissioned Portas Review[14] pointed to the growth of 'online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession' as reasons for the UK's local high streets now reaching 'crisis point'. The report set out a manifesto for the regeneration

of the high street, based around re-imagining it as a multifunctional and social place with a wide range of locally responsive services that create a comprehensive retail, cultural and community hub.

3.87   In respect of online retailing, the Office for National Statistics, for example, records a 10.1% year on year growth in sales and a 14.6% share of all spend[15].

Transport

3.88   There are significant trends in travel behaviour and emerging modes and configurations of travel provision that have the potential to significantly affect urban areas.

3.89   A report by the Independent Transport Commission[16], 'On the Move 2', sets out trends in travel behaviour in England between 1995 and 2014. This shows that the overall distance travelled per person has fallen by 10% since the peak year of 2003, primarily due to less trips and only a slight increase in average trip distance, with travel by car declining as a share of total travel. Historically, growth in travel has been linked to growth in the economy and incomes but this link now appears to no longer hold true.

3.90   There appear to be a number of reasons for this. Income growth has varied across generations, broadly favouring older age groups at the expense of younger people. This is linked to falls in licence holding and car ownership amongst younger age groups. Younger people are also less inclined to view car ownership as an aspiration linked to status and place more emphasis on mobile digital technology, a factor that is also likely to impact on travel behaviour across all age groups through substitution of digital connection for physical movement.

3.91   The rediscovery of city living as an aspirational choice, again particularly amongst the younger generation, is a significant factor, driven to a substantial degree by a desire for proximity, convenience and the absence of a frequent need to travel between places. Traffic congestion and policy measures are also likely to have played a role in the decline in travel per head and the fall in share of car travel as a proportion of the total, as a result of increased journey times and measures to reduce the need for travel and encourage non-car modes.

13 *www.tuc.org.uk/workplaceissues*
14 *The Portas Review: an independent review into the future of our high streets*
15 *Retails Sales in Great Britain – Office for National Statistics, 2017.*
16 *On the Move 2 - Independent Transport Commission, December 2016.*

3.92 Emerging developments in technology and services are likely to further alter travel patterns and trends to a significant degree. Automated vehicles, and related technology, such as digital communication between vehicles to manage traffic flows, are subject to major research and development investment and trials in a variety of environmental settings. The benefits could include more efficient use of road-space, lower accident levels and a reduced need for car ownership through sophisticated 'use on demand' services via mobile technology.

3.93 However, whilst this new technology has attracted a lot of attention, with some predicting driver-less cars in use on public roads within the next 5 years, it is an area of great complexity and it is very difficult to predict the range of environments within which automated vehicles, in particular, will become the norm. But, one area that has clear potential in the shorter term is the opportunity for small driver-less public transport vehicles to operate within residential neighbourhoods, serving to connect them to main routes. Such services are often currently not viable because of the costs of staffing, an overhead that would be greatly reduced by the use of automated vehicles.

3.94 Potentially of as much significance is the emerging concept of 'Mobility as a Service' (MaaS). This describes a shift away from personally owned modes of transport to an integrated offer that provides a range of options in a unified service that is enabled by mobile digital technology. Such a package might, for example, provide access via a mobile application to public transport, taxi and car hire services within defined travel distance or geographic limits, for a monthly subscription or on a 'pay as you go' basis. In the future the range of services is likely to include driver-less vehicles. It is an approach that has been trialled in a number of places, including Helsinki (Whim app), Gothenburg (Ubigo), Vienna (SMILE app) Denver, Los Angeles and Barcelona and appears very likely to grow and roll out as an important component of transport systems for towns and cities.

Strategic Infrastructure

3.95 Three nationally significant investments planned in the city region are likely to have enough economic reach to affect the locality communities explored in this study. These are the Hinkley Point C nuclear power station in Somerset, the modernisation of the Great Western Mainline Rail and High Speed Rail 2 (HS2).

Hinkley Point C Nuclear Power Station

3.96 After a long period of planning the UK government approved Hinkley Point C nuclear power station in September 2016 with some safeguards for the investment. Concrete pouring has recently commenced and it is expected that the plant could be operational by 2025. The operators EDF estimate that the construction period alone will create over 25,000 jobs. Although many of the site's employers will be based in purpose-built accommodation, it is expected that the communities of Bristol will form part of the project's labour market catchment, particularly those with easy access via the M5.

Oldbury-on-Severn Power Station

3.97 Land adjacent to the existing power station at Oldbury-on-Severn is one of eight UK sites included in the Government's Nuclear National Policy Statement (NPS) as being suitable for new nuclear build. Horizon Nuclear Power has begun exploring options for delivering two reactors here. In 2013 the Environment Agency and the Office for Nuclear Regulation began the process of assessing the suitability of the Advanced Boiling Water Reactor's 'generic' design. This process is now in its fourth and final stage and due to complete late in 2017. If the project proceeds, construction is expected to begin in the late 2020's at the earliest. Whist no estimates have yet been published on the number of jobs and spin-off infrastructure, as with Hinkley C it is expected that the communities of north Bristol will form part of the project's labour market catchment.

Modernisation of the Great Western Mainline

3.98 Network Rail plans to spend £5 billion on modernising the Great Western Main Line, its South Wales branch and other associated lines. The work includes electrification, resignalling, new rolling stock and station upgrades. However, in November 2016 the government announced that several major elements of the electrification program would be indefinitely deferred because costs had tripled, including the electrification of Bristol Parkway to Temple Meads.

3.99   Bristol Parkway had a third platform (Platform 4) completed in 2007 to provide a new platform for trains departing to London and Birmingham and to make services more reliable between London and south Wales. A new fourth platform is planned on the south side of the station.

High Speed 2

3.100 High Speed 2 (HS2) is a planned high-speed railway linking London, Birmingham, the East Midlands, Leeds and Manchester. The aim of HS2 is to boost these destinations by providing rapid direct connection between them and London's economy. The Department for Transport has stated there will be almost 15,000 seats an hour on trains between London and Birmingham, Manchester and Leeds - treble the current capacity. Birmingham-London journey times will be cut from 1hr 21min to 49min. This may enhance the performance of these places and make them, particularly Birmingham, more competitive in relation to the West of England.

The Implications of the Socio-Economic Profile and the Mega Trends

3.101 At a strategic and generalised level, the socio-economic data points to a picture typical of an urban area with a core of relative density, surrounded by low density suburbia. This is reflected in centre-suburb gradients with young people, higher qualification levels, higher level occupations, a housing stock characterised by apartments and preponderance of walking and cycling concentrated in the central area. Outside this area there is the converse of this, with an older population, lower qualification and lower value occupation levels, a high proportion of detached and semi-detached properties and movement patterns that are dominated by the private car.

3.102 Whilst there is some nuance and variation within this broad picture, as described in chapter 5, it does highlight elements of weakness inherent in the current centre-suburbia spatial model. It indicates that there are hotspots of high performance but also significant areas of under-performance within

urban South Gloucestershire in terms of economic activity, quality of life and its contribution towards a more sustainable future. The mega-trends suggest a need to move towards a more overtly urban spatial structure characterised by a network of stronger centres that have a greater sense of scale and identity. These trends also point to a need for new forms of development, diverse High Streets, environments and a mix of uses that facilitate walking, cycling, sports and recreational activity and, a major enhancement in the provision of travel alternatives to the private car.

4   Planning and Transport Policy Framework

National Policy

4.1   The policy framework for planning and transport will have a significant bearing on the future of the localities, not just in terms of the application of policy and delivery of proposals within the localities but just as importantly, in affecting the broader spatial geography and functioning of the urban South Gloucestershire, Bristol and the wider West of England areas.

4.2   The context for development is provided by the National Planning Policy Framework (NPPF), published in 2012 and likely to be the subject of some amendment in 2017, to amongst other things, provide further encouragement for brownfield development and development at high density in appropriate locations such as transport hubs and centres providing a concentration of uses and facilities.

4.3   At the heart of the NPPF is the role of planning in contributing to the achievement of sustainable development, encompassing an economic, social and environmental role. There is a presumption in favour of sustainable development and the Government's view of what sustainable development means is embodied within the policies of the NPPF taken as a whole (para.6).

4.4   Local Plans are required to provide a framework for delivering sustainable development reflecting the vision of local communities (para150). There is however a need to plan for the quantum of new homes and other uses, including meeting the development needs of business, based upon sound evidence (para. 158). In delivering the required quantum of development it is the role of Local Plans to set out policies and proposals to ensure sustainable travel (para. 35), good design (para58) and healthy communities (paras 69-70), as well as meeting the challenges of climate change (para 99) and safeguarding assets such as built heritage (para. 126) and Green Belt (paras. 84-85).

4.5   The NPPF places a particular emphasis on significantly boosting housing supply and this can result in the need for trade-offs with other planning objectives.

Transport

4.6   Sustainable transport modes are encouraged and development should have access to high quality public transport where practical (para. 35). Development proposals should however, be refused on transport grounds only where the residual cumulative impacts would be severe (para. 32).

4.7   In terms of new transport infrastructure, Local Plans can protect routes and sites where there is robust evidence (para. 41) and this will include evidence of funding. Achieving development that is served by high quality public transport is therefore a policy ambition but its delivery depends on existing provision and where this is not adequate, the availability of funding, through public sources and/ or development value, to bring about improvements that are technically feasible. In the absence of such funding, other provisions within the NPPF will take precedence to allow development to proceed, where the overall balance of planning considerations is judged to constitute sustainable development as defined in the NPPF.

5 Year Housing Land Supply

4.8   Where a deliverable supply of land to provide 5 years' worth of housing against planned housing requirements cannot be demonstrated, relevant policies for the supply of housing are not to be considered up to date (para. 49). The definition of relevant policies has been found by the Supreme Court to be only those that deal with numbers and distribution of housing. In such circumstances, the presumption in favour of sustainable development applies and development is to be permitted if it is judged to be sustainable in NPPF terms (para. 14). In this respect development that addresses a deficit in housing land supply can be treated as a benefit and a component of sustainable development in justifying proposals for new homes outside locations identified or provided for in the Local Plan.

Commercial Considerations

4.9   There is a general requirement that the provisions of Local Plans must take account of development viability and enable competitive returns to a willing landowner and developer (para. 173). Evidence that policy requirements cannot be met for viability reasons can therefore be a reason to depart from policy. This commonly applies in proposals for reduced affordable housing provision and in proposals for redevelopment of employment land or buildings for residential use, the latter backed by the NPPF stipulation that long term protection of such

sites for employment use should be avoided where there is no prospect of the site being used for that purpose (para.22).

4.10 There is a presumption in favour of town centre uses being located in existing centres but if suitable sites are not available then edge of centre, followed by out of centre sites can be considered, in that order (the sequential test), with a requirement to consider impact on existing centres and for applicants and local planning authorities to adopt a flexible attitude on issues such as format and scale (paras 24 and 26). Where the sequential test is failed or a significant adverse impact on existing centres is likely, then applications should be refused.

4.11 However, despite the provision on flexibility, a stated business model requiring large building footprints and significant parking provision tends to result in development on the edge of, or outside, established centres where the planning judgement is that the impact on existing centres is not 'significantly adverse'.

Housing Delivery

4.12 In relation to the delivery of new homes, the Government focus has been on streamlining the planning system and boosting demand. However, recent announcements herald an enhanced focus on brownfield development and a new drive to diversify the range of suppliers of new homes and the associated variety of housing types and models.

The Vision for Future Development and Change

4.13 The urban localities make up around 60% of the northern and eastern fringes of Bristol within South Gloucestershire. In turn, the wider city and the rest of the South Gloucestershire area both form major parts of the West of England area. It is important therefore to understand ambitions for the future expressed at West of England level and at more localised levels below this.

West of England Vision

4.14 The proposed Vision for the emerging West of England Joint Spatial Plan is:

By 2036 the WoE will be one of Europe's fastest growing and most prosperous city regions with the gap between disadvantaged and other communities closed

and a rising quality of life for all. The rich and diverse environmental character will be integral to health and economic prosperity. Patterns of development and transport will facilitate healthy and sustainable lifestyles. Existing and new communities will be well integrated, attractive and desirable places and supported by the necessary infrastructure. New development will be designed to be resilient to, and reduce the impacts of climate change.

Bristol City Vision

4.15 The spatial vision for the administrative area of Bristol, is set out in the Bristol Core Strategy, and at its core is the ambition '….*for Bristol to be a leading European city for innovative industry, enterprise*, culture, environmental quality, lifestyle and urban design…' As part of this 'Bristol will be a city of *sustainable communities that combine housing, employment, retail, education, training and leisure* functions, all linked by strong public transport.' It is to have an '….. *emphasis on walking, cycling, buses, rapid transit and rail …..*' with a goal to '…*build a low carbon economy…*', '…*support our growing population through building of new homes…to relatively high densities'* and create a city ' *….. with ample and high quality green spaces and public realm.…*'

South Gloucestershire Vision

4.16 The Council Plan 2016-2020 sets out an overarching vision for South Gloucestershire.

Achieving the best for our residents and their communities, ensuring South Gloucestershire will always be 'a great place to live and work.' This is the shared vision of the people who live, work and visit South Gloucestershire as set out in the Sustainable Community Strategy which outlines the context for the area's key priorities and provides a high level framework for integrated delivery by focusing on four broad themes which aim to:

- enhance our natural and built environment, develop low-carbon, health promoting, integrated communities with a strong sense of place connected by well-planned transport networks

- maximise opportunities to access first class education, reduce the attainment gap and prosper through a balanced economy, a well-trained workforce and sustainable jobs for all

- engage people of all ages so they feel they belong and can help provide local solutions; support communities so they are safe and feel safe and have access to services of an optimum quality

- promote personal well-being, reduce health inequalities and deliver high quality physical and mental health and social care services which protect our most vulnerable and offer people greater choice and control within strong, self-supporting communities

4.17   In terms of the physical environment the Vision for 2027 and beyond, set out in the South Gloucestershire Core Strategy, is that:

South Gloucestershire will continue to be a 'great place to live and work'. Within an attractive and accessible environment, everyone will be enjoying healthier and more sustainable lifestyles in balanced, vibrant and safe communities with ready access to jobs, supporting services and facilities. Adaptation to a changing climate will be taking place through the active management of impacts. The economy will be buoyant and prosperous and recognised internationally.

4.18   For the North Bristol Fringe the vision is:

The North Fringe of Bristol urban area will continue to be a major economic driver in the South West region and the West of England sub region. It will continue to maintain its role as a major focus for employment, commercial and retail activity, education and learning. The distinctive identities and heritage of the existing communities will also have been strengthened and preserved. New neighbourhoods will provide opportunities for people to live near to where they work and be well integrated with existing communities. All residents and workers will have better access to local amenities and high quality public transport, walking and cycling links. Community identity and neighbourhood distinctiveness will be improved by the development of new public spaces and high quality landscaping. The green network will be enhanced through opportunities to provide new and improved green spaces, within the existing urban area and which connect to the wider countryside. This network will include new corridors along the Henbury Trym, and Stoke Park to Three Brooks Nature Reserve via the East of Harry Stoke new neighbourhood.

4.19   In respect of the East Bristol Fringe the vision is:

The distinctive identity and heritage of the linked communities in the East Fringe of Bristol will be preserved and enhanced. The vibrancy and vitality of the traditional town centres at Downend, Staple Hill, Kingswood, and Hanham will be strengthened. The area will benefit from improved employment opportunities including the Science Park. Public transport services, especially to the North Fringe and central Bristol from the north of the area, will be more reliable, punctual and frequent.

Well-designed housing developments, including the major development at Emersons Green, will be integrated with and connected to existing communities. This will achieve a stronger town centre at Emersons Green and support balanced and quality neighbourhoods throughout the urban area.

4.20   For Yate, alongside Chipping Sodbury, the vision is:

Yate and Chipping Sodbury will build upon their distinct yet complementary heritage, character and roles to develop a coherent sense of place, and provide a richer mix of social, cultural and economic opportunities. The towns will develop as a popular destination and a more attractive service centre   for their surrounding villages and farming communities. Chipping Sodbury town centre will realise its retail and tourism potential. Yate's evening economy will develop and the range of town centre uses increased. Public transport services will be more attractive and accessible to users.

The open spaces, playing fields, footpaths and cycleways, which contribute to each town's unique identity will be strengthened and enhanced with improved linkages throughout the towns and beyond into the surrounding countryside.

A new neighbourhood to the north of Yate, will accommodate around 3,000 new homes (2,700 up to 2027), employment and community uses. This will enable the towns to meet locally generated housing requirements, provide a broader employment base and provide opportunities for modern flexible working practices, enhancing their sustainability.

West of England and South Gloucestershire Policy

Homes

4.21   The current planned number of new homes in South Gloucestershire for the period 2006 to 2027 is for a minimum of 28,355, of which 5,810 are accounted for by completions up to 2013. Of the balance, the majority are to be provided in the North and East Fringe, totalling 21,820, including new neighbourhoods east of Harry Stoke (2,000) and at Cribbs Causeway/Patchway (5,700) – (see Table 4.1).

4.22   The Core Strategy currently sets a requirement for 35% affordable homes on developments of 10 dwellings and over or 0.33 ha. and above.

4.23   The four West of England Authorities (Bristol, Bath and North East Somerset, North Somerset and South Gloucestershire) are also currently producing a Joint Spatial Plan for the West of England (JSP). Following consultation on an Issues and Options document in late 2015/early 2016 a second stage of consultation was undertaken in November and December 2016 on a 'Towards an Emerging Spatial Strategy' document. This proposed 105,000 new homes over the period 2016-2036.

4.24   On this basis, after deducting the planned housing provision already made in the Core Strategies of the four authorities, there is a requirement for the JSP to plan for an additional 39,000 dwellings. The JSP Emerging Spatial Strategy proposed around 10,200 in South Gloucestershire with 3,900 within the urban localities study areas (see Table 4.1).

4.25   Also within South Gloucestershire, strategic housing locations were proposed at Coalpit Heath (up to 1,500) and further north at Thornbury (up to 600), Charfield (up to 1,000) and at a new settlement at Buckover (up to 2,200). The proposals for Yate and Coalpit Heath were seen as providing potential for supporting transport investment to improve access to central Bristol, the north fringe, Bristol and Bath Science Park and Emersons Green Enterprise Area.

4.26   There was also an allowance for 1,000 dwellings on non-strategic sites, a significant proportion of which might be delivered within the study areas.

4.27   It is also significant in relation to the localities that the Bristol City area was identified for up to 12,000 new homes.

4.28   A further version of the emerging JSP, the Publication Plan, is due to be the subject of a public engagement exercise from November 2017 to January 2018 and this will update the strategy and housing supply proposals.

Location	Ha
North and East Fringe	1,300
Yate	2,600
Total	**3,900**

Table 4.1: Housing allocations proposed in the study areas in the West of England Joint Spatial Plan Emerging Spatial Strategy

nash
partnership

Boundary between South Gloucestershire and Bristol City Council

Study Area Boundaries

Core Strategy Safeguarded Employment Areas and Interim Safeguarded Employment Areas

Core Strategy Housing and New Neighbourhood Allocations

Core Strategy Town and District Centres within Study Area Boundaries

Town and District Centres

Railway

Train Primary Stations

Train Secondary Stations

Potential Train Stations

Fast car transit routes - Motorways

Fast transit route node - Motorways

Fast car transit routes - A Roads

Fast transit route node - A Roads

Green Belt

M4 West towards Wales

M5 North towards Birmingham

M4 East towards London

M5 South towards Exeter

PATCHWAY & FILTON

HARRY STOKE

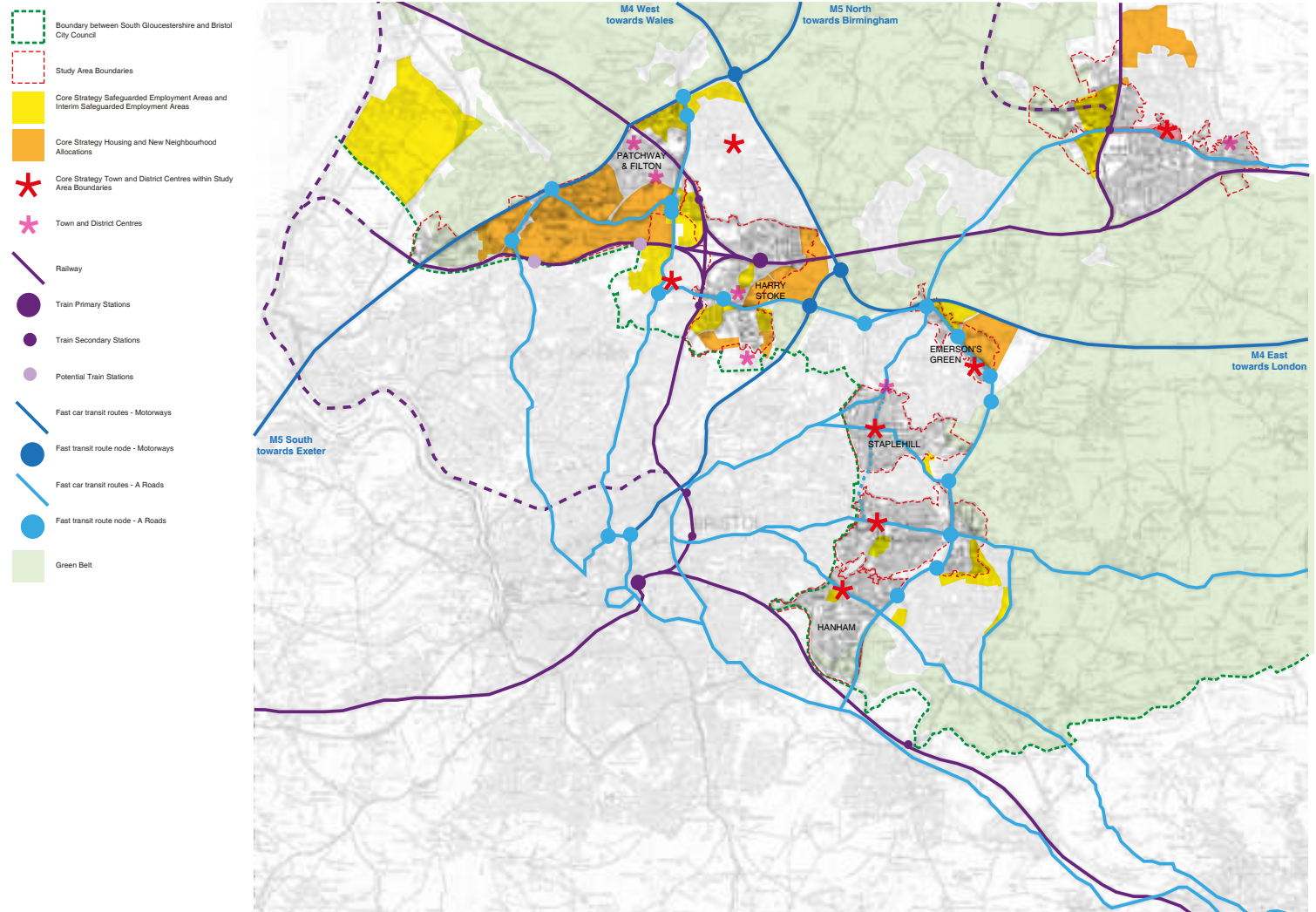EMERSON'S GREEN

STAPLEHILL

HANHAM

Figure 4.1: Principal Transport Routes and Core Strategy

51

Jobs

4.29   The JSP Emerging Spatial Strategy proposed planned jobs growth of 82,500, supported by the delivery of the quantum of homes summarised above. Again, any changes will be set out in the JSP Publication Plan due to be published in November 2017.

4.30   Job provision in South Gloucestershire is to be delivered through a combination of safeguarding existing employment areas and allocation of additional land for employment development. Within the study areas the following areas are proposed (Core Strategy Policies CS11 and CS12). (See Table 4.2)

4.31   In addition to Safeguarded Areas a number of Interim Safeguarded Areas are also designated and both are shown in the map at Figure 4.1. Within the Safeguarded Areas proposals for non 'B Class' uses need to demonstrate that they will not prejudice regeneration and retention of 'B Class' uses elsewhere within the designated area, will contribute to a more sustainable pattern of development, will improve the number and range of jobs in the area and that no suitable alternative provision is made in Local Plan or related documents. These criteria apply to development proposals in the Safeguarded and interim Safeguarded Areas unless a more fundamental review of the area's future is undertaken to enable regeneration, in line with Core Strategy policies, through

a Concept Statement, masterplan Supplementary Planning Document or the Policies and Sites Development Plan Document. The interim Safeguarded Areas are to be subject to review through supplementary planning documents, concept statements and potentially through the development management process.

4.32   Within the urban locality study areas there are two designated Enterprise Areas that take in some of the Safeguarded Areas. These are at Emersons Green, covering the Science Park and at Filton, around the advanced engineering and aerospace cluster.

4.33   The University of the West of England (UWE) Frenchay Campus is a major economic asset for the area and provision is made within the Core Strategy (Policy CS28) for further development for academic and research purposes. At Emersons Green a Supplementary Planning Document (2006) sets the Science Park within a proposed mixed use development. It is a location that will ultimately accommodated around 6,000 jobs and is also a facility of significance to the region and beyond, hosting the National Composite Centre and the planned location for the Institute for Advanced Automotive Propulsion Systems.

4.34   The Core Strategy also seeks to provide opportunities for modern working practices, including working from home, but this is specific to Yate (Policy CS30).

Location	Ha
North Fringe Safeguarded Areas	355
East Fringe Safeguarded Areas	147
Yate and Chipping Sodbury Safeguarded Areas	88
Allocation within new neighbourhood north of Yate	9
Total	**599**

Table 4.2: Core Strategy employment areas

Movement

4.35   The Core Strategy highlights the issue of congestion in both the North Fringe and the East Fringe (paras. 12.2 and 13.2). Significantly more people work in the North Fringe than live there, with a consequent high level of commuting. In the East Fringe employment has been lost and as a result some 18,000 people commute daily to central Bristol and around 6,300 to the North Fringe. These movements are not reflected in the level and quality of public transport provision and as a result car travel dominates.

4.36   At Yate, the Core Strategy highlights a deficit in public transport provision and congestion at certain times (para 14.2).

4.37   To address these issues, principal public transport schemes currently proposed are:

Greater Bristol Bus Network

4.38   This is a programme of improvement to the existing bus network on the most congested roads, including three bus corridors linking the North Fringe to Bristol City Centre and one between Emersons Green and the city centre.

Metrobus

4.39   The Metrobus project includes a link between the North Fringe and Hengrove and a link connecting Emersons Green to this route and the North Fringe area. Future potential includes an Emersons Green to Bristol Temple Meads link.

4.40   Metrobus will be an articulated bus, segregated from general traffic where possible.

Orbital Bus Route

4.41   A bus route linking Cribbs Causeway and Emersons Green.

Rail

4.42   A range of rail improvements are proposed, many of which combine as the Greater Bristol Metro (Metro West) project. Those relevant to the urban localities are:

- Improvements at Bristol Parkway and Yate stations.

- Half hourly service linking Yate and Bristol Parkway to Bristol Temple Meads.

- Potential future provision of passenger stations on the Hallen Freight Line to serve the New Cribbs Causeway/Patchway neighbourhood.

Walking and Cycling

4.43   The Core Strategy policies support enhance provision for walking and cycling. There are specific proposals for walking and cycling routes from Yate to connect with Emersons Green and Stoke Gifford/Bristol Parkway and requirements for provision within the new neighbourhood policies at Cribbs Causeway/Patchway, Harry Stoke and Yate.

Proposals to 2036

4.44   Looking beyond the adopted Core Strategy, the emerging JSP is accompanied by a Transport Vision. This sets out proposals for further transport investments to improve connections between the North Fringe, East Fringe and Yate to the centre of Bristol. The North and East Fringe routes to Bristol are identified as having potential for a light rail service, with the connection to Yate proposed as an extension of Metrobus, using dedicated road space on the A432.

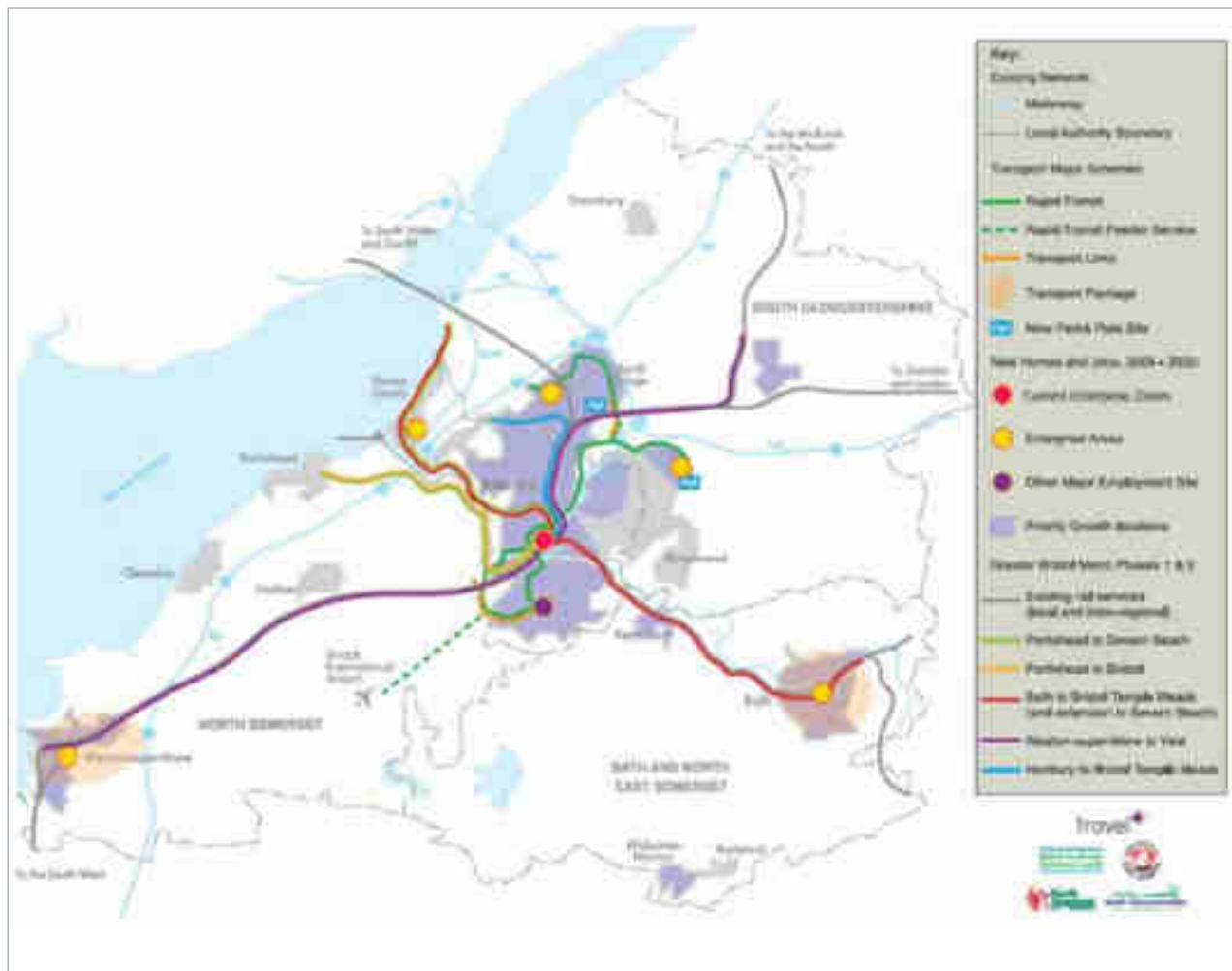*Figure 4.2: Existing transport investment programme*

Figure 4.3: Joint transport strategy potential future investments in Yate and the East Fringe

Figure 4.4: Joint transport strategy potential future investments in North Fringe and Severnside

Placemaking

North Fringe

4.45   The North Fringe currently lacks a sense of place and identity with the character and distinctiveness of existing communities under threat (Core Strategy para. 12.2). The Core Strategy (Policy CS25) therefore sets out key principles to be adopted by subsequent Development Plan Documents and development proposals in respect of character and identity, design and landscape, pedestrian and cycle routes and improvements in legibility, structure and the public realm, through rationalising car parking around major employment sites. This policy also proposes:

- Enhancement of Abbey Wood Retail Park by providing a broader range of uses and public space (complete).

- Investigation of the potential for development of the Sainsburys and B&Q retails sites at Stoke Gifford to provide a new district centre (early landowner engagement instigated).

- Public realm improvements, new local amenities at existing local centres, UWE and Cribbs Causeway.

- Support for redevelopment of the Frenchay hospital site for new homes and associated infrastructure and services, including health.

4.46   Placemaking requirements are set out for the proposed new neighbourhoods in policies CS26 and CS27 and these are further developed and articulated in the Cribbs/Patchway New Neighbourhood Development Framework SPD (2013) and the East of Harry Stoke New Neighbourhood Development Framework SPD (2016).

East Fringe

4.47   The Core Strategy highlights the aspiration of communities to maintain strong and separate identities, distinct from the core area of Bristol (para. 2.9). It also points to a need for additional green space and sports pitches, enhancement of existing green assets and the adverse impacts on Staple Hill and Kingswood of the retail park at Longwell Green, the new town centre at Emersons Green and

issues around congestion, parking, air quality and the quality of the public realm (para. 13.2).

4.48   Policy CS29 of the Core Strategy sets out a proposal for subsequent development Plan Documents and development proposals to improve the viability and vitality of existing centres, protect and enhance existing green assets, capitalise on opportunities for new green links, provide access to the countryside, seek opportunities to protect and enhance sport and recreation provision, protect and enhance heritage assets and seek opportunities to provide safe and convenient routes for pedestrians and cyclists. Development principles and requirements are set out for the urban extension at Emersons Green east in the Emersons Green East Development Brief SPD (2014).

Yate

4.49   In Yate the Core Strategy identifies a deficit in centrally located cultural provision and a shortage of allotments and outdoor sports facilities (para. 14.2). Policy CS30 proposes redevelopment of the industrial areas on the western edge of Yate to increase employment and improve this gateway to the town, diversification of the range of town centre uses, increased allotment provision, enhanced sport and recreation provision and realisation of the potential of Broad Lane Depot's employment potential, through re-modelling of the site. This policy also sets out key principles to be adopted in subsequent Development Plan Documents and development proposals in relation to architectural character, landscape setting, open spaces and pedestrian and cycle connections.

4.50   Core Strategy Policy CS31 proposes that the North Yate New Neighbourhood will the subject of a Supplementary Planning Document unless the development partners deliver a co-ordinated masterplan and related financial and delivery proposal. It also sets out requirements in terms of the infrastructure content of the development, including primary school provision, community facility, local retail, food and drink outlets etc. This allocation was granted planning permission in 2016.

Energy

4.51 The Core Strategy seeks (policy CS4), where practical and viable, the inclusion of renewable or low carbon combined heat and power generation and distribution for developments of over 100 dwellings where all or part of the proposal is at more than 50 dwellings per ha. and for non- residential development of more than 10,000m2. This is reflected in the policies for the North Fringe (CS25), the Cribbs/Patchway New Neighbourhood (CS26), The University of the West of England (CS28) and Yate and Chipping Sodbury (CS30).

4.52 Energy requirements are also set out in more detail in respect of two of the new neighbourhoods, via the Cribbs/Patchway New Neighbourhood Development Framework SPD (2013) and the East of Harry Stoke New Neighbourhood Development Framework SPD (2016).

A European Perspective

4.53 Both the proposed vision to set the starting point for the JSP and the Core Strategy's vision for the Bristol City administrative area set ambitions for the future within a European context. We have therefore briefly looked at approaches to growth and development in a selection of European cities.

4.54 One of the most striking aspects of the approaches taken by these cities is their level of ambition and achievement in delivery of public transport infrastructure. This is indicated in Table 4.3.

4.55 Public transport is closely related to quality of place and liveability, which in turn are central to the visions for these cities. The headline vision for Amsterdam for example, set out in the Amsterdam 2040 Structural Vision is '*Amsterdam: Economically Strong and Sustainable'*. The city '…*emphatically looks beyond its borders. Problems, challenges and opportunities present themselves on the scale of the Amsterdam Metropolitan Area*…….' From this flow a number of spatial tasks:

- Densify – to meet needs (e.g. housing) and support amenities such as energy management and public transport. The city has chosen not to expand its surface area but to intensify its existing urban territory and transform business zones. The intention is that by building 70,000 new homes with accompanying amenities within the existing city, there can be expansion of the '…*city centre milieu that makes the city attractive*.'

- Transform – for example mono-functional business parks become mixed residential and business neighbourhoods with a focus on knowledge intensive economic activity.

City	Year	Populations	Density/ km2	Tram	Under- ground/ Metro	Bus	Train
Amsterdam	2016	813,562	4,908	✓	✓	✓	✓
Copenhagen	2015	583,000	6,800		✓	✓	✓
Frankfurt	2012	671,927		✓	✓	✓	✓
Stockholm	2016	910,000	4,800	✓	✓	✓	✓
West of England		1,069,583	3,892			✓	✓

Table 4.3: European city comparisons (World Population Review, UK 2011 Census)

- Public Transport on a Regional Scale – To function as a metropolis necessitates fast, frequent and comfortable public transport on a regional scale.

- High Quality Layout of Public Space – Quality of life is increasingly important and includes providing more space for pedestrians and cyclists.

- Invest in Recreational Use of Green Space and Water – Increasingly important to well-being and attractiveness of the city to businesses.

4.56   Amsterdam 2040 describes the city, despite significant growth, as '…*retaining its human scale' and 'Not a sprawling city where you are forced to take the car, but a city where amenities are still found around the corner'. It concludes 'People want to live in Amsterdam because of its combination of metropolitan bustle and large expanses of greenery within a short distance of each other. That is our strength, with which we draw in residents and business enterprises.*'

4.57   A key aspect of the approach adopted in these European cities is that economic growth and prosperity are seen to emerge from the quality and sustainability of the place and this therefore is central to their visions for the future. Urban design quality and urban density enable the creation of identity and good qualities of liveability, with proximity to amenities and an emphasis on walking, cycling and public transport. The example of Amsterdam also illustrates the importance of a city-region approach and serious, sustained investment in public transport and the public realm, with a major focus on green space, trees and environments for walking and cycling.

4.58   The "political culture", approach to taxation, role of local government and city powers are, of course, significantly different in the Netherlands and other north European countries. Some of the approaches and experiences of these cities is nonetheless very relevant to consideration of the future of the localities and the wider urban context within which they sit.

Key Implications of the Policy Context

Vision

4.59   A key message from the vision statements is one of growth, particularly as a driver for the West of England as a whole and for the North Fringe of Bristol.

The ambition is that this is delivered in a way that secures local distinctiveness and urban environments that are sustainable, with good qualities of liveability.

4.60   An ambition for a highly liveable, distinctive and sustainable built environment takes a more leading role in the vision for the Bristol City administrative area, for South Gloucestershire as a whole and within this in relation to the East Fringe of Bristol and Yate. The approach adopted by other European cities, which are competitor locations for business and investment, and possibly more so as the UK leaves the European Union, points to the importance of evolution of the urban localities to create places of strong identity that provide for enjoyable urban living and working.

4.61   The vision for the urban localities might be strengthened by identification of the role they will play in relation to the adjacent Bristol area and others to which some of them will look.

Transport

4.62   Transport is a primary driver of change and the character of the built environment. The nature of the North Fringe, for example, reflects the dominance of highway infrastructure. Congestion in part of the East Fringe detracts from the quality of neighbourhoods and town centres and is likely to influence perceptions of these places as choices for living and business.

4.63   Policy proposals, including the Metrobus which is now at implementation stage, and measures such as enhancement of existing rail stations and opening of new stations will deliver a significant improvement in public transport provision. However, very significant further investment in public transport infrastructure, supported by provision for walking and cycling, will be needed in order to bring about transformation and fulfilment of the vision statements. This is recognised in the emerging JSP and associated Transport Vision. The extent to which these ambitions are carried through to adopted policy and delivery will be of fundamental importance.

Placemaking

4.64   Quality of place is important to the success and sustainability of the urban localities and the Core Strategy sets a policy framework to encourage and facilitate enhancement. There is, in particular, a need to bring a stronger sense

of urban structure, identity and status to some of the localities. This will need to involve increasing density, a clearer hierarchy of buildings and spaces, higher quality green spaces, improved pedestrian and cycle connectivity and enhanced public realm.

Homes

4.65   The policy framework requires a variety of types of homes and for these to contribute to the establishment of people-focused environments of character. To achieve this there is a need to consider a range of housing models and to build the confidence necessary for different approaches and, in some places, higher density.

Jobs

4.66   The retention and creation of jobs is an important policy objective and this in part is related to reducing commuting. Consideration therefore needs to be given to the stability of existing employment areas, opportunities for redevelopment and how this can best contribute to development of the local economy and the retention and creation of jobs. In doing this, regard needs to be had to pressures on employment land for residential development.

Energy

4.67   Provision of renewable and low carbon energy, in addition to measures to reduce energy consumption, is a key policy objective in seeking to tackle climate change. Often such provision is viewed primarily in terms of a development cost. However, renewable or low carbon energy provision can contribute to altered perceptions of places and potentially also provide opportunities for a long-term revenue stream/asset of capital value, with related potential for off-setting against and reducing short term development costs. There is also potential for reducing household bills. These opportunities should be explored through a value led rather than purely cost-based approach.

nash
partnership

5.1   This section sets out a brief summary of how each of the localities became what they are now, their current characteristics and a vision for the future.

5.2   The wider urban area, centred on Bristol, is relatively low density, even in the central area. This central city area quickly fades into the suburbs which, after a short distance is dominated by fairly monochrome post-war housing. For the urban South Gloucestershire area fringing north and east Bristol, the strategic opportunity for the future is its potential contribution to establishment of a more evident multi-centre urban structure, comprising a mosaic of thriving neighbourhoods, each with their own identity, around stronger and more distinctive town and district centres connected by the orbital A4174, linked to the motorway network and served by good quality, reliable and frequent public transport.

5.3   In the north fringe area, the potential lies in capitalising on its very substantial assets, particularly its clusters of business, academic and Government activity, to create a clearer sense of identity, integration and city-scale status. On the east fringe, its development through the nineteenth and early twentieth centuries give it a more discernible urban structure and character. However, more recent suburban development, out of town retail developments, the lack of first class public transport infrastructure and the growth in car based travel patterns have significantly diluted these characteristics. The potential here is therefore around uncovering and strengthening a sense of urban centre function and identity.

Patchway and Filton Airfield

Growth and Development

5.4   The Patchway area has grown very substantially over the past 50-60 years, shaped by the growth of industry, land availability, overspill housing for Bristol, the motorways and trends in planning and development.

5.5   This has resulted in a series of components that are not wholly integrated. The mature residential area of Patchway grew around the village of Patchway Green (known now as Patchway Common), driven by the growth of the aero-industry

based at Filton Aerodrome and the need for overspill housing to accommodate people displaced from war damaged and clearance areas in Bristol.

5.6   Filton aerodrome has played a central role in the area's aerospace industry. It was from here that the Bristol Brabazon made its maiden flight in 1949, but without progressing beyond its prototype stage due to concerns over its size and cost in relation to the practical requirements of airline operations at the time. More successful was Concorde which entered commercial service in 1976 and flew until 2003. Design and production of Concorde is symbolic of the significance of the locality aero-industry to its historical development and identity. It was a joint Anglo-French project and it was one of only two supersonic airliners that have been used for regular passenger flights (the other being the Russian Tuplev Tu-144), with the first British built Concorde flying from Filton in 1969.

5.7   Filton airfield closed at the end of 2012 and is now allocated with surrounding land for development of a New Neighbourhood.

5.8   The Patchway neighbourhood today, much of it typified by pleasant suburban streets, has a strong sense of community identity and two local shopping centres. Immediately adjoining to the south is the new residential area of Charlton Hayes, which has a more urban and denser character.

5.9   Around this residential area is a patchwork of commercial development characterised by car-based, edge or out of town development typologies. There are the industrial areas that grew up around the aero-industry, notably Rolls Royce and, reflecting the out-of town development industry models of the 1980s and early 1990's, the high quality business park at Aztec West and the regional shopping park at Cribbs Causeway, both served directly by the M5 and located close to its junction with the M4.

5.10 The Patchway and Filton Airfield locality therefore contains significant assets but the car-based, inward looking estate model of its most recent commercial development has created an area that lacks character and coherence, notwithstanding the identity inherent in the mature residential neighbourhood of Patchway.

Socio-Economic Characteristics

5.11 A summary profile of the socio-economic characteristics of Patchway can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.12 In relation to South Gloucestershire as a whole and most of the other localities Patchway has a younger age demographic, potentially reflecting its relative affordability for younger and middle-stage families. It has higher than average

proportions of 0-15 year old and 16-34 year old than the localities average. It has higher proportions of socially rented housing and purpose-built blocks of flats, and a particularly low proportion of detached dwellings. Its profile is perhaps the least typically 'suburban' of all the localities and is most closely aligned with the Bristol Urban Area average.

5.13 With this comes a higher prevalence of issues more common in the city centre such as overcrowding and multiple deprivation. Patchway has the highest proportion of households deprived in one dimension or more of all the localities which at 61% is notably higher than the average for the Bristol Built Up Area (BUA) figure of 45% and the average across the localities taken together (52%). Deprivation maps show particular pockets within social rented stock on and around Coniston Road. Despite this multiple deprivation, residents' health

Figure 5.1: Typical housing and local shops, Patchway (Source: Google Maps)

Figure 5.2: 'View across Filton airfield site from A38' (Source: Google Maps)

![nash partnership]

profiles are quite typical for the urban localities average, perhaps reflecting its relatively younger family population.

5.14 Patchway has the highest proportion of social rent tenure of all of the localities (20%) which is higher than the average for the Bristol built up area (18%) and notably higher than the localities average (12%). The property stock of the principal Registered Social Landlords in Patchway is mapped in Appendix 3.

5.15 Of all localities Patchway has the lowest proportion of its population working in higher or lower managerial, administrative and professional occupations (25%) compared to the Built-Up Area and localities averages (33% and 30% respectively). It has the highest proportion of people working in routine and semi-routine occupations (34%) of all localities, with the average for the Bristol BUA and localities at 24% and 26% respectively. 4% of people in economically active age groups have never worked or are long term unemployed, which is joint highest for the localities alongside Kingswood and Staple Hill, and equal to the Bristol BUA average.

5.16 Despite having a fairly typical travel to work distance of 13.3 miles (against the localities average of 13.5 miles), a good number of residents travel by foot (12% compared to the localities average of 9%), a likely reflection of their working in more routine but locally available employment. Part of the characteristic of working in lower grade employment may be explained by a parallel lack of qualification; Patchway has the joint highest level of residents with no qualifications alongside Kingswood at 25%, compared to the BUA and localities averages of 18% and 20% respectively.

5.17 In addition to the picture painted by the data, discussions with key stakeholders suggest that the sense of community in the Filton and Patchway area is strong.

The Future

5.18 Patchway has a sense of social identity and the potential to rise in profile as a place that people aspire to live in. For the future, the disused Filton Airfield is of a scale, particularly in combination with the planned new neighbourhood taking in Cribbs Causeway and the Charlton Hayes area, that offers the potential for transformational change to strengthen the overall sense of place and the degree of integration within the Patchway and Filton Airfield locality.

Much hinges on whether Filton Airfield can rapidly create the high status, mixed use urban style neighbourhood its owners aspire to achieve as a step change above surrounding stock. This will need to recognise the area's dual role as a residential neighbourhood and its strategic function serving a sub-regional hinterland.

5.19 There is the opportunity to build an expanded residential neighbourhood, offering a good quality of life and integrating the existing mature residential areas with the new. It is not the role of this study to comment on the pros and cons of current proposals to extend the retail and leisure offer at Cribbs Causeway or its impact or otherwise on Bristol city centre. However Cribbs Causeway unequivocally provides a retail and leisure offer that serves a sub-regional catchment and will continue to do so. The external environment is however mundane and functional. In this respect, its peripheral location on the M5 motorway potentially provides the opportunity for a bolder character and identity, with further differentiation from the Bristol city centre offer.

5.20 There is a potential for synergy with the employment opportunities in Harry Stoke but this is inhibited by the severing effect of the railway corridor between the two areas. However, there does appear to be potential to address this as part of the future of the Harry Stoke locality.

Harry Stoke

Growth and Development

5.21   This locality is centred on Harry Stoke, with Bristol Parkway Station in the north and Cheswick village in the south. It is bounded to the west by the mainline railway running north from central Bristol. Where this line intersects the east-west railway that runs through Bristol Parkway station, there are four large quadrants of largely under-used land.

5.22   As recently as 1980 the ordnance survey map shows the area to be largely undeveloped (see Figure 5.3). Since this time very substantial development has occurred driven by the accommodation requirements of major institutions, the availability of land and major new infrastructure including the M32 and the A4174 'ring road'. The University of the West of England opened its Frenchay Campus here in 1975 and has added new buildings over time since then. This includes the acquisition of the former Hewlett Packard site to the west and establishment of Bristol Robotics Laboratory in partnership with the University of Bristol. In 1996 the Ministry of Defence opened its Abbey Wood establishment between the UWE campus and the railway line running into Bristol, including a replacement Filton Abbey Wood rail station. In 2013 the Bristol Technology and Engineering Academy, a university technical college, opened.

Figure 5.3: Map - Harry Stoke Locality in 1980

5.23 Significant commercial development has taken place, including the major Aviva office campus, Bristol Business Park and Abbey Wood Retail Park. Residential development has also taken place in the southern part of the locality at Cheswick Village.

Socio-Economic Characteristics

5.24 A summary profile of the socio-economic characteristics of Harry Stoke can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.25 Harry Stokes's socio-economic profile is influenced by the combined effects of UWE to the south of the railway line and relatively affluent and well qualified midlife-stage families living in older-suburban stock to the north. Of all the localities, Harry Stoke has the highest proportion of working-age people (73%),

and the joint lowest proportion of both 0-15 year old residents aged 14-34 and of those aged 65+. Only 10% of the population are of retirement age against the BUA and localities averages of 14% and 16% respectively. In relation to the needs of older people a 260 care home is under construction on Cold Harbour Lane.

5.26 Harry Stoke has the highest proportion, amongst the localities of residents living in private rented accommodation (16% against the localities average of 13%), most likely an effect of the student population and UWE staff living in rented accommodation. However, the social rented stock in Harry Stoke is very limited (Appendix 3).

5.27 In contrast the longer-term residents tend to under-occupy larger, often detached homes in the north. These are often owned with a mortgage (44%

Figure 5.4: Entrance to quadrant of 'railway' land (Source: Google Maps)

Figure 5.5: Urban scene typical of Harry Stoke (Source: Google Maps)

- the second highest of all localities, behind Emersons Green). Housing stock here is quite typically 'fringe suburban' and based around modern estate design with a very low proportion of terraces and a relatively low proportion of semi-detached dwellings.

5.28   Residents in Harry Stoke generally have higher level qualifications (the second highest proportion of residents with level 4+ qualifications behind Emersons Green) and are more likely to work in higher and lower managerial and professional occupations. 27% of residents' socio-economic status is unclassified according to census definitions and this is likely to reflect the student population.

5.29   Proximity to the station results in a relatively high proportion of residents using the train to get to work (5%). This may not seem high but is well above the average for the BUA of 2% and five times higher than the localities average of 1%. Walking is also more common at 12%. Whilst this might suggest that a good proportion of the residents are working within local employment areas around UWE, the MoD and Bristol Business Park, the overall average distance of travel to work is actually highest of all localities at 17.5km (the localities average being 13.5km). The proportion of residents driving to work is the lowest of all the localities but is still the overwhelming majority mode at 59% and still above average for the BUA.

5.30   Affluence and a younger student population are likely to be contributing factors to the locality's relatively high health standards and lower deprivation levels.

The Future

5.31   Overall, the Harry stock locality contains the ingredients for a successful and thriving part of the urban area of South Gloucestershire fringing the north of Bristol and, in many ways it is. However, it is also an area that lacks a coherent sense of place, with large land holdings laid out as self-contained establishments for institutions and commercial occupiers, within a broader setting that is dominated by roads and cars.

5.32   The locality nonetheless has a sense of urban status in the quality of its buildings and the knowledge, innovation and significance inherent in the activities that take place. More recently, the residential development at

Cheswick Village has also achieved a sense of urbanity and identity and substantial additional development is proposed through the allocation for a new neighbourhood east of Harry Stoke. These attributes are things to build upon through the realisation of more immediate development opportunities and over the longer term as opportunities for change and increases in density arise. For the future, the potential of the area lies in building upon its established major assets to create a central focus for 'public life' and identity, to develop a stronger sense of urban structure and scale and better integrate the disparate components of the locality through new development, landscaping, walking and cycling routes and enhanced public transport connection to central Bristol and the wider South Gloucestershire urban area.

5.33   A new urban centre of significant scale has an important role to play here in bringing identity and serving residents and businesses in a way that strengthens the urban area overall and is complementary to Bristol City centre. The locality highly advantageous infrastructure and a critical mass of good quality employment. Its industrial estates are likely to present opportunities for higher density development in the longer term.

Emersons Green, Science Park and Environs

Growth and Development

5.34   Emersons Green has been shaped by the suburban expansion of the area fringing the north and east of Bristol, outward to the A4174 and served by Emersons Green Shopping Centre which backs on to the A4174. Beyond this to the east the large triangle of land, between the A4174 and the M4 motorway, was originally conceived of as a location for businesses premises to take advantage of the strategic road infrastructure. This includes Bristol and Bath Science Park, home to a variety of businesses, including the National Composites Centre and the proposed location for a new automotive industry research and development centre. However, the ambition is now for a mixed-use area including a substantial new residential neighbourhood and this development is underway.

5.35   As defined above, the locality for the purposes of this review encompasses the triangle between the A4174 and the M4, also taking in the shopping centre west of the A4174. Whilst the strategic road infrastructure is an asset, it also separates the Science Park, business park and new residential neighbourhood from the shopping centre and residential neighbourhoods immediately to the west. This presents a challenge in terms of achieving integration and a sense of place and a new footbridge across the A4174 has been installed to help address this.

Socio-Economic Characteristics

5.36   A summary profile of the socio-economic characteristics of Emersons Green (ward) can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

Figure 5.6: Bristol and Bath Science Park (source: Google Maps)

Figure 5.7: New homes at Lyde Green (source: Google Maps)

5.37 Emersons Green (ward) is the newest, most affluent and least deprived of all the localities. Its socio-economic profile suggests an area for young families, with the highest proportion of 0-15 year old (24% compared to the BUA and localities averages of 19%), and of 34-64 year old (43% compared to the BUA and localities average of 36% and 39% respectively).

5.38 Its residents tend to hold high level qualifications (34% qualified at level 4+ compared to the localities and BUA averages of 23% and 31% respectively) and work in higher managerial and professional roles (17% compared to the localities and BUA averages of 10% and 12% respectively). Living conditions are good and economic activity amongst its working age population is very high at 80%.

5.39 Home ownership with a mortgage is highest in this locality at 47%, although outright ownership is low, reflecting the relatively young family population. The housing tenure is less diverse, with a limited stock of social rented housing (see Appendix 3) and the lowest levels of social rented tenure within the localities, at 6%. Detached housing is common and new residents are buying larger properties than they actually need, perhaps reflecting the ambitions of younger families to have space to grow in the future, as well as indicating the way estates have been delivered in line with contemporary house-builder models on larger greenfield sites.

5.40 Residents in Emersons Green tend to travel longer distances to work at an average of 16.6km (the second longest behind Harry Stoke). Car usage is highest of all the localities at 73% (the localities and BUA averages being 68% and 59% respectively). The cycling rate is higher than average for the localities (5.7%) but walking is lowest amongst the localities (5.1%). This is perhaps reflective of the relative lack of local employment opportunities in this new, largely residential neighbourhood.

The Future

5.41 There is currently poor integration between the Science Park and the established communities of the east fringe of the wider Bristol urban area. There is consequently a need to help those established populations, including those in Yate, benefit from the Science Park and the north Bristol economy as a whole.

5.42 Capitalising on the unique assets of Emersons Green, Science Park and Environs and using them to establish a stronger sense of place and vitality will be important to the locality, particularly given the competition for companies and employees that will be offered by delivery of the proposals for Temple Quarter Enterprise Zone in central Bristol. The Supplementary Planning Document, 'Emersons Green East – development brief' seeks to promote this but does not articulate an overarching role and position for the locality in relation to the wider area.

5.43 The research and development activities of the Science Park are of particular importance to the wider West of England economy. Its campus is however constrained and it is essential that future investors can see a pathway to continuation and expansion of its work into proximate areas and this is something that requires strategic planning now. Linked to this the Science Park needs to be seen as part of a wider ecology of premises and facilities for economic activity in the urban South Gloucestershire area. This need is really important to future visions for the east fringe area, and to Yate. In this respect, there may be an opportunity to review the Science Park Masterplan to consider smaller business units and a range of supporting users and facilities.

Staple Hill and Environs

Growth and Development

5.44 Staple Hill grew from a rural village following the introduction of its own station on the Bristol and Gloucester railway line, which became part of the Midland Railway, providing services to Bristol, Gloucester and the wider network. Growth brought industry, including motorcycle manufacturers, Wilson & Sons. With the addition of trams and buses, the area also became a commuter neighbourhood for people working in Bristol and Bath. In the twentieth century the construction of the A4174 Bristol 'ring-road', linking to the M4 motorway to the north, facilitated further expansion of Staple Hill as a residential suburb.

5.45 The centre of Staple Hill retains elements of its historic character, in its three storey Victorian buildings providing a characterful frontage and well-articulated roof line to parts of the High Street. However, this character has been substantially diluted by more recent development, much of it single and two-storey, which presents flat elevations and roof lines, with the effect of reducing urban character and creating a plainer more suburban environment. To the east of the High Street the park and to the south the Bath-Bristol cycle way are important assets.

5.46 Staple Hill's centre sits within a sea of suburban housing, some of it Victorian and characterful but large swathes of it twentieth century development that creates relatively unvaried, monochrome neighbourhoods. This is alleviated in some places with arts and crafts style houses and where front garden hedges and trees have been retained to provide a sense of garden suburb character. The topography in places also allows for glimpses of the countryside beyond.

5.47 Within the residential areas there are significant pockets of industrial and commercial buildings and this is true also of areas just off the High Street.

5.48 Overall, Staple Hill has a latent urban centre character and potential that is currently obscured to a significant degree by the undifferentiated nature of its residential offer and the dilution of the sense of urban scale and character as a result of suburban type twentieth century development.

Figure 5.8: High Street (source: Google Maps)

Figure 5.9: Typical residential street (source: Google Maps)

Socio-Economic Characteristics

5.49   A summary profile of the socio-economic characteristics of Staple Hill and environs can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.50   Staple Hill's population is older than the localities average, with the lowest proportion of 0-15 year old and second highest proportion of those aged 65+ (behind Hanham). Families are still prevalent, but these are 'older-stage' with older children than localities such as Patchway and Filton Airfield and Emersons Green's Science Park and Environs. These families characterise the majority of the suburban housing stock but there are concentrations of younger people living around the High Street core, particularly around the crossroads with Soundwell Road and Victoria Street.

5.51   Other than this older profile it is more difficult to identify pronounced socio-economic traits compared to the other localities. Staple Hill's socio-economic profile is quite well mixed and less polarised than most others, with a spread of groups almost exactly in line with the average for all of the localities. Its qualification profile is also in line with the average for the localities, albeit with a slightly higher proportion of residents with no qualifications. These spreads may be an effect of a blend in affluence across the area, with relatively lower prosperity in the South West and around the High Street core, and increasing levels of affluence towards Downend. In this respect, it is notable that there is a pocket characterised by people in higher level occupations around Christchurch Lane, which is characterised by a sense of greenness, elements of characterful housing and proximity to the shops and other amenities in the centre of Downend.

5.52   Staple Hill's housing stock diverges most from the low-rise suburban housing model, with the highest prevalence of purpose-built blocks of flats (20% against the localities average of 12%). This is mostly an effect of pockets of purpose-built higher diversity social housing including the Pendennis estate on Hayes Lane (see Appendix 3 for mapping of the social rented housing stock). This area accounts for the relatively high proportion of social rented housing (16% against the localities average of 12%) but it should be noted that there is also a spread of other house types, including a good proportion of homes owned outright (34% against the localities average of 32%).

5.53   This more mixed profile may mask issues of inequality, however, as 58% of households are deprived in one dimension or more compared to the localities average of 52%. A relatively lower standard of living conditions is concentrated in the Hayes Lane Estate, around the High Street core and to a lesser extent in the south west. Staple Hill has the highest number of households deprived in two dimensions of all the localities.

5.54   Residents tend to travel a slightly shorter distance to work on average than most of the other localities and Staple Hill has the highest percentage of residents travelling by bicycle (6% against the locality and BUA averages of 5% and 7% respectively)

5.55   Discussion with key stakeholders again suggests that there is a strong sense of community in the area with a regeneration partnership driven by local councillors and a new business association being formed.

The Future

5.56   Staple Hill's location and connection in relation to the economy of the north fringe of the wider Bristol urban area provide a level of spatial advantage that can help it grow in stature and attractiveness.

5.57   Staple Hill's future lies in building up again it's sense of status, urban centre character and community, capitalising on strong locational assets. Its centre has a key role to play in this and the pockets of industrial and commercial use provide potential for a more dynamic local economy, supported by the connectivity provided by the A4174 and its proximity to the Bristol and Bath Science Park. There is a significant degree of travel to work by bus but improved public transport and a better sense of connection to the life of the wider urban area and the opportunities it presents will be important to realising the potential of the locality.

Kingswood

Growth and Development

5.58   Kingswood is a historic settlement whose origins lie in the 17th and 18th centuries, initially coming to prominence as a result of coal mining. Throughout the 18th, 19th and early 20th centuries it held a very strong sense of its own identity and economic attainment as a town centre, evidenced still in much of its fabric. The area has significant historic assets, including a number of chapels that reflect Kingswood's role in the development of Methodism and the gardens created by William Champion, zinc producer, as the setting for his house adjacent to Warmley.

5.59   Kingswood developed a significant manufacturing economy, including the famous Douglas motor-bike factory and Pratt's and G B Britton's boot and shoe factories. However, Kingswood has long been disadvantaged in connectivity, its radial connections to Bristol being constrained by existing development and isolated from the most recent growth points of Greater Bristol's economy to the north and centre of the city.

5.60   Today, the centre of Kingswood has a tangible urban centre character and it is likely that the lack of connectivity and historic sense of independence help to sustain this. Kings Chase Shopping Centre, with its low-rise brutalist architecture, weakens the urban High-Street character of the centre to a significant degree. However, it provides a range of shops including a Sainsbury's convenience store and other High Street names to help anchor the centre and generate footfall. To the east of the centre the large park is a major asset with the Civic Centre opposite providing a symbol of civic status and a concentration of office based employment. Both however lack a feeling of connection to the High Street.

5.61   The residential areas of Kingswood are similar in some respects to those of Staple Hill with a relatively generic suburban character. However, there is a stronger sense of mature family housing, which is enhanced in those places where front garden hedges and trees have been retained. There is also a more evident patchwork of green space, which again adds to the residential offer.

Figure 5.10: High Street (source: Google Maps)

Figure 5.11: Mixed residential and industrial neighbourhood (source: Google Maps)

5.62 As with Staple Hill, there is significant industrial and commercial space within the residential area and just off the central area. In Kingswood, the majority of this is concentrated in an area between Hanham Road and Forest Road, much of it appearing to be in poor condition and under-used.

Socio-Economic Characteristics

5.63 A summary profile of the socio-economic characteristics of Kingswood and environs can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.64 Kingswood's socio-economic profile is closely aligned with the localities average. It has the third highest proportion of residents in the 16-34 age group (27% compared to the South Gloucestershire figure of 23% and the localities average of 26%), behind Harry Stoke and closely following Patchway.

5.65 Despite having a relatively healthy economic activity rate of 75% (higher than the 74% across all the localities), Kingswood's residents typically have lower qualification levels than the localities average and the locality has the joint highest number of residents with no qualifications alongside Patchway (25%). In parallel with this a high proportion of its residents fall within more modest socio-economic classifications than the localities average, with 31% employed in routine or semi-routine occupations (compared to 24% in the BUA and 26% across the localities). Nevertheless Kingswood has a good representation of households working in skilled trade occupations (as shown in Figure 3.14), with concentrations of these based around Dyrham Road and Honey Hill Road. It is also notable that there is a pocket with a higher proportion of people in managerial and related occupations around Hill Street/High Street, where the housing stock is more characterful.

5.66 Kingswood's housing stock exhibits many traits of low-rise, suburban development, with a very high prevalence of terraced housing (39%), compared to the BUA and localities averages of 32 and 33% respectively). There is a higher prevalence of social rented housing (15%) than the localities average (11%) with a number of areas of significant concentration of social rented homes (see Appendix 3). The housing stock is generally efficiently occupied, with relatively low levels of over- and under-occupation. Living standards,

however, are lower than average, with 57% of households deprived in one or more dimensions against a localities average of 52%.

5.67 At an average distance of 10.9km, Kingswood residents travel the shortest distance to work of all localities besides Hanham. Bus usage is highest of all the localities at 8%, a likely effect of good provision of services along the A420. Kingswood also has the lowest proportion of residents working from home. But despite these factors private car use is still very high at 69%, above the localities average of 68%.

5.68 Stakeholder discussions point towards challenges in raising educational aspiration and attainment, community safety issues, especially in relation to the night-time economy, a community perception of not sharing in the economic success of the wider urban area, with lack of transport a contributor to this, a relatively high churn of people as a result of lower cost rented housing, a sense of independence and a culture that looks to the Council to sort things out, with the capacity for local responses weakened by an under-resourced voluntary sector.

5.69 As so much of Kingswood's indigenous and historical employment has declined, much has found new capacity to develop in the industrial estates of Warmley. So, in employment terms and travel to work metrics Kingswood/Warmley work well. But, economic health, social and cultural identity are vulnerable. Currently it lacks the foothold in both education and emerging business start-ups to connect with the growth points of the wider city economy.

The Future

5.70 Kingswood, like Staple Hill, has the potential to develop its urban centre identity as a place to live and work and to build on its historic sense of community identity. It has an unusual capacity for change due to the quantum of underutilised sites. Enhancing connectivity between the High Street and the significant green spaces in the centre should be part of this. However, whilst its sense of identity is important, for the future, so too is its place in the wider urban economy. The connection to the economy of the north fringe and to Keynsham and Bath, provided by the A4174, can be part of Kingswood's offer as a place to live. Its role as a centre of civic activity may change but this role is important to Kingswood in terms of status and jobs. It also needs to develop its own

place economy, with a more varied and higher quality business premises offer, particularly for small and emergent businesses, and this needs to be supported by different housing offers and a stronger presentation of its heritage assets to help build local identity. Whilst the A4174 'ring-road' is an asset, a more vibrant and confident Kingswood will require better connection to central Bristol if it is to present a lifestyle offer attractive to a wider audience.

5.71   Kingswood stands out amongst the mature localities in the scale of possible accumulation of brownfield sites with significant transformational change potential. But the investment case for capitalising on this has to be built and linked with the wider urban economy. Its potential capacity for change is a major asset.

Hanham

Growth and Development

5.72 Originally a rural hamlet, Hanham has been absorbed into the urban area of the wider Bristol conurbation. Its High Street retains a village character and is surrounded by residential neighbourhoods that, like Staple Hill and Kingswood, are suburban in nature with a housing offer that is relatively ordinary and unvaried. In places where trees and hedges have been retained in front gardens this again lifts the quality of streets.

5.73 There is little in the way of employment floorspace in Hanham, following the closure of the Kleeneze brush-strip operation some 15 years ago. At the eastern end of the locality the Longwell Green Retail Park is a significant trade draw as well as being a centre of employment. Its physical nature is typical of out of town retail parks and is characterised by large box retail stores surrounded by

extensive parking, with access direct off the A3174.

Socio-Economic Characteristics

5.74 A summary profile of the socio-economic characteristics of Hanham and environs can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.75 In Hanham 22% of residents are aged 65+ compared to the localities and BUA averages of 16% and 14% respectively. It also has a low proportion of population aged 0-15 (17% compared to average of 19% for the localities, South Gloucestershire and BUA). Conversely, the proportion of people in the 34-64 years age group is larger than for all other localities except Emerson's Green, Science Park and Environs (41% compared to the localities average of 39%, the South Gloucestershire figure of 41% and 36% in the BUA).

Figure 5.12: The vacant former Kleeneze site (source: Google Maps)

Figure 5.13: Typical residential street (source: Google Maps)

5.76   Hanham therefore appears to be a popular location for older families with grown-up children and for people of retirement age. Dwelling occupancy rates (see below) suggest that many of those in the 65+ age group have lived in Hanham with their family and stayed-on once their children have left home. Figure 3.4 and Figure 3.5 show that there is a higher concentration of this older group across to the south of the High Street, with younger households being based north of it.

5.77   Hanham's socio-economic profile is broadly in line with the urban localities average, although it has the highest representation of middle-occupation groups of all the localities. 28% work in intermediate occupations or as small employers/own account workers, compared to an average of 24% and 20% for the localities and BUA respectively. In general, its residents work in occupations in between the more routine ones prevalent in Patchway and Staple Hill and the more professional and managerial ones prevalent in Emersons Green, Science Park and Environs and Harry Stoke.

5.78   Hanham's most unique feature compared with the other localities is its housing market, which has significantly higher levels of out-rightly owned, detached, semi-detached and under occupied housing. This suggests that the area is populated by an older population living in houses they have long occupied and owned, but which they are under-occupying as a result of their children leaving home. There is however, a cluster of social rented housing in the northern part of the locality (see Appendix 3).

5.79   As with Kingswood, residents make relatively infrequent use of sustainable transport options to get to work compared with the other localities despite being the closest to the city centre. 72% of those in employment travel to work by car, which is the second highest rate behind Emersons Green. Hanham has the highest proportion of residents working from home at 4.5%, higher than the localities average of 3.6% but lower than the BUA average of 4.6%.

5.80   Stakeholder dialogue has pointed towards the popularity of Hanham as a place to live, with its 'village' character valued by residents. Whilst younger people travel to Kingswood for night-time leisure activity the Parish Council is viewed as active, including in the provision of youth activities.

The Future

5.81   Hanham has a sense of urban village character that is valued by residents. It is a popular place to live and its older demographic is likely to reflect this, with households remaining in the area as they move into old age. In the future, it can build on its attributes by introducing new housing offers, potentially including homes for downsizing older households and apartments for younger people seeking to take advantage of relative affordability and connections to employment opportunities at Emersons Green, Warmley, Keynsham and Bath, as well as in central Bristol. New employment space for small businesses, together with other uses, potentially including a modest element of retail provision, and good quality public space to strengthen the centre would add dynamism and help to enhance the attractiveness of Hanham as a place to live and invest in. As an established aspirational place, with good access in all directions, Hanham offers a good prospect for 'new economy' place building, for which its Hanham Hall development provides evident acknowledgement.

Yate

Growth and Development

5.82 Yate's growth from a rural settlement was based on exploitation of mineral resources through quarrying and mining of sandstone, limestone, coal and Spar (Celestine). At one time Yate accounted for over 70% of world production of Spar. Mining brought the first railway line into Bristol in 1844 to carry coal from Yate into the city. The station at Yate closed in 1966 under the Beeching cuts but was reopened in 1989.

5.83 World War 1 brought industry to Yate, including an aircraft repair depot and concrete slab factory. Parnalls subsequently established an aircraft factory in 1925 and in 1932 Newmans electric motor factory was established. Parnalls later produced electrical household appliances and the site is now occupied by appliance manufacturer Indesit.

5.84 From the early 1960's Yate's residential areas expanded, initially on a New Town model using Radburn design principles with back gardens fronting streets and houses facing on to one another across common landscaped areas. Further expansion followed, based on the generic cul-de-sac housebuilding models of the 1970s and 1980s.

5.85 Today Yate provides a mature family living environment strongly characterised by green space and at its heart Yate shopping centre. Whilst the shopping centre is an American style, precinct type environment, built between 1965 and 1970, that lacks the character of a traditional town centre, it is well placed for access by walking and cycling as well by car. It appears to function reasonably well and the recent development of a cinema, albeit situated in an out of town style retail park environment, is close by on the opposite side of Link Road and adds to the attraction of central Yate. A more traditional and secondary shopping offer is provided on Station Road. The station itself is a major asset but currently low in status in terms of both station facilities and access to it. Immediately adjoining the station to the west is the Beeches Industrial Estate, an extensive area of 'shed' style industrial, storage and commercial premises that is important for the range of businesses and employment it accommodates. It however presents a low-grade and low-density gateway to Yate when approached from Bristol.

Figure 5.14: Typical housing (source: Google Maps)

Figure 5.15: Industrial and storage premises at the western entrance to Yate (source: Google Maps)

Socio-Economic Characteristics

5.86   A summary profile of the socio-economic characteristics of the Yate locality area can be found in Appendix 1, whilst the raw data upon which this is based is in Appendix 2.

5.87   Yate's demographic, labour market, health and deprivation profile is very close to the urban localities average, including its economic activity rate at 74%. It is perhaps best defined as an area popular with middle-stage working families. Whilst there is an average number of retirees and economically active families, there is a large proportion of 0-15 year old (the second highest in the study at 20%, behind Emersons Green), suggesting Yate is popular with younger families.

5.88   Despite its good economic activity rate, Yate is more reliant on routine and semi-routine jobs - the second highest of the localities, at 33%, compared to the average of 26%. As such it has a lower than average representation of people in managerial, administrative and professional occupation (27% compared to the localities average of 30%). Similar to Kingswood there are pockets of people working in skilled trades. Qualification levels are generally lower and Yate has the highest proportion of residents whose highest qualification level is level 2, and a low proportion of people qualified at level 4+ (18% compared to the localities average of 23%).

5.89   Yate's housing stock is markedly different from the localities average, incorporating significantly larger proportions of terraced housing (49% against the average of 33%). This is a legacy of when the town was initially planned according to Radburn housing principles. This has lead to a relative lack of diversity in the housing stock and there is very little availability of flats (7%).

5.90   Yate's housing market is relatively mature, with the second highest level of outright ownership (34%) behind Hanham and ownership with a mortgage also very high (44%). It follows from this that the availability of privately rented accommodation is low (11%). It is an attractive and affordable residential destination for middle-stage families. There is relative lack of social housing in Yate at 8% of stock compared to the localities average of 12% (see Appendix 3 for distribution of the social rented stock).

5.91   Despite having a train station, travel-to-work by rail is perhaps less common than might be expected at only 1.8%, not much above the localities average of 1.4%. Figure 3.20 shows that travel-to-work by train is largely limited to areas very close to the train station, suggesting its detachment from the main residential core is seriously hindering its attractiveness. Despite being most distant from Bristol city centre. Yate's average distance travelled to work is near to the localities average of 13.4km. Travel to work by foot is also second highest of all the localities at 10%. These factors suggest that Yate is more self-contained and less reliant on the city centre for employment than some of the other localities. However, car use still dominates commuter patterns, with 70% of journeys made this way.

5.92   Stakeholder discussion has indicated that there is a strong sense of community in Yate, with an active Town Council which, for example, works with landlords in the centre. There are however concerns over educational attainment, low-quality employment and the integration of new housing.

The Future

5.93   As a de-facto New Town, Yate is now at something of a pivotal point in terms of its demographics and its role in the wider spatial pattern of urban South Gloucestershire. It's rail connection to central Bristol is a major asset, as is its proximity to the Bristol and Bath Science Park and the wider north Bristol fringe whilst it also provides a significantly different lifestyle offer to the fringe neighbourhoods. It has the potential to appeal to new households looking for proximity and connection to employment opportunities whilst enjoying the lifestyle offered by a free-standing small town sitting in a rural setting.

5.94   The 'modernism' inherent in the 1960's model for Yate's expansion could provide a metaphor for its future, through an offer that is deliberately modern and forward looking. With its established attractiveness for families, level topography, green corridors, network of paths and relatively quiet secondary roads the town is, for example, well suited to the Dutch model of towns based on key principles such as walking and cycling, a strong landscape infrastructure and generous provision of children's play facilities. A higher quality western gateway, as the setting for an improved rail station, and better linking it to the centre, would be part of such an offer.

6   Principles for Development and Change

6.1   The seven urban localities contain significant assets, are home to a large number of people and play and important role in the wider economy. However, they are overwhelmingly suburban in character and this negatively impacts on their quality, attractiveness and dynamism. A continuation of an approach to development based on the suburban model will result in the localities failing to fulfil their potential as desirable places where communities and economies thrive. The risk inherent in this is exacerbated by the competition for people, businesses and investment presented by other places, including central Bristol.

6.2   There is potential for a new story for the future of the localities to be written and to bring this about will require bold and concerted action. The planning policy framework recognises the need for change and drawing upon this, the wider context and the current story of each locality, the following principles are put forward to steer future development and change.

Mutability

6.3   The mutability of urban areas (i.e. their capacity for change), is of fundamental importance to their sustainability and resilience. Those urban areas that are able to adapt tend to be dynamic and characterful places that people want to live, work and invest in and which consequently best prosper over the long term. Some parts of the urban area will not be susceptible to change because of factors such as the type, occupation, value and relative newness of established development. Identification, prioritisation and a focus on areas which are capable of change over the foreseeable future is therefore a key principle.

Mixed Communities

6.4   The localities are not uniform in their socio-economic characteristics but it is particularly notable that the proportion of people with higher level qualifications is low compared to the wider BUA average and this is mirrored in a lower proportion of people in higher level occupations. To a large extent this reflects the general pattern across the suburban areas compared to central Bristol and is to be expected. It is also the case that the suburban areas are better suited to accommodating light industrial activity and in this respect the strong
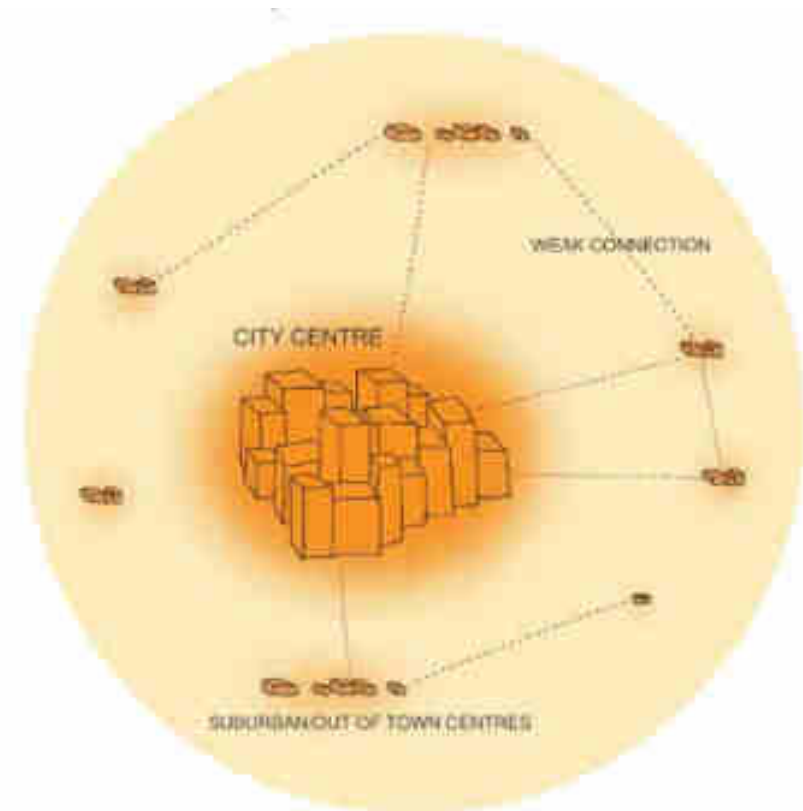
Figure 6.1: City Centre - Surburb Spatial Model
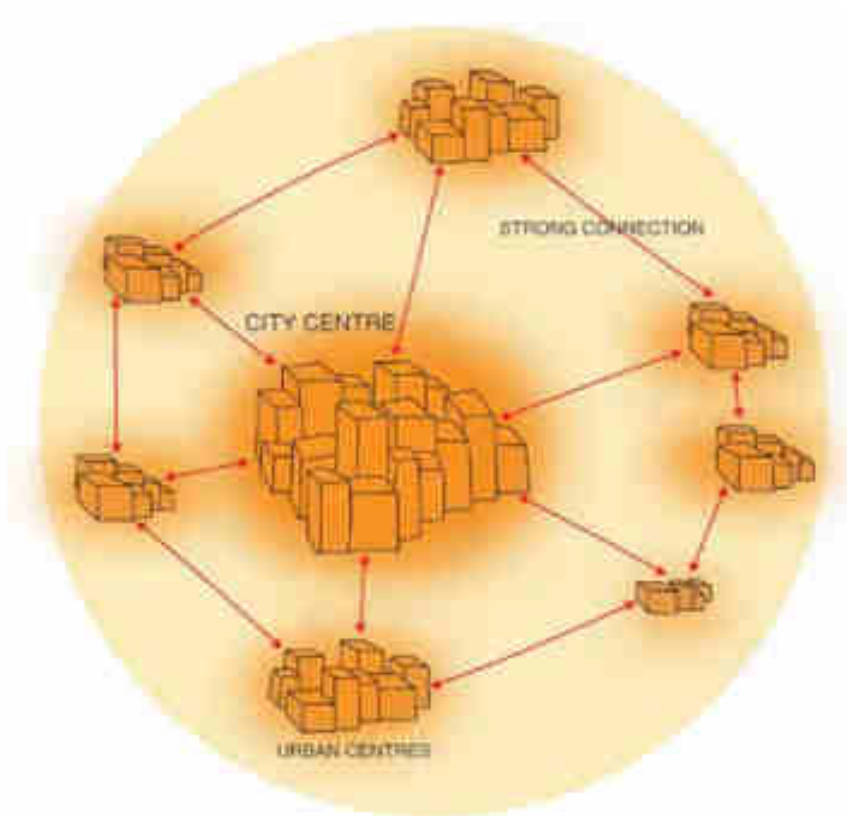
Figure 6.2: Multi-Centre Spatial Model

representation of skilled trades in some of the localities is an important part of the wider urban economy. However, the physical nature and characteristics of the localities places limitations on the extent to which they are likely to develop mixed communities. Whilst there will inevitably be a difference between the socio-economic composition of communities in the central and outer areas, the creation of urban environments in the localities that are attractive to a more diverse and stronger community mix can bring benefits to these areas and to the wider urban area.

A Network of Strong Centres

6.5   The spatial structure of the wider urban area centred on Bristol and the contribution the localities make towards this is a primary consideration because other things flow from it Figure 6.1 illustrates the basic centre-suburb and the multi-centre spatial models.

6.6   It is proposed that a network of strong centres, complimentary to Bristol city centre (a multi-centre spatial structure), should be an overarching principle because the basis for such a structure already exists and it can bring benefits in terms of cohesion, identity, sustainability and economic performance. It is right that Bristol city centre remains the principal focus for the urban area and the agglomeration of certain types of economic activity is always likely to remain highest here. However, the development of a network of stronger sub-centres, with distinctive characteristics, can help to diversify local economies, reduce travel, strengthen identity and raise overall productivity and gross value added generated by the urban area as a whole and enhance its resilience.

6.7   The principle of a network of strong centres is something that needs to be expressed within the JSP. Such a structure links to, is supported by and requires the other principles set out below.

Sense of Place and Liveability

6.8   Having a sense of place requires character, identity and liveability. These are measures of the attractiveness of a place to live in by choice rather than by necessity. It is important because ultimately people create economic

activity and successful communities. Those with the wherewithal to do so will gravitate towards those places with the most to offer in terms of quality of life.

6.9   Such places require a sense of urban scale and density, strong landscape and greenspace features, proximate provision of a range of amenities and services that are easily accessible by means other than car travel, places that enable interaction, diverse local economies and a good standard of public service provision, such as education. In this respect, the socio-economic data in chapter 3 shows, for example, pockets of higher level occupations where there is a greater sense of character and greenness.

An Eco-System of Business Premises

6.10   The provision of premises for business activity is important to the long-term sustainability of communities and the performance of the local economy. Where development potential is identified, there is a risk that employment uses will be pushed out by the need for new homes and the values generated by residential development. However, whilst land shouldn't be protected for employment use where there is little prospect of such use occurring, it is important that adequate provision for future change is made. This does not simply require the right quantum of floorspace but also the provision of premises that can support a strong and productive economy. In order to flourish, local economies need an eco-system of business premises to enable ideas to be generated, tested and developed and for services and products to be produced. New business premises provision has a role to play in complimenting the existing stock, including the Science Park, in order to enhance the overall offer.

6.11   This eco-system needs to enable business interaction and the retention and attraction of staff. It needs to be based on a good understanding of the diversity of economic activity, including the importance of the 'industrial' sector, the advanced activities that take place within this sector and its relationship to research, innovation and creative activities. Some business activities are suited to utilitarian premises in peripheral locations close to main roads, but many which might now be categorised as 'industrial' are not best served by standard shed type premises in isolated locations. It is important therefore to
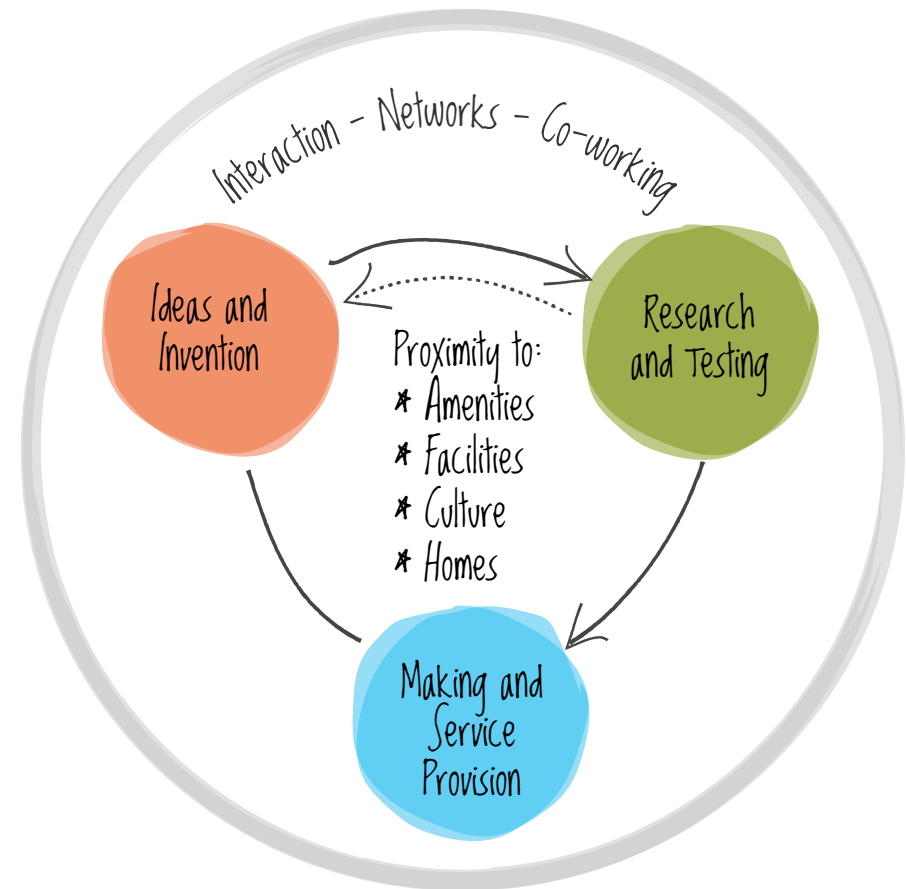
Figure 6.3: Business Premises Requirements

understand the needs of such businesses, which require premises with a sense of identity and access to a range of services and amenities.

Diverse High Streets and District Centres

6.12   The multi-centre model is built around a network of centres and, given the broad trends in the sector, these can't rely solely on retail activity but need to offer a variety of services and facilities. This includes places for leisure and social activity but also business space and places, both inside and out, where people can meet and interact.

New Types and Models of Housing Provision

6.13   The nature of the housing offer within the localities is of fundamental importance to their attractiveness as places to live and the extent to which they can establish communities with mixed socio-economic characteristics. New types of housing have a role to play in diversifying the offer and enhancing identity. This can link to new models of housing delivery. Custom-build, for example, provides occupiers with significant choice over the design and specification of their home and projects at significant scale provide the potential for generating community energy and enthusiasm around the project and helping to alter perceptions about an area.

Leadership and High Ambition

6.14   The characteristics of the South Gloucestershire urban localities and the development models, market perceptions and spatial expectations that have created this are now very well evidenced in the built environment. These forces would be likely to perpetuate what has gone before in terms of an overwhelmingly low-density suburban character. To shift expectations, perceptions and delivery models to a focus on creating urban centres, structure and character in appropriate parts of the localities will require strong leadership to articulate a bold ambition and to co-ordinate the actions and players that can deliver against this.

APPENDICES

Appendix 1: Socio-Economic Summary Profiles by Locality

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1 Socio-Economic Summary Profiles by Locality

Patchway Urban Locality

Study Area Boundary

Area covered by data in this profile
(Best-fit of COAs within study area)

Housing Stock

Pronounced Types

Flats

Terraces
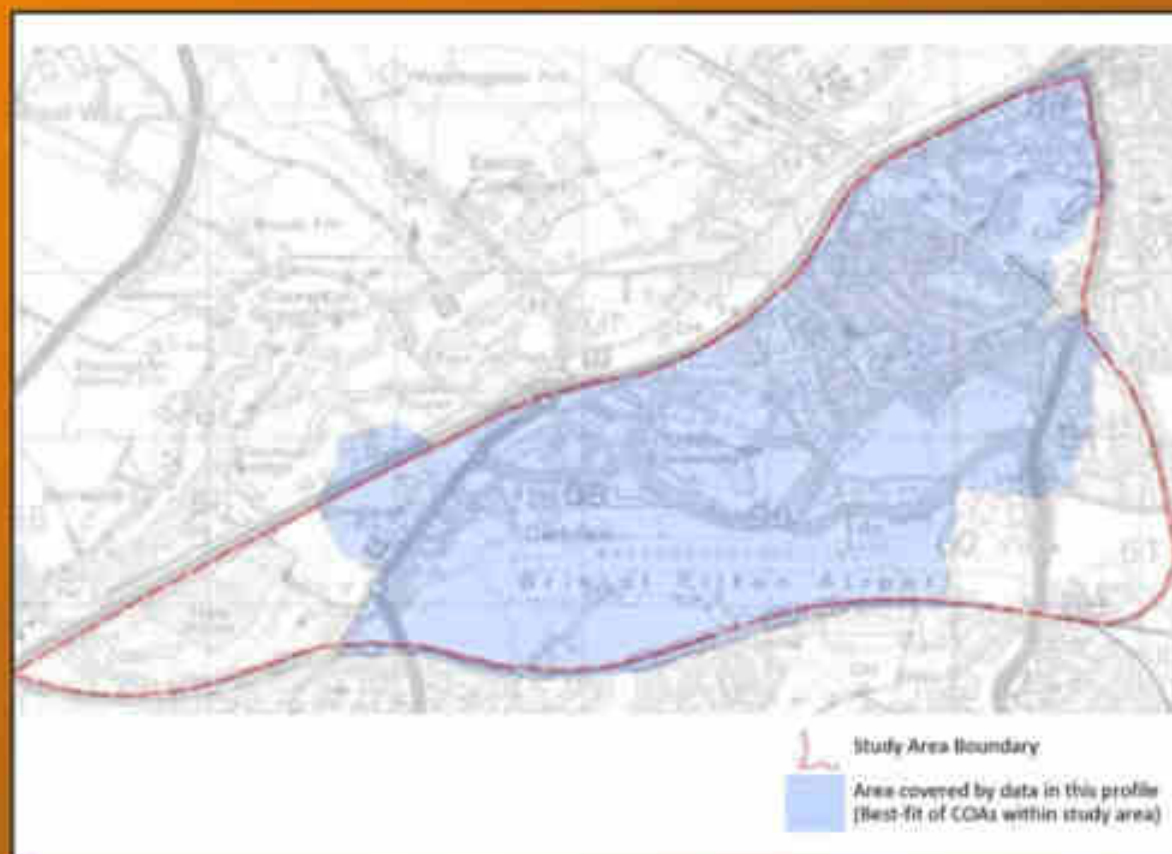
Pronounced Tenure
Social Rented

Occupancy
-1 Spare Bedrooms per household

- Very low proportion of detached houses
- Highest proportion of social rented accommodation
- Overcrowding relatively prevalent

Travel to Work

- Highest travel by foot of all localities

- Normal spread amongst other modes

Average Distance: Average

Patchway Urban Locality

Labour Market

Age Profile: Young for Localities but typical for Bristol

Economic Activity Rate: Good (76% of 16-64 Year Olds)

Qualifications

Lower

Pronounced Socio-Economic Groups

Routine Occupations

Pronounced Living Standards

General Health: Average

Deprivation: More common

Summary Descriptive Profile

Patchway's profile is perhaps the least typically 'suburban' of all the localities, more closely mirroring the Bristol Urban area average with its age demographic, higher proportions of socially rented, purpose-built blocks of flats or tenements and particularly low proportion of detached dwellings. Overcrowding is also relatively prevalent for the localities.

Despite having a fairly typical distance to get to work for the localities, many residents travel by foot, a likely reflection of their working in routine but locally readily available employment not requiring higher level qualifications.

Residents health profiles are quite typical for the urban localities but deprivation is more common, which is most concentrated within the social housing in the area.

Harry Stoke Urban Locality

Key

Study Area Boundary

Area covered by data in this profile
(best-fit of COAs within study area)

Housing Stock

Prononuced Type
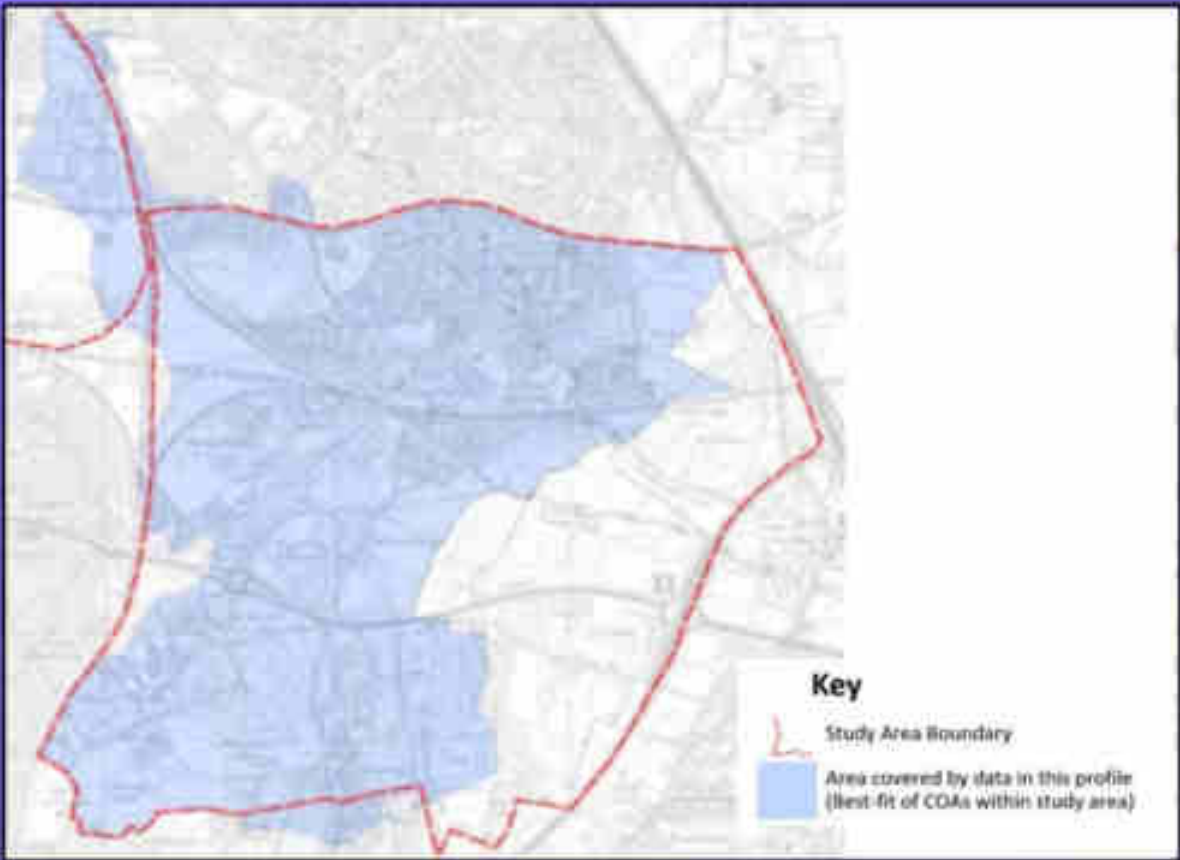
Detached

Pronounced Tenures
Owned with Mortgage
Private rented

Occupancy
+2 Spare bedrooms per dwelling

- Very low proportion of terraced housing
- Under-occupancy common
- Fairly low proportion of social rented

Travel to Work

- Highest train & pedestrian rates
- Good bus usage rate
- Lowest car usage
- High working from home rate

Average Distance: Highest

Harry Stoke Urban Locality

Labour Market

Age Profile: Younger families

Percentage of Population by Economic Age Group

Economic Activity Rate: Lowest (69% of 16-64 Year Olds)

Qualifications

High

Pronounced Socio-Economic Groups

Higher Managerial
Not Classified (students)

Living Standards

General Health: Very Good

Deprivation: Uncommon

Summary Descriptive Profile

Harry Stoke is defined by the combined effects of UWE and a relatively affluent and well qualified residential population living in mature residential suburbs. Students are likely to be occupying the higher proportion of private rented properties whilst the longer term residents tend to under-occupy larger detached homes which they own with a mortgage. Its housing stock is quite typically 'fringe suburban' based around modern estate design with a very low proportion of terraced housing and a relatively low proportion of semi detached.

Whilst proximity to the station results in a higher proportion of residents using the train to get to work, the proportion is still not as high as we might expect at 5%. Walking is also more common but driving is still the majority mode.

Affluence combined with a younger student population means relatively high health standards and little deprivation.

Emersons Green (Ward)
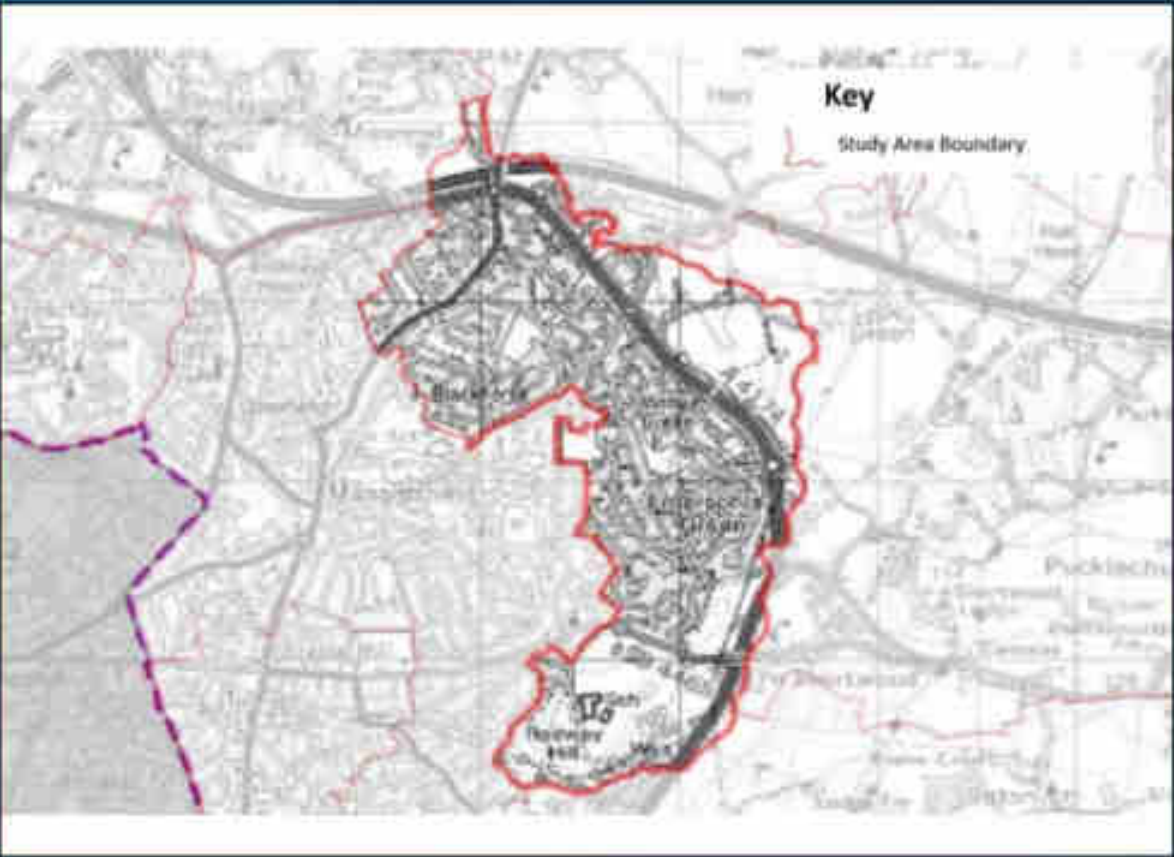
Housing Stock

Pronouced Type

 Detached

Pronounced Tenure
Owned with Mortgage

Occupancy
+2 Spare bedrooms per dwelling

- Highest ownership by mortgage of all localities
- Lowest social rented tenure of all localities
- Under-occupancy very prevalent (highest of all localities)

Travel to Work

Average Distance: **High**

- Highest car usage
- Second highest cycling rate BUT also lowest walking rate
- Second highest working from home rate

Emersons Green (Ward)

Labour Market

Age Profile: Younger families
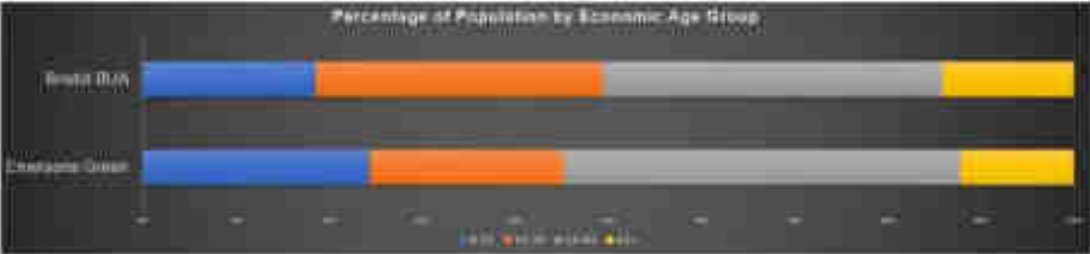
Economic Activity Rate: Very High (80% of 16-64 Year Olds)

Qualifications

High

Pronounced Socio-Economic Groups

Higher Managerial

Living Standards

General Health: Good

Deprivation: Uncommon

Summary Descriptive Profile

Emersons Green (ward) is the newest and most affluent of all the urban localities. Its residents tend to hold high level qualifications and work in higher managerial roles. Living conditions are good and economic activity is very high. High proportions of both 34-64 and 0-15 age groups suggest professional families 'settling down' and having children at later life stages or with already established families.

Home ownership with a mortgage is highest in this locality, although outright ownership is perhaps unexpectedly low, reflecting the new nature of the housing market here. The housing tenure is less diverse, with low levels of social rented. Detached housing is common and new residents are buying larger properties than they actually need, reflecting the way estates have been delivered in line with contemporary housebuilder models on larger greenfield sites, and older stage families wanting more space.

Residents tend to travel longer distances to work and car usage is highest here. Cycling rates are higher than average but walking rates are lower.

Staple Hill Urban Locality
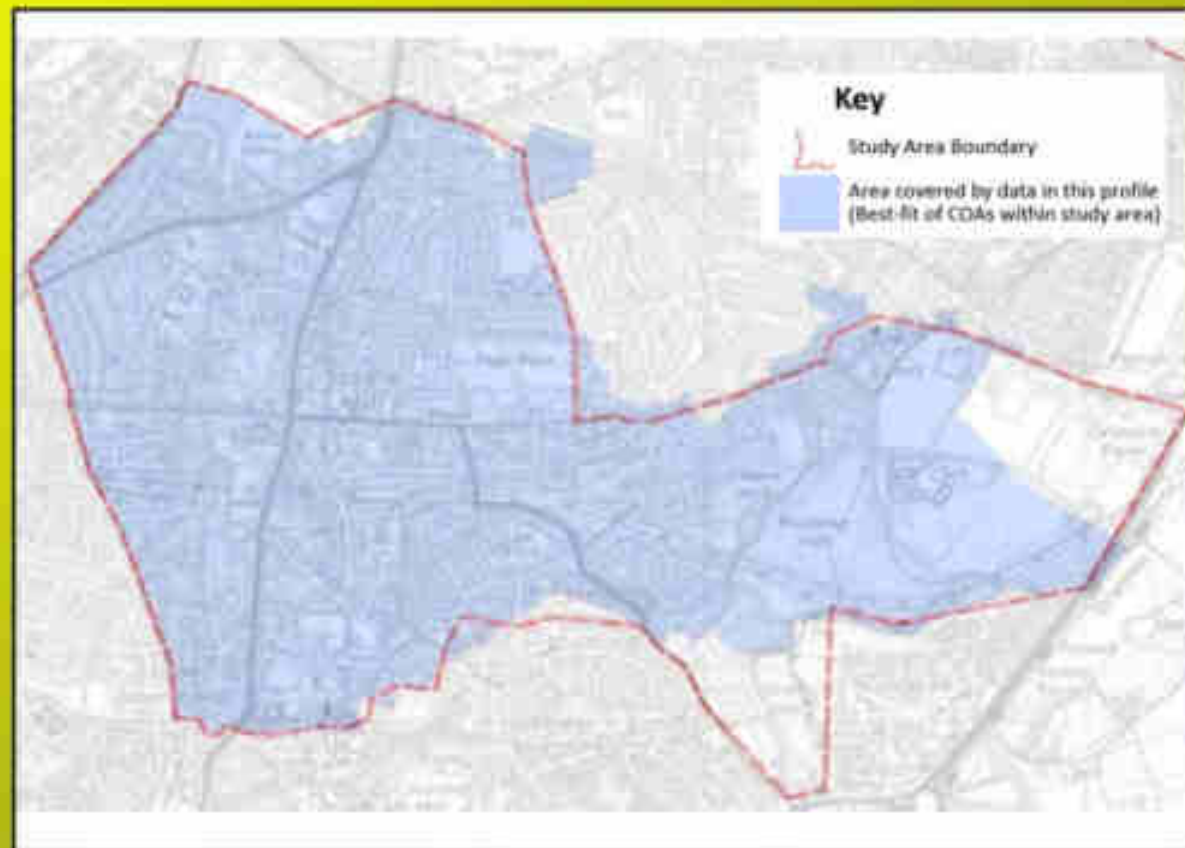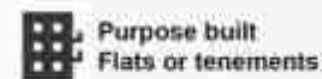
Key

Study Area Boundary

Area covered by data in this profile
(Best-fit of COAs within study area)

Housing Stock

Pronounced Types

Purpose built Flats or tenements

Pronounced Tenure
Social & Private rented

Occupancy
0 Spare Bedrooms per household

- Highest proportion of flats of all localities
- Second highest proportion of social rented of all localities
- Second most effectively occupied stock but over-crowding also more common

Travel to Work

- Higher rates of bus and bike usage than most other localities

Average Distance: Low

Staple Hill Urban Locality

Labour Market

Age Profile: Younger for Localities but older against Bristol

Percentage of Population by Economic Age Group

Bristol BUA

Staple Hill
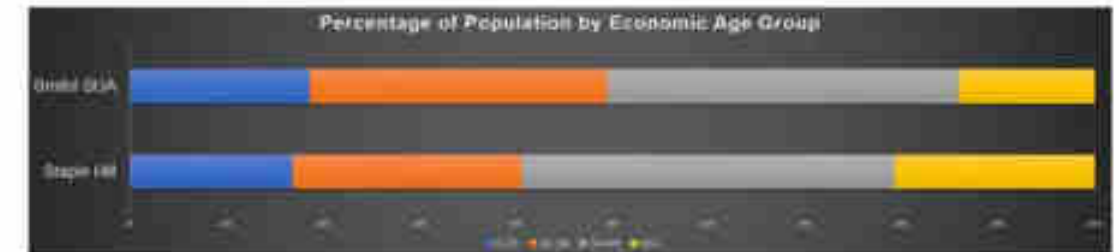
Economic Activity Rate: Average (73% of 16-64 Year Olds)

Qualifications

Polarised

Pronounced Socio-Economic Groups

Evenly Spread

Pronounced Living Standards

General Health: Fair/Bad

Deprivation: More common

Summary Descriptive Profile

Staple Hill is a more enigmatic locality. It exhibits signs of being more mixed and less homogenised than the others, with a broader range of socio-economic groups and qualification levels but also suffering from low living conditions. Its housing stock diverges most from the low-rise suburban housing model, with the highest prevalence of purpose-built blocks of flats or tenements. This may be an effect of pockets of higher rise social housing, but it should be noted that there is also a normal spread of other house types, including a good proportion of homes owned outright. This suggests that right to buy has had a big influence in the area.

This more mixed profile may mask issues of inequality, as living standards are lower than average for the localities but close to the Bristol average. Staple Hills's age demographic is also slightly younger than the Localities average.

Residents tend to travel shorter distances to work than most of the other localities and more frequently make use of buses and/or bicycles to get to work.

Kingswood Urban Locality
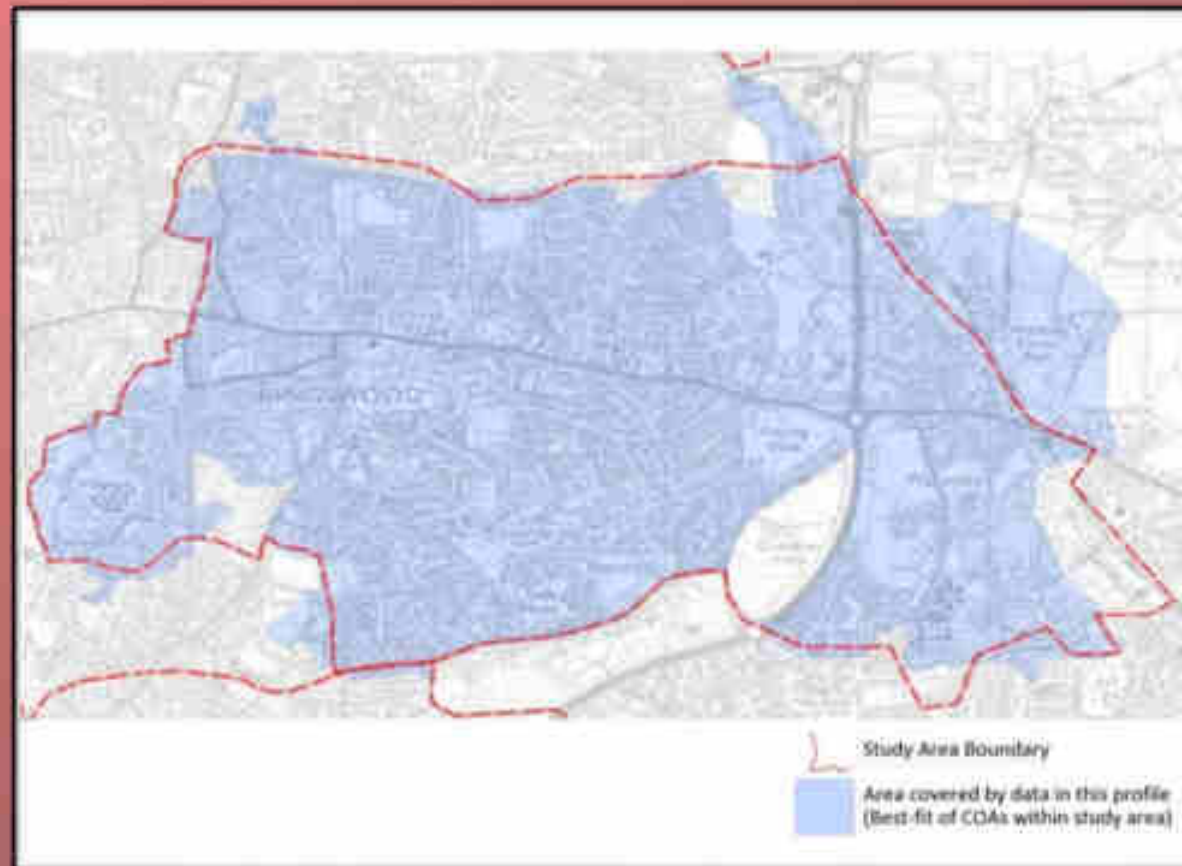
Study Area Boundary

Area covered by data in this profile
(Best-fit of COAs within study area)

Housing Stock

Pronounced Types

Terraced

Semi-Detached
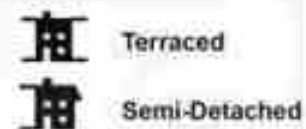
Pronounced Tenure
Social & Private rented

Occupancy
0 Spare Bedrooms per household

- Third highest prevalence of social rented of all localities
- Second highest prevalence of private rented of all localities
- Most effectively occupied stock but over-crowding also more common

Travel to Work

- High car usage rate
- Highest public bus usage rate
- Car sharing more common than all other localities

Average Distance: Lowest

Kingswood Urban Locality

Labour Market

Age Profile: Average for Localities

Economic Activity Rate: Average (75% of 16-64 Year Olds)

Qualifications

Lower

Pronounced Socio-Economic Groups

Routine Occupations

Living Standards

General Health: Fair

Deprivation: More common

Summary Descriptive Profile

Kingswood exhibits many of the features of a conventional lower-value city suburb, with residents working in more routine job sectors and probably living here out of necessity or convenience rather than due to quality of life opportunities. It exhibits many traits of low-rise, high density suburban sprawl development, with a higher prevalence of terraced housing and efficiently occupied housing. Living standards are typically lower than average for the localities but closer to the Bristol average.

Whilst residents tend to travel shorter distances to work than all of the other localities, private car use is still very high. Bus usage is highest of all the localities.

Kingswood's age demographic and economic activity rate is close to the Bristol and Localities average, but its residents typically have lower qualification levels and fall within more modest socio-economic classifications. This suggests they are employed in lower value but readily available local employment.

Hanham Urban Locality

Key

Study Area Boundary

Area covered by data in this profile
(Best-fit of COAs within study area)
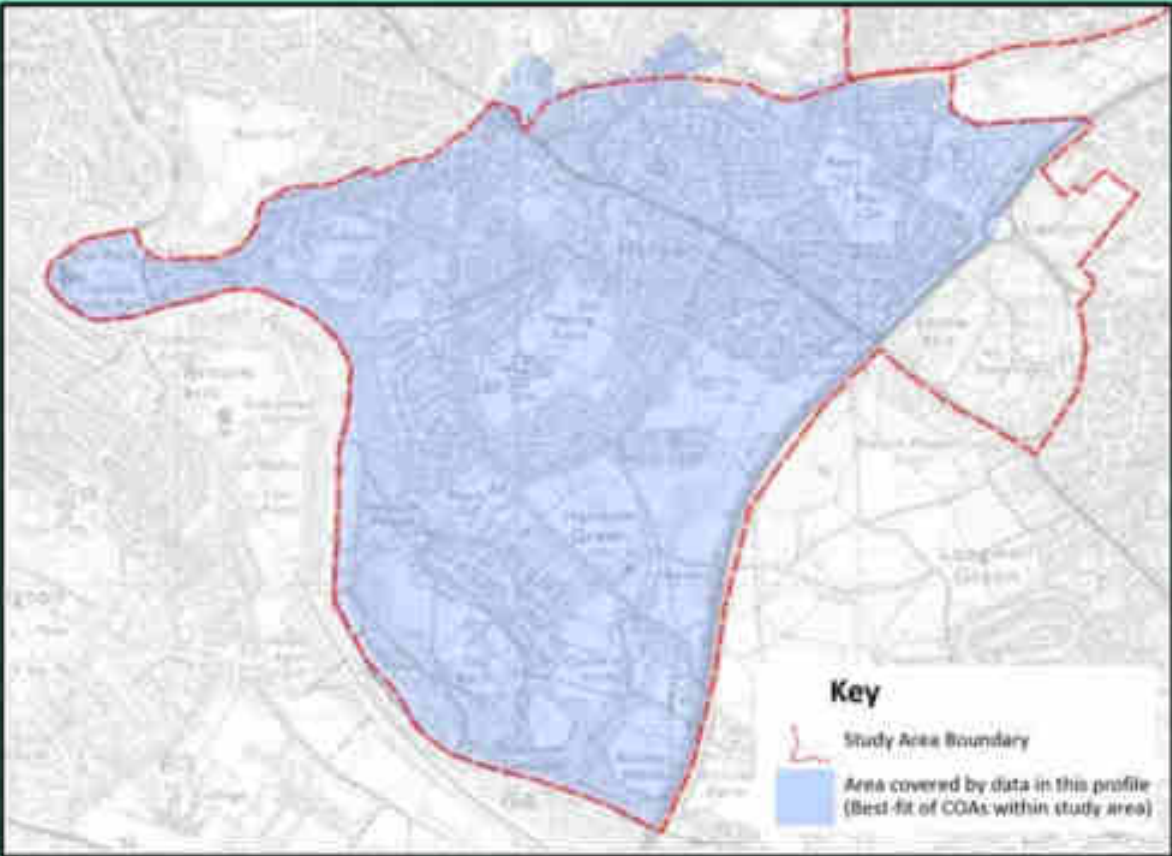
Housing Stock

Pronounced Types	Pronounced Tenure: Outright Ownership
🏠 Detached	
🏠 Semi-Detached	**Occupancy** +2 Spare Bedrooms per household

- Highest outright home ownership of all localities
- Lowest private rented tenure of all localities
- Under-occupancy very prevalent (second highest of all localities)

Travel to Work

- Very high car usage
- Low cycling & walking rates
- Highest working from home rate

Average Distance: Low

Hanham Urban Locality

Labour Market

Age Profile: Older

Percentage of Population by Economic Age Group
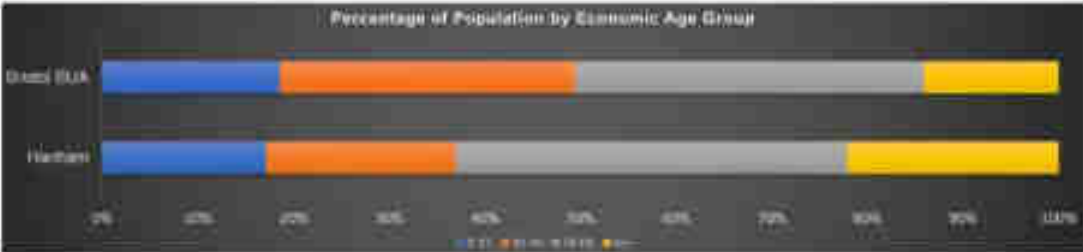
Economic Activity Rate: Average (73% of 16-64 Year Olds)

Qualifications

Evenly spread

Pronounced Socio-Economic Groups

Evenly Spread

Living Standards

General Health: Average

🙂

Deprivation: Average

🙂

Summary Descriptive Profile

Hanham's labour market and living standards profile is close to the urban localities average, although it has and has notably higher proportions of retirees aged 65+ and those in the 35-64 age bracket.

However Hanham's most unique feature compared with the other localities is its housing market, which has significantly higher levels of outrightly-owned, larger detached and under-occupied housing. This suggests that the area is populated by an older population living in houses they have long occupied and owned, but which they are under-occupying as a result of their children leaving home. The area is likely to be the most aspired-to living destination of the East fringe neighbourhoods in this study.

Residents make relatively infrequent use of sustainable transport options to get to work compared with the other localities, instead more likely than other localities to use private cars or work from home.

Yate Urban Locality

Key
- Study Area Boundary
- Area covered by data in this profile (Best-fit of COAs within study area)
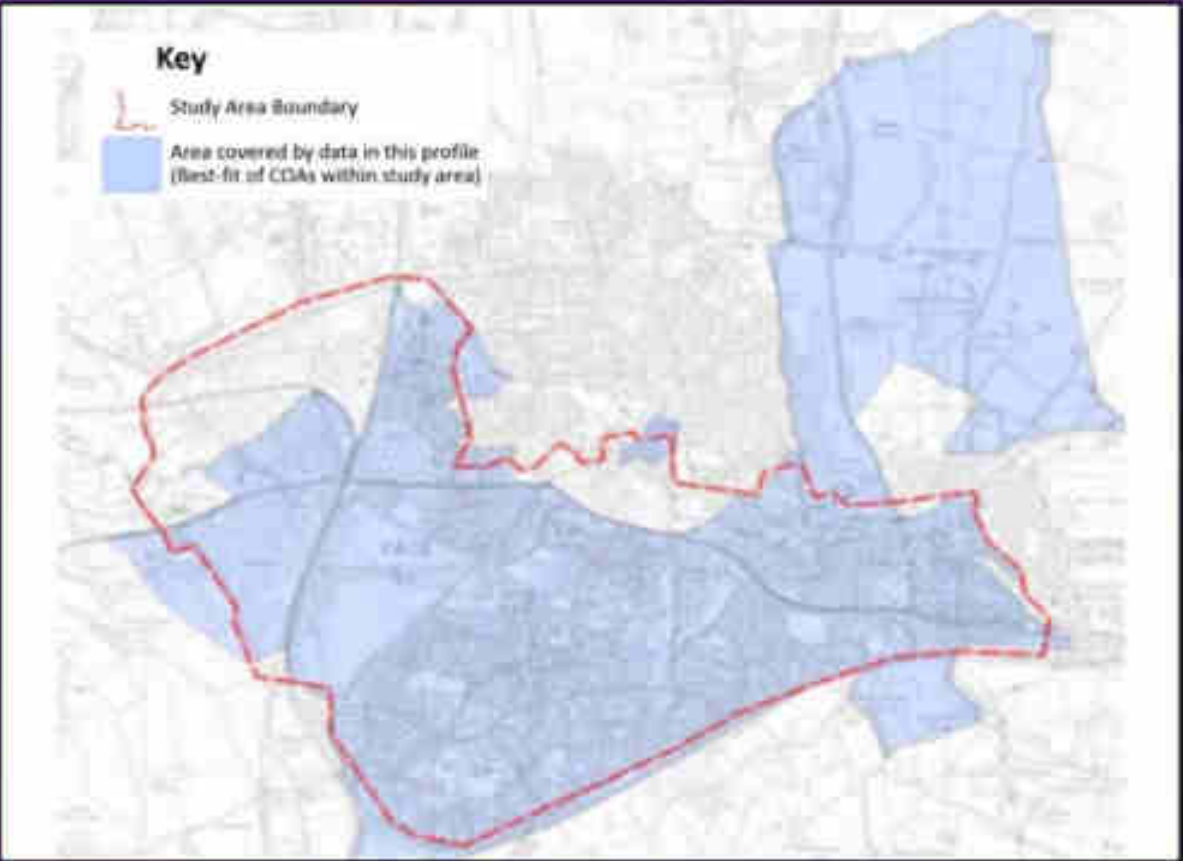
Housing Stock

Pronounced Types

Terraces

Pronounced Tenures
Owned Outright
Owned with Mortgage

Occupancy
+1 Spare Bedrooms per household

- Very homogeonous terraced housing stock
- Relatively low proportions of social rented accommodation
- Over-occupancy evident but not as prevalent as some localities

Travel to Work

- Car usage dominates; relatively even spread of other uses
- Train usage not as common as perhaps expected
- Lowest bus usage

Average Distance: Average

Yate Urban Locality

Labour Market

Age Profile: Settled families / Average for urban localities
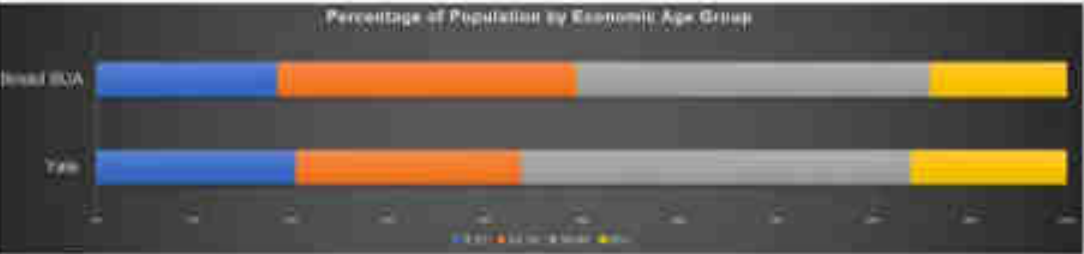
Economic Activity Rate: Average (74% of 16-64 Year Olds)

Qualifications

Lower-Average

Pronounced Socio-Economic Groups

Semi-Routine occupations
Routine occupations

Living Standards

General Health: Average

Deprivation: Average

Summary Descriptive Profile

Yate's demographic profile, labour market and living standards profile is very close to the urban localities average. However its housing stock is markedly different, incorporating significantly larger proportions of terraced housing. This is a legacy of when the town was initially planned according to Radburn housing principles.

Its housing market is relatively mature, with outright ownership and ownership with a mortgage more prevalent than most other localities. Whilst high levels of home ownership usually comes with an older population, this is not so much the case in Yate, suggesting it is a desired and affordable residential destination for middle-stage families. This does however result in a more homogenous demographic and socio-economic mix, with low representation of managerial classes.

Despite having a well positioned train station, rail travel is perhaps less common than we might expect and car usage still dominates commuter patterns.

2 Census Data Used to Inform Socio-Economic Analysis

Age structure

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Age	Hanham	Kingswood	Patchway	Staple Hill	Stoke Gifford	Yate	Emersons Green	S Glos	Bristol BUA	Localities Mean	All Mean
0-15	17.3	18.3	19.5	16.9	16.9	20.3	24.4	18.9	18.6	19.1	19.0
16-64	60.8	64.9	66.7	62.3	73.4	63.1	63.6	64	67.4	65.0	65.1
65+	22	17	14	21	10	16.6	12.1	16.8	14.1	16.1	16.0
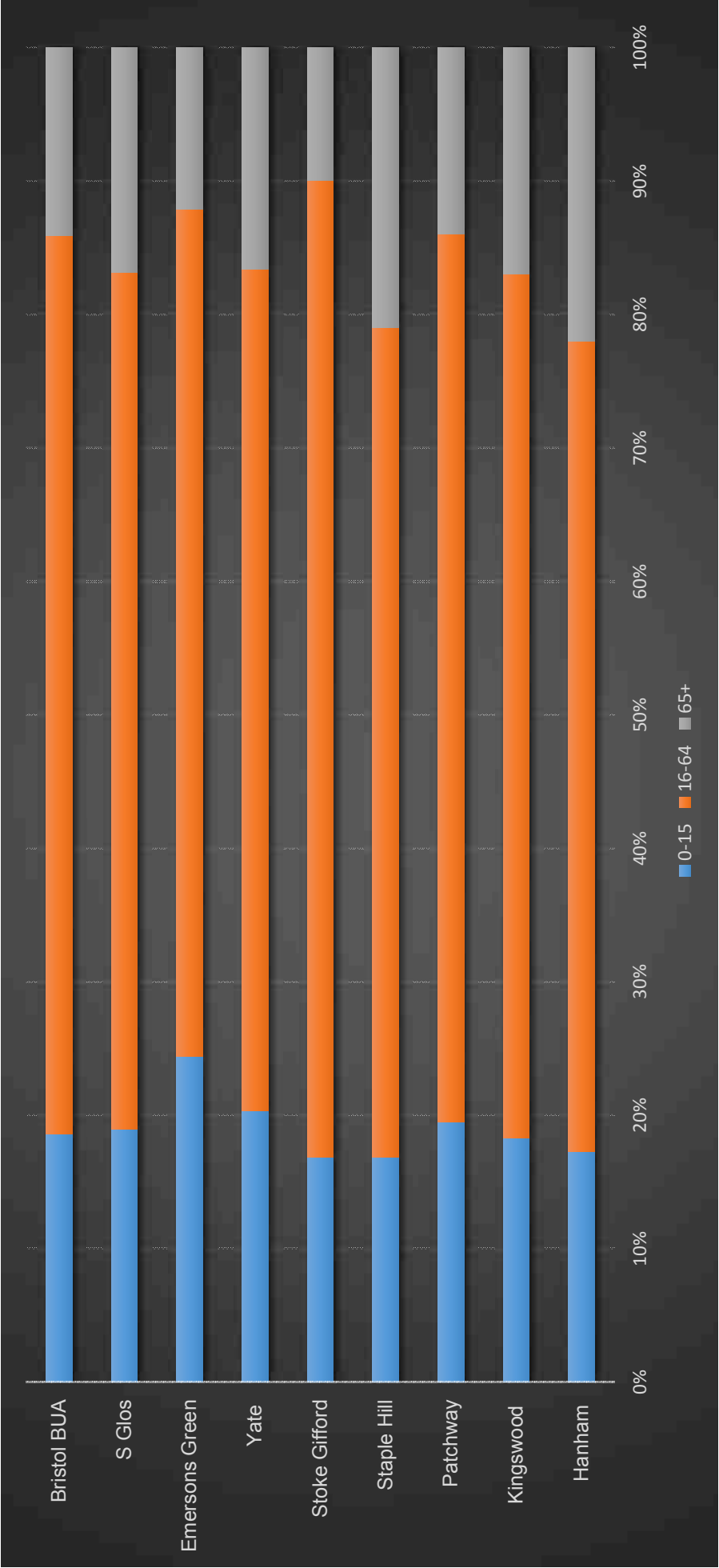
Highest level of qualification
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Area	All persons	No qualifications	%	Level 1 qualifications	%	Level 2 qualifications	%	Apprenticeship	%	Level 3 qualifications	%	Level 4 + qualifications	%	Other qualifications	%
Hanham	8,018	1,803	22.5	1,240	15.5	1,411	17.6	593	7.4	1,014	12.6	1,672	21	285	3.6
Kingswood	15,830	3,931	24.8	2,783	17.6	2,745	17.3	921	5.8	1,961	12.4	2,829	18	660	4.2
Patchway	7,300	1,811	24.8	1,327	18.2	1,251	17.1	363	5.0	851	11.7	1,258	17	439	6.0
Staple Hill	11,437	2,702	23.6	1,656	14.5	1,760	15.4	658	5.8	1,432	12.5	2,785	24	444	3.9
Stoke Gifford	8,973	942	10.5	921	10.3	1,359	15.1	327	3.6	2,436	27.1	2,665	30	323	3.6
Yate	16,892	3,647	21.6	3,094	18.3	3,164	18.7	998	5.9	2,184	12.9	3,103	18	702	4.2
Emersons Green (ward)	9,367	1,202	12.8	1,262	13.5	1,528	16.3	499	5.3	1,388	14.8	3,168	34	320	3.4
South Gloucestershire	212,837	39,618	18.6	31,661	14.9	35,490	16.7	11,435	5.4	29,111	13.7	56,805	27	8,717	4.1
Bristol BUA	502,496	99,130	19.7	64,172	12.8	69,726	13.9	18,660	3.7	72,447	14.4	154,777	31	23,584	4.7
Localities average			20.1		15.4		16.8		5.5		14.9		23.2		4.1
All Average			19.9		15.0		16.5		5.3		14.7		24.4		4.2
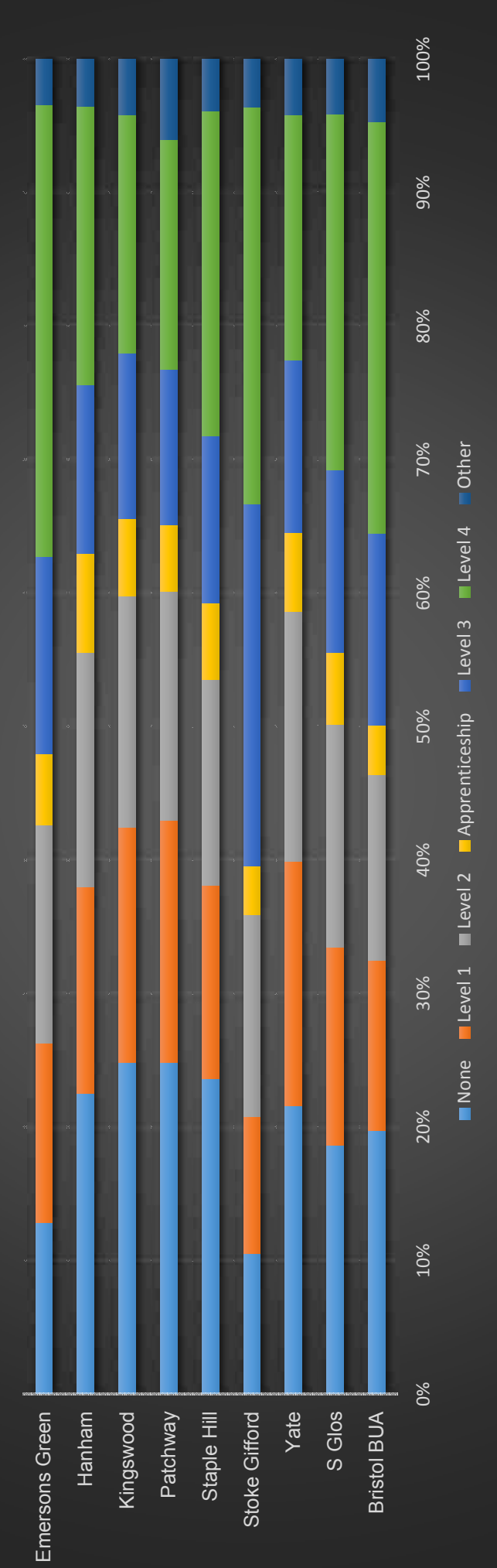
Households by deprivation dimensions
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Household Deprivation	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green (Ward)	%	South Glos	%	Bristol BUA	%	Localities Mean %	All Mean %
All households	4,056		8,430		3,852		6,262		3,702		8,641		4,881		107,538		260,716			
Not deprived in any dimension	1,866	46.0	3,583	42.5	1,512	39.3	2,639	42.1	2,148	58.0	3,981	46.1	2,979	61.0	54,100	50.3	116,264	44.6	47.9	47.8
Deprived in 1 dimension	1,307	32.2	2,781	33.0	1,343	34.9	1,995	31.9	1,074	29.0	2,916	33.7	1,322	27.1	33,900	31.5	83,367	32.0	31.7	31.7
Deprived in 2 dimensions	756	18.6	1,626	19.3	772	20.0	1,325	21.2	400	10.8	1,463	16.9	493	10.1	16,216	15.1	46,851	18.0	16.7	16.7
Deprived in 3 dimensions	116	2.9	400	4.7	194	5.0	269	4.3	73	2.0	261	3.0	81	1.7	3,042	2.8	12,759	4.9	3.4	3.5
Deprived in 4 dimensions	11	0.3	40	0.5	31	0.8	34	0.5	7	0.2	20	0.2	6	0.1	280	0.3	1,475	0.6	0.4	0.4

National Statistics Socio-Economic Classification

NS-SeC	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green (Ward)	%	S Glos	%	Bristol BUA	%	Localities Average	All Average
All categories: NS-SeC	6,911		14,246		6,784		9,905		8,513		15,501		8,694		192,468		459,592			
1. Higher managerial, administrative and professional occupations	663	10	952	7	467	7	970	10	1,208	14	1,185	8	1,505	17	23,187	12	56,045	12	10	11
2. Lower managerial, administrative and professional occupations	1,453	21	2,646	19	1,204	18	2,120	21	1,575	19	2,886	19	2,327	27	42,163	22	95,135	21	20	21
3. Intermediate occupations	1,232	18	2,309	16	1,003	15	1,568	16	1,132	13	2,434	16	1,458	17	30,527	16	60,208	13	16	15
4. Small employers and own account workers	701	10	1,214	9	498	7	907	9	445	5	1,211	8	670	8	16,894	9	34,207	7	8	8
5. Lower supervisory and technical occupations	541	8	1,267	9	649	10	748	8	437	5	1,466	9	505	6	14,300	7	29,468	6	8	8
6. Semi-routine occupations	1,029	15	2,610	18	1,305	19	1,509	15	791	9	2,796	18	1,001	12	27,122	14	62,613	14	15	15
7. Routine occupations	685	10	1,910	13	994	15	1,124	11	486	6	2,290	15	592	7	18,843	10	46,909	10	11	11
8. Never worked and long-term unemployed	165	2	509	4	254	4	367	4	125	1	347	2	156	2	5,091	3	20,610	4	3	3
Not classified	442	6	829	6	410	6	592	6	2,314	27	886	6	480	6	14,341	7	54,397	12	9	9
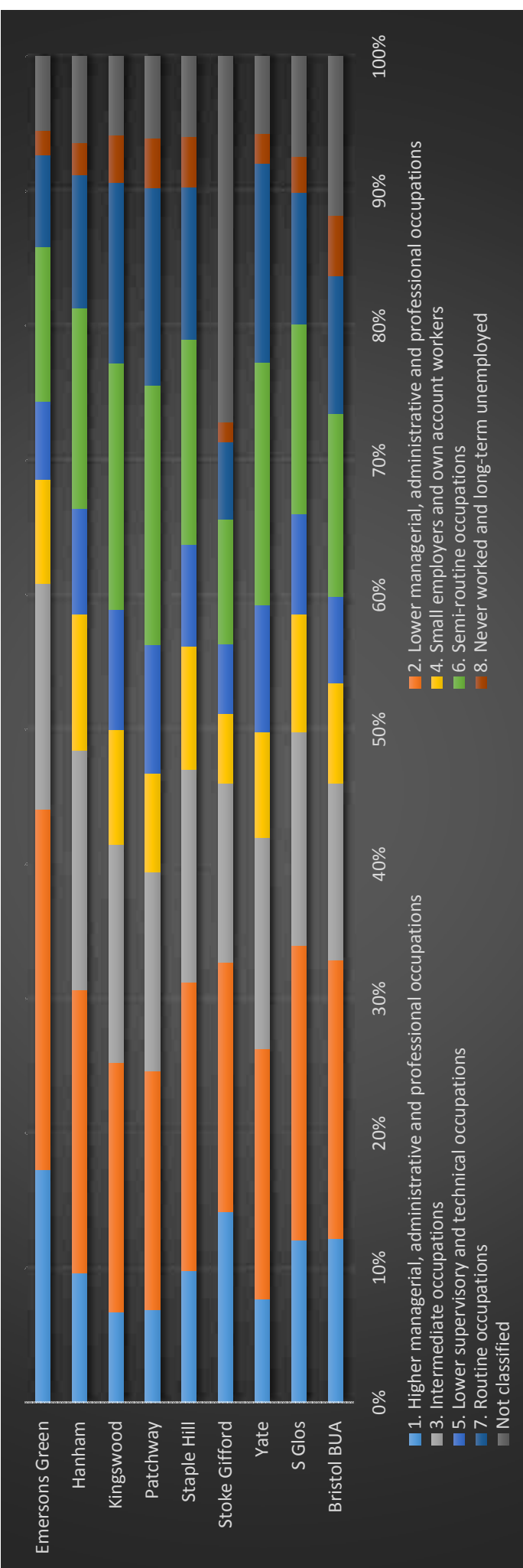
Economic activity

Economic Activity	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green	%	S Glos	%	Bristol BUA	%	Localities Average %	All Average %
All persons	6,911		14,246		6,784		9,905		8,513		15,501		8,694		192,468		459,592			
Economically active: Total	5,042	73	10,618	75	5,158	76	7,238	73	5,886	69	11,454	74	6,966	80	143,198	74	330,542	72	74	74
Economically inactive: Total	1,869	27	3,628	25	1,626	24	2,667	27	2,627	31	4,047	26	1,728	20	49,270	26	129,050	28	26	26
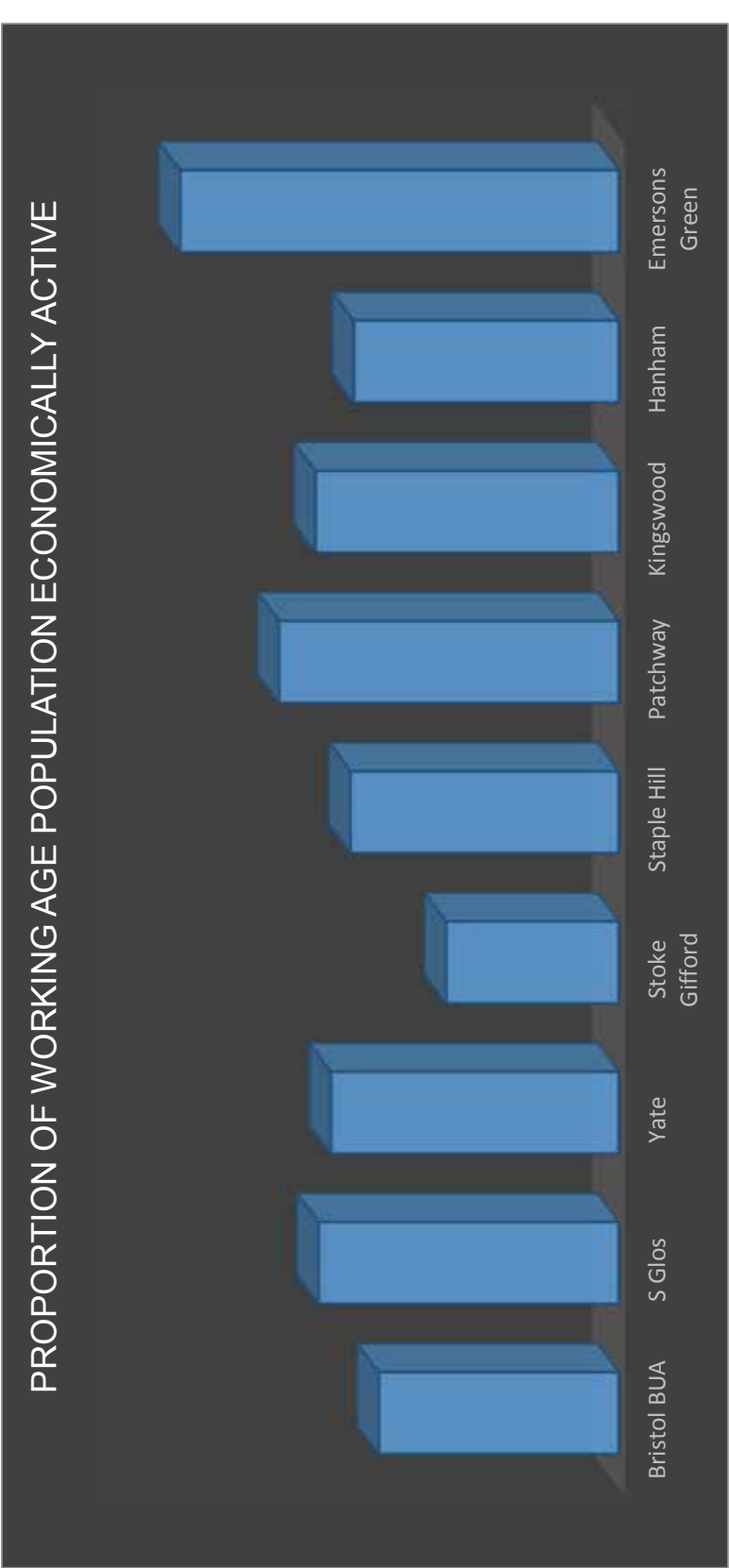
PROPORTION OF WORKING AGE POPULATION ECONOMICALLY ACTIVE

11

General health

Area	All categories: General health	Very good health	%	Good health	%	Fair health	%	Bad health	%	Very bad health	%
Hanham	9,676	4,507	47	3,426	35	1,237	13	396	4	110	1
Kingswood	19,366	8,804	45	6,838	35	2,661	14	821	4	242	1
Patchway	9,071	3,986	44	3,343	37	1,245	14	382	4	115	1
Staple Hill	13,758	6,097	44	4,772	35	2,066	15	650	5	173	1
Stoke Gifford	10,796	5,790	54	3,733	35	980	9	234	2	59	1
Yate Urban	21,213	9,762	46	7,756	37	2,795	13	693	3	207	1
Emersons Green ward	12,392	6,985	56	3,988	32	1,099	9	254	2	66	1
South Gloucestershire	262,767	129,141	49	91,675	35	30,940	12	8,556	3	2,455	1
Bristol BUA	617,280	301,946	49	208,906	34	74,772	12	24,402	4	7,254	1
Localities Average %			48		35		12		4		1
All Average %			48		35		12		4		1
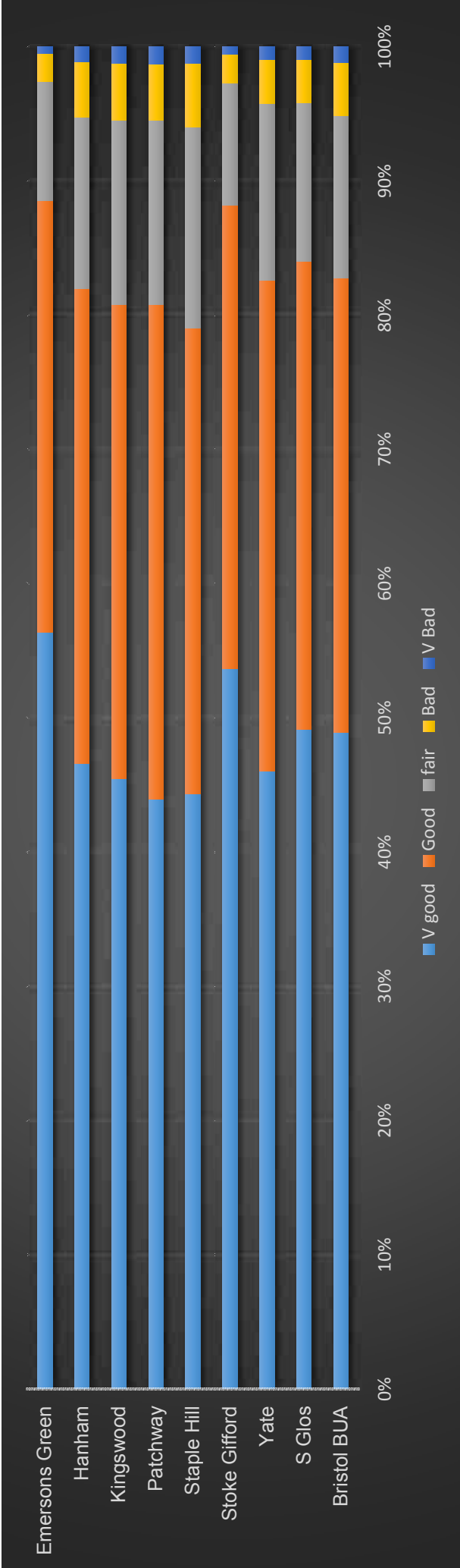
Distance travelled to work

Distance travelled to work	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green	%	Bristol BUA	%	S Glos	%	Localities Average	All Average
All TTW	4,817		10,033		4,841		6,833		5,432		10,945		6,721		308,363		136,531			
<2km	690	14	1,624	16	1,119	23	1,110	16	891	16	2,642	24	710	11	60,586	20	21,120	15	17	17
2km to <5km	1,099	23	1,884	19	862	18	1,319	19	1,339	25	1,237	11	1,080	16	82,157	27	22,334	16	19	19
5km to <10km	1,237	26	3,045	30	1,303	27	2,288	33	1,398	26	1,380	13	2,531	38	65,066	21	34,619	25	27	27
10km to <20km	653	14	1,259	13	399	8	505	7	351	6	3,074	28	705	10	26,925	9	22,076	16	12	12
20km to <30km	69	1	182	2	82	2	123	2	81	1	316	3	147	2	4,885	2	3,643	3	2	2
30km to <40km	34	1	74	1	56	1	56	1	95	2	165	2	53	1	3,079	1	1,730	1	1	1
40km to <60km	47	1	134	1	149	3	95	1	143	3	155	1	153	2	4,683	2	2,551	2	2	2
60km +	97	2	194	2	156	3	177	3	308	6	308	3	302	3	10,139	3	4,599	3	2	2
Work mainly at or from home	414	9	694	7	321	7	547	8	416	8	811	7	546	8	25,882	8	12,787	9	8	8
Other	477	10	943	9	394	8	613	9	410	8	857	8	494	7	24,961	8	11,072	8	8	8
Average distance (km)	10.8		10.9		13.3		11.9		17.5		13.7		16.6		12.6		14.6		13.5	13.5

Average distance travelled to work (km)

Accommodation type - Households

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Dwelling Type	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	S.Gifford	%	Yate	%	E.Green	%	S Glos	%	Bristol BUA	%	Localities Average %	All Average %
All categories Accommodation type	4,056		8,430		3,852		6,262		3,702		8,641		4,881		107,538		260,716			
Total	4,056		8,420		3,852		6,245		3,702		8,634		4,881		107,489		258,916			
Whole house or bungalow: Total	3,635		6,882		3,062		4,629		3,313		7,922		4,449		95,006		188,252			
Detached	917	23	761	9	255	7	649	10	1,389	38	1,217	14	2,073	42	28,541	27	29,075	11	20	20
Semi-detached	1,670	41	2,812	33	1,379	36	1,949	31	1,035	28	2,482	29	1,248	26	36,946	34	76,329	29	32	32
Terraced (including end-terrace)	1,048	26	3,309	39	1,428	37	2,031	32	889	24	4,223	49	1,128	23	29,519	27	82,848	32	33	32
Flat, maisonette or apartment Total	421		1,471		764		1,615		306		704		428		11,807		70,029			
Purpose-built block of flats or tenement	299	7	1,178	14	696	18	1,275	20	263	7	585	7	398	8	9,708	9	46,536	18	12	12
Part of a converted or shared house (including bed-sits)	78	2	228	3	46	1	207	3	34	1	56	1	12	0	1,406	1	20,275	8	2	2
Flat, maisonette or apartment In commercial building	44	1	65	1	22	1	133	2	9	0	63	1	18	0	693	1	3,218	1	1	1
Caravan or other mobile or temporary structure	0	0	67	1	26	1	1	0	83	2	8	0	4	0	676	1	635	0	1	1
Shared dwelling	0	0	10	0	0	0	17	0	0	0	7	0	0	0	49	0	1,800	1	0	0

(See overleaf for comparative graphs)

Accommodation Type (Households)

Legend:
- Detached
- Semi-detached
- Terraced (including end-terrace)
- Purpose-built block of flats or tenement
- Flat, mainsonette or apartment: Part of converted or shared house (including bed-sits)
- Flat, maisonette or apartment: In commercial building
- Caravan or other mobile or temporary structure
- Shared dwelling

Categories (y-axis): Emersons Green, Hanham, Kingswood, Patchway, Staple Hill, Stoke Gifford, Yate, S Glos, Bristol BUA

Tenure - Households

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Tenure	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green	%	S Glos	%	Bristol BUA	%	Localities Av %	All Average %
All categories: Tenure	4,056		8,430		3,852		6,262		3,702		8,641		4,881		107,538		260,716			
Owned outright	1,745	43.0	2,439	28.9	979	25.4	2,124	33.9	1,102	29.8	2,967	34.3	1,362	27.9	37,050	34.5	70,701	27.1	31.9	31.7
Owned with a mortgage or loan	1,520	37.5	3,143	37.3	1,555	40.4	2,116	33.8	1,635	44.2	3,783	43.8	2,283	46.8	43,536	40.5	85,228	32.7	40.5	39.6
Shared ownership	14	0.3	66	0.8	22	0.6	26	0.4	33	0.9	47	0.5	8	0.2	497	0.5	1,737	0.7	0.5	0.5
Social rent: Local Authority	71	1.8	250	3.0	172	4.5	195	3.1	20	0.5	140	1.6	53	1.1	2,063	1.9	28,225	10.8	2.2	3.1
Social rent: Other	284	7.0	1,022	12.1	621	16.1	815	13.0	233	6.3	516	6.0	258	5.3	8,570	8.0	17,382	6.7	9.4	8.9
Private rent: Private landlord or agency	316	7.8	1,280	15.2	414	10.7	839	13.4	585	15.8	1,004	11.6	682	14.0	13,124	12.2	50,400	19.3	12.6	13.3
Private rent: Employer	1	0.0	8	0.1	3	0.1	9	0.1	4	0.1	5	0.1	102	2.1	233	0.2	406	0.2	0.4	0.3
Private rent: Relative or friend	52	1.3	94	1.1	32	0.8	52	0.8	37	1.0	112	1.3	43	0.9	1,039	1.0	2,695	1.0	1.0	1.0
Private rent: Other	7	0.2	14	0.2	3	0.1	16	0.3	7	0.2	7	0.1	53	1.1	204	0.2	573	0.2	0.3	0.3
Living rent free	46	1.1	114	1.4	51	1.3	70	1.1	46	1.2	60	0.7	37	0.8	1,222	1.1	3,369	1.3	1.1	1.1

(See overleaf for comparative graph)

Household Tenure

Legend: Owned outright · Social rented from council · Private rented: Employer · Living rent free · Owned with a mortgage · Social rented: Other · Private rented: Relative or friend · Shared ownership (part owned and part rented) · Private rented: Private landlord · Private rented: Other
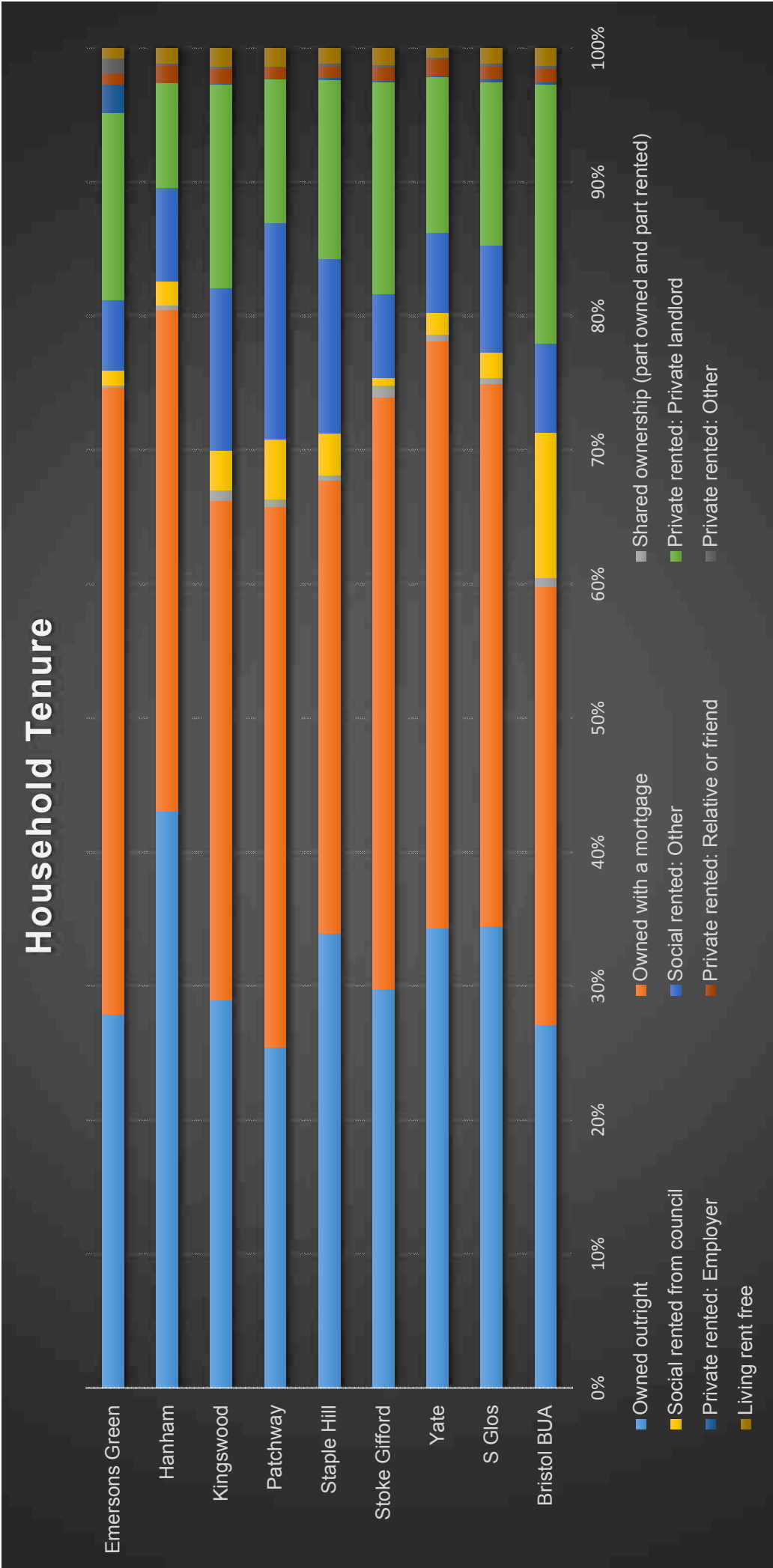
Occupancy rating (bedrooms)
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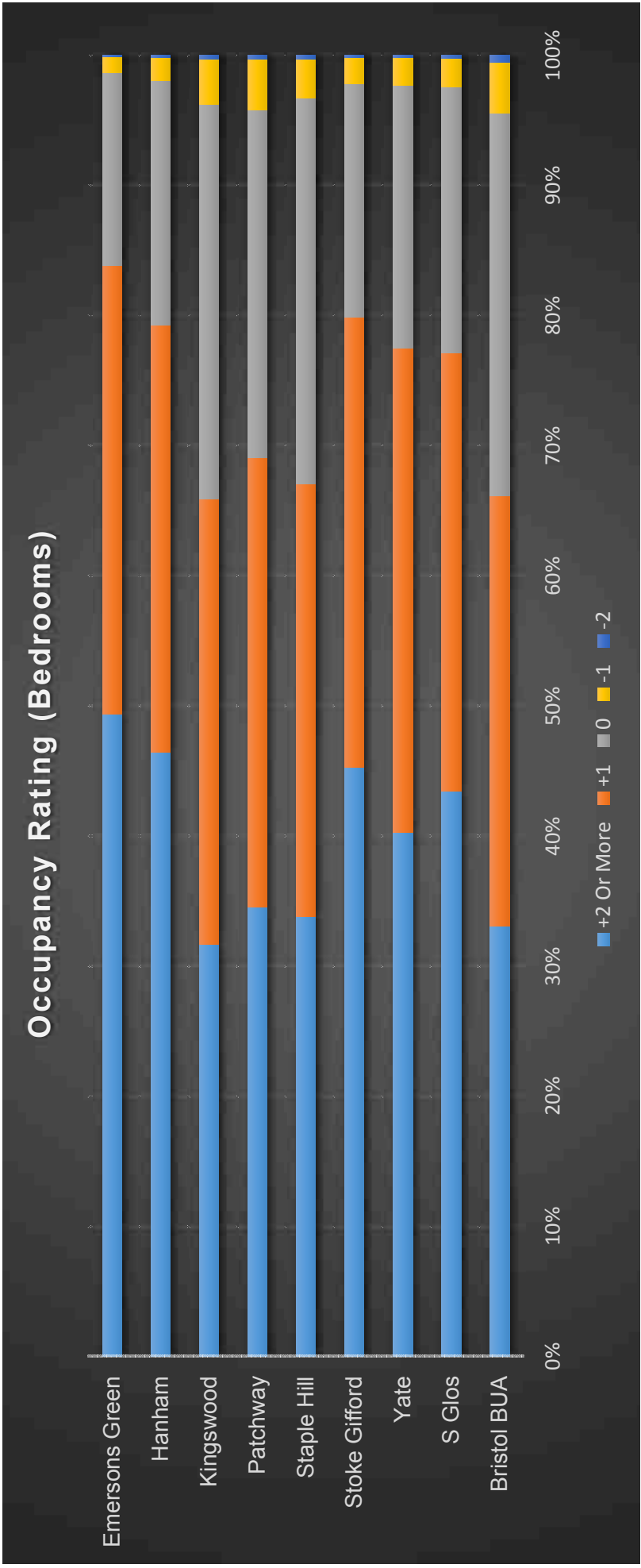| Area	All	+2 or more	%	+1	%	0	%	-1	%	-2 or less	%
Hanham	4,056	1,883	46	1,333	33	763	19	70	2	7	0.17
Kingswood	8,430	2,669	32	2,888	34	2,559	30	288	3	26	0.31
Patchway	3,852	1,330	35	1,331	35	1,030	27	150	4	11	0.29
Staple Hill	6,262	2,117	34	2,085	33	1,857	30	184	3	19	0.30
Stoke Gifford	3,702	1,675	45	1,281	35	665	18	74	2	7	0.19
Yate	8,641	3,479	40	3,217	37	1,747	20	182	2	16	0.19
Emersons Green	4,881	2,408	49	1,685	35	724	15	58	1	6	0.12
S Glos	107,538	46,741	43	36,224	34	22,003	20	2,355	2	215	0.20
Bristol BUA	260,716	86,135	33	86,286	33	76,821	29	10,148	4	1,326	0.51
Localities Average			40		34		23		2		0.22
All Average			40		34		23		3		0.25

Occupancy Rating (Bedrooms)

Legend: +2 Or More | +1 | 0 | -1 | -2

(Bar chart showing Emersons Green, Hanham, Kingswood, Patchway, Staple Hill, Stoke Gifford, Yate, S Glos, Bristol BUA from 0% to 100%)

Mode of travel to work
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Method of Travel to Work	Hanham	%	Kingswood	%	Patchway	%	Staple Hill	%	Stoke Gifford	%	Yate	%	Emersons Green	%	S Glos	%	Bristol BUA	%	Localities Average	All Average
Total in employment	4,817		10,033		4,841		6,833		5,432		10,945		6,721		136,531		294,866			
Work mainly at or from home	215	4.5	289	2.9	145	3.0	253	3.7	215	4.0	339	3.1	289	4.3	6,479	4.7	13,497	4.6	3.6	3.9
Underground, metro, tram	4	0.1	7	0.1	2	0.0	3	0.0	5	0.1	7	0.1	9	0.1	100	0.1	361	0.1	0.1	0.1
Train	23	0.5	28	0.3	35	0.7	34	0.5	291	5.4	192	1.8	45	0.7	1,724	1.3	5,346	1.8	1.4	1.4
Bus, minibus or coach	317	6.6	784	7.8	285	5.9	518	7.6	403	7.4	351	3.2	328	4.9	6,743	4.9	26,118	8.9	6.2	6.4
Taxi	3	0.1	24	0.2	11	0.2	21	0.3	18	0.3	33	0.3	13	0.2	263	0.2	797	0.3	0.2	0.2
Motorcycle, scooter or moped	69	1.4	153	1.5	62	1.3	102	1.5	70	1.3	157	1.4	91	1.4	1,906	1.4	3,815	1.3	1.4	1.4
Driving a car or van	3,455	71.7	6,937	69.1	3,193	66.0	4,443	65.0	3,219	59.3	7,674	70.1	4,886	72.7	95,258	69.8	172,600	58.5	67.7	66.9
Passenger in a car or van	277	5.8	623	6.2	277	5.7	387	5.7	247	4.5	629	5.7	320	4.8	6,948	5.1	15,419	5.2	5.5	5.4
Bicycle	145	3.0	320	3.2	236	4.9	421	6.2	306	5.6	437	4.0	381	5.7	5,356	3.9	20,517	7.0	4.6	4.8
On foot	291	6.0	836	8.3	581	12.0	622	9.1	632	11.6	1,089	9.9	340	5.1	11,150	8.2	48,372	16.4	8.9	9.6
Other method	18	0.4	32	0.3	14	0.3	29	0.4	26	0.5	37	0.3	19	0.3	604	0.4	1,521	0.5	0.4	0.4
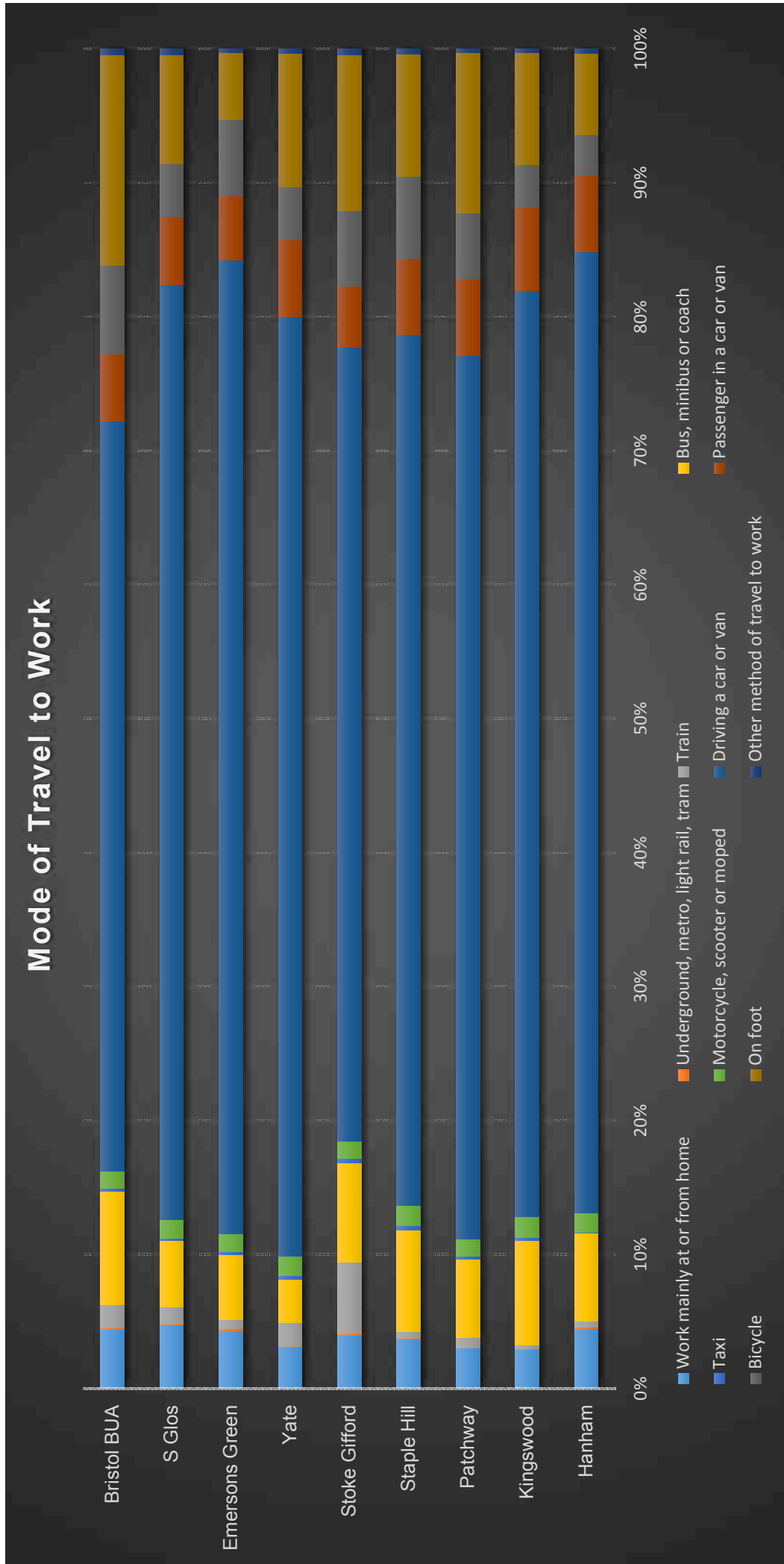
Mode of Travel to Work

Legend:
- Work mainly at or from home
- Taxi
- Bicycle
- Underground, metro, light rail, tram
- Train
- Motorcycle, scooter or moped
- Driving a car or van
- On foot
- Bus, minibus or coach
- Passenger in a car or van
- Other method of travel to work

Categories: Bristol BUA, S Glos, Emersons Green, Yate, Stoke Gifford, Staple Hill, Patchway, Kingswood, Hanham

Axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

16

3 Ownership in the Localities by Housing Associations
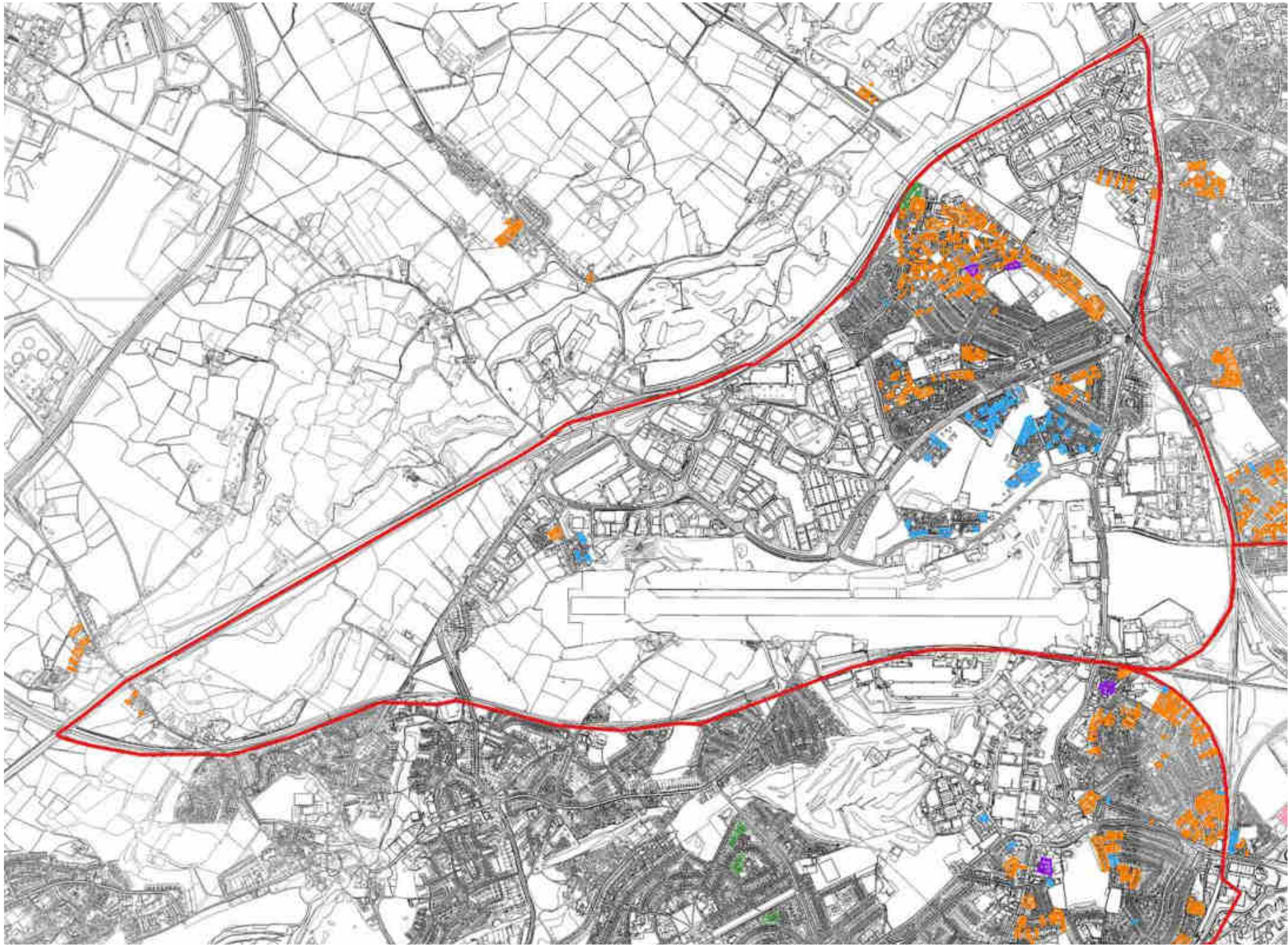
Patchway and Filton
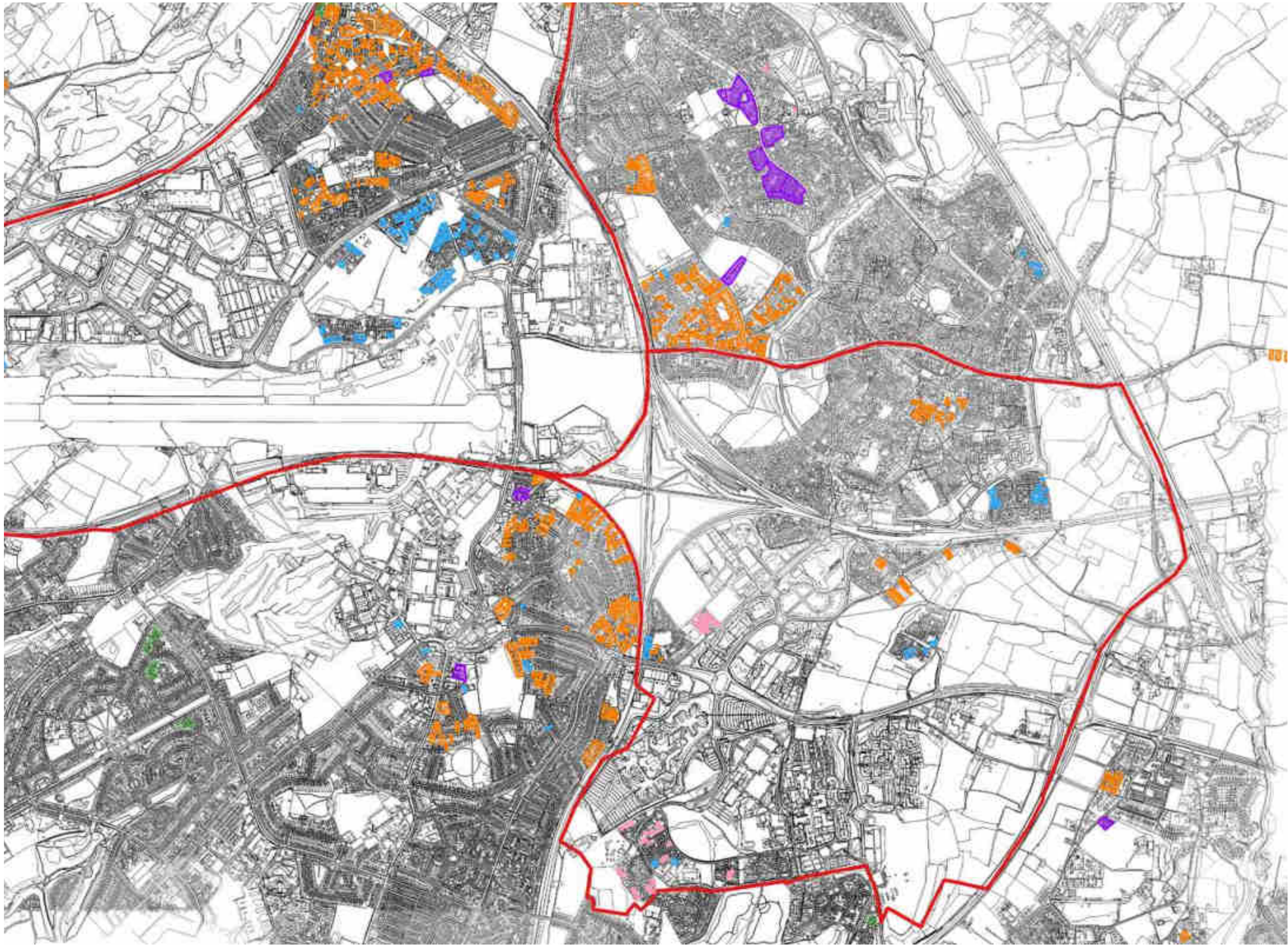
Harry Stoke

Emerson's Green

Yate

Staple Hill

Kingswood

Hanham

KEY

- Study Area
- Curo
- Merlin
- Knightstone
- Sovereign
- Guinness

nash partnership

16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Patchway

Scale	Initials	Date	Image Nº	Revision
1:20,000@A3	LM/EN	06 July 2017	16053_IM_021	B

KEY

- Study Area
- Curo
- Merlin
- Knightstone
- Sovereign
- Guinness

Registered Social Landlords (RSL) Sites in Harry Stoke

Scale	Initials	Date	Image Nº	Revision
1:20,000@A3	LM/EN	06 July 2017	16053_IM_022	B

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KEY

Study Area
Curo
Merlin
Knightstone
Sovereign
Guinness

16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Emersons Green

Scale	Initials	Date	Image Nº	Revision
1:10,000@A3	LM/EN	06 July 2017	16053_IM_023	B

KEY

- Study Area
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- Guinness

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16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Yate

Scale	Initials	Date	Image Nº	Revision
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KEY

- Study Area
- Curo
- Merlin
- Knightstone
- Sovereign
- Guinness

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16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Staple Hill

Scale	Initials	Date	Image Nº	Revision
1:10,000@A3	LM/EN	06 July 2017	16053_IM_025	B

22

KEY

- Study Area
- Curo
- Merlin
- Knightstone
- Sovereign
- Guinness

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16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Kingswood

Scale	Initials	Date	Image №	Revision
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23

KEY

- Study Area
- Curo
- Merlin
- Knightstone
- Sovereign
- Guinness

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16053 South Gloucestershire Council

Registered Social Landlords (RSL) Sites in Hanham

Scale	Initials	Date	Image Nº	Revision
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