8 ENHANCING ECONOMIC PROSPERITY AND QUALITY OF EMPLOYMENT OPPORTUNITY

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8.0.1 This Section of the Draft RSS sets out the region's approach to promoting successful and competitive businesses, including tourism, the allocation of employment land and the development of town and city centres. It aims to make the links with the RES and contributes to the *'Just Connect!'* aim to enhance our economic prosperity and ensure quality of employment opportunity, which are both important factors in achieving sustainable communities.

8.1 The RSS and the Regional Economic Strategy

8.1.1 Sections 1, 2, 3 and 7 paint the picture of a sustainable South West, setting out the trends, challenges and policy responses that the region will need to address, emphasising the commitment of both the RES and Draft RSS to securing sustainable economic progress. The Draft RSS supports the RES vision, and its policies have been shaped to help enable this vision to be realised in spatial terms.

The Draft RSS supports the RES objectives:

- To deliver successful and competitive businesses
- To deliver strong and inclusive communities
- To help deliver an effective and confident region

8.1.2 The RES recognises that the economy needs to respect environmental limits and meet the challenge of climate change, and identifies the importance of a low carbon approach in helping to achieve this. Regional sourcing has a major role to play in both minimising CO_2 emissions, and stimulating local markets. There are also opportunities for the South West that arise from predicted climate change impacts; continued support from the environmental technology sector in the region will be crucial to maximise these economic benefits.

8.1.3 Development Policies A, B and C will enable all the region's towns, and small communities in rural areas, to continue to make a significant contribution to the region's economic performance. They will do this by supporting economic growth and development commensurate with their role, function, needs and potential. Importantly, the Spatial Strategy helps to redress imbalances in towns and cities between jobs and resident population.

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Most importantly, the Strategy and transport proposals will enable the SSCTs, as 'engines' of economic growth, to realise their potential and increase competitiveness, to create new markets and to achieve a critical mass to secure essential investment in infrastructure and ensure the supply of housing will enable people to live closer to their place of work.

Growth of the Region's Economy

8.1.4 The region's economy is forecast to grow significantly over the next 20 years and a range of relatively high-growth scenarios for GVA have been considered in developing the RES and Draft RSS as Section 2 has outlined. The Draft RSS and its sub-regional emphases stated in Sections 3 and 4 provide a framework which will help realise the economic potential of the SSCTs in the centre, north and south east of the region (where growth must be managed very carefully) and for interventions to enable economic development to tackle some of the deeper seated regeneration needs of the west of the peninsula. This Section sets out a number of specific principles and policies which are required to enable that change to happen 'on the ground'.

8.1.5 *'The State of the Region'* report prepared by the Regional Observatory in 2004, and econometric forecasts informing the RES evidence base show that the key business sectors in the South West are primarily the service-based industries, accounting for over 76% (almost 1.67 million) of all full time equivalent (FTE) jobs in 2004. If current trends continue, this is forecast to rise to over 81% (almost two million) FTE jobs by 2026[26]. Also, the importance of certain specific sectors such as aerospace and advanced engineering (including defence related manufacturing, which is particularly prominent in the north and south east of the region) and tourism is recognised by the RES. The RES identifies eight key sectors (advanced engineering and aerospace; food and drink; creative industries; tourism; marine; bio-medical and health; ICT; and environmental technologies) which are considered to be particularly important to the region's economy and which may require specific interventions to ensure their continued success. It also identifies five other sectors including Health, Retail and Engineering as a focus to improve skills and an efficient labour market.

8.1.6 In the South West, the public sector plays a significant role in employment terms, especially within the education, health, public administration and defence sectors. This particularly is the case in the far South West and remoter rural areas and it is expected to continue to be so in the future. For example in 2004, the education and health sector as a whole supported over 365,000 FTE jobs and trends indicate that the sector could increase to support 439,000 FTE jobs by 2026, making it one of the top three highest growing sectors in the region. As a further example, in 2003/04, the MoD expenditure on equipment from companies based in the region (with whom the MoD has contracts) was around £2.2 billion. Around 19,000 jobs were generated as a result of this expenditure[27]. For certain public sector bodies, there will be a need in future to consider their expansion for operational purposes at strategic locations in the region. This will require the development of land. At such times, local issues will need to be considered within the context of the need to expand facilities, which benefit national or wider public interest. This is dealt with by Development Policy I in section 3.

[26] *Cambridge Econometrics Forecasts, December 2005.*

[27] *GVA Grimley/MoD, December 2005.*

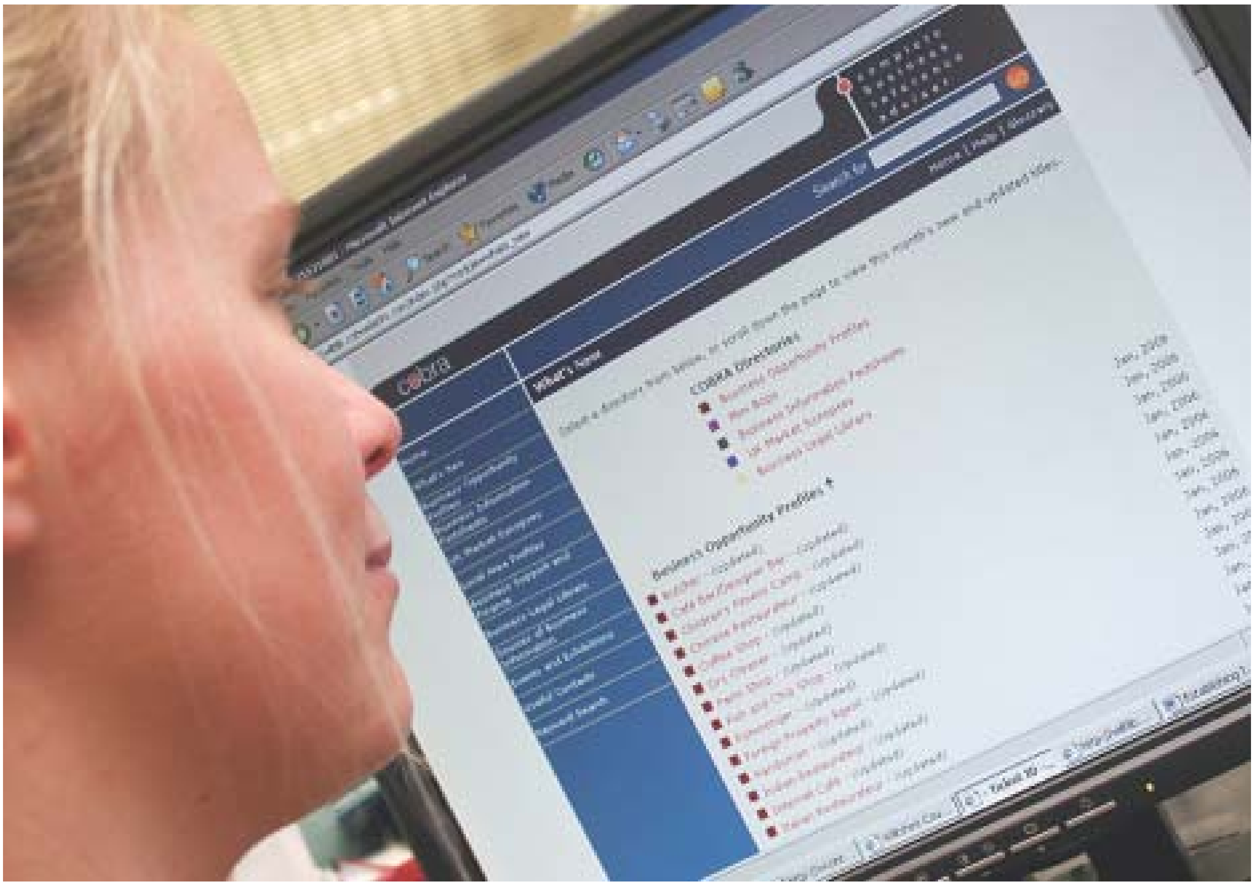
Workforce Skills

8.1.7 Skill levels in the South West vary considerably across the region. In some places, education services have performed poorly, and levels of educational attainment are relatively low. Spatially, this tends to correspond with places where multiple deprivation is high (outlined in Section 2 and in Section 9). Education and training are essential to support success in an increasingly knowledge-driven economy. Without the necessary skills, individuals could be excluded from benefiting from growth in these sectors and could fail to gain access to rewarding employment. The RES highlights lack of basic skills as a key issue, but intermediate and vocational skills should not be overlooked. There is a key role for local authorities, working with other stakeholders including the South West Enterprise and Skills Alliance, to facilitate spatial links between skills development (basic, intermediate and advanced), business productivity, prosperity and sustainable skills. The skills challenges and employment opportunities presented by an ageing population together with the need to promote lifelong learning are issues which are particularly pertinent in the South West. The Strategic Environmental Assessment of the RES addresses some of these issues.

8.1.8 The increasing number of older people living in the South West presents unique opportunities and challenges with a number of 'younger' older people wish to remain in paid employment. The current crisis in pensions will require many older people to remain economically active beyond the current, statutory retirement age of 60 (female)/65 (male) years old. Older people's skills and experiences are valuable assets to the region's businesses and communities, as is the purchasing potential of wealthier older people. There are also opportunities for South West businesses to become leaders in the development of products and services for older people.

8.1.9 Parts of the South West, particularly some of the more rural western areas, are characterised by low wage/low productivity/low skill occupations. Developing the skills and general capacity of the workforce is an essential element of any strategy to encourage the establishment of more successful, innovative and competitive enterprises in these areas. In other inner city areas there is an urgent need to equip residents with skills enabling them to benefit from job growth and social enterprise in particular may be able to play an important role here. Policy SK1 in Section 6 provides for improved access to skill training facilities.

Map 8.1 Economic Activity Zones



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8.2 Promoting Successful and Competitive Businesses

8.2.1 The region's economy is noted for its relative diversity with many strong businesses in a variety of sectors, but in general terms the region's productivity lags. There is a pronounced east to west gradient of productivity in the region; with lower productivity being a long-standing feature of the far South West. There is a clear relationship between productivity and time/distance from key economic hubs, particularly London, as already indicated in Sections 2 and 5. The relative lack of integrated and flexible labour markets based on large urban centres is a further contributory factor to lower productivity again, particularly in the far South West. There is a need to build on existing business success and further raise business productivity. Resource efficiency and a low carbon approach will have an important role to play in terms of both boosting business efficiency, and allowing economic development within environmental limits. The RES promotes increased support to encourage innovation, enterprise and entrepreneurial activity across the region, and there is a need to focus support in certain parts of the region.

8.2.2 Businesses will be subject to increasing competitive and structural pressures over the timescale of the RSS. It is important that a supportive planning framework is created so as to ensure that the region's businesses can continue to grow and develop. This is likely to demand different responses in different contexts. For example, in urban locations redevelopment and mixed-use development needs to cater for new and emerging sectors such as creative industries. Opportunities offered by regeneration schemes, in locations with regeneration companies and elsewhere, will be an important ingredient in catering for this potential. Equally, harnessing the opportunities offered by proximity to key knowledge intensive institutions such as the region's seven universities, hospitals and higher and further education institutions will help to develop the knowledge driven economy. The establishment and expansion of these institutions elsewhere in the region could provide a stimulus for

economic activity. The sub-regional sections in Section 4 identify the importance of these links and LDDs should make adequate provision enabling 'spin offs' and businesses related to these bodies to develop through the identification of sites for 'science parks', technology centres and incubator units, etc.

Small Rural Businesses

8.2.3 In rural areas, reform of the Common Agricultural Policy (CAP) means that subsidies will no longer be so closely linked to farm production, and this should lead to more efficient farm businesses as a result. The expansion of the second 'pillar' of the CAP, the Rural Development Regulation, is likely to encourage greater diversification away from agricultural activity, and an increased desire on the part of farmers to diversify their capital assets, for example into workspace. Businesses in rural areas now and in the foreseeable future are likely to have little connection with the land-based industries but should be supported where they secure jobs for local people and improve the viability of rural communities. Development Policies B and C provide a framework of encouragement for the development of small businesses in the 'market towns' and smaller settlements throughout the region.

8.2.4 Growth of small businesses in rural areas will inevitably need to be based in sustainable and accessible locations to avoid pressures on local environments and roads. LDDs will need to facilitate the provision of alternative accommodation at better connected locations, for example the market towns, where appropriate. Small businesses can be badly affected by proposals for relocation in terms of staff retention, etc. In considering the merits of development and expansion in planning terms, authorities need to take account of these potential impacts which might induce firms to relocate out of the area completely.

8.2.5 Accessibility to Broadband and future information communication technologies will continue to play an important part in helping to reduce issues of remoteness for rural firms and businesses in the far South West and should help to reduce the need to travel in the region. The situation has improved over recent years with Broadband now more widely available. As part of the Sustainable Construction Package included in Development Policy G, new buildings should have future-proof Broadband connectivity as standard in these locations in particular. In order to reduce the need to travel, it will also be important for new homes to be built with live/work space to enable home working.

8.3 Employment Land Provision and Review

8.3.1 A ready supply of high quality sites and buildings at the right time and in suitable locations is fundamental to the continued economic performance of the region. A sufficient supply is fundamental in promoting successful business, in helping to secure successful delivery of economic development and regeneration, sub-regional employment space strategies and development of key established emerging business sectors, including clusters of related activity. It is clear that in future many jobs will arise within established urban areas on redevelopment land rather than on green field sites. The context for provision and review of employment land and buildings has changed significantly since RPG 10 was published. It is now necessary to provide a larger number of smaller sites to meet organic growth and rural investment, to regularly and robustly review those sites and take greater account of the role of non-B class uses (ie not B1, B2 or B8) as generators of employment. For example, economic projections for the region suggest that over the RSS period the health, social, education and hotel and catering sectors will account for almost 39% of the total increase in FTE jobs in this respect. As indicated above the significance of the public sector's employment role varies across the region.

8.3.2 In some communities, particularly some of the towns covered by Development Policies B and C, the loss of employment sites, particularly in convenient near-centre locations, is causing local concern. In such circumstances, taking into account the overall balance between employment, services and housing, local authorities should use Development Policies H and I to assess carefully how any proposed redevelopment fits in with this, and their own, strategy for development, and what the most important need is for that community. Loss of previously developed land sites to other uses can remove much needed employment opportunities and force release of edge of town sites; however, circumstances do vary between towns.

8.3.3 Guidance from the ODPM on Employment Land Reviews focuses on 'traditional' employment land uses that are within the scope of PPG4. It also identifies the need to take into account 'specialised employment land' requirements which should also be addressed when considering the preparation of LDFs and RSSs. These include any specific employers in sectors which are important to the local economy whose potential expansion needs to be safeguarded, the creative industries, transport related uses, for example those related to airports, ports and other inter-modal freight terminals (covered by Policies TR7, TR8, TR9 and TR13), specialist waste facilities (covered by Policies W1, W2 and W3), and low value industrial uses or replacement sites for 'bad neighbour' issues.

Estimating Employment Land Requirements

8.3.4 Section 4 contains an indicative range of jobs which are likely to arise in the SSCTs. Within this context, local authorities should look to utilise the ODPM's *'Employment Land Review Guidance Note'* (Annex D) which provides guidance on the translation of forecasts to land requirements. In the case of Exeter, Plymouth and South East Dorset, strategic authority advice has identified specific land amounts. For places elsewhere in the region, authorities will need to base their allocations of land on their understanding of the functional role of towns, local economic circumstances and the ODPM's *'Employment Land Review Guidance Notes'.* Local authorities should ensure that they maintain an up-to-date robust evidence base of supply and likely demand for employment land and sizes and types of unit for their area. This will ensure that the right types of provision are brought forward in response to identified requirements. In areas where employment and property markets overlap and cross administrative boundaries, for example within the functional areas of SSCTs, local authorities should work together to establish a realistic picture of need and respond to it across that area.

Strategic Sites

8.3.5 Within the context of Policy E1, strategically significant sites need to be identified and safeguarded for employment use. An employment site can play a strategic role for a number of reasons related to location and potential users' requirements. Strategic sites will be of different sizes, serve different employment uses and provide different numbers of jobs in different parts of the region, ie a strategically important site in Bristol could be very different to a strategically important site in Cornwall. When identifying strategic employment sites, local authorities should give consideration to provision of on-site support facilities, such as child-care and training, and to the eventual layout and quality of environment created.

8.3.6 In identifying a portfolio of 'new' sites to be safeguarded to meet future needs there will also be opportunities to influence the redevelopment of those sites not protected. This could include, for example, mixed-use development with intensification of an employment use on a smaller part of the site. This could encourage the occupier to invest in new premises to improve productivity, competitiveness and job retention in the longer term, as well as increasing employment and residential densities.

Coastal sites

8.3.7 Within the Coastal Zone to be defined under Policy CO1, a number of towns and cities are of importance to their local area or broader sub-region as centres for services and employment, as well as being focal points for tourism or as ports (see Policy TR7). Many of these coastal towns are undergoing significant change as their primary role as a resort or fishing community is diminishing. Other coastal communities are thriving and there are significant pressures for growth and development. In some cases, they may be locations appropriate for new casinos (see Section 8.6).

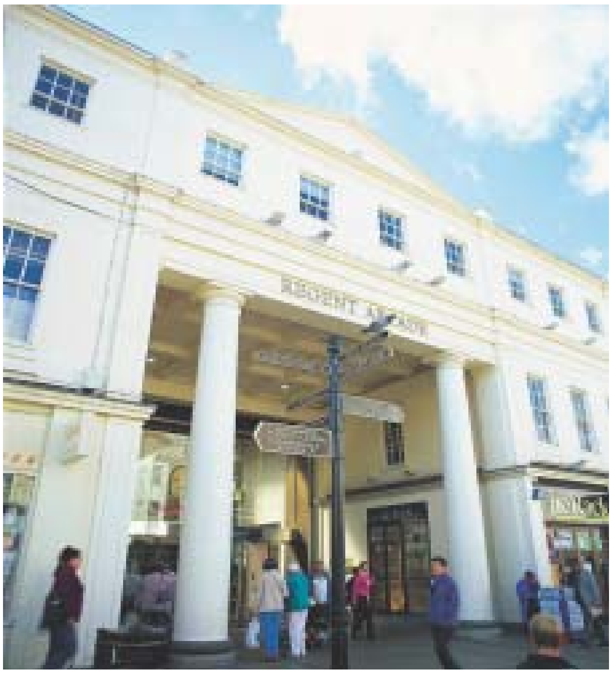
8.3.8 Within these towns and cities, maritime industries are clearly reliant on estuarine and coastal sites with access to water, as are some parts of the tourism industry. In places where development pressures could result in alternative uses taking place on such sites, there is a need to ensure they are safeguarded for future use by those activities needing a waterside location.

E1 Assessing Employment Land Provision

Local authorities will assess the supply of, and demand for, employment land in their area, and through their LDDs will maintain a ready supply of sites and premises to meet local requirements for business expansion and inward investment to meet the particular needs of small businesses, and the future development of ports, airports, knowledge intensive institutions and non-B class uses such as health, leisure and tourism. In undertaking assessments, local authorities should co-operate across administrative boundaries to ensure supply meets business needs.

E2 Identification of Employment Sites

At SSCTs identified in Development Policy A, LDDs will provide sufficient sites to accommodate the numbers of jobs identified for each SSCT in Section 4 along with the needs of individual sectors of the economy. This will include a range of sites capable of meeting the requirement of uses identified in Policy E1. Outside of SSCT's, LDDs should give preference (having regard to the sequential test) firstly to land within the SSCTs identified through the application of Development Policy B and then outside these places to previously developed land which is well integrated with the existing settlement pattern.



E3 Review of Employment Sites

The supply of sites should be critically reviewed in line with Policy E1 on a three year rolling basis so as to ensure that those allocated continue to meet the requirements of business, and will meet current or longer-term needs for economic development.

E4 Redevelopment of Employment Sites

Sites which no longer meet the needs of business or are poorly located for economic development purposes should be considered for redevelopment for alternative uses in the following sequence: for non-B use class employment generating uses; for mixed-use development including residential use taking account of the potential for higher employment densities; for residential use only.

E5 Waterside Employment Sites

Within coastal towns and the developed coast, waterside sites must be safeguarded for social and economic uses which require such a location, giving priority to maritime industries.

8.4 Town Centres

Main Retail Centres

8.4.1 The region's SSCTs are important centres, some of national importance, offering a good range of retail and leisure activities, but the region lacks a dominant retail centre of national standing[28]. Many improvements have been made over recent decades to improve the public realm and ease traffic congestion which enhances their quality, but there is still a lot to do. The Transport Section (Section 5), highlights the extent to which demand management and improved public transport will have an effect on people's enjoyment of the city and town centre environment.

8.4.2 In major centres there is strong demand from multiple retailers, coupled with low vacancy levels. However, there is still demand for out of town provision. Research[28] has shown that, based on an annual growth in GVA of 2.8%, and resultant population growth and spend, the region will need to plan for an increase in provision of retail floor space of between 1.31 and 1.97 million m^2 gross by 2026, based on average sales densities of between £4,000 per m^2 and £6,000 per m^2, in addition to the current floor space in the region of 3.39 million m^2 gross.

8.4.3 The centres of the region's cities and towns usually contain a number of cultural assets, facilities and services which add significantly to the quality of life of residents and visitors. This asset base, along with key public services, is of fundamental importance to current and future residents in attracting them to consider urban living. The need to maintain and enhance these and other town and city centres' economic vitality and viability is key to helping to deliver effectively the draft RSS and RES strategies. The 'centres first' approach is one also embedded in Government policy guidance[29].

[28] *DTZ Pieda 'A Needs and Impact Assessment of the Region's Significant City and Town Centres'.*

[29] *Planning Policy Statement 6: Town Centres.*

8.4.4 The main retail centres in the region include Barnstaple, Bath, Bournemouth, Bristol, Cheltenham, Exeter, Gloucester, Plymouth, Poole, Salisbury, Swindon, Taunton, Torquay, Truro, Weston-super-Mare and Yeovil. Overall strategic planning and direction for the main town centres in terms of retail, leisure and office provision is given in Section 4. All of the SSCTs of the region have experienced out of town, edge of town and other 'out of town centre' development for retail and other functions over the last 20 years - the effects on town centre provision have varied.

8.4.5 A further key issue in ensuring that centres' opportunities are maximised is the need to positively market individual centres. Many towns now have Town Centre Managers and partnerships to oversee their improvement, and Chambers of Commerce play an active role. Further concerted efforts are needed to facilitate growth, change and improvement, based upon provision of mixed-use development and the retention and improvement of centres' retail cores. Key to retaining and improving a centre's vibrancy is the need to retain and improve the public realm, the retail offer and adequate space for office-based and leisure activities and to ensure there is sustainable access to it and that traffic congestion is eased.

Other Major Shopping Centres

8.4.6 The region also has two other main shopping centres at Cribbs Causeway on the edge of Bristol (in South Gloucestershire) and at Clarks Village in central Somerset attracting shoppers from a wide area. Both feature highly in the ranking of shopping centres in the region, and both are major visitor attractions generating high volumes of car journeys. Pressures for developing further retail out of town centres should be resisted, and the policy tests provided by PPS6 should be applied. There is no current requirement for further out of town retail centres in the region. The established, sequential approach to location of new retail development will be applied, with schemes on previously developed sites in established town centres the priority.

8.4.7 One of the key considerations in the future development of retail and leisure provision is to take steps to improve accessibility of town centres and existing major out of centre retail locations to public transport, walking and cycling. When adopting traffic demand management measures, Highway Authorities should have regard to the need not to disadvantage traditional centres compared with out of town/edge of town locations.

Main Office Centres

8.4.8 The region performs relatively well in terms of office stock and employment generated by office related work, compared against other regions. Based on an assessment of stock within the region, Bristol is considered the 'office capital' with over one million m^2 of office space and is ranked well above other regional centres, of Swindon, Bournemouth/Poole, Exeter, Cheltenham, Plymouth and Gloucester, which have 250,000 to 600,000 m^2 office space. Other SSCTs have a range of office space up to 200,000 m^2. A number of key issues emerge as challenges for the region's SSCTs in terms of provision during the plan period. Much of the office stock in the SSCTs comprises older office stock, eg Bristol City, Gloucester and Plymouth all have over 60% of stock built before 1980, and Swindon's stock largely comprises 1980s stock. This could prove a problem in attracting potential occupiers which may require more modern and adaptable stock. Much of the newer stock is currently located in out of town locations, and at sites well connected by road. Research has shown that provision will need to be made for additional office space between 2.7 and 3.2 million m^2 in Bristol, Bath, Weston-super-Mare, Gloucester, Cheltenham, Swindon, Bournemouth/Poole, Taunton, Exeter, Torbay and Plymouth representing 32 to 44% of existing stock.

8.4.9 Whilst having a policy framework which encourages centre location for development, one of the main challenges will therefore be in making town centre locations sufficiently more attractive to occupiers, particularly if accessibility to those centres is, or is perceived to be, poor. Where town and city centre accommodation is newly built, a further challenge is to attract new businesses into this accommodation, or into the older accommodation that relocating businesses leave behind. The need to achieve net gains in office accommodation within towns and city centre locations will be a key issue in helping to achieve urban renaissance and securing and enhancing centres' utility, viability and economic performance.

Local Centres

8.4.10 Within the context of the development which will happen at the region's main centres, maintaining growth and investment at other towns in step with both planned local population growth and household expenditure growth is important in providing choice and reducing the need to travel to other centres. Population growth of the towns identified through Development Policy B should help maintain their retail and service role relative to the major regional centres and help avoid greater concentration of these facilities at larger places. Such towns also play an important service role for nearby smaller town and village communities. Within the context of Development Policy C, Local and Strategic Authorities and other agencies/organisations should seek to secure appropriate support, as far as economic realism allows, for the retention of local retail, Post Office and other community services in villages away from the immediate vicinity of towns. This support would include promotion of innovative, community based schemes to provide essential services and facilities for local residents, particularly older people, children and young people, and those who are unable to access facilities further away from their homes due to disability, lack of transport, or caring responsibilities.

8.4.11 Appropriate actions to maintain healthy town centres founded on the evidence base, studies and measures, should be included in LDDs. The case for major new development will need to be supported by appropriate impact assessments for broad retail, leisure or cultural uses in other centres within the broad catchment area of the proposals.

Provision for Retail, Office, Leisure and Other Town Centre Uses

8.4.12 Provision for retail, office, leisure and other town centre uses will need to be provided in-step with the needs generated by economic and population growth. The challenge will be to provide this in sustainable locations, based on the 'town centre first' sequential approach. Policies and proposals developed by local authorities, developers and other agencies for development in town centres should follow guidance given in PPS6. They should seek to redress existing imbalances in the provision of facilities and services, to improve a centre's 'offer' relative to its role and function and help to bring forward more sustainable patterns of use. Proposals for facilities at out-of-town centre locations should not be detrimental to the regeneration, vitality and viability of the centre. Whilst strategic direction on town centre provision is given in Section 4, the RPB will continue to work with local authorities to determine how these forecasts can be accommodated, and what they mean for the SSCTs.

8.4.13 Local and Strategic Authorities will need to keep an up-to-date and robust evidence base and, in line with review of LDFs, they should undertake regular locally-based assessments once at least every three years to establish appropriate needs, based on policies and principles in the Draft RSS (including, for example, Policy E1) and guidance given in PPS6 (and other Government guidance). It would be pragmatic for local authorities to explore the functionality and the different types of needs of places at the same time and it may therefore be appropriate to undertake town centre assessments when reviewing other issues such as employment land supply/demand and urban housing potential/capacity. At the regional and sub-regional level, the understanding of leisure needs will be supplemented by the South West Cultural Infrastructure Development Strategy referred to in Section 7.

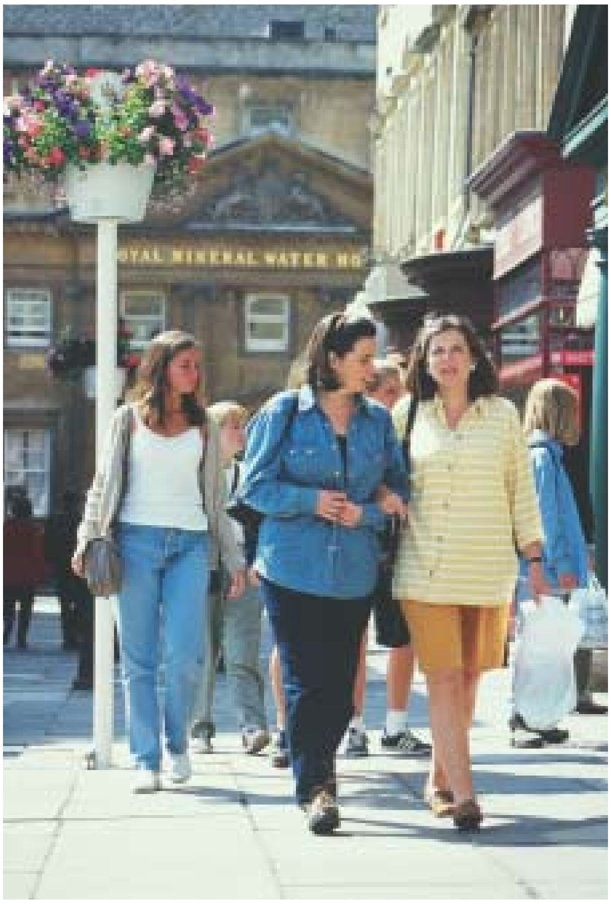
TC1 City and Town Centres

In order to meet the needs of local communities within the region, local authorities and other agencies will work together to ensure that the vitality and viability of the region's existing network of towns and city centres is maintained and enhanced. In doing so, it will be important to ensure that such centres are not adversely affected by inappropriate development elsewhere, and that provision is made for a mix of uses within town centres, including retail, cultural facilities, offices, other employment and housing.

The central areas of the SSCTs identified in Development Policy A will be the main focus for new investment in retail and other major facilities requiring high levels of accessibility to the communities they serve, recognising their function as focal points for extensive catchment area populations. The sub-regional policies provide the strategic direction for these places.

Within those settlements identified in the context of Development Policy B, the range and quality of central area facilities will also be maintained and enhanced to meet future needs. In all settlements, measures should be introduced to improve accessibility by sustainable modes, and to enhance the public realm and quality of the town centre environment. In doing so, local authorities and other agencies must recognise the role of central area investment in supporting regeneration objectives.

The scale of new investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth. The development of major new regional shopping facilities outside these centres will not be supported.



8.5 Tourism

8.5.1 Section 7 considers the need to enhance and promote cultural life and provision, of which tourism is a part. Tourism is also a key sector of the region's economy.

8.5.2 South West Tourism and the RDA have identified nine recognised tourism destinations in the South West through the Regional Tourism Strategy: Cornwall, Devon, Somerset, Dorset, Bournemouth and Poole, Bath, Bristol, Wiltshire and Gloucestershire. The region's most visited broad destination area is Devon[30]. The region contains a number of major international and national tourism attractions including: Stonehenge, the beaches of Cornwall, Devon and Bournemouth, as well as the National Parks, the Areas of Outstanding Natural Beauty, an extensive Heritage Coast and the region's many country houses and small towns and villages. Within this context, the region has a number of recognisable, major holiday resorts including Bournemouth/Poole, Newquay, Torbay, Weymouth and Weston-super-Mare.

8.5.3 The region now contains some 'iconic' tourism attractions such as the Eden Project, Tate St Ives and @Bristol (at-Bristol). Events such as the 2012 Olympics will provide an opportunity for Weymouth and Portland (which will host the Olympic Regatta) and for other parts of the region in providing training facilities and for the tourism industry to benefit from activity the Olympics will generate. The sub-regional and transport impact implications of the Olympics are considered in the Transport and Sub-regional Sections (Policy SR31). A high proportion of the region's tourism 'product' is generated by smaller-scale tourism attractions and businesses and planning policies should reflect the need to maintain and enhance this part of the existing tourism industry 'base'. This is reflected in the region's approach to encouraging more sustainable tourism.

8.5.4 Whilst tourism is one of the region's key economic sectors and particularly important in certain parts of the region, the far south west and coastal areas, it is traditionally low wage and seasonal. In the face of increasing overseas competition, a key challenge for the South West is how the tourism industry can improve this position whilst sustaining and

[30] *The UK Tourism Survey 2003.*

improving the quality of its overall 'offer'. As well as appropriate physical development, the tourism industry in some parts of the region may need to respond to this challenge by investment in training and extension of the season where acceptable and appropriate. The industry will also need to consider the potential impacts of climate change, and how best to respond to the opportunities and challenges presented.

Sustainable Tourism and Improving Quality

8.5.5 The Regional Tourism Strategy[31], identifies three priorities: sustainable tourism; increased quality; and, improved destination management arrangements. The first two of these, in particular, can be influenced by this Draft RSS. The Government recognises the economic significance of tourism in *'PPG21: Tourism'*.

8.5.6 Whilst tourism can provide an opportunity significantly to enhance destinations and attractions by generating economic return and reinvestment, it can place burdens on the region's natural and heritage resources. One of the cornerstones of *'Towards 2015'* is to deliver truly sustainable tourism, protecting the region's key asset - the natural environment - and balancing this with the needs of the visitor, community and industry as a whole. In order to achieve more sustainable tourism, the region's approach is to enhance the tourism 'offer' by investing in existing attractions and destinations, rather than investing in and promoting major new high profile (iconic) attractions. However, if such attractions are proposed, support should be given as long as those attractions are not detrimental to achieving more sustainable tourism, and are consistent with policies of the Draft RSS.

8.5.7 To ensure that impacts from tourism related development are lessened, those responsible for developing and promoting tourism should ensure tourism is more sustainable, for example: in resource use; use of sustainable construction; retention of visitor spending in the local economy; local sourcing of materials; meeting training needs of potential employees in the industry locally; extension of the season where environmentally, socially and economically viable and acceptable; and, achieving sustainable accessibility and reducing the need to travel, in order to reduce greenhouse gas emissions.

8.5.8 The quality and provision of accommodation in the region is clearly important to the health of the tourism industry. The tourism industry should focus on maintaining and enhancing the diversity, quality and provision of accommodation stock. In some parts of the region and in coastal resorts in particular, there is some concern about the loss of high-quality accommodation stock to other uses. Where this is the case, local authorities should undertake assessment of need, supply and demand, liaising with the tourism industry and other stakeholders to establish an evidence base from which positive policies can be developed for LDDs and other strategies to protect accommodation stock where necessary, and to establish a sequential approach to redevelopment/re-use of redundant accommodation, securing the most appropriate re-use within the local socio-economic context. Other measures, such as off-setting the loss of accommodation stock in one area of a town, by replacing stock in another area of the town, could be used.

[31] *'Towards 2015: Shaping Tomorrow's Tourism' (2005).*

8.5.9 LDDs will be particularly important in enabling the changes outlined above. They will take into account and will be supported and guided by:

- Management, policy and strategy documents such as the Regional Tourism Strategy and Destination Management Plans
- Emerging trends driving both the consumer marketplace, for example changing consumer tastes and spending power
- The recognition of the cross-boundary nature of tourism activity and destinations

8.5.10 In addition, new tourism development should be encouraged to improve quality, and attract additional visitors based on realistic, and well evidenced, measures of demand in most locally accessible locations. This would include appropriate small-scale schemes in more rural areas where they will assist the diversification of the economy. New developments and, in particular major high quality and high profile projects should add value to the local tourism 'offer'.

TO1 Sustainable Tourism

Local authorities, stakeholders and the tourism industry will promote the development of tourism by:

- **Improving the quality and diversity of existing facilities and accommodation throughout the region, particularly where this would reduce seasonality**
- **Maintaining and enhancing the role of existing resorts, especially the major resorts of Bournemouth, Poole, Torbay, Weymouth, Weston-super-Mare and Newquay, by safeguarding existing high quality accommodation and facilities, and investing in new facilities where these would be viable and of an appropriate scale**
- **Realising the potential of the region's environmental, cultural and heritage assets as a basis for the development of sustainable tourism, where consistent with their conservation**
- **Identifying opportunities for the development of new facilities and accommodation related to recreational cycle and footpath networks within the region**

TO2 Safeguarding and Investing in Tourism Destinations

At coastal towns and other strategic tourism destinations, local authorities and stakeholders should collaborate to define the future role of tourism in the local economy, identify the measures required to support it, and develop action plans for their delivery. Such plans should identify:

- The need to allocate specific sites for new tourism related investment
- The nature and mix of new investment required, and
- The necessary infrastructure and investment required to support the industry within the context of the need for regeneration and economic viability

TO3 Major New High Quality, High Profile Attractions

Major new tourism attractions should be located within, or close to, SSCTs and particularly within the existing major resorts of Bournemouth, Poole, Torbay, Weymouth, Weston-super-Mare and Newquay where they will:

- Enhance the overall quality of the tourism offer in the region
- Develop new tourism markets complementary to those in established tourism areas, particularly those areas under greatest pressure
- Be readily accessible by public transport, cycle and pedestrian networks, and
- Help to extend the tourism season and contribution to the regional economy

8.6 Casinos

8.6.1 Further casinos may be permitted under the Gambling Act 2005. The Draft RSS recognises that the Government is exploring (through the independent Casino Advisory Panel) the role of, and possible locations for, 17 casinos nationally (one regional at 5,000 m^2, eight large at 1,500 m^2 and eight small at 750 m^2). Regional and large casinos could offer a high profile visitor experience and serve to support and further develop the region's tourism 'product' and may also offer very significant opportunities to assist regeneration in appropriate locations. However, recognising that there could be both positive and negative impacts of such facilities, it is clear that even large casinos should be located only where locations have been identified based on an assessment and full understanding of the impact on the settlement/community and sub-region concerned.

8.6.2 Whilst it is unlikely that the South West will be the first choice for location of the first Regional Casino, it is clear that several local authorities in the region are likely to wish to 'bid' for a large casino. Should one or more Regional Casinos be allocated to any named settlement in the Draft RSS, the following criteria should be followed when considering their location.

CA1 Regional and Large Casinos

Regional and large casinos should only be developed in locations where:

- **They support and extend the range of attractions in existing major regional tourism destinations named as SSCTs (see Development Policy A), and/or**
- **They assist regeneration measures in a location named in Section 4, which will not threaten the economic viability of established tourist resorts in the immediate catchment and where an adequate labour supply can be provided**
- **They offer large scale and appropriate public transport access**
- **Any negative social impact can be minimised, and**
- **Benefits for regeneration and the local economy can be identified**