Planning: Annual Monitoring Report

1 April 2004 - 31 March 2005

Southampton

...a smarter, safer, cleaner city

SOUTHAMPTON CITY COUNCIL

2005 Annual Monitoring Report

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Indicators - current trends

- ↑ Improved
- ↘ declined
- → unchanged

Foreword

This first Annual Monitoring Report demonstrates that excellent progress is being made, in particular, towards targets in the field of housing provision and quality of life.

Improvements in transport provision are being maintained, and targets are being met in most cases; economic strategy is progressing towards ensuring that the growth in knowledge based industry, training and maintaining the city's strength in its retail economy is being achieved.

Environmental care and Sustainable living conditions are being achieved through increases in re-cycling, use of renewable energy, and protection of the environment; careful use of natural resources as levels of employment and housing provision grow, will become an increasingly important area within the monitoring programme, as the system progresses.

Jill Baston

Councillor Jill Baston
Cabinet Member for Environment and Transport

1.0 Introduction

The Annual Monitoring Report is intended to provide information to measure the effectiveness of policies set out in the City of Southampton's Local Plan. Where possible, targets and indicators have been included in relevant policies, to assist in the monitoring process.

Changes in policy may be required where data illustrates that targets are not being reached, or where more broadly based aims and objectives are not being met.

Since this is the first Monitoring Report to be put together in relation to the City's Local Plan policies, there will be areas of work where relevant data is not available, and an assessment of policy effectiveness difficult to reach.

Similarly, there is not a baseline or target figure on every issue referred to in the Local Plan. Data availability is expected to improve, once the reports start to be put together on a regular basis, and collection procedures become more established.

The key elements which need to be addressed are related to housing provision, urban renaissance and quality of life, economic growth, transportation, and environmental and sustainability issues.

In the future, as the City Council begins to produce its Local Development Documents which will be set out to meet the vision of the core strategy, their content will be designed so that the extent to which the policies are being achieved can be compared with the strategy.

At the present time, the monitoring process will assess whether the soundness upon which the plan is based still holds good; that the plan is up to date; that the policies, where relevant, are being implemented and are guiding development, and where additional policies may be needed, as part of the new system.

2.0 Housing Issues

The aim and objective of urban renaissance is to create a quality of life which makes living in an urban area desirable. Development should be concentrated in urban areas, to ensure the retention of Greenfield land, and re-use of brownfield land, which should be combined with a higher quality in urban design. Deprived urban areas are the regeneration priority.

Targets

- To reduce the number of unfit properties in the private sector, and improve the Council's own housing stock, with more reaching the decent homes standard
- To meet housing need, particularly on an affordable basis; especially for key groups, with a target of 500 dwellings a year, and affordable provision of 300 dwellings per year.
- To meet the Structure Plan housing target (7,330 dwellings between 1996 – 2011)
- Co-ordinating investment in housing, with investment in economic and environmental needs
- Encouraging movement back into the City's central area, by building more residential property
- To seek to reduce the need for private car use in the urban environment
- Improve the quality, and make homes "fit to live in".
- To reduce the levels of fuel poverty
- To reduce the number of households in housing need on the housing register
- Improving the energy efficiency of the housing stock
- To increase the density of housing provision on brownfield land
- To maximise the use of empty properties
- To increase the supply of one and two bedroom properties, to reflect household size decreases
- To assess the needs of gypsies and travellers, to help eliminate unauthorised encampments

2.1 Increasing housing completions

Key Findings and Indicators

In 1996, the Hampshire Structure Plan required that a provision for 7,330 dwellings should be made within the City by 2011. This would lead to a delivery of approximately 500 dwellings per year.

Since this date higher rates of housing completions have been achieved; in the financial year 2004/05 a total of 1009 completions have been achieved[1], which is double the expected delivery rate, and the highest rate of return in Hampshire.

Owing to the decrease in household size, approximately 80% of all permissions have been for flats.

Average density figures are increasing, and revised figures for the period 2004/05 have placed a minimum density of 100 dwellings per hectare on sites within or close to the City, and its town and district centres[2].

All sites allocated for housing development are on brownfield land.

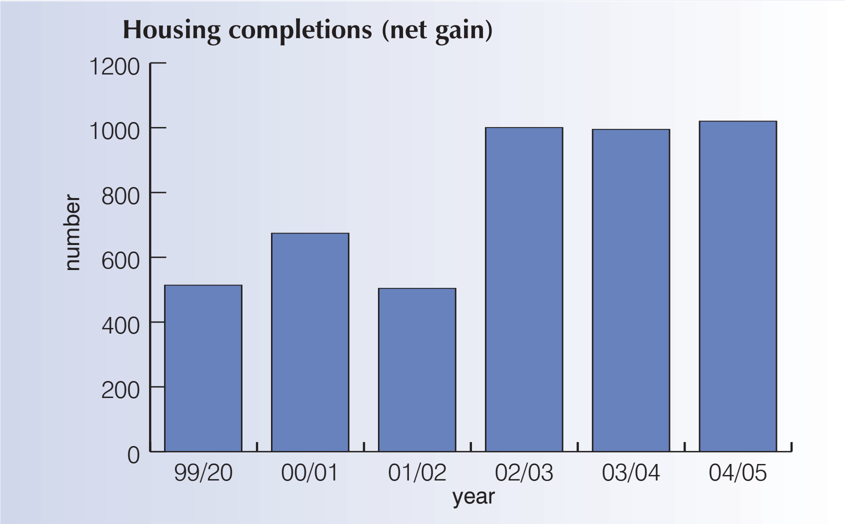
Housing completions (net gains) have risen considerably in recent years[1]:-

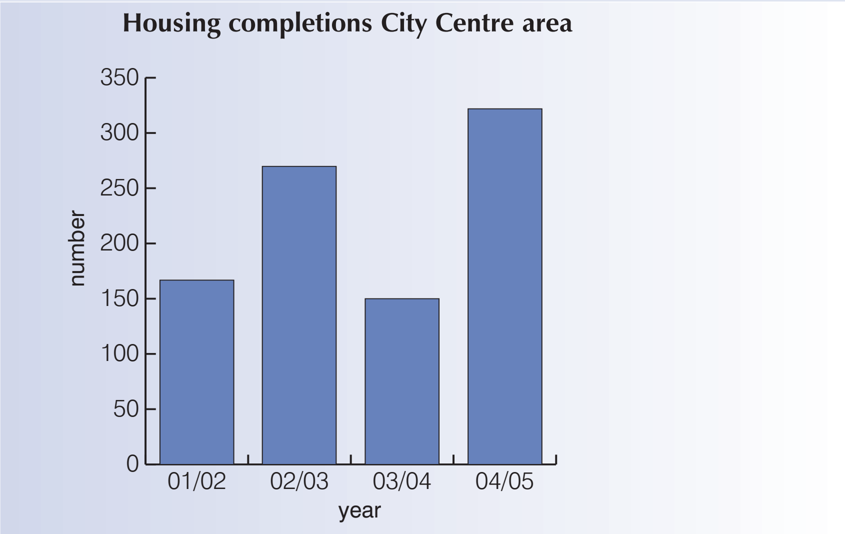
1999/2000	-	513
2000/2001	-	674
2001/2002	-	503
2002/2003	-	1000
2003/2004	-	995
2004/2005	-	1009

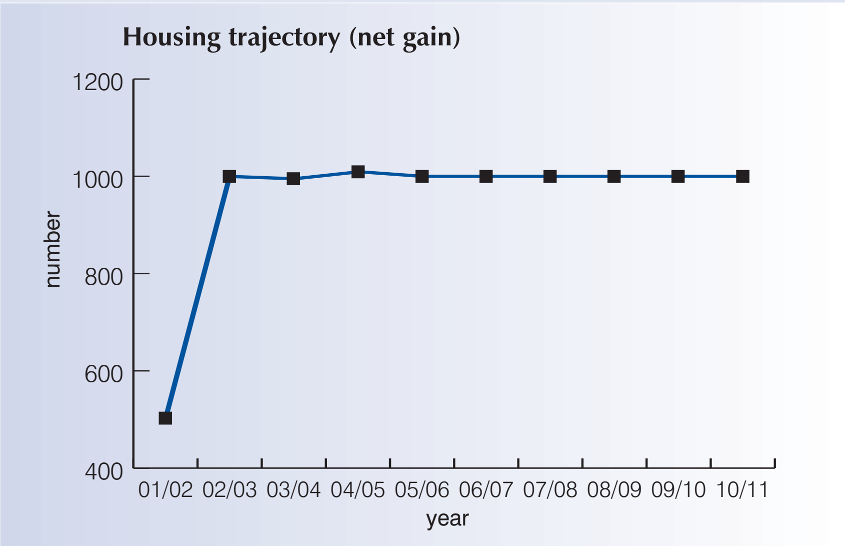
City Centre Area

2001/2002	-	167
2002/2003	-	270
2003/2004	-	150
2004/2005	-	322

An updated Urban Capacity Study has been completed for the city during 2005, which sets out the anticipated supply of housing over the lifespan of the Local Plan, 2005-2011. It has followed "tapping the potential" government guidelines, employed an appropriate discounting procedure, taken into account the pattern of delivery during recent years, and assessments carried out by housing need and housing market surveys. Consultation has also been carried out.







From this study, the total number of dwellings capable of being provided on identified sites between 2005 and 2011 (net) are:-

City Centre	724
Rest of the city	1490
Mixed Development Sites	4239
TOTAL:	6453

This can be broken down further into the likely potential sources of housing supply:-

Flats over shops	22
Previously developed vacant and derelict land	5131
Intensification of existing areas	871
Re-development of existing areas	94
Re-development of car parks	207
Commercial building conversion	128
TOTAL:	6453

There are two key sites within the city which will make an important contribution to housing delivery.

Woolston Riverside	1500
Northern Above Bar	400

A planning application has been received for the Woolston site; an application is due shortly for the Above Bar Site.

The average annual completion figures on small residential sites (under 10 dwellings) are:- 178 properties[1].

A realistic **housing trajectory** figure based upon the above information is therefore a continuing delivery of approximately 1000 dwellings per annum, during the course of the Local Plan, with the likelihood of brownfield sites becoming less available after 2011.

Property sub-division has risen from approximately 30 dwellings per annum to 50 dwellings per annum during 2004/05[1], thereby accommodating the smaller housing units.

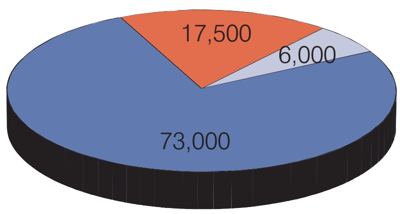
An average of 100 **empty houses** per annum are brought back into residential use. Southampton's figure of 2.53% in 2004/05 is lower than the national average of 3.17%, and slightly higher than the south-east 2.40%.[3]

Commentary

There are just over 96,000 homes in the city:- approximately 17,500 owned by the city council; 6,000 provided by Registered Social Landlords; 73,000 owner occupied or with private landlords[4].

96,000 Homes in the city

- owner occupied
- owned by city council
- provided by Registered Social Landlords



The amount of housing delivered has increased by 100% per annum since 2001/02, reflecting both the increase in demand for property, and the nature of its provision. House price rises and the fall in the average size of occupancy, has led to a significant increase in flatted development. Housing provision is therefore buoyant. Housing growth in the Central Area has greatly increased, and encouraged movement back into this area; just over 5,000 people now live there[1].

2.2 Affordable home provision

Key Findings and Indicators

Over 400 new affordable homes have been provided in the City, in partnership with registered Social Landlords during 2003/04; and 2004/05; this has exceeded the target by 100 properties.[4]

110 Key Workers have been assisted to find a home, through low cost home ownership schemes against an original target of 50: 2004/05.[4]

223 Low Cost Home Ownership properties were completed in 2003/04 against a target of only 40; 236 were completed in 2004/05 against a target of 60.[4]

19.7% of all property within the City is rented from the Council; this is one of the highest percentages in the South-East.[4]

There is a significant proportion of workers earning under £15,000 per annum in the City, owing to a relatively high unskilled workforce.[5]

Property prices are below the average in Hampshire, but are still relatively high on a national basis. Average prices 2004/05:-[6]

Flats
£138,000
% increase since 1998 – 173%
Terrace Houses -
£153,000
% increase since 1998 – 134%
Semi-detached houses
£183,000
% increase since 1998 – 135%

The number of households on the Housing Register and Property Transfer List has moved from 8,221 (2003/04) to 9,225 (2004/05); but the number of homeless people has moved downwards from 1003 to just over 700.[3]

City Council Ownership

Type of Housing	Number
Houses: *traditional*	
pre 1945	2050
1945-64	788
1965-74	540
post 1974	453
bungalows	14
non traditional	1,788
All Houses	5633
Flats	
pre 1945 low rise (1-2 storeys)	105
post 1945 low rise (1-2 storeys)	3,739
medium rise (3-5 storeys)	6246
high rise (6+ storeys)	1,819
All flats	11,909
Total all dwellings	17,542

During the year 2003/04, 1,300 council properties had been improved at a cost of £18m; during 2004/05; 7,421 have been improved at a cost of £22m. In total, the City Council owns 17,542 properties (2004/05); 10,588 meet the Decent Homes Standard, ensuring the retention of the stock is on track to meet the 2010 target.[4] The proportion of homes meeting the standard is 17% above the target figure. A further £25m is to be invested in 2005/06 to achieve the Decent Homes Standard.[4]

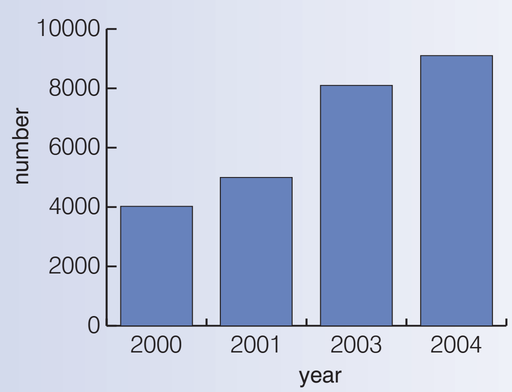
In the private sector, the number of houses brought up to the Council's HMO standards (2003/04) is 117, against a target of 75: in 2004/05 it has been 85, against a target of 75.[4]

Homelessness for the period (2003/04) has been prevented in 412 cases, against a target of 400: in 2004/05, it has been 391 against a target of 400.[4]

Commentary

The need for a continued supply of affordable homes, together with provision for key workers, will be assessed through a regularly updated Housing Needs Assessment. Demand for accommodation is highest among single people, but homeless families are also putting increasing pressure on the council. To ensure that affordable housing remains so in perpetuity, provision, where possible, is undertaken through a Registered Social Landlord, who will be a signatory to the city's Social Housing Partnership.

Numbers of households on the housing register 2000-2004



House price rises in Southampton 1990-2004

	1990	1992	1994	1997	1999	2001	2003	2004
House type	£	£	£	£	£	£	£	£
Semi	58,433	71,228	56,295	61,704	76,805	104,145	126,000	183,000
Terraced	50,070	54,410	43,932	52,827	67,465	88,638	108,463	153,000
Flat/ maisonette	41,606	41,044	42,622	41,152	51,652	99,360	103,931	138,000

Source: HM Land Registry Nationwide Anglia BLDG. Soc. 1990-96

2.3 Quality of life for citizens

Key Findings and Indicators

The City's Local Neighbourhood Renewal Strategy has identified eleven priority neighbourhoods. Those areas which are considered to be disadvantaged are being helped by:-

- An Area Investment Framework and Neighbourhood Renewal Fund
- Single Regeneration Budgets (SRB)
- New Deals for Communities (NDC)
- A West Itchen Trust, to further the SRB Programmes
- Action Plans

Throughout 2004/05, over 6,700 [8] disadvantaged residents benefited from Neighbourhood Renewal Fund projects.

The SRB2 programme in the City, focused on the Central Area, ended in 2003, and was reviewed independently. It helped reduce deprivation; improved employment opportunities and enhanced life quality. Two Enterprise Centres, a new hotel, 300 rented homes, 200 new homes for sale and a new Doctor's Surgery were completed. The government grant of £26m, has effectively been turned into an £80m investment.[9]

The SRB6 programme is currently progressing for Shirley and Millbrook:- £15m has been granted by government to currently fund the capital and revenue projects.[9]

During 2004/05 in Thornhill, the New Deal for Communities has begun to raise homes to above the Government's decent homes standard; improved the environment through increasing cleanliness; improved safety, security and access, with new road crossings and fencing; bought brownfield land to increase the level of housing provision. The provision of new health and learning facilities within the ADC programme is a particular emphasis. Thornhill is Southampton's largest regeneration scheme currently proceeding, with government funding of £49m over a ten year period.

Regeneration schemes have improved skills, health and crime reduction in other areas, through Neighbourhood Partnerships, and creation of increased community cohesion.

Southampton possesses 5 neighbourhood partnerships, which together with over 50 other partnerships have contributed to the delivery of a Community Strategy, which received 1,600 comments at its consultation stage.

The Southampton Partnership has 32 members plus representatives from GOSE and SEEDA.

The Community Strategy (April 2004) criteria:-

- Enhance individual potential
- Create vibrant communities
- Create competitive and diverse businesses
- Create a dynamic and effective infrastructure for city services
- Create a Sustainable Environmental Lifestyle for Citizens and Economy for Employees.

Commentary

City Regeneration is of fundamental importance in reducing community disadvantage, deprived neighbourhoods, a poorly maintained environment, poor quality housing provision and an unsustainable neighbourhood. At the present time, a total of £70m of Government funding has been allocated to carry out regenerative work, particularly in Thornhill and Shirley and Millbrook. As an example, the New Deal for Communities Board set up for Thornhill has installed new kitchens and bathrooms in 130 houses in 2003/04. A further £1.7 million has been agreed upon (2004/05) to fund projects to help close the gap between disadvantaged areas, and the rest of the City. In October 2005, a major residential regeneration scheme in the City's Central Area (Chapel) was granted a "Building for Life Gold Standard Award" by CABE, a clear indication that one of the City's schemes, which was built throughout 2004/05, and includes a high percentage of affordable housing, is of outstanding quality.

2.4 Housing density

Key Findings and Indicators

Housing density has been re-defined in the updated Local Plan and the 2005 Urban Capacity Study. There is to be a minimum density of 100 dwellings per hectare on sites within, or close to the City, town and district centres 50 dph within areas of high or medium accessibility; and 35 dph on sites with low accessibility.

Density levels in areas of **high accessibility** have generally reached beyond 200 dph, and in some cases 400 dph, in 2004/05.[10]

Commentary

Housing Density levels are now an important factor in the achievement of housing targets. In urban areas in particular, an increase in density will ensure the continued re-use of brownfield land and the saving of Greenfield land elsewhere in Hampshire. The increase in residential density also reflects the increase in flat provision within the City, which assists in catering for the fall in average household size, it currently stands at 2.31 persons per household. Thirty five percent of households in Southampton are one person, which is the highest level in Hampshire.

2.5 Gypsies and travellers

Key Findings and Indicators

The city possesses a **permanent site** for settled gypsies and travellers, with 14 pitches, capable of accommodating 36 caravans.[20]

The trend in the number of **unauthorised encampments** from nomadic gypsies has risen since 2000:-

Unauthorised encampments attract a rapid response to move gypsies and travellers, which can only be achieved if there is an alternative and established Transit Site.

Year	Number of encampments	Number of adults	Number of children
2000	3	20	25
2001	4	43	75
2002	14	70	83
2003	10	124	150
2004	20	270	212

Source: Strategy for Gysies and Travellers

Commentary

The growing number of unauthorised encampments in the city now means that the development of a Transit Site to meet the housing needs of nomadic gypsies and travellers, is needed, so that a bid for a government grant is currently underway.

The requirements of gypsies and travellers, is forming a part of a Housing Needs Assessment, which is currently taking place. The City Council has recently adopted its strategy for meeting the needs of Nomadic Gypsies and Travellers.

3.0 Transportation

The strategy for achieving an integrated and high quality transport system is set out in the city's Local Transport Plan; the infrastructure and facilities need to enable people to travel to, from and within the city, safely, easily and affordably.

Targets

- Support for improvements to inter-regional transport corridors, and City region transport schemes
- Promotion of traffic management and parking schemes
- Promoting walking and cycling modes
- Providing affordable and accessible public transport
- Promoting changes in transport interchange facilities
- Using traffic management to help reduce road accidents, and promote sustainable modes of transport
- Expanding the use of intelligent transport initiatives
- Maintaining the transport infrastructure in a safe condition

Key Findings and Indicators

In terms of encouraging change in transport modes, the proportion of passengers using their own cars and those using buses has varied by less than 1% during 2003/04 and 2004/05 during peak periods. Slightly less people have used buses during the 2004/05 period (18.9 million journeys, as opposed to 19.02 million previously).[11]

Car use during peak times has been complementary at 72.9%, compared to bus use of 24.1%. The milestone target was 71.4% and 25.7%.[11]

Off-peak bus usage has risen. The target figure for 2004/05 was 18.8%, but has risen to 19%.[11]

The number of properties built within 400 metres of a bus stop or rail station has risen, primarily as a result of density increases, and high and medium accessibility levels form 64.5% of the land area.[7]

Throughout 2004/05 there has been extra investment in bus promotion and information, in a bid to increase their use, such as linking improvements at bus stops, to the "roll-out" of a real-time information system and identifying potential corridors with the bus operators to improve facilities. A transport Smartcard system is being developed with operators to offer access to all the city's bus services.

By 2004/05, 24 bus priority schemes had been delivered, against an original target of 16, and 366 bus infrastructure schemes have been delivered, against a target of 325.[11]

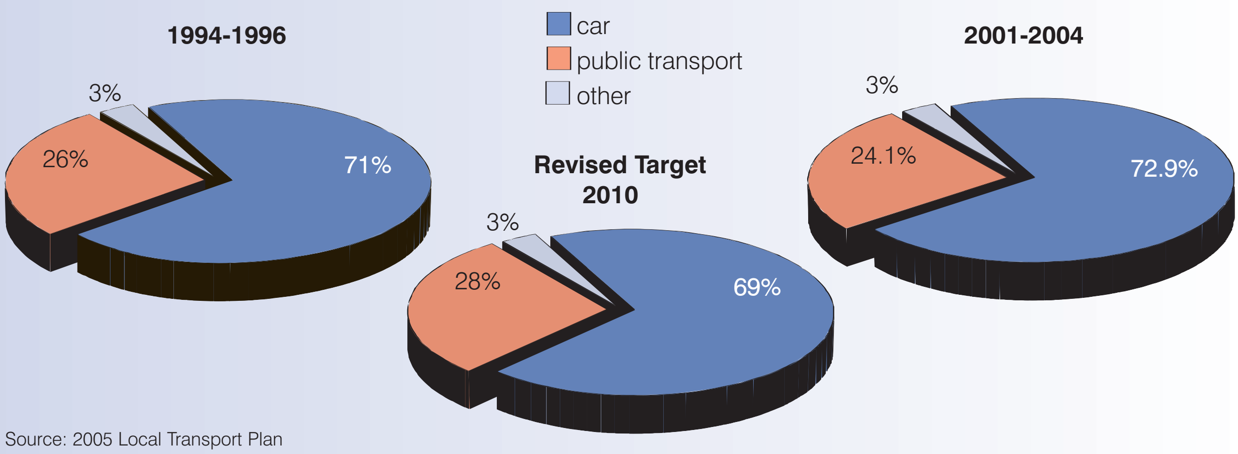
The City Council's target for the preparation of its own Travel Plan has been met (March 2005).

The target for eight of the City's fourteen largest organisations to be covered by aTravel Plan has also been met. 22% of the working population is covered by a Travel Plan.[11]

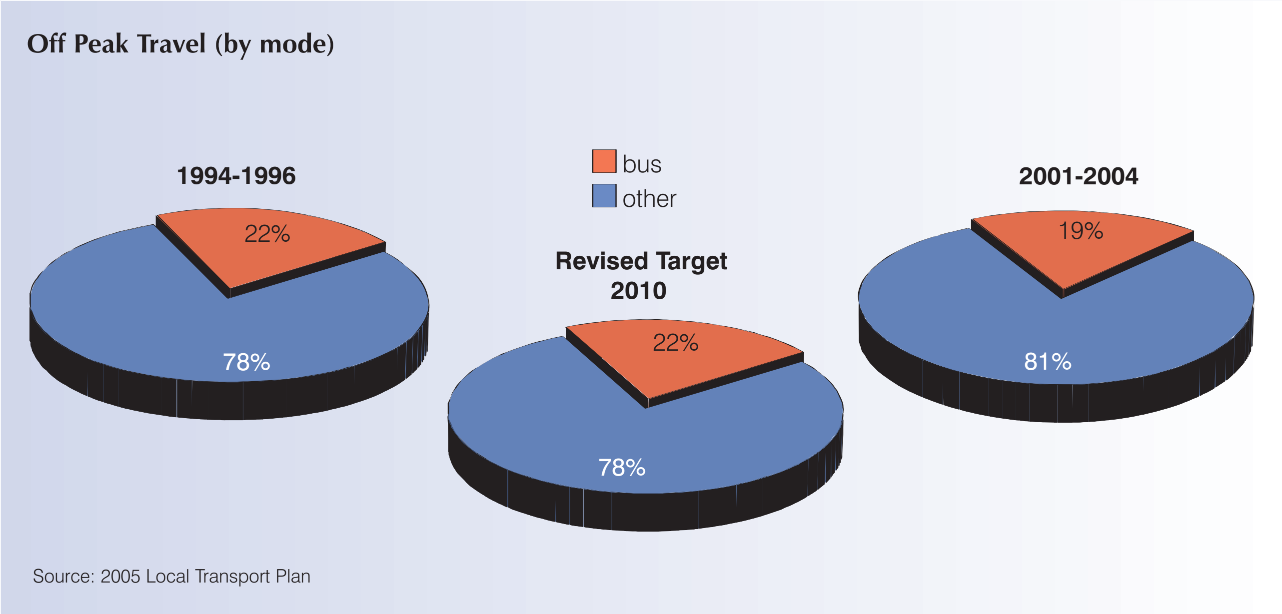
School Travel Plans have run ahead of the targets, with 26 safer routes coming into operation by March 2005, against a target of 24.[11]

The Uni-Link bus service, set up in 2001, carried 2.5 million passengers during 2004/05, a 150% increase over their first year.[11]

Peak Period Travel (by mode)



Source: 2005 Local Transport Plan



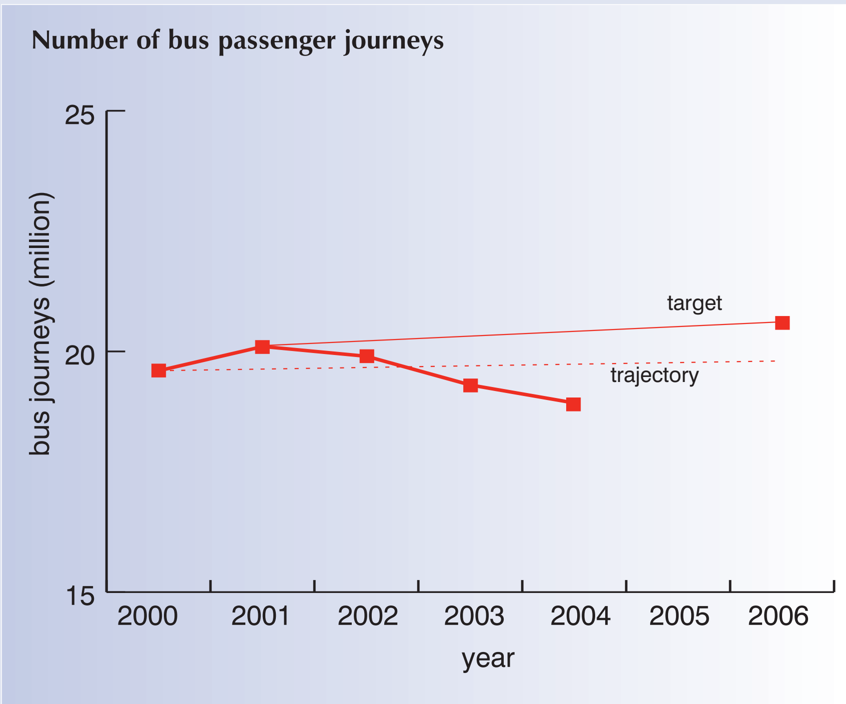
A prestigious award – 2004 Green Gown Award for Transport, has been won by Uni-Link, for the best university transport operation in the country.

Cycle use within the City is rising, and is at its highest for five years. A target of 1.9% cycle use has been achieved during 2004/05. Schemes to encourage cycling have picked up during 2004/05, with a total of 111, being delivered against a target of only 48. Such schemes involve an increase in the number of carriageway cycle lanes; advance stop line installations and new cycle parking facilities across the City.[11]

Commentary

Bus usage, particularly at peak travel times has not increased, despite a number of major initiatives to improve the attractiveness of bus travel. The City Link bus service, which is free of charge, and the Night Link buses which serve the night time economy in the City, have undergone continued growth. However, the use of the car for work access remains at a constant figure. Southampton is however, a net importer of labour, with 47,000 trips in, and 34,000 trips out.[12] The target for Green Travel Plans has been met, and site specific plans will be developed over the next two years. Two Travel Plan networks have been established within the City during 2004/05.

Cycling levels have risen during the last year, and the previous two. The modal split target for cycling use has been achieved, and has risen 8% over the last ten years.



4.0 Economic issues

Southampton has a population of 221,000, 650,000 live within the travel to work area, and rely on the City for employment purposes. It can be regarded as the 'economic engine' of the sub-region.

Targets

- To retain Southampton's focal point for commerce, culture, education, health and leisure:- an entrepreneurial environment
- To manage the continuing changes from manufacturing industries and dependence upon port related activities, to increasing growth of jobs in, knowledge based work, public administration, education, health, research and development
- To retain the City's role as the largest employment centre for the whole of Hampshire and the Isle of Wight, through job retention and creation, improvements in quality of life, and reduction in inequality amongst people
- To retain the allocated sites for employment within the Local Plan, thereby ensuring a more sustainable pattern of development and broad employment base.
- To enhance the labour supply, by improving adult skills, and educational attainment.
- To retain Southampton's role as a principal shopping centre – currently ranked 7th in the UK shopping centre hierarchy, and to achieve a balance of evening activity, in the night-time economy.
- To retain the vitality and viability of the District and Local Centres.
- To maintain the City's role as a regional transport interchange for sea, rail, road and public transport.

Key Findings and Indicators

The City possesses excellent communications with a strategically important port and airport; M27 motorway linkage to the national roadnetwork, and passenger and freight rail services, all of which contribute to economic prosperity.

Recent survey work (2004/05) has indicated an unemployment rate of 2.3% in Southampton, which is slightly above the average level for the South East at 1.8%, and lower than the national average of 3%.[13] The proportion of people of working age who were out of work in 1993, was as high as 14.7%.

Of the 7,200 business organisations within the City employing 111,300

Travel to work area for Southampton

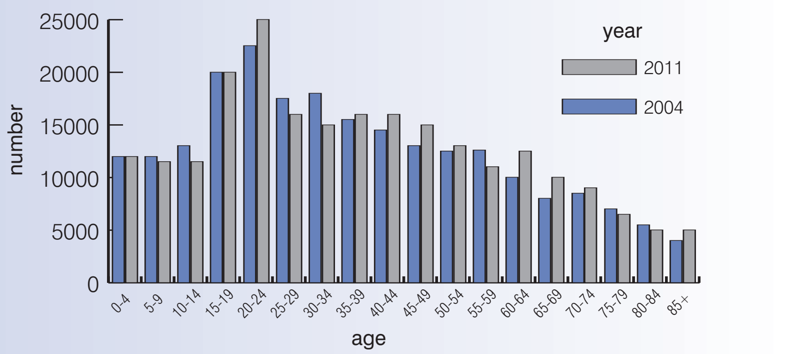
Source: Annual Business Inquiry, NOMIS, 2003

Work destinations of Southampton residents and those who work in the city - 2004/2005

Type of journey	1991	2001	Change	Change %
People living in Southampton and working from home	2,810	6,511	+3,701	+132%
People living and working in Southampton	49,100	64,151	+15,501	+31%
People living in Southampton and commuting out	23,130	33,981	+10,851	+47%
People living outside of Southampton and commuting in	41,190	47,119	+5,929	+14%

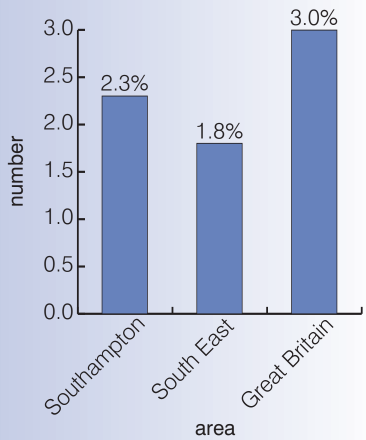
Source: Economic Profile for Southampton

Projected changes in age for the Southampton population 2004 - 2011



Source: Hampshire County Environment Department

Unemployment Rates



Source: NOMIS Labour Force Survey

people, companies with more than 200 employees account for 34% of employment, companies with under 50 employees account for 42%, those with between 50 and 200 employees account for 24%.[14]

The largest employers within the City, are the NHS, Higher Education and the City Council which accounted for 21,500 people in 2003.

Employment in the manufacturing sector halved between 1982 and 1999, from 20,000 to 10,000. At the present time (2004/05) under 7% of the working population are employed in the City's industrial structure.[14] The supply and take up of industrial land and premises within the City, will provide an indication of any further decline or growth.

The service sector now dominates employment levels 75% (2004/05),[9] but Southampton does have a higher than average number of people on low wages. In 2004/05, the average gross weekly wages were £412.00 for those at a workplace base against an average for the South-East of £446.00. For those working at home weekly wages were £382.00 against a South-East figure of £479.00.[15] The supply and take up of new office accommodation, will provide an indication of any further decline or growth. The degree of expansion within high-tech and knowledge based companies will also provide an indication of whether this field of employment is moving forward. An Area Investment Framework programme, in conjunction with SEEDA's grant award, has delivered six projects to assist in the development of knowledge based industries during 2004/05. At present the average salary is £22,157, against a South-East average of £27,945.

Employment changes

Southampton	High tech manufacturing		Knowledge based services	
year	number	% of all employees	number	% of all employees
1998	900	0.80	15,600	13.85
1999	700	0.63	15,600	14.10
2000	600	0.54	17,100	15.32
2001	600	0.54	18,200	16.37
2002	700	0.60	17,200	14.65
2003	700	0.63	16,900	15.18
Change	-200	-21.25	+1,300	+9.60

Source: NOMIS, Annual Business Inquiry, 2004; the numbers are rounded to the nearest 100

Highest ranked LA's in South-East on the index of Multiple Deprivation

Area (South-East)	Average of SOA scores	Rank out of 354 Local Authorities
Hastings	31.71	37
Portsmouth	25.4	83
Thanet	25.31	84
Brighton and Hove	24.57	89
Southampton*	**23.29**	**96**
Isle of Wight	22.36	108
Swale	22.18	110
Havant	21.27	122
Eastbourne	21.22	125
Shepway	20.96	128

Source: Indices of deprivation 2004, July 2004, produced bt R&I Unit. SCC
(SOA - Super Output Areas)

The position is reinforced by the Index of Multiple Deprivation which can represent a threat to social cohesion, a brake on Economic Growth and a drain on the public purse. In 2004, Southampton was ranked 96th out of 354 Local Authorities (where no.1 is the most deprived), which puts its position at no. 5 in the South-East.[16] This is reflected by a poor result in the education, skills and training sector. In particular, Southampton has a lower level of Grade AB employees (higher and intermediate management / professional) than the national average. An increase in the take-up of training opportunities will provide an indication of whether skill levels are increasing, and an increased number of 'starter' units coming forward with companies moving on to larger premises, will illustrate an improvement in this sector.

Southampton therefore reflects the national trend in shifting from manufacturing to services. Between 1998–2003, more than 4000 jobs (36%) were lost in manufacturing, and 6000 were gained in services.[15]

Business and Entrepreneurial Activity

can be measured by the registering and de-registering on Value Added Tax (VAT). The latest figures (2003) show that registrations were 525, but de-registrations were 620. This is lower than the average for the S.E. region as a whole, but in 2004 there has been an increase of 10% compared to the previous year, in business start ups. In terms of financial turnover rates however, the figure of £4,055,000 is the lowest in seven years. The Regional Economic Strategy's targets are being supported by a fund of £650,000 to support economic projects.

The shortage of land for employment generating activity within Southampton is a key issue. It is estimated, based upon rates of completion, and occupation that a supply of between 2.5 and 5 years of planning consents for offices exist at present, with a shortage of good quality available stock.[1] Many sites are considered to be unsuitable for the knowledge-based industries which the City is seeking to attract.

There is only one year's supply of land readily available for industrial and warehouse purposes; a total of 12.39 hectares, mostly spread across small sites.

An Employment Land Availability Survey is currently being implemented, in conjunction with a neighbouring authority, to address shortfalls in this important area.

The Economic Activity Rates for Southampton are slightly lower than that for the South-East with a 80.4% figure, (percentage of working residents who are economically active) against 82.1%.[13] The main barriers towards getting or retaining employment in the City are considered to be poor physical and mental health; caring responsibilities of lone parents, lack of essential and key skills.

The new Economic Strategy has however, shown that Economic Inactivity is in excess of 20,000; developing the workforce, has therefore been identified as a key economic development priority. City Centre Vision, is looking to create approximately 7000 jobs, thereby expanding the pool of skills.

Education is one of the principal drivers for economic competitiveness. The percentage of 16 year olds gaining five or more GCSE's is improving year on year, but lags behind the national average; however, at Key Stage 2 in English and Maths, the Council was the third most improved Education Authority last year.[19] In terms of 'A' level achievement, the City has a points score total of 224.3 against a national average of 258.9; 22% of employers have recently stated that the skills gaps are affecting one in ten jobs.[18] The City has over 31,000 students in Higher Education; 14% of the total population: Southampton "Solent" University has 11,000 students full time; the University 20,000 students.

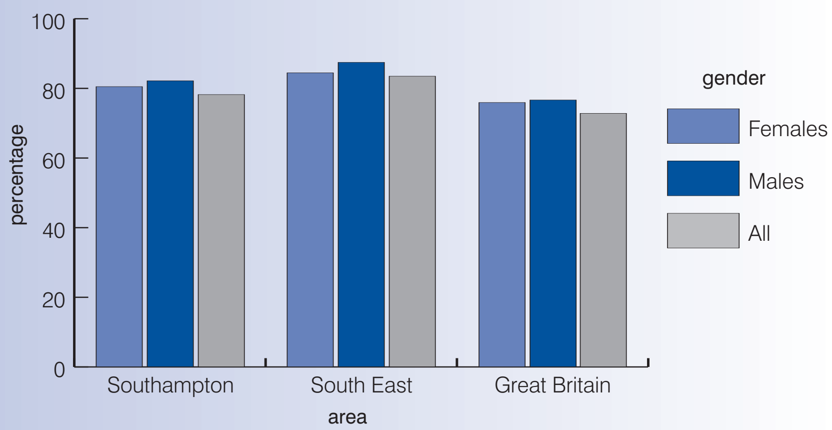
The University possesses a broad academic base, with high standards in research, in particular, as does the 'Solent' University. The latter organisation supports measures to "start-up" hi-tech businesses. At the present time 58% of local employers state that people with the desired skill levels cannot be recruited, which reflects the fact that the City has a higher percentage of people in unskilled or semi-skilled occupations. At present the qualifications and skills of the working population show that 26% of adults have no qualifications at all, and 48% have qualifications below NVQ level 2.[13]

A Government target that there should be a 10% reduction in the number of young people not in education, employment or training, has been exceeded during 2004/05.[4]

Commentary

It is considered that South Hampshire as a whole is below average for the South-East region in terms of economic performance. The area has been designated by the Government as a Priority Area for Economic Regeneration. There is evidence within the City, that wages are below the national average in many cases, and that a higher than average number of people are unskilled. If economic growth is to be increased, and knowledge-based employment levels are to rise, then it is essential that policies to retain sites for employment, particularly for training, and 'starter' units must be adhered to.

Percentage of working age residents who are economically active



Source: Local Area Labour Force Survey - NOMIS

Percentage of 16 year olds achieving 5 or more GCSE's A - C

Year	Southampton	England
2000	39.8%	49.2%
2001	43.1%	50.0%
2002	43.3%	51.6%
2003	44.3%	52.9%
2004	44.3%	53.7%

Source: DFES, www.dfes.gov.uk

4.1 Retail and leisure economy

Key Findings and Indicators

The **City Centre** has a high level of vitality and viability when measured against PPG6, with good accessibility, but lacking a transport interchange. The City Centre is performing well, since the opening of its West Quay Retail Centre of 74,000 sqm in 2000.

West Quay attracts 70% of its shoppers from Southampton; 7% from Bournemouth, 6% from Portsmouth.[9] It is responsible for almost doubling the previous city centre retail floorspace area of 78,000 sqm

In the core **retail area** of Southampton, a study of multiple retail stores has shown that sales are increasing year on year by 5%.[21]

Within the Central Area, the city's **retail rents** have risen sharply; In 2004, they were £300 per sq ft, with other city centres in the region, averaging below £200 per sq ft.[22] This confirms the city's leading role in both the sub-regional and regional areas, as retailers are prepared to pay to have outlets in Southampton.

Retail land use mix has remained fairly constant in the central area; durable goods maintained at 50%; food and drink 9%, financial services 8%.[22]

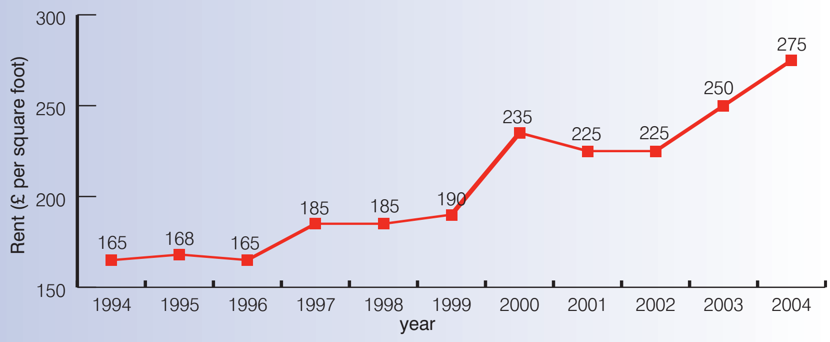
Another indicator of the retail success is the diminishing **spare capacity in the city's main car parks**:- 40% in 2001, down to 17% in 2004.[22]

Leisure and Cultural activities are complementing retail activity. Within the city centre retail core, there exists 70 restaurants, coffee bars and take-aways; 16 public houses, 4 night clubs; 4 amusement arcades; 3 hotels and 3 sports and health clubs.[22]

Growth in the **night-time economy** is a key factor in the renaissance of cities:- Southampton's economy has grown in this direction, helped by a relatively affluent student population of 31,000.

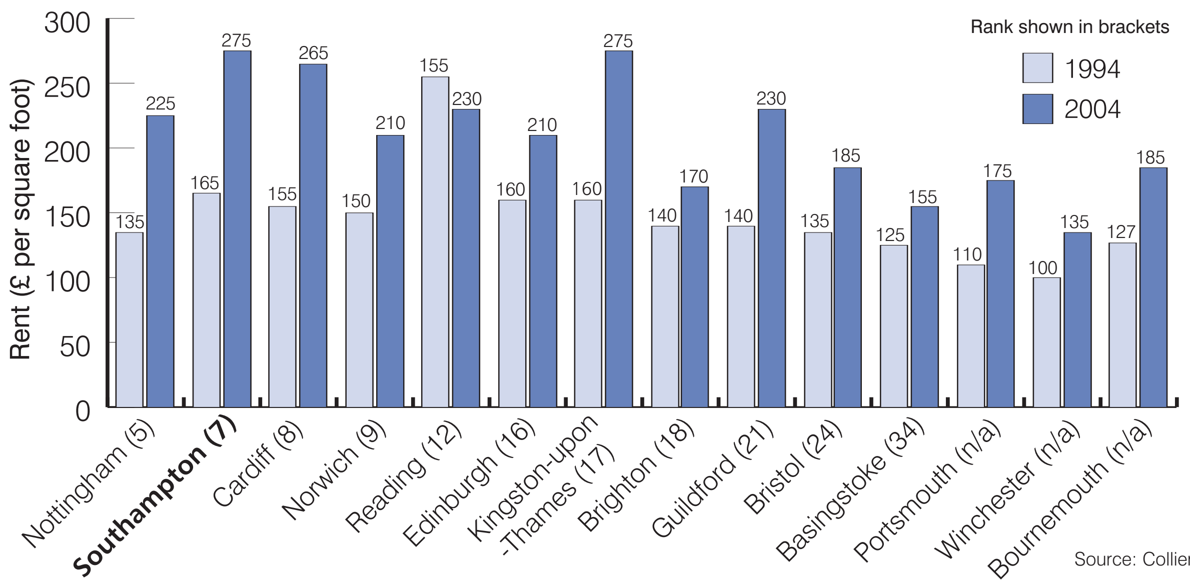
The city has moved forward during 2004/05 in managing the night-time economy:- the central area has been demarcated into areas of early and mid-evening, and late-night activity, creating concentrations that give a balance of evening activities. Late night bus services, and usage have risen during 2004/05.

Southampton City Centre retail rents since 1994

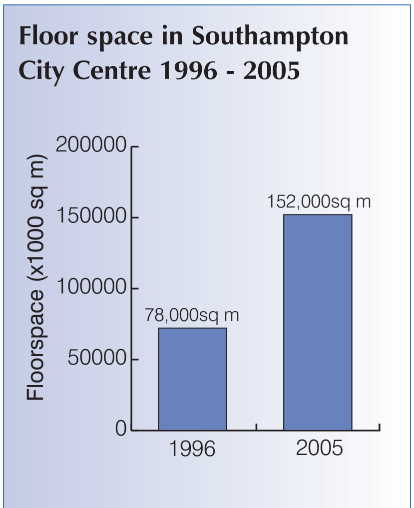


Source: Colliers CRE

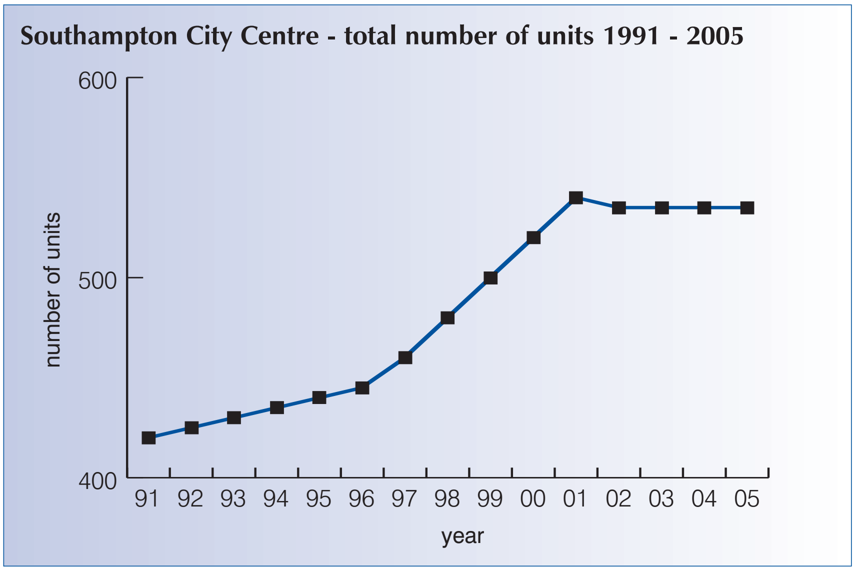
City Centre rents 1994 & 2004; and Experian League table ranking



Source: Colliers CRE



Source: White Young Green



Source: White, Young and Green Retail Study

On the cultural front, the city is also performing well. It possesses an Art Gallery which is the most outstanding in the South of England; visitor numbers exceeded 50,000 in 2004/05. The Mayflower Theatre is one of the country's most important regional theatres outside of London; a range of important museums, with a rise in attendance, particularly on the maritime front has a rise in visitors from 37,500 in 2003/04 to 44,000 in 2004/05.[22]

In the Town, District and Local Centres, surveys were carried out in 2002, and the summer of 2005; the number of empty properties are the clearest signal of the vitality of each shopping area.

In the Town and District Centres:

Portswood:-
9 vacant properties in 2002
17 vacant properties in 2005

Woolston:-
10 vacant properties in 2002
15 vacant properties in 2005

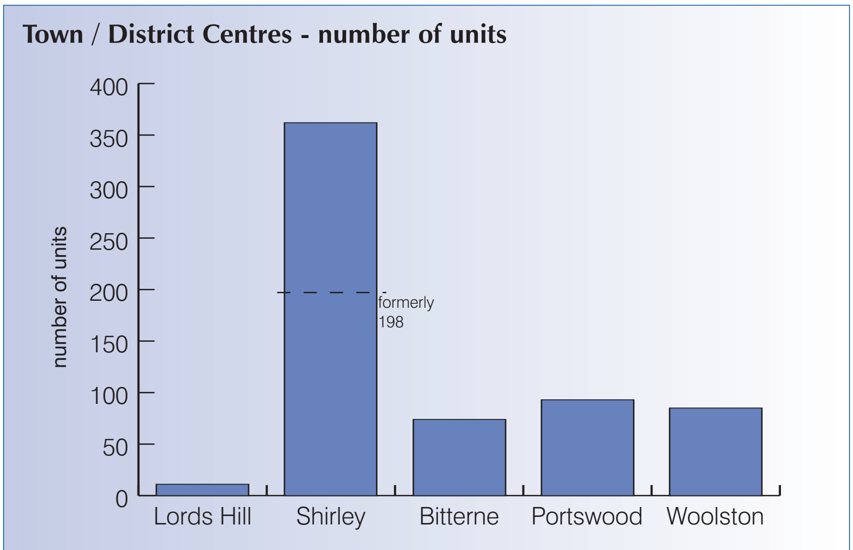
Bitterne:-
7 vacant properties in 2002
6 vacant properties in 2005

Shirley:-
9 vacant properties in 2002
24 vacant properties in 2005

(Shirley Town Centre has been re-defined in the Revised Local Plan, and is substantially larger in area. The number of vacant properties is therefore not directly comparable).

Lords' Hill:-
0 empty properties in 2002
4 empty properties in 2005

Most of the District Centres are performing slightly less well, than three years ago, but there have been recent improvements which should assist in improving their vitality. Shirley Town Centre has undergone significant improvements during 2004/05 with a new supermarket food store, and precinct re-development scheme.



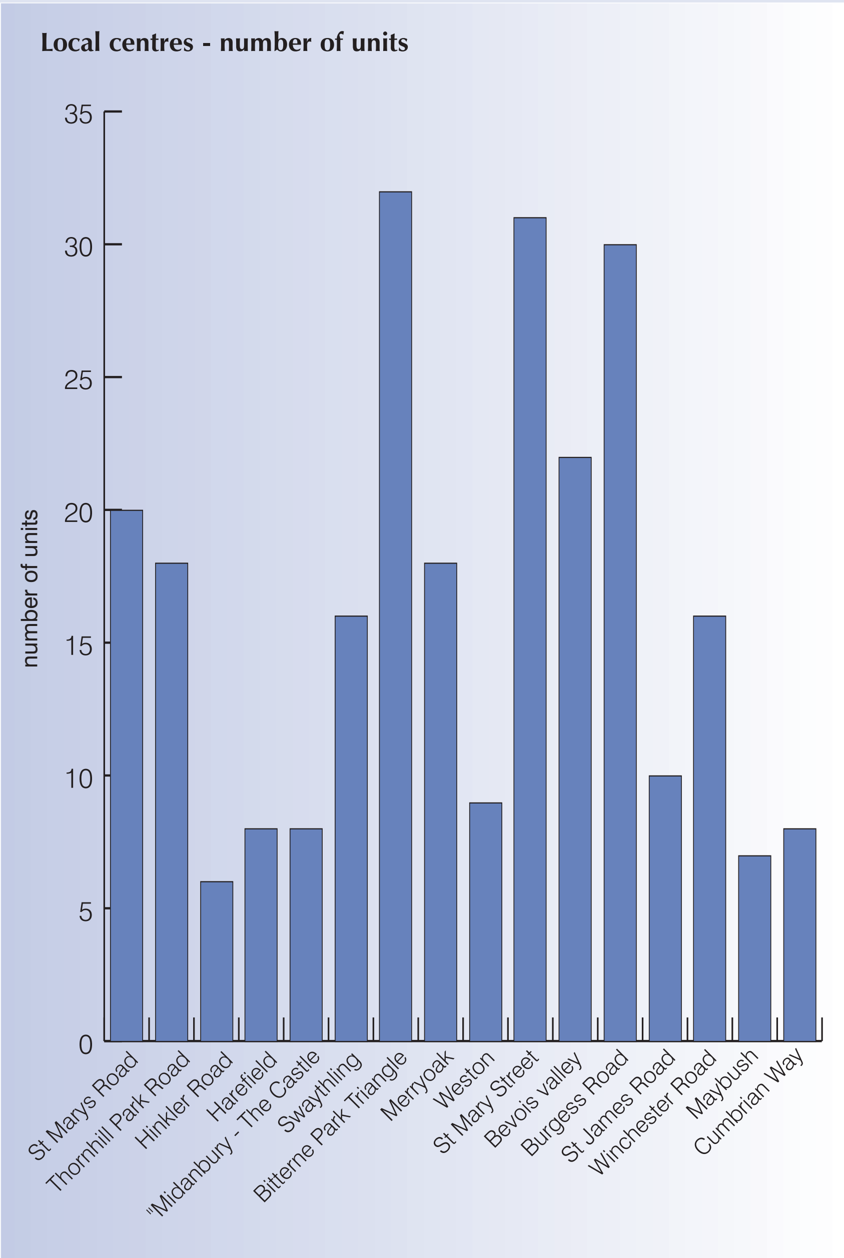
Source: White Young & Green Retail Study

Woolston has also gained a new supermarket food store during 2004, and could in the near future benefit from a large residential scheme taking place adjacent to the District Centre (Woolston Riverside).

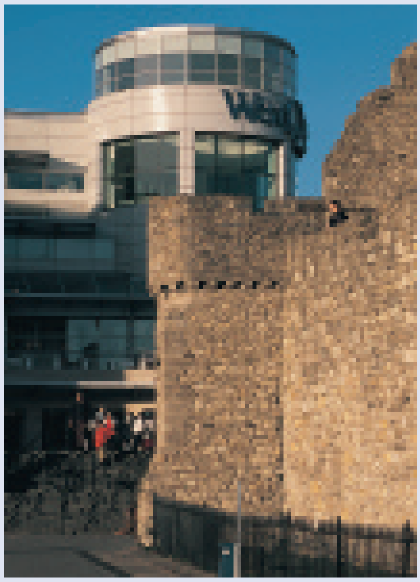
The **Local Centres** on the other hand, are performing better with most of them having less empty shops during 2004 than the two years previously. The balance of retail outlets within the area has remained constant, with a marginal increase in the number of cafes and takeaways.

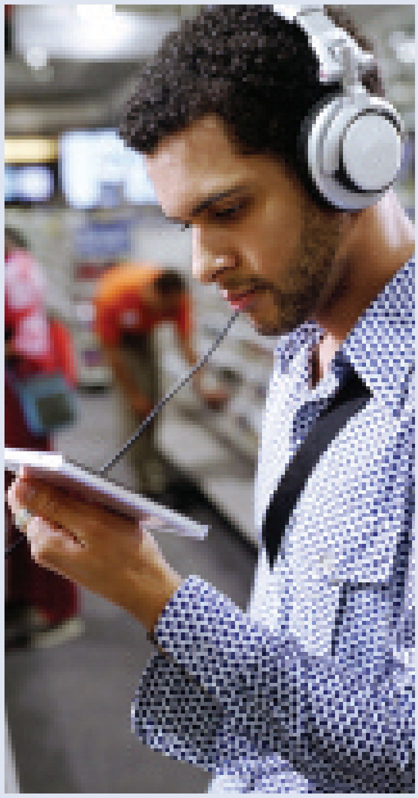
Commentary

Outside of London, Southampton is the largest retail centre in the south. The £350m West Quay Shopping Centre with its 4000 car parking spaces is attracting large numbers of people into the City Centre, and is rated 7th in the country as a whole, in the Experian league table of retail centres, a rise from 22nd as recently as 1995. The District Centres at Woolston and Town Centre at Shirley have undergone a degree of qualitative improvement during 2004/05.



Source: White, Young & Green Retail Study





5.0 Environmental & sustainability issues

The maintenance and improvement of the quality of life, should entail an effective protection of the environment, and careful use of natural resources, as stable levels of economic growth are maintained and social progress moves forward.

Targets

- To increase the use and re-use of natural resources
- To increase the level of protection of the natural environment
- To decrease the pollution levels from transport users, and improve air quality, including a decline in greenhouse gas emissions
- To ensure the provision of sustainable levels of economic growth, employment and housing provision
- To reduce the need to travel, and assist in the integration of transport and development
- To contribute to the objectives of the Biodiversity Action Plan
- To re-cycle building materials, and waste products, and environmentally-friendly materials where appropriate
- To develop and use, where appropriate, renewable and alternative sources of energy
- To ensure that noise generating uses do not adversely affect the Environment
- To ensure that areas subject to flood risk are protected
- To ensure that water quality is protected; drainage, surface and groundwater treatment does not harm the environment
- To ensure that where appropriate, land contamination is subject to remediation measures; land stability measures are environmentally acceptable.
- To improve the quality and cleanliness of the City's streets, and environment.

Key Findings and Indicators

Southampton has four areas of international importance for wildlife, and four designated sites of Special Scientific Interest (SSSI). The Government target is for 95% of SSSI's to be in what is termed to be a 'favourable' or 'recovering' condition. Southampton has reached 99%, with only 1.2 hectares considered to be 'unfavourable'.[23]

The City has 36 sites of Local Importance for Nature Conservation (SINC's). Recent research in this area has seen the City produce a Biodiversity Action Plan, relating to the species in them. A Green Open Space Audit has been completed, to assist in the planning of open space improvement in the City. An Open Space Strategy will follow in 2006.

River Water Quality is monitored by the Environment Agency; recent assessment of the five watercourses within Southampton has resulted in a classification from 'very good' to 'fair'. Estuary Water Quality assessment (2005) has classed Southampton Water as Class A – good quality in the upper reaches, and Class B in the lower reaches.[24]

Air Quality is monitored in Southampton. There are three monitoring stations; last year 2004, there were 10 days of moderate ozone pollution, and 1 day of moderate particulate pollution.[25] This is an improvement over the previous year's 48 days of moderate or high air pollution, but comparable to 2002. A new Air Quality and Climate Change Strategy has been published 2004/05.

The City has also set up 6 Air Quality Management Areas (2004/05). These have indicated that Southampton meets National Air Quality Standards and Objectives, except for NO^2, which is primarily a road traffic emission. Traffic congestion remains a problem as a pollutant within the City, and the latest MORI poll indicates that 75% of residents surveyed, perceived traffic congestion as a difficult and problematic issue. Checks made upon Industrial premises 2004/05, for air pollution have risen by nearly 100% over the previous year.[4]

Within the last year, the City Council has implemented a kerbside recycling scheme across the City. The most recent figures, (2003/04) show that recycling is 12.8%; landfill is 69.8%; incineration 12.5%, and composting 4.9%, but in 2004/05, recycled household waste rose to 17.7%.[4] Although this is an improvement upon past figures, in 2002, when only 10.4% of household waste was recycled, the City is lagging behind the national target of 24% waste recycling for 2006. Nevertheless 91.7% of the population is now served by a kerbside collection of recyclables, and missed refuse bin collections have fallen by 60% during 2004/05. The number of recycling glass banks has risen to 80.[9]

The year 2004/05 has seen an increased level of investment in cleaning up the City's streets to improve the environment. Modern street cleaning equipment, a fast response graffiti clean-up service, and new initiatives for dealing with abandoned vehicles, have resulted in a clearly visible improvement in street cleanliness.

Southampton is a leader in the production and use of sustainable and renewable energy. The Geothermal Heating System is responsible for saving 90,000 tonnes of carbon dioxide emissions per annum, and a total of 18% of energy used in the City (2004/05) is from the geothermal, CHP and District Heating Schemes.[29] This is well ahead of both the Government target, to reach 10% of electricity use from renewable energy sources by 2010, and the current figures for the south-east, where only 0.65% of electricity is generated from renewable sources.[28] The Southampton Geothermal system is the largest in the U.K., and is the only combined Heat and Power network which provides power and heat to private domestic users; 10% of them.

A new Combined Heat and Power Scheme is due online in a couple of year's time. The City is aiming for a target of 20% decrease in greenhouse gas emissions (CO^2) by 2010, compared to the levels in 1990. The new CHP, is expected to save one third of this target figure. The scheme will benefit 3,400 homes, 10 schools and some businesses.

The City has participated in what is known as a National Green Flag/Pennant Scheme, which is a national award recognising good practice in the provision of green open space. Two awards have been won (2005). Throughout 2004/05 an Open Space Audit has been carried out in the City; a Biodiversity Action Plan has been prepared. These documents should form the basis for setting targets to monitor biodiversity, and the setting of provision standards for green space, sport and recreation facilities, quality standards, spatial distribution of unmet needs, forecasting needs etc.

On the contaminated land front, mineral extraction sites throughout the City have been reclaimed using domestic, commercial and building waste fill. In 1989, 14 former landfill sites were identified and subsequently investigated. Some of these were quite dangerous to human health; a 43 acre site near the Weston Shoreline; former Royal Naval Stores, and the site adjacent to the Northam Gasworks, were a particular threat to the environment, and a sustainable form of economic development.[27] The City Council maintains a register of regulatory action taken in respect of remediation measures to accommodate new developments. There is now a significant reduction in contaminated land areas within the City, and there is no contamination of surface water quality.

283 hectares of Southampton, lie within the Environment Agency's tidal floodplain; sea level rise is predicted to be 6mm per annum,[27] and the areas under threat within the City are:- Crosshouse, Northam, St. Deny's and Woodmill. Some erosion is occurring in the Weston Shore area. The Hampshire Water Strategy has not set targets, but the anticipated climate change will contribute to an increase in tidal flooding, which the Environment Agency is monitoring, and will lead to revisions in land areas affected. A new Coastal Defence Strategy has been drafted (2003/04).

Water consumption monitoring is important within the City area, because housing figures have indicated that the rising population and the smaller households, will cause a rise in consumption. Across the whole of Hampshire between now (2004/05) and 2010, it is estimated to increase by 590 mega litres a day. The national average consumption of water is 141 litres per head, per day. Southampton is above this, but no targets have been set for water consumption reduction.

The divisions in land use throughout the city are:- 53% residential; 18% commercial and retail; 16% recreational and open space; 6% related to the docks, and 7% to other uses. The City possesses 61 open spaces; 42 sports pitches and playing fields, and 22 allotment areas.[30] An Open Space Audit has been undertaken during the spring and summer of 2005.

Despite the move towards a more concentrated rather than a dispersed form of development, the quality of the Built Environment is receiving a greater degree of emphasis from the City Council, with the adoption since 2000 of an Urban Design Strategy; an Old Town Development Strategy; a North-South Spine Strategy, and during 2004/05 a Streetscape Manual. In 2006, a Residential Design Guide will be adopted.

Commentary

Southampton has a range of formal parks, recreational and natural open spaces, including coastal, estuaries and riverside landscapes. A high number of residential districts possess green open space: several of the areas are of national and international importance. It is a leader in the field of production and use of sustainable energy and air and river and water quality is monitored on a regular basis, and is improving. Waste recycling remains a challenge in the short to medium term; the recycling rate is increasing, but remains low compared to other parts of Hampshire, and other cities in the South-East. In the longer term, sea level rise is predicted to have an impact on the City by 2007.

Despite the considerable growth in residential development, the green areas have been retained, which are of value for biodiversity; wildlife is safeguarded.

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