

**PLANNING, HOUSING AND ECONOMIC DEVELOPMENT POLICY DEVELOPMENT
AND SCRUTINY PANEL**

Minutes of the Meeting held

Tuesday, 5th January, 2016, 2.00 pm

Bath and North East Somerset Councillors: Rob Appleyard (Chair), Barry Macrae (Vice-Chair), Colin Blackburn, Lisa O'Brien, Fiona Darey, Paul Crossley (In place of Cherry Beath) and David Veale

Officers : Lisa Bartlett (Divisional Director for Development), Simon de Beer (Group Manager for Policy & Environment), Graham Sabourn (Head of Housing) and Richard Walker (Planning Officer)

Cabinet Members in attendance: Councillor Liz Richardson (Cabinet Member for Homes & Planning) and Councillor Patrick Anketell-Jones (Cabinet Member for Economic Development)

35 WELCOME AND INTRODUCTIONS

The Chairman welcomed everyone to the meeting.

36 EMERGENCY EVACUATION PROCEDURE

The Chairman drew attention to the emergency evacuation procedure.

37 APOLOGIES FOR ABSENCE AND SUBSTITUTIONS

Councillor Cherry Beath had sent her apologies to the Panel, Councillor Paul Crossley was present as her substitute for the duration of the meeting.

38 DECLARATIONS OF INTEREST

Councillor Fiona Darey declared an other interest with regard to Agenda Item 12 (Student Accommodation) as she is a tutor at the University of Bath.

The Chairman, Councillor Rob Appleyard declared a disclosable pecuniary interest during Agenda Item 8 (Cabinet Member Update) as he is a Director of Curo.

39 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIRMAN

There was none.

40 ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE DEPUTATIONS, STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING

Robin Kerr, Chairman of the Federation of Bath Residents' Associations (FoBRA) made a statement to the Panel on the subject of the Placemaking Plan. A copy of the statement can be found on the Panel's Minute Book, a summary is set out below.

FoBRA has been tracking the Placemaking Plan for some years, as we did the Core Strategy. We have contributed to its long development assiduously, meeting with officers and probably making more comments than any other body. Its importance to Bath residents is obvious, but it is lengthy and complicated.

From the beginning we have wanted a Student Housing Policy, my colleague Chris Beezley is going to speak about this further later, but that duty cannot be shirked. The seemingly unstoppable expansion of our two universities, however desirable, is a ticking time-bomb threatening our citizens' ability to find homes or jobs here and placing further pressure on the Green Belt.

We also want to see space standards for market housing. About half of English Authorities impose minimum space standards on new commercial housing, but not B&NES, with the result that many of our new-build houses are cramped, often with less space than social housing.

Lastly, flooding risk, there is much in the Plan about mitigation of this risk in the Enterprise Areas, which is understandable, as otherwise no development would take place in them. However, there is a considerable likelihood some 2000 existing homes upstream, many of them Listed, and of great importance to World Heritage, yet this is hardly mentioned and no practical measures are proposed to deal with it.

Moreover, in the sections on development sites in Central Riverside and Manvers Street mitigation is planned for the development parts, but, scandalously, nothing for the existing properties close by, thereby condemning them to damage. In all fairness this has to be rectified and money found to carry out the necessary work.

Councillor Barry Macrae commented that in a previous representation to the Panel the Environment Agency had clearly stated that upstream flooding would not be a problem.

Ian Herve, Abbey Ward Flood Group made a statement to the Panel on the subject of the Placemaking Plan. A copy of the statement can be found on the Panel's Minute Book, a summary is set out below.

Throughout this Draft Placemaking Plan there are many contradictory statements and much wishful thinking where flood risk in Bath is concerned. In the Bath subsection of this Plan, paragraph 122 states that the Recreation Ground "Functions as an important storage area during flood events".

All well and good you might say except for one missing piece of information. The flood risk maps for that area. These can be viewed on the B&NES website in the 2013 Black and Veatch Technical Note for the Bath Quays Project.

This shows the actual flooded areas for various Annual Probability return risk events. The Rec does indeed flood at a low risk event of a 1:25 year flow but so do the neighbouring properties. As the water rises the neat line drawn on the B&NES map does not define the flooded area.

This effectively means that it is now council policy to designate the basement flats of Johnstone Street, Great Pulteney Street, the houses in Pulteney Mews, those along Pulteney Road to the south of the railway bridge, Broadway and the Dolemeads and of course, Widcombe School as “important flood storage”.

The Environment Agency predicts that this risk will increase by 10% by 2040. This Placemaking Plan predicts that by 2020 “winter precipitation could increase by up 18% and be more intense”.

Paragraph 21 states that the “Council will encourage and support residents throughout Bath”. We would argue that a key element of that support has to be a more thorough recognition of the flooding risks and concrete and funded proposals for protecting the whole city, not merely sites planned for development.

Councillor Fiona Darey said that she was aware of the concerns of Walcot residents and that a further meeting would be of benefit so that they could ask questions to the Environment Agency.

The Chairman said that he felt it was a matter that the Panel could review at a future meeting.

Chris Beezley made a statement to the Panel on the subject of Student Accommodation in Bath. A copy of the statement can be found on the Panel’s Minute Book, a summary is set out below.

For over 10 years FoBRA has been pressing B&NES to adopt a Student Housing Strategy. With the Placemaking Plan (PMP) reporting 24,000 students now, forecast to rise to 32,000 within 5 years, B&NES has acknowledged FoBRA’s concerns:

- *that there will be considerable and ever-increasing pressure for private sector student accommodation for the foreseeable future;*
- *that Bath ‘over performs as a host to Higher Education’ (para.252);*
- *that student accommodation ‘is one of the most high profile issues affecting Bath’(para.221);*
- *that student accommodation is ‘clearly a matter that requires policy direction at a strategic and site specific level.’ (para.233); and*
- *that, as early as 2020, even with 1,000 further campus beds, there could be a shortfall of 5,000 private sector beds (para.229)*

and yet it refuses to advocate a Student Housing Strategy (para.234).

The Plan proposes little scope for further accommodation blocks, and there is no indication that the universities will scale back their growth aspirations or risk building more campus bedrooms than the usual demand from new students justifies. This means that more students could find themselves homeless (a trend that has already started at the University of Bath this year) as demand for additional HMOs approaches 1,250, that is 250 per year over the next 5 years.

To put this into context, the Government's net additional housing allocation to Bath of 7,020 equates to 390 per year. FoBRA suggests that homeless students and/or a build rate of 640 new dwellings per year to achieve the target figure of 390 would be unsustainable, and is likely to render the PMP 'unsound'.

Where in the PMP does it state how the universities intend to house their future students or what increase in HMO numbers would be sustainable? Nowhere. That is why FoBRA believes that a Student Housing Strategy is so desperately needed.

FoBRA therefore seeks this Scrutiny Panel's assurance that the long-overdue Student Housing Strategy is now developed as a matter of urgency, is regularly reviewed, engaging openly with the universities and residents, and that the Placemaking Plan and its reviews are guided by it.

Neil Latham, Bath Spa University made a statement to the Panel on the subject of Student Accommodation in Bath. A copy of the statement can be found on the Panel's Minute Book, a summary is set out below.

I would like to start by confirming the University's desire to work with the Council and the community in developing our plans for student housing in the city and wider region. In 2012, the University did not object to the Article 4 proposals about restrictions on the development of houses of multiple occupation (HMOs), recognising the impact in wards such as Oldfield Park and Westmoreland. In 2016, we hope to see our continued contribution to the dialogue around student housing.

The data presented in sections 5.10 to 5.15 of the paper does not align with our own projections, which indicate much more modest growth. We will be preparing a full response to the Placemaking Plan consultation and would welcome a meeting with the Council to jointly update the student number projections and housing estimates. In summary, by 2020/21 our estimated number of additional bedspaces is approximately 1,100 (equivalent to around two Green Park House sized developments or three Twerton Mill developments) rather than the 3,895 quoted.

Conscious of the impact HMOs have on the city, we are in the early stages of planning a pilot scheme to house some continuing students (i.e. 2nd and 3rd year undergraduates).

We recognise that all new accommodation does not need to be in the city. We have excellent transport links into Bath, particularly on the routes from Bristol. We would welcome the opportunity to discuss possible sites with the Council that fall along those key transport routes into the city.

We therefore believe that Bath does not 'over perform' as a host to higher education as some people have suggested, and has the capacity to benefit from some further carefully managed expansion.

I would like to close by saying that our students are an extremely important part of this community. They don't just contribute economically, but bring a wealth of creativity and innovation, and also contribute to the cultural life of Bath.

Councillor Paul Crossley asked what % of students still live at home while studying at the university.

Neil Latham replied that 7% of students are from Bath and live at home, whilst 27% of students live outside of the city but remain in family accommodation.

Councillor Paul Crossley asked if he had a timescale for the proposals relating to 2nd and 3rd year students.

Neil Latham replied that ideas were at the early planning stages.

Councillor Barry Macrae commented that he was concerned over possible new sites being developed along the A4 as this would add to traffic congestion.

Neil Latham replied that any development in Corsham would be in relation to the 50 post graduate places for that site and enable students to live and study there. He added that in terms of Keynsham sites there would be no car parking at any halls and use of public transport would be highly encouraged.

41 MINUTES - 24TH NOVEMBER 2015

The Panel confirmed the minutes of the previous meeting as a true record and they were duly signed by the Chairman.

42 CABINET MEMBER UPDATE

The Head of Housing informed the Panel that the Housing Zone capacity funding bid to DCLG to provide resident support, a viability assessment and a full time Project Officer to manage the Council's involvement in the regeneration of Foxhill and the development of Mulberry Park had been successful. He added that the level of detail was not known at this stage, but the figure was £313,000.

Councillor Paul Crossley asked in terms of gypsy and traveller sites what the unmet demand of the travelling community is.

The Head of Housing replied that the full transit need had been met and that they were 10 permanent pitches short from what was originally identified.

The Group Manager for Policy & Environment added that identifying new pitches was in the work programme for the coming 2 to 3 years and that an options document could be published towards the end of 2016 or the beginning of 2017.

Councillor Lisa O'Brien said that she was pleased to read about the successful remodeling and extension of a property in Keynsham, but that she was aware of a similar property that was having difficulty in securing funding.

The Head of Housing said that he was aware of the case referred to by Councillor O'Brien as the costs were higher than the current threshold for funding. He added that low interest loans are available in these circumstances providing security can be given.

The Head of Housing informed the Panel that the annual estimate of rough sleeper numbers was carried out in November in partnership with DHI Reach and Julian House. Twenty two people were identified as rough sleeping, which is a reduction from twenty seven in 2014 and thirty three in 2013.

He said that the Government funding stream for this service was due to end in March 2016. However, the Supporting People & Commissioning Team has confirmed that new funding has been identified for 2016/17.

43 WEST OF ENGLAND JOINT SPATIAL PLAN

The Group Manager for Policy & Environment introduced this item to the Panel. He explained that the Joint Spatial Plan (JSP) is being prepared by the officers of the four UAs and that the costs of which are being managed within existing budgets. However, additional funding has been required to procure specialist expertise and for the public consultation process. It is proposed that this will be funded during 2015/16 from reserves.

He stated that the Joint Transport Study (JTS) is being undertaken by Atkins on behalf of the West of England Councils. The need for additional resource input from Atkins is presently being reviewed, to support the initial transport assessment of JSP options. This is likely to entail a small additional funding requirement from B&NES and the other UAs, the source for which will be identified and approval sought through usual process prior to any further commitment.

He said that chapter 3 of the document sets out the evidence on the quantum of development that needs to be accommodated. In summary, the Wider Bristol Strategic Housing Market Assessment (SHMA) identifies that around 85,000 dwellings are needed between 2016 and 2036. Around 56,000 are already identified in existing plans leaving around 30,000 still to find. The affordable housing needed between 2016 and 2036 is around 30,000 of which around 20,000 still need to be identified.

He added that the JTS is being undertaken alongside the JSP with complementary milestones. The first stage of the JTS has assessed the performance of the current transport network, study objectives and outline concepts for investment in improving the transport network. In addition, the Issues and Options document includes a commentary on transport issues and a transport-focused spatial scenario.

He informed the Panel that the consultation period closes on January 29th 2016 and that a draft Plan could be expected towards the middle of this year.

Councillor Paul Crossley asked if the 'vision' within the Plan had been adopted by any of the four UAs. He stated that he did not agree with it in its entirety.

The Group Manager for Policy & Environment replied that this vision had taken key points from existing versions across the four UAs based upon the agreed Strategic Economic Plan, but that no overall agreement for it had yet been received.

Councillor Paul Crossley commented that the housing shortfall in his opinion was through Bristol's inability and their lacking of a High Buildings Strategy.

The Group Manager for Policy & Environment replied that the three other authorities encouraged Bristol to complete work relating to urban intensification and that they have acknowledged there is a need for a "step change" in their approach.

Councillor Lisa O'Brien commented that she felt it was a rose tinted vision that was over ambitious and not a solid blueprint. She asked if any consideration had been given to discussing development outside of the four UAs, Monmouthshire for example.

The Group Manager for Policy & Environment replied that discussions have only been in relation to the prescribed areas of the SHMA.

Councillor Lisa O'Brien said that she was aware of a number of people that are choosing to live in lower cost homes in Wales and then commute into the area for work. She added that she didn't feel that this element should be ruled out.

The Divisional Director for Development replied that there was a strict process to this work and that the needs of the identified areas must be met first. She added that there were 2 to 3 phases to the process and that discussions were ongoing between the UAs.

Councillor Paul Crossley commented that action should be taken on sites that have planning permission, but have not been developed. He said that it was also too easy to convert employment sites into housing.

The Divisional Director for Development replied that they have highlighted the issue of change of use to the Government as a problem locally.

Councillor Barry Macrae said that he would like to see a timeline of events published for these documents. He added that the needs of our residents must be protected with the correct infrastructure in place.

Councillor Fiona Darey asked if Bristol were truly aware of their need to change.

The Group Manager for Policy & Environment replied that they were and that we were awaiting their Urban Intensification document. He said that this was expected in January / February and could be shared with the Panel.

Councillor Lisa O'Brien said that in her opinion the area of North West Bristol / Severnside was the ideal area for development of housing and employment sites. She added that she wished to applaud the Joint Transport work that had been carried out

The Chairman asked if there was a hierarchy to the documents involved in this work area.

The Group Manager for Policy & Environment replied that the recently adopted Local Plan takes precedent and that the JSP would guide further Core Strategy work.

The Panel **RESOLVED** to ask that their comments on the West of England Joint Spatial Plan Issues and Options Document and the Joint Transport Study be taken into consideration as part of the consultation process.

44 DRAFT PLACEMAKING PLAN FOR BATH & NORTH EAST SOMERSET

The Group Manager for Policy & Environment introduced this item to the Panel, He explained that the draft Placemaking Plan includes;

- Spatial frameworks for Bath, Keynsham, the Somer Valley & the Rural Areas. It allocates sites for development where these are necessary to deliver the strategy, setting out the required land-use mix and the development principles.
- Designations where there is a need to identify and protect valued assets, such as important open hillsides or Local Green Space
- Identifies schemes to be implemented such as road or cycleway improvements
- Generic criteria-based planning policies

He said that the consultation period ends on 3rd February 2016 and any comments from the Panel can be taken into account as part of the forthcoming examination process.

He stated that in Bath, the key issue is how to facilitate the Council's ambitions for growth and change in a relatively small city, recognized for its unique heritage and environment and constrained by the Green Belt. The development of the spatial strategy has therefore required that the Council make choices, in order to ensure its key priorities are met. The Plan reflects the ambitions of the Economic Strategy the Housing & Well-being Strategy and the Bath Transport Strategy. In particular the proposals of the Bath Enterprise Area Masterplan have been formalised. The Plan highlights the transport interventions that are needed to realise the District's growth proposals.

In Keynsham, the Plan seeks to build on the growing strengths of the town, providing a Masterplan for future change. This takes account of the significant growth contained in the Core Strategy. It seeks to consolidate this growth and address the identified key issues facing the town. It includes the allocation of Riverside for mixed use, residential led development including a replacement Leisure Centre. He said that a key element of the strategy for the town is the need to regenerate the High Street and the Plan includes a number of policies to achieve this.

In the Somer Valley, the Plan focuses on regeneration in light of the Core Strategy objectives of seeking a greater balance between homes and jobs. Both Midsomer Norton and Westfield are preparing their own Neighbourhood Plans and the Placemaking Plan complements the Neighbourhood Plans.

In the rural areas, B&NES has worked closely with the parishes to produce spatial frameworks for inclusion either in the Placemaking Plan or in their own Neighbourhood Plans. The approach has been to identify locations for new

development where required in consultation with the local communities whilst identifying the key environmental assets for protection and conservation.

Councillor Paul Crossley questioned the need for approx. 30,000 m² of comparison retail up until 2029 as a vast majority of people now do their shopping on the internet.

The Group Manager for Policy & Environment replied that this recommendation was within the Plan following advice that had been sought by retail experts.

Councillor Lisa O'Brien commented that whilst internet sales were obviously massive a great number of people still look at items in shops prior to purchasing. She added that to some the whole process of shopping remains an aspect of enjoyment and a pleasurable leisure experience.

The Chairman asked if the Council has a policy that controls the heights of buildings within the City.

The Group Manager for Policy & Environment replied that a study had been previously carried out and that this evidence base had been used to formulate the policies in the Draft Plan.

The Chairman asked if as the views of officers and developers will differ would it not be better to firm up our position through a policy.

The Divisional Director for Development said that the Building Heights Study was a thorough piece of work and it has been and would continue to be used by developers and officers to assess development with the benefit of the new draft policies.

Councillor Fiona Darey said that she thought the Plan was an impressive document but asked why there was a lack of guidelines on room areas / heights.

The Group Manager for Policy & Environment replied that including space standards within the Plan was considered but the approach is not supported by Government guidance.

The Panel **RESOLVED** to ask that their comments on the Pre-submission Draft Placemaking Plan be taken into account during this consultation process.

45 NEIGHBOURHOOD PLANNING

The Divisional Director for Development introduced this item. She explained that the Council has worked closely with local communities in both preparing neighbourhood plans and on the Placemaking Plan. She stated that there are currently three 'made' plans which have been brought into force (Stowey Sutton, Freshford & Limpley Stoke and Clutton) and another 10 plans under preparation with 6-7 expected to be 'made' by the end of 2016.

She said that a number of the Parish and Town Councils have sought to allocate sites or designate local green spaces via the Placemaking Plan rather than through a Neighbourhood Plan. This is an efficient way for the Parish and Town Councils to

impact on development locally without incurring the additional work of a Neighbourhood Plan.

The Chairman asked if these Parish & Town Councils were still able to receive CIL funding.

The Divisional Director for Development replied that once the Neighbourhood Plan is made (adopted), a parish will receive 25% of CIL payments for development within their Neighbourhood Area, in line with the CIL Regulations (rather than the typical 15%).

The Panel **RESOLVED** to note the current position on Neighbourhood Planning in B&NES.

46 STUDENT ACCOMMODATION - SCENE SETTING

The Chairman commented that he welcomed this report as decisions need to be made on how we work in the future regarding this subject.

The Divisional Director for Development introduced the report to the Panel. She explained that at the time of the preparation, examination and adoption of the Core Strategy in 2013/14 the combined published growth forecasts/corporate plans of both institutions were lower than the growth rates achieved prior to 2011.

She said that the data provided by the University of Bath (UoB) in July 2015 shows that it aspires to grow from around 14,000 registered students in 2011/12 to around 19,300 in 2020/21. The forecast growth is very much set to be oriented towards full time study, which generates the greatest need for further study bedrooms. The aspiration is therefore for 5,300 more students and this would equate to a need for 4,700 more bed spaces to 2020/21.

She said that the data provided by Bath Spa University (BSU) between March and July 2015 lacks clarity in respect of future changes in actual students, their mode of study and accommodation needs revising. She added that in its representations at Options stage it stated that it aspired to grow from 6,632 FTEs (full time equivalents) in 2014/15 to 10,500 FTEs in 2020/21. This was broken down by year group but not mode of study. In response to the Council's request to back date FTEs figures to 2011/12 the University provided a figure of 6,060. Total aspired to FTE change for the current decade is therefore around 4,500.

She stated that on the basis of the representations received at the Placemaking Plan Options Stage (Jan- July 2015) it is prudent for the Development Plan to assume in total that:

- aspired to enrolment would see numbers increase from around 22,500 to around 31,700 (+9,200) to 2020/21
- accommodation needs would increase from 16,300 to 24,800 (+8,500)
- that these figures are only to 2020/21 and that if they are not achieved by then, that they may be achieved later in the Plan period. If they are achieved then further growth may be aspired to later in the plan period.

She explained that in December 2015, the Council had taken into account dedicated new supply (on and off-campus) that has been built since 2011, is under construction or is permitted, and estimated additional capacity of not more than 1,000 within specific areas currently shown for accommodation development in the UoB masterplan (2014 update). Exclusive use developments yield around 3,000 bed spaces (1,700 to UoB and 1,300 to BSU). A further 944 bedspaces that are built, under construction or permitted are currently or potentially available to any student.

She said that the Council still seeks to enable, as far as possible, the continued success of The UoB and BSU and the contribution they make to the city's identity, profile and employment base, and their wider contribution to the UK skilled workforce and GVA. However, in terms of the strategy for Bath, the University development requirements and aspirations form part of a whole suite of demands on a highly constrained city, which is a relatively small as a host for two universities and which has a limited land supply for meeting all development needs in full.

She stated that the development of new academic space and student accommodation are clearly matters that require policy direction in the Local Plan at a strategic and site specific level. The Council is mindful that the growth in student numbers has not been accompanied by sufficient on-campus study bedrooms but that the associated expansion of the student lettings market (which the National Planning Practice Guidance or NPPG allows as part of the solution to student housing issues) has diminished the 'normal' housing stock of the city, cancelling out, in part, gross additions to the stock. She added that whilst a student HMO sector is a common feature of University towns its current size in relation to Bath is already a cause for concern and the idea of it increasing further exacerbates this concern for interest groups including residents associations and those seeking to secure a house to rent or buy. The issues relate to the retention of mixed neighbourhoods in the city and also the maintenance of the conventional stock of residential properties from a strategic perspective.

She said that some stakeholders have requested a dedicated student accommodation strategy to inform planning policy. In the Council's view the reality for Bath is that the approach to this issue cannot stand alone outside of an overall integrated suite of planning policies for the whole city that considers and balances all uses and all issues.

She informed the Panel that site allocation policies have been made for the UoB campus at Claverton Down (including the Sulis Club) and for BSU campus (but not including Sion Hill for which generic development management policies will be used to manage change). The UoB's and BSU's work in preparing and consulting on estate and campus masterplans demonstrates the value of proceeding on a strategic basis and has provided part of the evidence base to inform planning policy for future development.

Councillor Barry Macrae said that he agreed with the view that this matter cannot be discussed in isolation. He added that the loss of communities is a concern and that if accommodation sites were to move to rural areas and students were to then commute what effect would this have on other members of the public.

He called for the Universities to contribute fully to this process and welcomed any subsequent debate on the matter.

Councillor Lisa O'Brien asked if the true cost of the summer lettings option had been configured.

The Planning Officer replied that this had not been carried out yet as aspirations can go up and down. He added that sites along the river corridor were being sought. Councillor Paul Crossley asked if any firm proposals had been put forward for the BMW site on the Lower Bristol Road.

The Planning Officer replied that no definitive proposal had been received.

The Chairman asked if a Memorandum of Understanding should be sought between the Council and the Universities to have a holding number of students for a period of time.

The Divisional Director for Development replied that ongoing discussions were taking place with both Universities.

The Planning Officer added that he was aware that Bath Spa University had taken part in a number of discussions with the Council over the past few years.

Councillor Colin Blackburn asked if there had been any studies regarding the possibility of returning current HMOs into regular housing stock.

The Planning Officer replied that he felt it was unlikely that any current HMO would return to its former state.

Councillor Colin Blackburn said that he would be keen to see the Council's thoughts on extending the Article 4 direction to other parts of the City.

Councillor Fiona Darey asked if it was possible to define under the licence the category of residents that live in a particular HMO e.g. Young professionals / students.

The Divisional Director for Development replied that the Planning process does not allow the Council to be that descriptive.

Councillor Paul Crossley said that he endorsed the views of Councillor Blackburn regarding extending the Article 4 direction. He added that it was important for the standards of the property and the responsibilities of the landlord to be identified.

Councillor Liz Richardson, Cabinet Member for Homes & Planning commented that some discussions on this matter have taken place within the Local Development Framework Steering Group. She added that she felt that there were still some properties within the area that are not licensed.

The Chairman asked if officers were supportive of the role that HMOs currently play within the Council.

The Divisional Director for Development replied that the matter of HMOs should not be seen solely as a student issue. She added that she would discuss the SPD with Councillor Richardson.

Councillor Colin Blackburn said that he would welcome further discussion on the matter as he believed that HMOs for young professionals were invaluable.

Neil Latham stated that Bath Spa University would be writing a written contribution as part of the current consultation on the Draft Placemaking Plan.

The Panel **RESOLVED** to ask that their comments on the strategy contained in the Draft Placemaking Plan for responding to the demands for student accommodation be taken into account.

47 PANEL WORKPLAN

The Panel confirmed their current workplan as printed in the agenda pack.

The meeting ended at 5.05 pm

Chair(person)

Date Confirmed and Signed

Prepared by Democratic Services

This page is intentionally left blank

Placemaking plan - Speaking notes – Planning Scrutiny Panel 5th Jan 16

I am Robin Kerr, Chairman of the Federation of Bath Residents' Associations, which is the main representative voice for residents' groups in Bath, with currently 25 full member associations, across all wards in Bath, and six affiliates, including both students' unions.

FoBRA has been tracking the Placemaking Plan for some years, as we did the Core Strategy. We have contributed to its long development assiduously, meeting with Officers and probably making more comments than any other body. Its importance to Bath residents is obvious: but it is lengthy and complicated. Initially, the Council set the Consultation at seven weeks; but technical difficulties with their website reduced this to about six. This means that normal human beings (who celebrate Xmas and New Year) would therefore have only about four weeks in which to read, assess and respond – not nearly long enough bearing in mind the challenging hurdles put in the way of commenting (such as the tests of legality and soundness, with evidence), and the need for organizations like my own to consult its members. I therefore ask, on behalf of all B&NES citizens, companies and organizations for an extension of at least 3 weeks, to make up this shortfall.

From the start, we wanted a Student Housing Policy. My colleague Chris Beezley is going to speak about this later, but that duty cannot be shirked. Other university towns and cities have them - Loughborough, Leeds and Leicester to mention but three: and if you want to know what can happen if you don't have one, go and look at Leamington Spa, which is close to Warwick. The seemingly unstoppable expansion of our two universities, however desirable, is a ticking time-bomb threatening our citizens' ability to find homes or jobs here, and placing further pressure on the Green Belt. I wrote about this in the Chronicle on 23rd Dec, and I would remind you that students don't pay any Council Tax.

We also wanted space standards for market housing. About half of English Authorities impose minimum space standards on new commercial housing, but not B&NES, with the result that many of our new-build houses are cramped, often with less space than social housing (where standards still exist). This is not worthy. Government has recently introduced a scheme to rectify this, and we commend its imposition here.

Lastly, flooding risk: there is much in the Plan about mitigation of this risk in the Enterprise areas, which is understandable, as otherwise no development would take place in them. However, there is a considerable likelihood of flooding some 2000 existing homes upstream, many of them Listed, and of great importance to World Heritage; yet this is hardly mentioned, and no practical measures are proposed to deal with it. Moreover, in the sections on development sites, in Central Riverside and Manvers Street, mitigation is planned for the development parts, but, scandalously, nothing for the existing properties close by, thereby condemning them to damage. In all fairness, this has to be rectified, and money found to carry out necessary work. I hope I hardly need to mention Carlisle, York, Rochdale and the Somerset Levels to remind us all of the misery and expense which can be caused by flooding.

Robin Kerr - draft 2 and final - 29 Dec 15

Statement to Scrutiny Panel- 5th January.

I am Ian Herve. I represent the Abbey Ward Flood Group which consists of the Chairmen of Pulteney Estates Resident's Association, The Abbey Resident's Association and Henrietta Park RA along with our elected councillors and myself.

Throughout this Draft Placemaking Plan there are many contradictory statements and much wishful thinking where flood risk in Bath is concerned.

The limited time available today will not be enough to address them all so I will limit this to one specific example. The Recreation Ground.

In the Bath subsection of this Plan, paragraph 122 states that the Recreation Ground "Functions as an important storage area during flood events".

Look at the reference diagram 5 and you will see the area referred to.

All well and good you might say except for one missing piece of information. The flood risk maps for that area. These can be viewed on the B&NES website in the 2013 Black and Veatch Technical Note for the Bath Quays Project.

This shows the actual flooded areas for various Annual Probability return risk events. The Rec does indeed flood at a low risk event of a 1:25 year flow but so do the neighbouring properties. As the water rises the neat line drawn on the B&NES map does not define the flooded area.

This effectively means that it is now council policy to designate the basement flats of Johnstone Street, Great Pulteney Street, the houses in Pulteney Mews, those along Pulteney Road to the south of the railway bridge, Broadway and the Dolemeads and of course, Widcombe School as "important flood storage".

I cannot believe that this is what you intend but it may be that this is now the established policy of your council, as it will be if this document is ratified as it stands.

If this is so then I believe the residents concerned should have knowledge of this.

In 2012 The Environment Agency produced the Bristol Avon Catchment Flood Management Plan.

This, on Page 13, states “The current level of flood risk in Bath is considered unacceptable” and a 2014 update by the EA put the current number of properties at risk as 914. An oddly precise number given that there are discrepancies in the counting such as the care and nursing homes in St. John’s Road, which contain over 100 residents but are counted as only three dwellings.

These are in the same flood risk zone as the Rec.

The Environment Agency predicts that this risk will increase by 10% by 2040.

This Placemaking Plan predicts that by 2020 “winter precipitation could increase by up 18% and be more intense”.

We urge you all to consider our recent lucky escape. Had storm Desmond tracked a few miles to the south, Bath would not have had a Christmas market, or indeed a Christmas. We would have been engaged in an emergency rescue process and would be mopping up still.

Paragraph 21 states that the “Council will encourage and support residents throughout Bath”

We would argue that a key element of that support has to be a more thorough recognition of the flooding risks and concrete and funded proposals for protecting the whole city, not merely sites planned for development.

**Statement to B&NES Planning, Housing and Economic Development Policy
Development and Scrutiny Panel - 5th January 2016**

Student Accommodation in Bath

I am Chris Beezley, a member of FoBRA which, for over 10 years, has been pressing B&NES to adopt a Student Housing Strategy.

With the Placemaking Plan (PMP) reporting 24,000 students now, forecast to rise to 32,000 within 5 years, B&NES has acknowledged FoBRA's concerns:

- that there will be considerable and ever-increasing pressure for private sector student accommodation for the foreseeable future;
- that Bath 'over performs as a host to Higher Education' (para.252);
- that student accommodation 'is one of the most high profile issues affecting Bath'(para.221);
- that student accommodation is 'clearly a matter that requires policy direction at a strategic and site specific level.' (para.233); and
- that, as early as 2020, even with 1,000 further campus beds, there could be a shortfall of 5,000 private sector beds (para.229)

and yet it refuses to advocate a Student Housing Strategy (para.234).

The Plan proposes little scope for further accommodation blocks, and there is no indication that the universities will scale back their growth aspirations or risk building more campus bedrooms than the usual demand from new students justifies. This means that more students could find themselves homeless (a trend that has already started at the University of Bath this year) as demand for additional HMOs approaches 1,250, that is 250 per year over the next 5 years.

To put this into context, the Government's net additional housing allocation to Bath of 7,020 equates to 390 per year. FoBRA suggests that homeless students and/or a build rate of 640 new dwellings per year to achieve the target figure of 390 would be unsustainable, and is likely to render the PMP 'unsound'.

And that is only up to 2020. Within a further 8 years the PMP predicts demand for up to a further 4,000 private sector student beds.

Where in the PMP does it state how the universities intend to house their future students or what increase in HMO numbers would be sustainable? Nowhere. That is why FoBRA believes that a Student Housing Strategy is so desperately needed.

Other unanswered questions include:

- Is Article 4 Direction working and should its 25% threshold be changed?
- How many more accommodation blocks and where?
- Is it sustainable that students could soon number one-third of the population and occupy well over 4,000 HMOs exempt from Council Tax?
- How many more campus beds and for what proportion of students?
- At what rate of build?
- Within the Cotswolds AONB as suggested in the PMP?

FoBRA has little confidence that a workable solution is in sight. There needs to be urgent discussion between the Council, the universities and residents to agree the compromises that will inevitably be needed to allow all this to work.

FoBRA therefore seeks this Scrutiny Panel's assurance that the long-overdue Student Housing Strategy is now developed as a matter of urgency, is regularly reviewed, engaging openly with the universities and residents, and that the Placemaking Plan and its reviews are guided by it.

Thank you.

Chris Beezley

Federation of Bath Residents' Associations

**Bath and North East Somerset Council
Planning, Housing and Economic Development
Development and Scrutiny Panel, 5 January 2016**

**Statement by Mr Neil Latham
Response to Student Accommodation (Placemaking Plan) paper**

Thank you for this opportunity to respond to the Student Accommodation paper tabled at this meeting.

I would like to start by confirming the University's desire to work with the Council and the community in developing our plans for student housing in the city and wider region. In 2012, the University did not object to the Article 4 proposals about restrictions on the development of houses of multiple occupation (HMOs), recognising the impact in wards such as Oldfield Park and Westmoreland. In 2016, we hope to see our continued contribution to the dialogue around student housing.

The data presented in sections 5.10 to 5.15 of the paper does not align with our own projections, which indicate much more modest growth. We will be preparing a full response to the Placemaking Plan consultation and would welcome a meeting with the Council to jointly update the student number projections and housing estimates. In summary, by 2020/21 our estimated number of additional bedspaces is approximately 1,100 (equivalent to around two Green Park House sized developments or three Twerton Mill developments) rather than the 3,895 quoted

We are working on several new initiatives:

- Conscious of the impact HMOs have on the city, we are in the early stages of planning a pilot scheme to house some continuing students (i.e. 2nd and 3rd year undergraduates). This will involve looking at how we can offer affordable alternatives to HMOs using some of our own accommodation stock. The pilot will use part of the University's income from a growing summer lettings business to subsidise term time rental.

- We recognise that all new accommodation does not need to be in the city. While the paper before the Panel focuses on Bath, we must not forget the wider region when considering opportunities for student housing; after all we are in Bath and North East Somerset. We have excellent transport links into Bath, particularly on the routes from Bristol. We would welcome the opportunity to discuss possible sites with the Council that fall along those key transport routes into the city.
- We are also investigating the possibility of some accommodation in Wiltshire to support those studying at Corsham Court.

A recent study by Oxford Economics found that the student population in Bath represents 17.4% percent of the population which is broadly equal to that of Nottingham and lower than other university cities such as Oxford and Cambridge. For BaNES as a whole, the percentage is much lower at around 10.9%. We therefore believe that Bath does not 'over perform' as a host to higher education as some people have suggested, and has the capacity to benefit from some further carefully managed expansion. That benefit is illustrated by the Oxford Economics reports which found that in 2014/2015 Bath Spa University and its students generated a value-added contribution of nearly £100 million to the Bath and North East Somerset economy and supported 1 in every 49 jobs.

I would like to close by saying that our students are an extremely important part of this community. They don't just contribute economically, but bring a wealth of creativity and innovation, and also contribute to the cultural life of Bath.

Thank you.



OXFORD
ECONOMICS



THE ECONOMIC IMPACT OF BATH SPA UNIVERSITY

OXFORD ECONOMICS

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Headquartered in Oxford, England, with regional centres in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC. We employ over 200 full-time people, including more than 130 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Our global team is highly skilled in a full range of research techniques and thought leadership capabilities, from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics. Underpinning our in-house expertise is a contributor network of over 500 economists, analysts and journalists around the world and our heritage with Oxford University and the academic community.

Oxford Economics is a key adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base now comprises over 1000 international organisations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

November 2015

All data shown in tables and charts is Oxford Economics' own data, except where otherwise stated and cited in footnotes.

All information in this report is copyright © Oxford Economics Ltd.

This report is confidential to Bath Spa University and may not be published or distributed without their prior written permission.

The modelling and results presented here are based on information provided by third parties, upon which Oxford Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

CONTENTS

Executive summary	2
Introduction	4
1. Employment contribution	7
1.1 Total employment	7
1.2 The University's own employment	8
1.3 Supply chain and consumer spend contribution	9
1.4 Student subsistence spending	11
1.5 Visitors to students spending	11
2. GDP contribution	12
2.1 Total GDP contribution	12
2.2 Direct GDP contribution	12
2.3 Supply chain and consumer spend contribution	13
2.4 Student subsistence spending	14
2.5 Visitors to students spending	14
3. Tax contribution	15
3.1 Total contribution	15
3.2 The University and its staff's contribution	15
4. Conclusion	16
5. Methodological Appendix	18

THE IMPACT OF BATH SPA UNIVERSITY'S 2015/16 EXPANSION

STUDENT DENSITY AND ECONOMIC IMPACT
26 NOVEMBER 2015

INTRODUCTION

This study represents an extension of the analysis carried out by Oxford Economics to identify the economic impact of Bath Spa University in 2014/15. The University is planning to expand its student and staff numbers in 2015/16.¹ It is also planning to enlarge its offer of student accommodation outside the city centre. Bath Spa University commissioned Oxford Economics to investigate the impact of this expansion on the student density in Bath city centre and on the economic activity supported by the institution in the district.

To investigate the contribution of Bath Spa University's expansion and student housing developments, each chapter of the report looks at a different aspect. It is ordered as follows:

- Chapter 1 looks at the estimated changes in the student density in Bath city centre and BANES as a whole over the period 2011-2016.
- Chapter 2 investigates the estimated employment, gross value added contribution to GDP and taxes supported by the University, its students and visitors to these students in 2015/16.

¹ The student body is projected to increase by 500 students and the University is projected to hire 50 additional members of staff in 2015/16

1. STUDENT DENSITY IN BATH CITY CENTRE

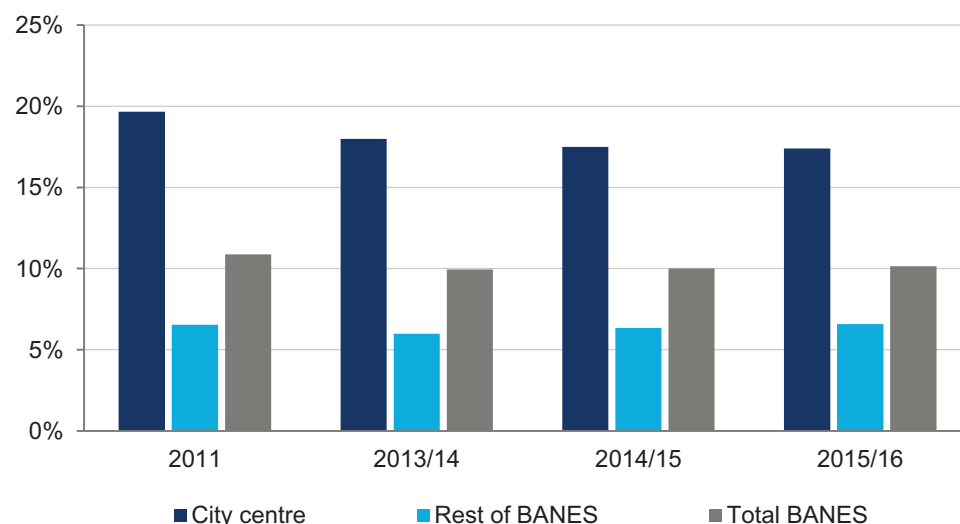
Using Census data, Oxford Economics calculated the student density for each ward in Bath and North East Somerset in 2011. The wards defined as city centre² were then aggregated to estimate what proportion of the resident population was made up of students in 2011.

In order to grow this ratio forward, Oxford Economics used the following:

- HESA data “HE student enrolments by HE provider” for Bath Spa and the University of Bath were employed to grow the number of students forward (the numerator of the ratio)
- ONS’ mid-year population estimates for BANES were used to grow forward the total population (the denominator of the ratio)
- Information provided by Bath Spa University on new student housing developments since 2013/14 was used to relocate students among wards in BANES

The estimation’s results are shown in Figure 1. Census data (2011) suggest that full-time students represented 10.9 percent of the population in the district in 2011. The student density was higher in the city centre than in the rest of BANES (19.7 percent versus 6.5 percent). However, estimates suggest that over time the student density in the city centre will decline from 19.7 percent in 2011 to 17.4 percent in 2015/16 and the student density in the district will shrink from 10.9 per cent to 10.1 percent over the same period.

Fig. 1: Estimated share of the population enrolled in full-time study in Bath and North East Somerset, 2011-2016



Source: ONS Census, ONS Population Estimates, HESA, Oxford Economics

² The following wards identify Bath city centre: Weston, Lambridge, Walcot, Newbridge, Westmoreland, Abbey, Widcombe, Bathwick, Lyncombe, and Odd Down.

2. THE ESTIMATED ECONOMIC IMPACT OF BATH SPA IN 2015/16

Bath Spa University plans to increase its staff and student number in 2015/16. This will have an impact on the following:

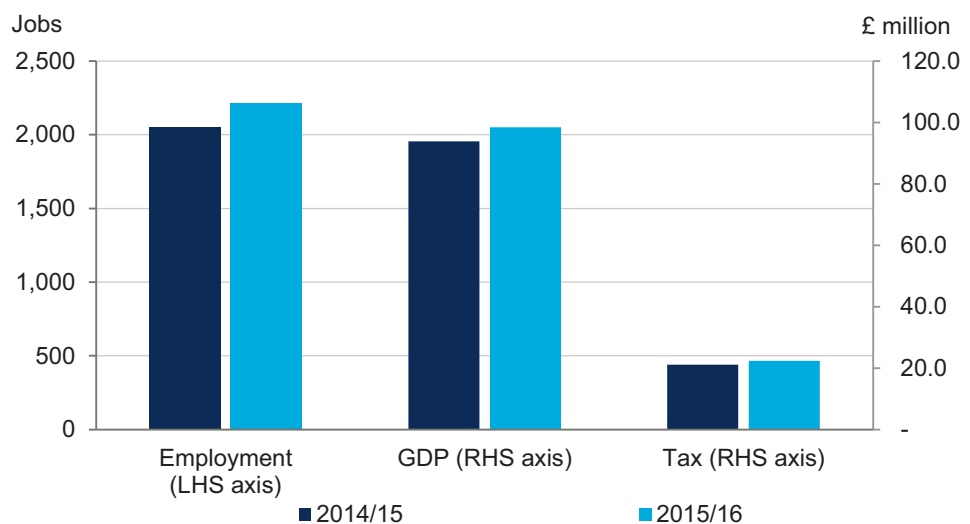
- Direct employment within the University itself
- Direct GVA, as the compensation of employees will increase
- Taxes paid by the University itself and its employees
- The induced impact, as additional staff will be paid wages which will be spent in the local area
- Students' subsistence spending
- Expenditure by visitors to students

In 2015/16, Bath Spa University and its students are estimated to support nearly 2,220 people in employment in Bath and North East Somerset, 8 percent more than in 2014/15. In 2015/16, some 1,016 people (or 46 percent of the total) will be employed by Bath Spa University itself. Subsistence spending by students who moved to the district are estimated to support another 1,026 jobs.

In total, the University and its students will make a £98.5 million gross value added contribution to Bath and North East Somerset's GDP in 2015/16, 5 percent more than in 2014/15. The largest share of this (47 percent) was generated by the University itself. The additional students made a £44.4 million gross value added contribution to GDP.

In 2015/16, the University is estimated to make a total tax contribution of £22.4 million, 6 percent more than in 2014/15. The University and its staff will be responsible for the largest share of the total. Council tax paid by the University's staff is projected to increase by 7 percent over this period.

Fig. 2: Economic impact of Bath Spa University in BANES, 2014/15 vs 2015/16



Source: Oxford Economics

26 November 2015

All data shown in tables and charts is Oxford Economics' own data, except where otherwise stated and cited in footnotes.

All information in this report is copyright © Oxford Economics Ltd.

This report is confidential to clients of Bath Spa University and may not be published or distributed without their prior written permission.

The modelling and results presented here are based on information provided by third parties, upon which Oxford Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

To discuss the report further please contact:

Alice Gambarin: agambarin@oxfordeconomics.com

Oxford Economics

Broadwall House, 21 Broadwall, London, SE1 9PL, UK

Tel: +44 207 803 1400

EXECUTIVE SUMMARY

Bath Spa University supported over 2,050 jobs in Bath and North East Somerset in 2014/15 – equivalent to one in every 49 jobs in the district.

The University itself employs 966 people. This makes it the fifth largest employer in Bath and North East Somerset. It is considerably more than are employed by some of the city's most famous institutions. Bath's museums, historical sites and buildings employ 292 people, while Bath Rugby employs 130 people.

The University's employees are highly embedded in the local community. In 2014/15, 420 of the University's staff (or 43 percent of total) lived in Bath and North East Somerset. Another 430 (or 44 percent of total) lived in the wider South West.

2,050 JOBS

Supported by Bath Spa University and its students in Bath and North East Somerset in 2014/15

This is equivalent to one in every 49 jobs in the local area.



The University employs a wide range of people with different skills sets and backgrounds. Some 55 percent of roles are academic in teaching and research. The remaining 45 percent of the people are employed in administrative, technical or managerial roles.

In total, the University generated a value-added contribution of £93.9 million to the Bath and North East Somerset economy in 2014/15. This is equivalent to 2.0 percent of the district's economic output. Of this, the University supported a £51.7 million contribution and the University's additional students and their visitors the remaining £41.7 million contribution to GDP.

In 2014/15, Bath Spa University made a total tax contribution of £21.1 million to the UK Exchequer. This could fund the Royal United Hospital's and Royal National Hospital for Rheumatic Diseases' running cost for about a month.

£93.9 m

Economic activity supported by Bath Spa University and its students in 2014/15

This is equivalent to 2.0 percent of the economic output of Bath and North East Somerset.

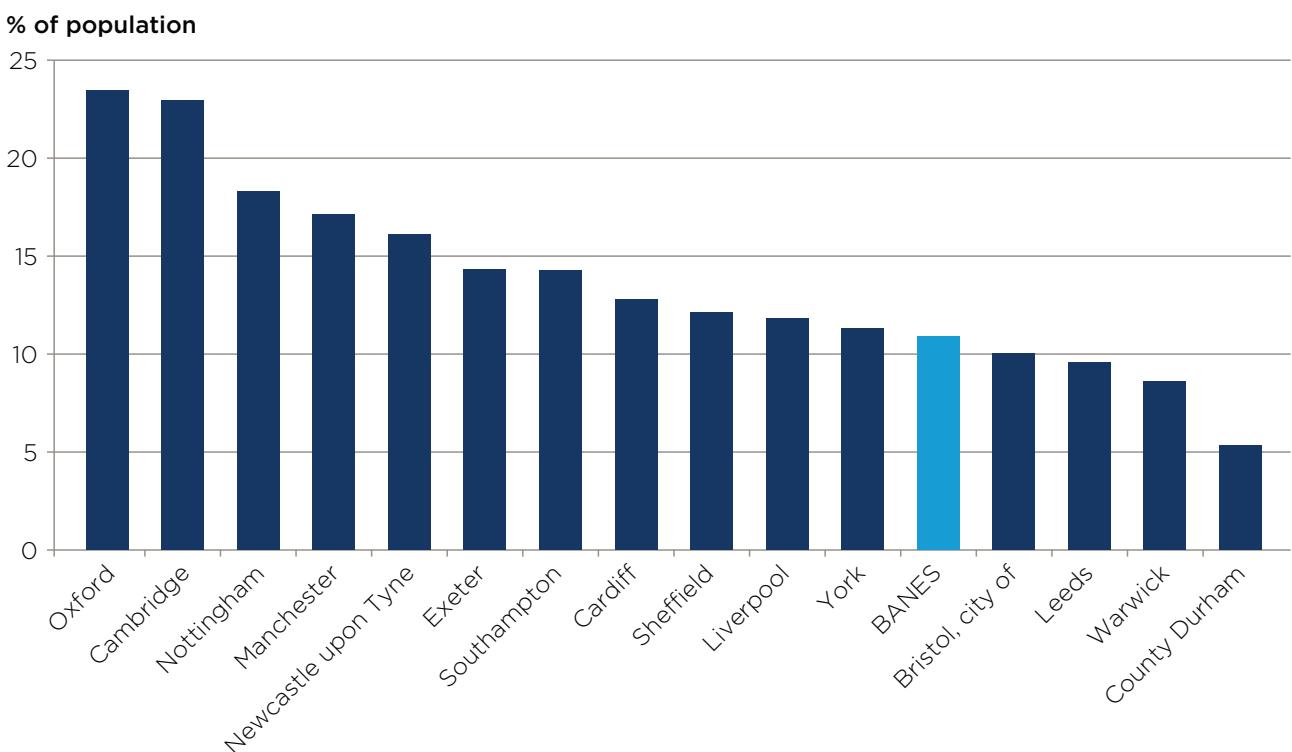


INTRODUCTION

This study investigates the economic contribution Bath Spa University makes to the district of Bath and North East Somerset. It does so by looking at the additional expenditure the University and its students bring to the local area. This stimulates economic activity at many firms across the district, boosting employment, output and tax receipts.

Bath Spa is one of two universities in Bath and North East Somerset. The Office of National Statistics' (ONS) Census data (2011) suggests that full-time students represent 10.9 percent of the population in the district. Although this is above the average of 5.4 percent for England and Wales, it is significantly below many local authorities in which some of the UK's most prominent universities are found (Figure 1).

Fig. 1: Share of the population enrolled in full-time study in the local authority districts which are home to the Russell Group of Universities, in comparison to Bath and North East Somerset



Source: ONS

As the Council's economic strategy sets out for 2014-2030, "Bath's two universities are key to the supply of highly qualified workers and are also a source of entrepreneurialism and local economic growth with several significant companies in the city having spun out of, or benefitted from, links with the Higher Education sector."¹

4 1. Bath and North East Somerset Council, "Economic Strategy Review 2014-2030", 2014, page 34.

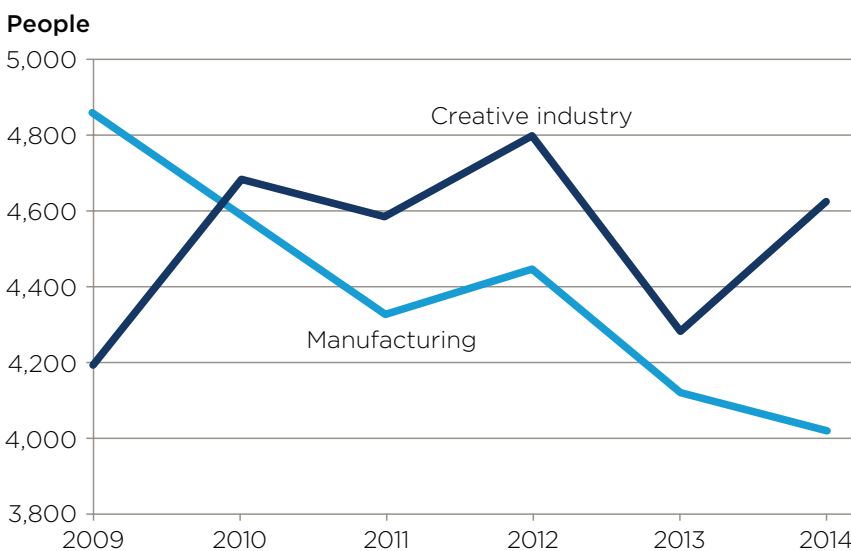
To investigate the contribution Bath Spa University makes to the Bath and North East Somerset economy each chapter of the report looks at a different metric. It is ordered as follows:

- Chapter 2 looks at the University’s contribution to employment in the district in 2014/15.
- Chapter 3 investigates the gross value added contribution to GDP supported by the University’s, its students’ and visitors to these students’ expenditure.
- Chapter 4 calculates the tax receipts that flow from the economic activity the University’s and its students’ expenditure support.

It is however important to remember that the University and its students contribute to the district’s economy through other ways which are difficult to quantify using these standard metrics. The University is focused on creativity, culture and enterprise.² Its research effort has spillover effects for local businesses, enhancing their rate of innovation and productivity. It contributes to the cultural life of Bath through its facilities and the events it organises and sponsors attracting additional tourist income into the district. While no attempt is made to quantify these non-expenditure related contributions, the growing importance of the disciplines pursued by the University in terms of local employment is illustrated by the numbers employed in the manufacturing and creative sectors in Bath and North East Somerset (Figure 2).



Fig. 2: Employment in the manufacturing and creative industries in Bath and North East Somerset, 2009-2014



Source: ONS

2. Bath Spa University, "Strategy 2020", September 2015.

INTRODUCTION TO ECONOMIC IMPACT ANALYSIS

The study undertakes a standard economic impact assessment, looking at three forms of expenditure (Figure 3).

- The first channel of impact is the direct effect. This is the economic activity generated by the University itself, for example by employing academic and operational staff and by generating economic activity through its payment of wages and generation of surpluses.
- The second channel of impact is the indirect effect, which is the employment and activity which is supported through the University's local supply chain, as a result of its purchases of inputs of goods and services from local suppliers.
- The final channel, known as the induced effect, captures the economic activity supported by staff and those employed in direct supply chains spending their wages on goods and services in the local economy.

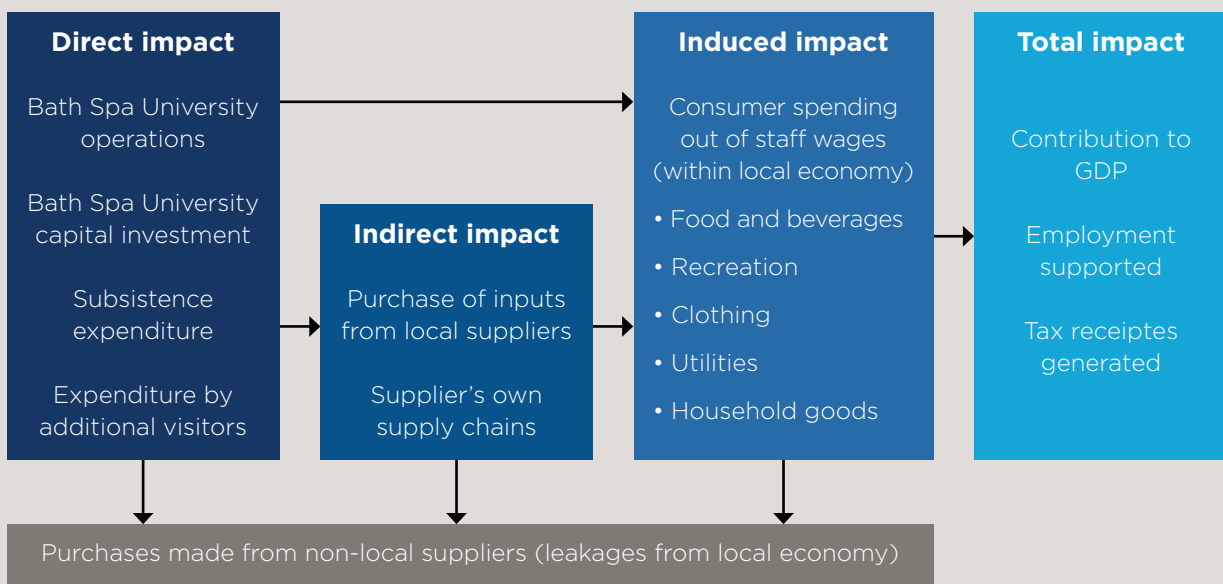
The indirect and induced impacts are calculated using multipliers derived from regional input-output tables. These are developed by combining ONS (2014) input-output data for the whole UK with the

technique developed by Flegg, et al. (1995).^{3,4} Employment and tax estimates are calculated using ONS data on labour productivity, average earnings in each industrial sector and tax allowances rates for 2014/15.

The scale of the University's impact for each of the three channels is measured using three metrics:

- Gross value added – Gross value added is the contribution an institution or company makes to Gross Domestic Product (GDP). It is most simply viewed as the value of the output it produces less the value of inputs used in that output's production.
- Employment – measured in headcount terms rather than on a full-time equivalent (FTE) basis to facilitate comparison with ONS employment data.
- Tax receipts – this study considers the receipts generated from Income and Corporation taxes, employee and employer National Insurance contributions and other indirect taxes paid by employees (such as VAT).

Fig. 3: The channels of economic impact



3. ONS, *Input-output analytical tables - 2010*, ed. Richard Wild (Newport: ONS, 2014).

4. Webber C. D. and Elliott M. V. Flegg A. T., "On the application of location quotients", *Regional Studies*, 29 (1995): 547-61.

1. EMPLOYMENT CONTRIBUTION

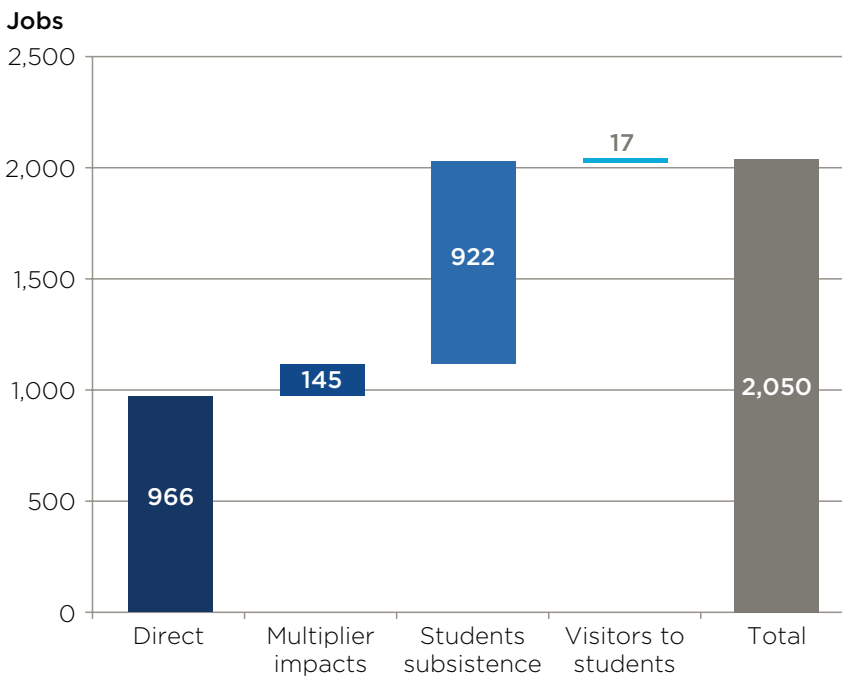
1.1 TOTAL EMPLOYMENT

The University stimulates employment in the local area by bringing additional expenditure into the economy. The University employs people, it purchases goods from local suppliers, it pays wages which get spent in local retail and leisure outlets, its students undertake expenditure and their visitors pay for accommodation and food etc.

In 2014/15, Bath Spa University and its students supported over 2,050 people in employment in Bath and North East Somerset. Therefore 1 in every 49 jobs in the district was to some degree dependent on the University's existence.

The major sources of employment are the University itself and economic activity stimulated by the subsistence spending of students attracted into the district to study at the University. In 2014/15, some 966 people (or 47 percent of the total) were employed by Bath Spa University itself (Figure 4). Subsistence spending by students who moved to the district supported another 922 jobs (or 45 percent). The University's expenditure on inputs of goods and services, wage-financed expenditure and the spending by visitors to the students accounted for the remainder of the jobs supported.

Fig. 4: Bath Spa University's total employment contribution, 2014/15

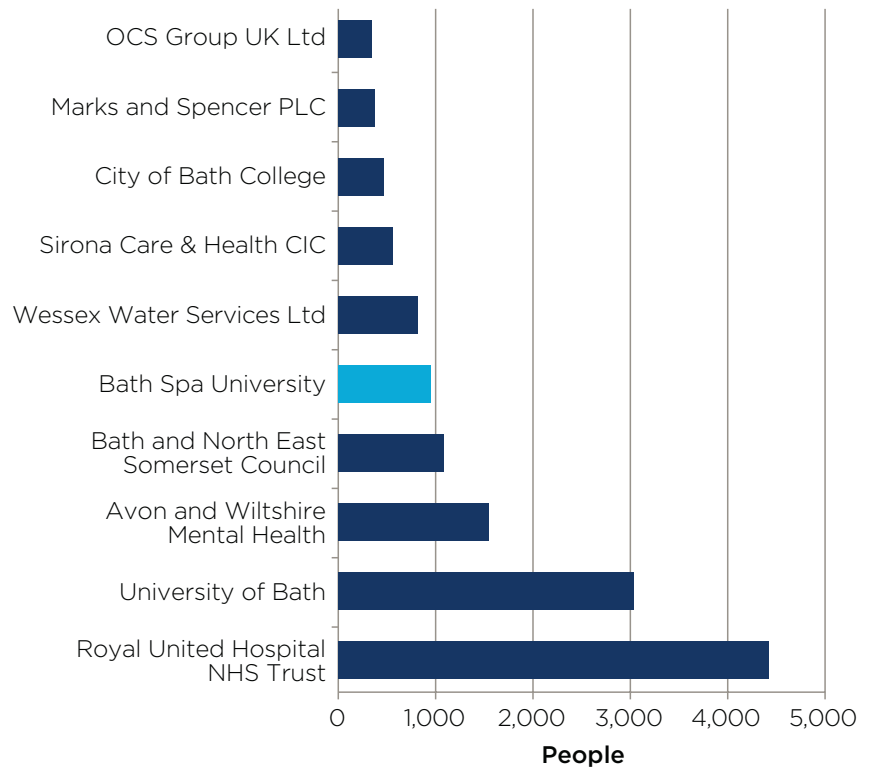


Source: Oxford Economics

1.2 THE UNIVERSITY'S OWN EMPLOYMENT

The University itself maintains a large workforce to deliver teaching, research and run its day-to-day operations. In 2014/15, it employed 966 people. This makes it the fifth largest employer in Bath and North East Somerset (Figure 5). An alternative way of putting the University's own employment into context is to compare it to some of the institutions in Bath for which the city is most famous. Its museums, historical sites and buildings which are visited by millions of people each year employ 292 people.⁵ Bath Rugby which play at the historic Rec Ground employs 130 people.⁶

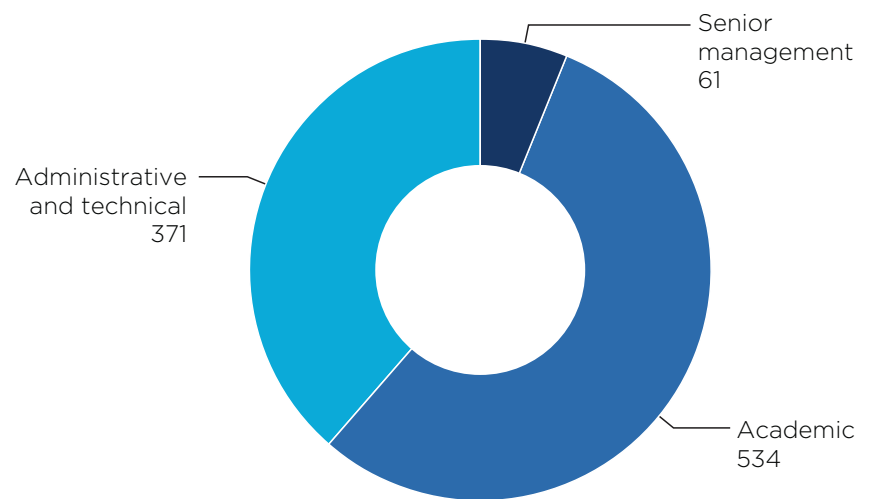
Fig. 5: Ten largest employers in Bath and North East Somerset



Source: Bath Spa University, The University of Bath, Bath and North East Somerset Council

The University employs a wide range of people with different skills and backgrounds. Besides the employees engaged in academic activity, which constitute over half of the University's workforce, it also employ hundreds of workers in its administrative departments and as senior management staff (45 percent of their workforce). Bath Spa University offers employment opportunities for people across the skills spectrum (Figure 6).

Fig. 6: Staff by major category, 2014/15



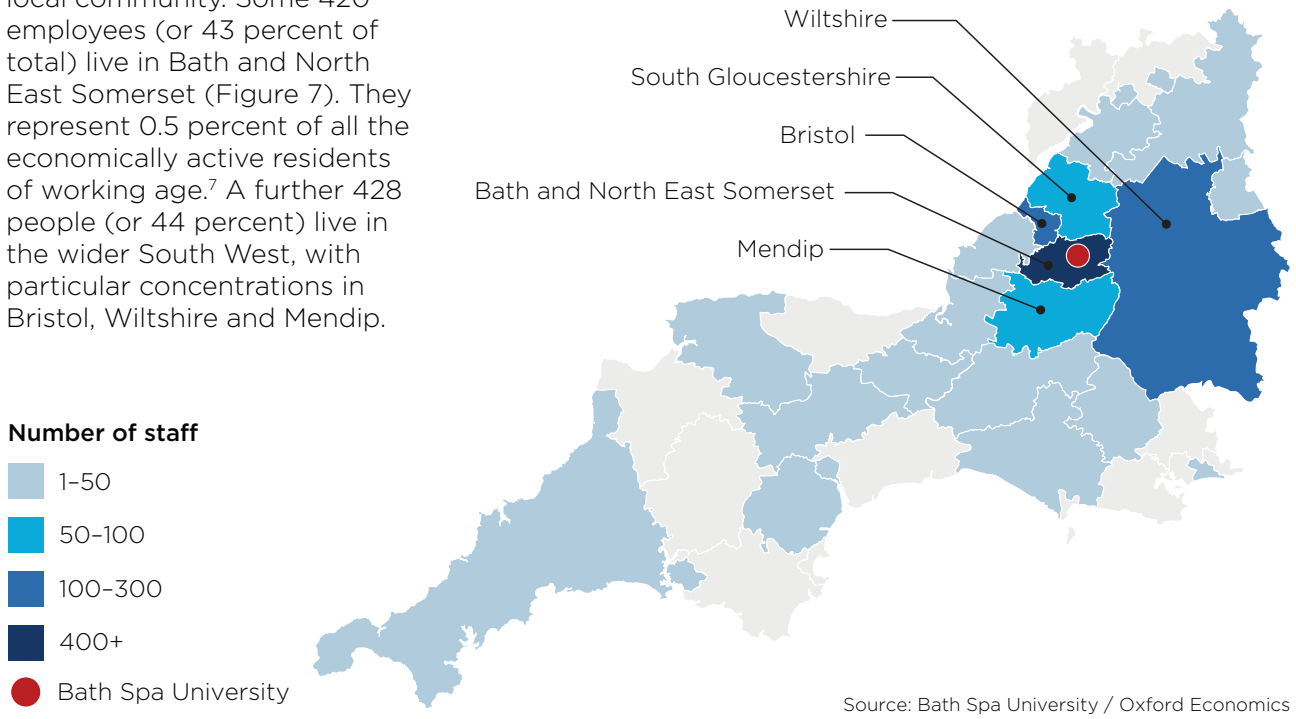
Source: Bath Spa University

5. Employment data sourced from ONS Business Register and Employment Survey for 2014 for museum activities (SIC91020) and the operation of historical sites and buildings and similar visitor attractions (SIC91030).

6. Bath Rugby Limited, (2015), 'Full accounts made up to 30/6/2014'.

The University's employees are highly embedded in the local community. Some 420 employees (or 43 percent of total) live in Bath and North East Somerset (Figure 7). They represent 0.5 percent of all the economically active residents of working age.⁷ A further 428 people (or 44 percent) live in the wider South West, with particular concentrations in Bristol, Wiltshire and Mendip.

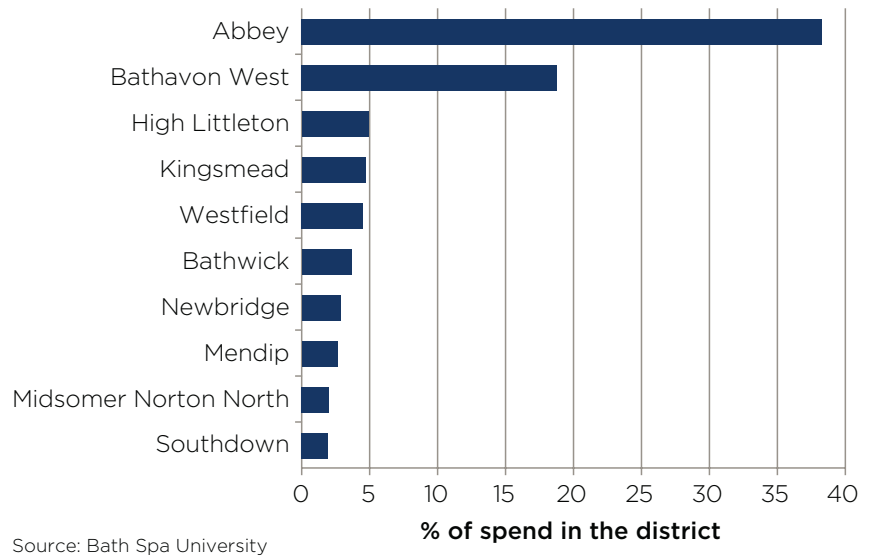
Fig. 7: Home locations of Bath Spa University's employees, 2014/15



1.3 SUPPLY CHAIN AND CONSUMER SPEND CONTRIBUTION

Bath Spa University sources many of the goods and services it purchases to operate locally. In 2014/15, the University spent £3.5 million on inputs from over 420 suppliers⁸ in Bath and North East Somerset. Suppliers located in Abbey and Bathavon West wards received 38 and 19 percent of the expenditure, respectively (Figure 8).

Fig. 8: Location of Bath Spa University's suppliers within the district by contract value, 2014/15



7. ONS, Annual Population Survey.

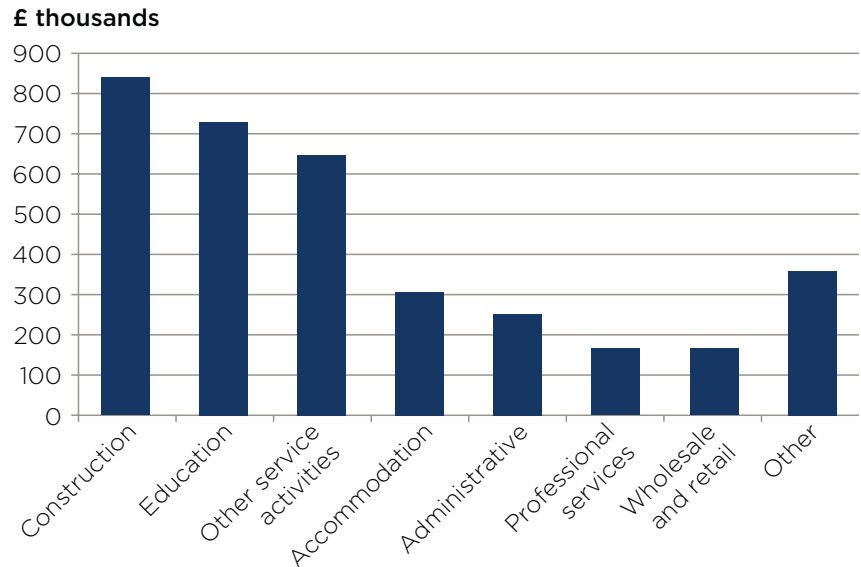
8. This study assumes that one postcode equals one business.

Nearly a quarter (or £844,000) of the value of the University's procurement budget from suppliers within the district was spent with firms in the construction industry (Figure 9). Local suppliers in the education industry (such as visiting lecturers) ranked second, receiving contracts worth £740,000. Other service activities (such as costs associated with transport) ranked third receiving contracts worth £650,000.

The University procurement expenditure stimulated activity at firms across the district. It is estimated to have supported 50 people in employment in Bath and North East Somerset.

In 2014/15, the University's 420 employees who lived in Bath and North East Somerset received £10.7 million in wages before tax. They spent a proportion of their income in local retail and leisure outlets, helping to sustain local businesses. Their expenditure and that of people working in the University's supply chain is estimated to support 100 jobs in the district. Most of these are in retailing and the hospitality sector.

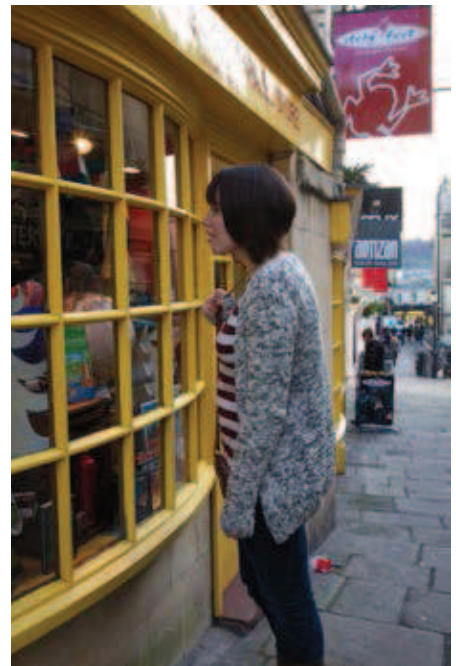
Fig. 9: Procurement spend by industry, 2014/15



Source: Bath Spa University

It is likely this is an underestimate. Many of the University's staff and those employed in its direct supply chain that live elsewhere are likely to visit the district's retail and leisure outlets during lunch-breaks or after work. But it is difficult to estimate the extent of this spend.

The University has an employment multiplier of 1.15 in Bath and North East Somerset. So for every 100 jobs at the University itself, it supports a further 15 across the district.



1.4 STUDENT SUBSISTENCE SPENDING

Bath Spa University attracts students to Bath and North East Somerset from other parts of the world and keeps students previously resident in the locality. Some 4,330 of the University's students (or 57 percent of the student body) can be classified as 'additional' to the local area.⁹ These students are estimated to have spent £59.0 million on local transport and food and personal items from retail and leisure outlets in Bath and North East Somerset. This 'extra' expenditure in the district helps to sustain many local businesses.

The students' subsistence spending is estimated to stimulate economic activity across the district. In total, it is estimated to support an additional 920 jobs in Bath and North East Somerset.



1.5 VISITORS TO STUDENTS SPENDING

Friends and relatives visiting the students who moved to Bath and North East Somerset to study at Bath Spa University spend money in the district, generating economic activity and supporting employment in local businesses.

Visitors to students at Bath Spa University spent £0.8 million on transport, local hotels, restaurants and bars and visiting cultural, recreational and sports attractions. Taking account of the subsequent supply chain and wage consumption impacts, this spending supported around 20 jobs in the district.

9. Additional students include students who came from outside Bath to live in the area while studying and students originally from Bath, who choose to stay because of the University.

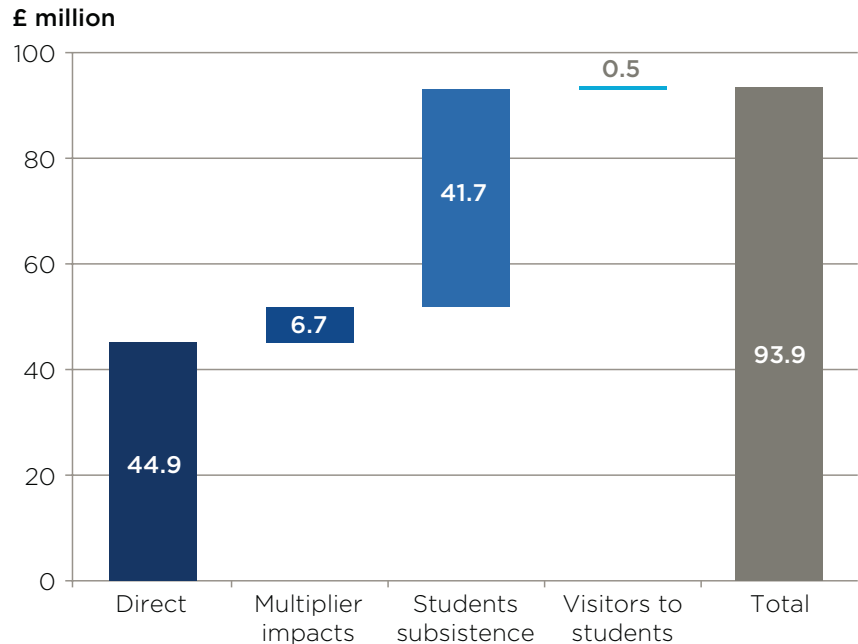
2. GDP CONTRIBUTION

2.1 TOTAL GDP CONTRIBUTION

In total, Bath Spa University and its students made a £93.9 million gross value added contribution to Bath and North East Somerset's GDP in 2014/15. This is 2.0 percent of all economic output produced in the district.

Of this, the University supported £51.7 million gross value added contribution to GDP. The majority (87 percent) of this was generated by the University itself, with the remainder resulting from its procurement from suppliers within the district and payment of wages, which in turn are spent at local retail and leisure outlets. The additional students and their visitors contributed a £41.7 million gross value added contribution to GDP (Figure 10).

Fig. 10: The contribution to GDP of Bath Spa University and its students, 2014/15

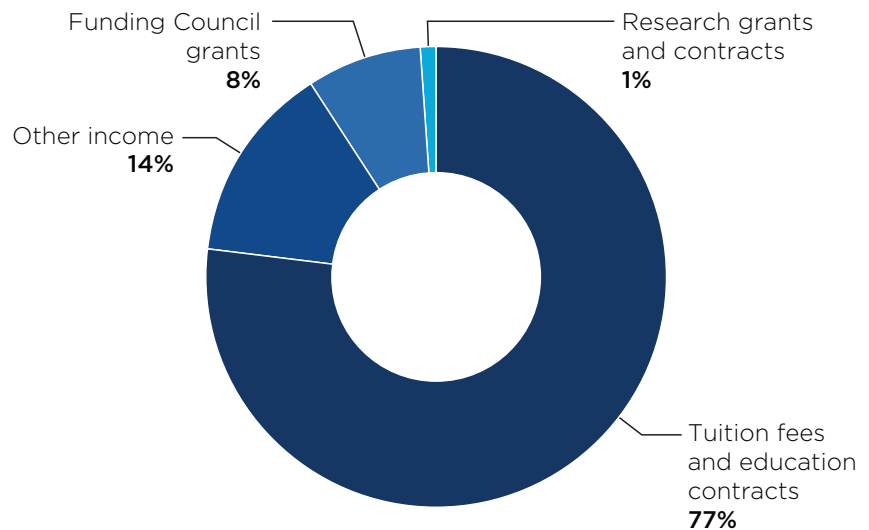


Source: Oxford Economics

2.2 DIRECT GDP CONTRIBUTION

In 2014/15, the University earned £68.8 million in income. Some £53.1 million of this came from the University's students in the form of tuition fees and education contracts (Figure 11). Another £5.1 million came from Funding Council grants and £0.9 million in the form of research grants and contracts.¹⁰

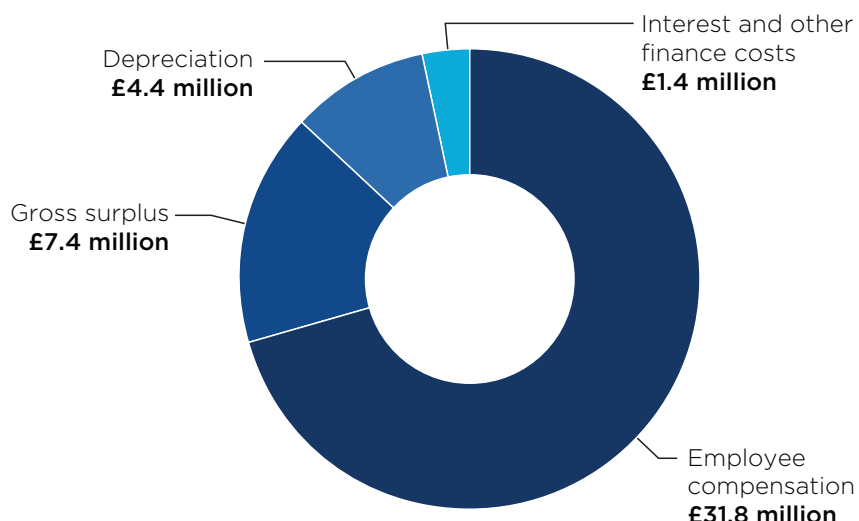
Fig. 11: The University's income by source, 2014/15



Source: Bath Spa University 2014/15 annual report

Bath Spa University spent over £61.4 million in 2014/15 on current expenditures. The University's single largest expenditure was its payment of wages and salaries to its 966 employees – and other employment costs such as pension and National Insurance contributions – amounting to £31.8 million (Figure 12). It also made a surplus of £7.4 million. Based on this information, Oxford Economics estimates the University made a £44.9 million direct gross value added contribution to GDP, or 1.0 percent of all the economic output produced in Bath and North East Somerset in 2014/15.

Fig. 12: Bath Spa University's gross value added by source, 2014/15



Source: Bath Spa University 2014/15 annual report

2.3 SUPPLY CHAIN AND CONSUMER SPEND CONTRIBUTION

The University's expenditure on inputs of goods and services and its payment of wages to staff that were subsequently spent at local retail and leisure outlets stimulated considerable activity at businesses across Bath and North East Somerset.

The University spent £3.5 million on inputs of goods and services from suppliers in Bath and North East Somerset. This was equally spread between firms in the city (51 percent of total spend) and the rest of the district (49 percent). The expenditure is estimated to support a £2.0 million gross value added contribution to GDP along the University's local supply chain.

Bath Spa University and the companies in its direct supply chain pay their staff wages. These people spend a proportion of it making purchases in local stores or buying meals in local restaurants etc. This wage-financed expenditure is estimated to support a £4.8 million gross value added contribution to GDP in the district. Most of it occurs in the retail sector and in the real estate industry.

Comparing the size of the University's own gross value added contribution to GDP with the impact it has on its supply chain and through wage consumption impacts suggest it has a GDP multiplier of 1.15. Therefore for every £100 in GDP created directly by the University, a further £15 is generated elsewhere in the Bath and North East Somerset economy.

2.4 STUDENT SUBSISTENCE SPENDING

In addition to the University's operations and the economic activity generated it directly and indirectly supports, the subsistence spending of Bath Spa University's students forms part of the overall impact of the University in Bath and North East Somerset. The 4,330 additional students' £59.0 million expenditure on transport, food and personal items is estimated to support an additional gross value added contribution to GDP of £41.7 million.

2.5 VISITORS TO STUDENTS SPENDING

Visitors to students attending Bath Spa University used local transport, stayed at hotels, paid entrance fees to the city's attractions and visited the district's restaurants and bars during their stay. This extra expenditure stimulates economic activity at local businesses. In 2014/15, visitors' to students spending is estimated to have supported a £0.5 million contribution to GDP.

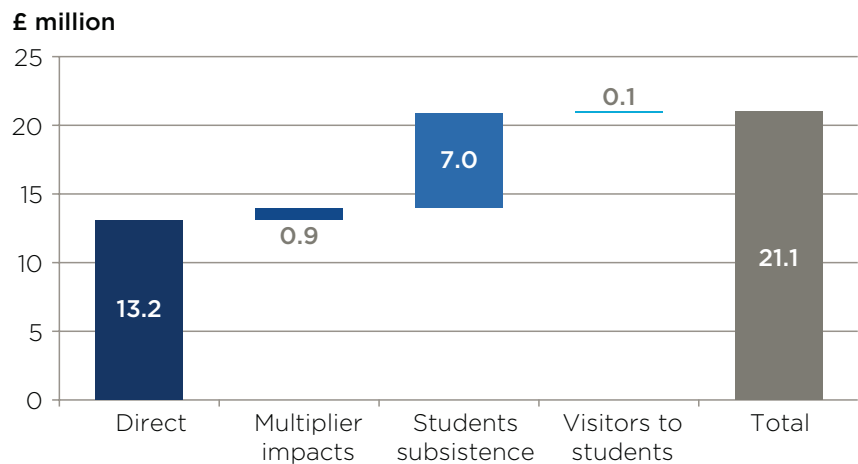


3. TAX CONTRIBUTION

3.1 TOTAL CONTRIBUTION

In 2014/15, Bath Spa University made a total tax contribution of £21.1 million to the UK Exchequer. The University and its staff were responsible for 66 percent of the total (Figure 13). Tax payments generated by the students' subsistence spending comprised a further 33 percent.

Fig. 13: Total tax contribution of Bath Spa University, 2014/15

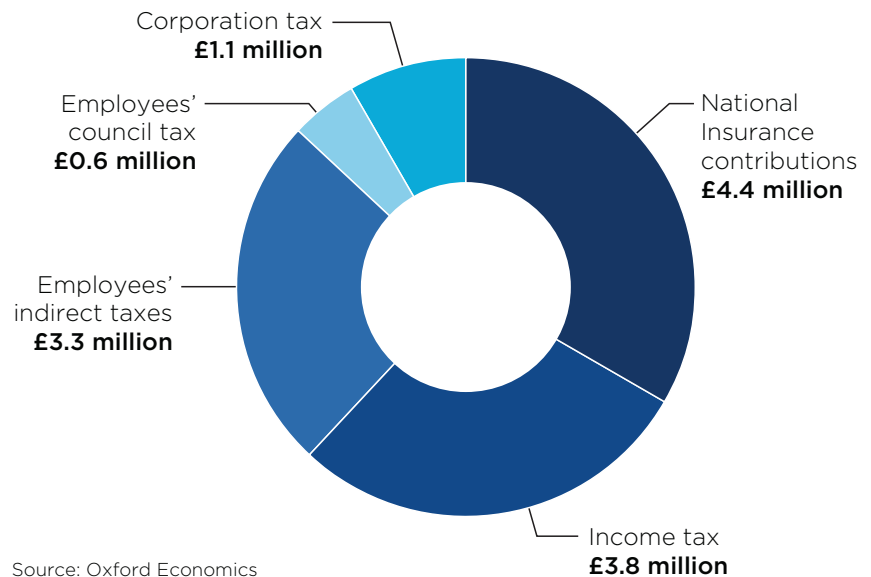


Source: Oxford Economics

3.2 THE UNIVERSITY AND ITS STAFF'S CONTRIBUTION

The University and its employees paid £13.2 million in taxes in 2014/15. Employer and employee National Insurance contributions accounted for 33 percent of the University's total direct tax contribution (£4.4 million), while Income Tax payments generated a further £3.8 million for the Exchequer. The payments of indirect taxes by Bath Spa University's employees accounted for over a quarter of the direct tax impact of the University. The University's employees paid nearly £600,000 in Council Tax in 2014/15 (Figure 14).

Fig. 14: Bath Spa University's direct tax contribution by type, 2014/15



Source: Oxford Economics

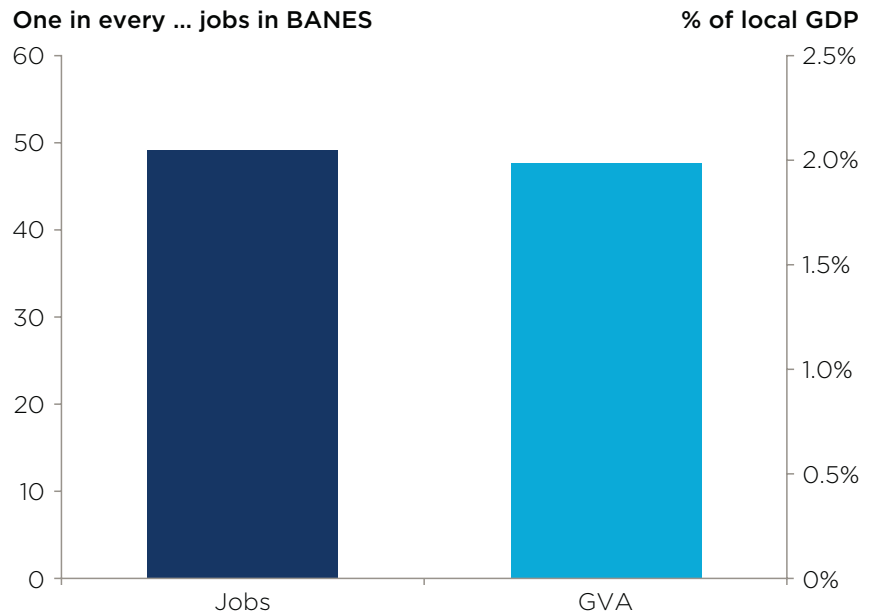
To give an indication of scale, the £21.1 million contribution to tax revenues is sufficient to pay for the Royal United Hospital's and Royal National Hospital for Rheumatic Diseases' running costs for roughly a month.

4. CONCLUSION

The total impact of Bath Spa University on Bath and North East Somerset in 2014/15 is the sum of the three channels through which it contributes to the economy - the University's activities, the subsistence spending of its students and the spending of visitors to its students.

In total, Bath Spa University, its students and their visitors are estimated to have supported one in every 49 people in employment in Bath and North East Somerset. The University also supported a value added contribution of £93.9 million to Bath and North East Somerset economy. This is equivalent to 2.0 percent of the local economy (Figure 15).

Fig. 15: The economic impact of Bath Spa University on Bath and North East Somerset, 2014/15



Source: Oxford Economics



5. METHODOLOGICAL APPENDIX

STUDENTS' SUBSISTENCE SPENDING

Bath Spa University attracts students to Bath and North East Somerset from other parts of the world and keeps students previously resident in the locality. The subsistence spending of these students would not otherwise occur in the Bath and North East Somerset economy and is, therefore, part of the overall impact of Bath Spa University.¹¹

Subsistence expenditure refers to all spending on goods and services except for their tuition fees. It includes, for instance, the purchases of items required for facilitating their study – such as transport to University and books – as well as other consumer expenditure – including spending on food, leisure and social activities. Payments to the University in the form of tuition fees and for university accommodation are removed from the calculation so as not to double count.

The Department for Business Innovation and Skills regularly publishes data on subsistence expenditure by students. The latest available covered the 2011/12 academic year.¹² Students' expenditure is made up of:

- living costs, including food, drink, personal items etc...;
- housing costs, including rent, mortgage costs, Council Tax etc...;
- participation costs, including costs of books, stationery etc..., and;
- spending on children, if any.

Making allowance for the change in living costs between 2011/12 and 2014/15 using the Consumer Price Index indicates that the average student at Bath Spa University spends £11,100 per year, including housing costs.

To calculate how much expenditure Bath Spa University brings into the district in the form of student subsistence spending, it is necessary to compare student term time and home locations. It suggests that 3,920 students came from outside Bath and North East Somerset to live in the area while studying in 2014/15. A further 590 students lived in the area while they studying at Bath Spa University, but as these students were originally from Bath and North East Somerset, their spending cannot be treated as 'additional' unless they would have left the area to go to other higher education institutions (HEIs). Using tracking data provided by the University, it has been estimated that nearly 100 percent of full-time students would have left Bath and North East Somerset to pursue higher education elsewhere.

11. The spending of students domiciled in Bath and North East Somerset prior to attending university is not deemed to be additional to the local economy as the counterfactual scenario assumes that these students would be spending money in this economy if they were not attending Bath Spa.

12. Department for Business Innovation & Skills, Student Income and Expenditure Survey 2011/12

VISITORS TO STUDENTS

The additional visitors the University attracts to the local area come from other parts of the UK and overseas. The spending profile of the two types of visitors – domestic and international – differs by a visitor's origin; therefore two methods are used to calculate the spending impact of these visitors in Bath and North East Somerset.

Visitors from overseas

The ONS' International Passenger Survey (IPS) provides detailed data on the spending of international visitors to the UK and its nations and regions, disaggregated by purpose of the trip and by nationality of the visitor. University data indicate that, for instance, there were 290 additional students from China living in Bath and North East Somerset in 2014/15. The 2011 Census data indicate that there were 1,000 people of Chinese nationality living in Bath and North East Somerset. Therefore, 29 percent of all spending by Chinese visitors to the area who were visiting friends and relatives in the area is attributed to the Bath Spa University.

Applying this methodology to the University's 650 additional overseas students who were living in Bath and North East Somerset indicates that visitors to these students spent nearly £0.4 million in the area in 2014/15.

Domestic visitors

The University's domestic students also attract visitors to Bath and North East Somerset. Although no information is available on how many visitors each additional student receives, data do exist on the average spend of a visitor from each part of the UK to friends and relatives in the South West.¹³ Using a similar approach to that employed for overseas students it is possible to estimate the spending that these domestic visitors make in the district. This study assumes that each student from outside Bath and North East Somerset gets one visitor from their home region each year. With the likelihood that some students receive multiple family visits over the course of an academic year and that parents are often involved in the transport of personal effects at the beginning and end of session, this is probably a very conservative assumption.

Following this approach, the 3,270 additional students who came to Bath and North East Somerset to study at Bath Spa University from elsewhere in the UK attracted visitors who spent over £0.4 million in the local area.

In total in 2014/15, domestic and international visitors to students at Bath Spa University spent £0.8 million on local transport, accommodation, restaurants and bars, and visiting cultural, recreational and sports attractions.

13. Great Britain Tourism Survey (2014), online data browser

Europe, Middle East, and Africa:

Global headquarters

Oxford Economics Ltd
Abbey House
121 St Aldates
Oxford, OX1 1HB
UK
Tel: +44 (0)1865 268900

London

Broadwall House
21 Broadwall
London, SE1 9PL
UK
Tel: +44 (0)20 7803 1418

Belfast

Lagan House Sackville Street
Lisburn
County Down, BT27 4AB
UK
Tel: + 44 (0)2892 635400

Paarl

12 Cecilia Street
Paarl 7646
South Africa
Tel: +27(0)21 863-6200

Frankfurt

Mainzer Landstraße 41
60329 Frankfurt am Main
Germany
Tel: +49 69 95 925 280

Paris

25 rue Tiphaine
75015 Paris
France
Tel: +33 (0)1 56 53 98 52

Milan

Via Cadorna 3
20080 Albairate (MI)
Italy
Tel: +39 02 9406 1054

Americas:

New York

5 Hanover Square, 19th Floor
New York, NY 10004
USA
Tel: +1 (646) 786 1879

Philadelphia

303 West Lancaster Avenue
Suite 2e
Wayne, PA 19087
USA
Tel: +1 (610) 995 9600

Mexico City

Emerson 150, Despacho 802
Col. Polanco, Miguel Hidalgo
México D.F., C.P. 11560
Tel: +52 (55) 52503252

Boston

51 Sawyer Road
Building 2 - Suite 220
Waltham, MA 02453
USA
Tel: +1 (617) 206 6112

Chicago

980 N. Michigan Avenue,
Suite 1412 Chicago
Illinois, IL 60611
USA
Tel: +1 (773) 372-5762

Miami

8201 Peters Road
Suite 1000
Plantation, FL 33324
USA
Tel: +1 (954) 916 5373

Asia Pacific:

Singapore

Singapore Land Tower
37th Floor
50 Raffles Place
Singapore 048623
Tel: +65 6829 7198

Hong Kong

30/F, Suite 3112
Entertainment Building
30 Queen's Road Central
Tel: +852 3103 1096

Sydney

Level 4, 95 Pitt Street
Sydney, 2000
Australia
Tel: +61 (0)2 8249 8286

Email:

mailbox@oxfordeconomics.com

Website:

www.oxfordeconomics.com

**Housing Services Update
Planning, Housing and Economic Development PDS
January 2016**

Hanover Extracare, Ensleigh

Hanover Housing Association has been allocated £2.54m of HCA funding to support the delivery of a 72 unit Extracare scheme at MOD Ensleigh North. With a total cost of over £15m, this project is also being supported by the use Hanover recycled grant, reserves and borrowing as well as £600k affordable housing capital funding from the Council.

This project is a groundbreaking approach to mixed tenure extracare delivery. It is the pilot of Hanover's new Extracare-lite product, which maximises service delivery but minimises the historic level of communal space in order to reduce both capital development and ongoing service charge costs. All units will be care-enabled, the scheme designed to HAPPI principals and with a dementia-friendly approach to all aspects of design.

In order to meet high local need for homeownership options for older persons housing, as identified by the LIN population-based formula for extracare supply, the scheme will be split 60% (43 units) for Older Person's Shared Ownership and 40% (29 units) social rent. The home ownership model is based on allowing existing home owners to buy an 80% share of an extracare unit, with the purpose of freeing up funding through the sale of their existing home to pay for future care requirements.

It is anticipated that development of the extracare scheme will commence in November 2016 and complete by February 2018.

Rough Sleeper Count

The annual estimate of rough sleeper numbers was carried out in November in partnership with DHI Reach and Julian House. Twenty two people were identified as rough sleeping, which is a reduction from twenty seven in 2014 and thirty three in 2013.

Of the twenty two people identified, nineteen are known to the Outreach Service and have been offered support and services. Ten of the rough sleepers are from outside the area with no local connection to Bath and north East Somerset; of these four have no recourse to public funds. Housing Services have met with other agencies to identify individually tailored services and assistance for all of the identified rough sleepers.

The Council commissions intensive support for rough sleepers through the Assertive Outreach service, jointly operated by Julian House & DHI Reach. The Government funding stream for this service was due to end in March 2016. However, the Supporting People & Commissioning Team has confirmed that new funding has been identified for 2016/17. This is good news and which means that this important service will be able to continue to address the needs of rough sleepers.

Meeting Specific Housing Needs

Working collaboratively with Curo, Sirona and the CCG, Housing Services have funded the major remodeling and extension of a property in Keynsham to allow a family to live together where the mother was severely disabled. Meeting her accessibility needs, the need for 24/7 carers as well as the housing needs of the rest of the family has been a significant challenge. The resulting property is testament to clever design, excellent partnership working and a landlord willing to help meet the needs of the community.

The family moved into their new home in December having lived apart for almost two years because their current accommodation could not be adapted to allow mother to live at home.

Key Projects Update

Carrswood Gypsy and Travellers Site

- All 8 permanent pitches are now occupied with Council nominated residents. Of these, 7 had a local connection to B&NES.
- The 5 transit pitches are now operational. At the time of writing 4 of these pitches were occupied and the remaining one allocated.
- Elim Housing Association, who are developing and managing the scheme, are now in the process of finalising some minor outstanding works including landscaping and lighting. Once completed the Council will be able to release the final grant payment.

Energy at Home

- Energy at Home is a Council led partnership initiative with the particular involvement of Housing Services and Corporate Sustainability that provides a full advice, grants and installation service. The new Energy at Home website provides advice and information backed up by the telephone advice line. The Delivery Provider carries out Home Energy Assessments and energy efficiency improvement works including heating and insulation.
- The current Energy at Home grant scheme provides up to £6,000 towards energy efficiency measures installed by the retrofit delivery provider and funded through a successful bid to DECC. The grant means that subject to a survey B&NES residents may be able to install solid wall and other insulation measures with no upfront installation costs. Additional grants including top up grants are available for low income and vulnerable households. Details of the scheme are available from Energy at Home on 0800 038 5680 or www.energyathome.org.uk.

Affordable Housing Programme

- The following affordable homes are forecast to complete by end of Q3
 - Knobsbury Lane, Writhlington = 7 units
 - Bath Riverside = 1 units
 - High Street, High Littleton = 9 units
 - Somerdale, Keynsham = 2 units
 - Norton Radstock Regeneration = 5 units
 - The Meadows, Keynsham = 3 units
- A 37 further rented and shared ownership homes are due for completion by the end of Q4.
- Forecast completions for 2015/16 currently stands at 152
- Regeneration proposals for the Foxhill estate are becoming a key area of work for the Enabling Team and the wider Community Regeneration Service. This is the more complex element of the Foxhill Housing Zone that also encompasses the Mulberry Park development on the former MOD Foxhill. Most recently, a series of workshops facilitated by Atlas (the HCA's advisory team for large sites) have seen senior managers from Curo and the Council working with Cabinet and Ward members to begin to develop a Charter to underpin regeneration proposals. The outcome of the workshops will be presented to SMT, PHED PDS and Cabinet in the spring, prior to a series of master planning workshops with the Community, key stakeholders and the Council in March.

The first phase of Mulberry Park has been granted Reserved Matters approval and infrastructure work will be commencing in January.

A Housing Zone capacity funding bid has been made to DCLG to provide a full time Project Officer to manage the Council's involvement in the regeneration of Foxhill and the development of Mulberry Park.

Q2 Performance

What we have done well...

100% of homelessness decisions were made within 33 days.

100% of Equalities Impact Assessments are in place.

98% of customers are satisfied with our services and we have exceeded the 90% customer satisfaction target. Putting the customer first and having high standards for the quality and timeliness of services is very important to us.

40% of advice and prevention approaches were successful in preventing or relieving homelessness compared to the target of 33%.

86 new affordable homes were delivered in the first six months of this year. We are working with delivery partners to keep on track with delivering new homes for residents.

How we will improve...

45 weeks average time to complete adaptations for disabled facilities compared with a target of 35 weeks. This is a joint service provided by the Council's Occupational Therapy (OT) service and Housing Services. Unfortunately resourcing issues have resulted in significant delays by the OTs in completing client assessments and we have also been dealing with a large number of cases that are potentially exceeding the £30k financial cap. These are complex and take significantly more time to process.

26 households in temporary accommodation at the end of September 2015. The number of households approaching the service threatened with homelessness increased by nearly 20% in the second quarter, which combined with some key staff vacancies, has led to a higher number being placed in TA. We hope to fill these vacancies by the end of Q3.

71% of complaints dealt with within corporate timescales, compared with a target of 87%. Two complaints breached the 3-week timescale in the second quarter. Both complaints were complex and took time to resolve and in both cases the complainant was kept fully informed.

22 empty properties were brought back into use, compared with a target of 25. The changes in Council tax means there is no longer an incentive for empty home owners to notify the Council. This means that it is harder to identify empty properties. Housing Services will be using National Empty Homes Week to run a campaign that encourages residents to report likely empty homes and help boost the number that are identified.

1. Customer

	<u>1st Qtr 15/16</u>		<u>2nd Qtr 15/16</u>		<u>Target</u>
Customer Complaints (responded within corporate timescales)	100 %	●	71.4 %	● ↓	87%
Customer Satisfaction	97.9 %	●	97.8 %	● ↓	90 %
Staff Sickness	2.8 %	●	3%	● ↓	5%
Telephone response (responded within corporate timescales)	88.4 %	●	85.7 %	● ↓	90 %
Equalities Impact Assessment	100 %	●	100%	● →	100%
Invoices paid 30 days	97.6 %	●	92.9 %	● ↓	93%
<u>1.1 Customer Service Standards</u>					
Customer Satisfaction	97.9 %	●	97.8 %	● ↓	90%
Customer satisfaction with improvements made to their home	100%	●	98.5 %	● ↓	90%
Customers treated fairly	97.9 %	●	97.8 %	● ↓	100%
Homelessness decisions	100 %	●	100 %	● →	90%
Performance information published	Completed	●	Completed	● →	Completed
<u>2. Finding and Keeping Housing</u>					
Homelessness cases prevented	38.1 %	●	40%	● ↑	33%
Homelessness decisions	100%	●	100%	● →	90%
Temporary Accommodation	18	●	26	● ↓	24

1St Qtr 15/16 2nd Qtr 15/16 Target

3. Improved Homes

Total time to complete adaptations - Average time from initial enquiry to completion in weeks

36 ● 45 ● ↓ 35

Additional HMO Licences issued

98.4% ● 98.5% ● ↑ 80%

Customer satisfaction with improvements made to their home

100% ● 98.5% ● ↓ 90%

Initial HMO Licence inspections

100% ● 100% ● → 100%

4. More Homes

Empty properties brought back in to use

8 ● 22 ● ↑ 25

Deliver 480 new affordable homes over a 3 year period 2015-2018 comprising both intermediate housing & social homes for rent (cumulative)

2.3% ● 17.9% ● ↑ 16%

Percentage of permanent Gypsy and Traveller pitches occupied

100% ● 100% ● → 70%

This page is intentionally left blank