appendices- contents

introduction

The following appendices contain a range of supporting information for the Western Somerset Economic &Access strategy. Appendix A details the baseline for the strategy and identifies a range of stakeholder perceptions (identified during strategy development workshops) under a range of key themes.

Appendix b sets out the current policy context for the strategy at national, regional and local levels. This is followed by appendix c “Next Steps” which provides further detail on the strategy development process. Appendix d identifies the local stakeholders who attended the workshops which informed the baseline and strategy documents. The final appendix provides a set of detailed transport appraisal tables which informed the transport elements of the strategy.

appendix a

ISSUES, CHALLENGES & PRIORITIES

INTRODUCTION

A.1 The following section outlines the key economic and transport issues and challenges for Western Somerset. The section is split into the following distinct themes (used in the workshop sessions to identify key trends and issues):

- Demographics;
- Employment;
- Economic sectors;
- Small and medium sized business;
- Labour market;
- Land and Premises;
- Social Exclusion; and
- Transport.

A.2 The baseline/issues section has a number of objectives:

- To identify the current socio- economic conditions and the previous and likely future trends in the Western Somerset study area;
- To identify the main issues and challenges in light of 1;
- To identify the issues and challenges as perceived by the stakeholders consulted;
- To identify the strategic issues and priorities for the Western Somerset area in light of the above; and
- To inform all stakeholders of the work undertaken to date and identify the next steps for the project.

A.3 Within each theme we identify the following:

- Current baseline position based on a review of the available data;
- The likely future trends (where possible);
- Identification of the key issues and challenges in light of the data review;
- Presentation of the issues and challenges as identified by local stakeholders; and
- Links between themes.

A.4 In this way a comprehensive analysis of the current and future economic trends and issues is built up based on the use of both quantitative and qualitative information.

A.5 It should be noted that the data used within the following section is not intended to provide a comprehensive baseline. Such work has already been undertaken and it is the aim of this report to build on this information rather than duplicate it. Where necessary the section reproduces previous analysis in order to provide evidence for the key trends under each theme.

A.6 The final part of the section identifies a number of priority issues that need to be addressed by the strategy. These have been developed in light of the review of data and stakeholder perceptions outlined previously.

DEMOGRAPHICS

Summary of key issues & trends

- Ageing population.
- Out - migration of younger age groups.
- Growth through in-migration of retirement age.
- Approximately 50% of population in rural areas.
- Need to retain younger age groups in West Somerset.
- Increasing pressure on public services particularly health as population ages.

Review of data/key trends

A.7 The West Somerset Regeneration profile[1] identifies the age structures of both the current population (Mid year estimate 2000) and the future projected age structure for 2011. Based on these figures the main trends over the period can be identified as:

- There has been overall growth in population of 1100 over the period to 2011 – relatively low growth compared to Somerset and the wider SW region;
- There has been relative increases in the proportion of total population accounted for by age groups over 54 years of age (particularly males);
- A more stable population in 2011 compared to the current situation; and
- A 2.7% increase in the working age population over the period 2001 –2011. With a similar increase in the non-working age population.

Issues arising from data analysis

A.8 `There are a number of potential issues which could arise from the current and predicted demographic trends in Western Somerset, these include:

- Potential for the age structure to influence the nature of work and recruitment over the period to 2011 as local employers will have to draw on a comparatively older workforce;
- (Related to the comparatively older and increasingly ageing population) There is likely to be increased pressure on public health and social services; and
- As the population ages and if retirement in-migration continues to increase there will be less people of working age and a corresponding decrease in the economic contribution made by these individuals.

Identification of stakeholder issues/trends

Retaining younger population

A.9 Stakeholders felt it was vital to the future economic prosperity of Western Somerset to retain population from younger age groups. Changes that were needed to facilitate this included provision of further vocational training and education opportunities for the young

[1] West Somerset Regeneration Profile, Produced for WSDC by Somerset County Council Information Unit, 2001

linked to key employment sectors and the skills demanded by employers.

A.10 Additionally it was felt that the establishment of a Higher Education Institute within Somerset or alternatively increasing the range of franchised HE courses would boost the number of highly skilled graduates who chose to study locally and consequently would be available to local employers.

A.11 The discussions around this issue also covered the need to provide affordable housing for younger age groups given that the likely employment prospects for this group were in low wage occupations.

Improving the understanding of rural life at a regional level

A.12 This issue related primarily to the use of thresholds in data relating to settlement sizes, specifically the definition of a village as up to 3000 persons. However there was also a wider perception that public agencies at the regional level had a poor understanding of the realities of deep rural life which led to inefficient solutions at the local level. This is primarily an issue relating to communication and one that has previously been identified in previous board meetings of the SWRDA[2].

Linkages to other themes

A.13 The main linkages are with the labour market theme. Currently the West Somerset working age population is declining both in relative and absolute terms. If this trend continues and employment levels increase Western Somerset's businesses will have to search for suitable labour outside of the area. If this is the case potentially there could be an in-flow of additional workers. Whether this is in the form of commuting or permanent moves depends on a number of variables including; the skills available in local labour markets, the nature and scale of the skills demanded by local employers (which is dependent on the sectoral distribution of businesses) and the availability of suitable housing.

[2] Rural Issues, minutes of the 19th SWRDA board meeting 19th February 2001

EMPLOYMENT & ECONOMIC SECTORS

Summary of key issues & trends

- Dependency on Tourism and Agriculture.
- Employment decline 1993-1998 decline of 7%.
- Tourism employment declined by 20% 1993-1998.
- High degree of part time & self-employment.
- Low wage/low skill economy - agriculture/tourism.
- Vulnerability of key sectors to wider macro-economic change.
- Under represented in key growth sectors - hi-tech.
- Minehead – dependent on employment provided by Butlins facility.

Review of data/key trends

A.14 The table below identifies the sectoral distribution of employment for West Somerset district and also provides comparators in for Taunton Deane Local Authority and Somerset County. The main points to note from the data are that over 30% of employment in West Somerset is in Distribution, Hotels and Catering. The vast majority of these jobs relate to employment generated by the tourism industry. Additionally there are a comparatively low number of employment opportunities in total (approx. 10,000) representing just over 5% of all employment within Somerset as a whole. The significant proportion of employment in the mining & utilities sector is largely due to the presence of the Hinkley Point nuclear power station which is a major employer.

Table 1:Employment profile of Taunton Deane District, West Somerset and Somerset by broad industrial grouping, 1998

<table>
<tr><th rowspan="2">Industrial grouping</th><th colspan="3">Proportion of total employment</th></tr>
<tr><th>Taunton Deane</th><th>West Somerset</th><th>Somerset</th></tr>
<tr><td>Agriculture</td><td>3.6</td><td>7.0</td><td>3.6</td></tr>
<tr><td>Mining & utilities</td><td>0.7</td><td>9.2</td><td>1.3</td></tr>
<tr><td>Food, drink & tobacco</td><td>1.5</td><td rowspan="5">3.5</td><td>3.4</td></tr>
<tr><td>Textiles & clothing</td><td>0.6</td><td>1.8</td></tr>
<tr><td>Chemicals</td><td>#</td><td>1.9</td></tr>
<tr><td>Metals & minerals</td><td>0.9</td><td>2.1</td></tr>
<tr><td>Engineering</td><td>2.0</td><td>7.8</td></tr>
<tr><td>Other manufacturing</td><td>5.0</td><td>5.0</td><td>4.0</td></tr>
<tr><td>Construction</td><td>4.3</td><td>4.5</td><td>4.7</td></tr>
<tr><td>Distribution, hotels & catering</td><td>23.5</td><td>30.7</td><td>24.3</td></tr>
<tr><td>Transport & communications</td><td>4.8</td><td>3.2</td><td>4.2</td></tr>
<tr><td>Banking & business services</td><td>8.0</td><td>4.3</td><td>6.9</td></tr>
<tr><td>Professional services</td><td>4.7</td><td>2.5</td><td>4.4</td></tr>
<tr><td>Other services</td><td>4.3</td><td>5.8</td><td>3.7</td></tr>
<tr><td>Health & education</td><td>18.7</td><td>19.6</td><td>18.9</td></tr>
<tr><td>Public admin. & defence</td><td>16.0</td><td>4.7</td><td>7.0</td></tr>
<tr><td>Total jobs (number)</td><td>45,200</td><td>10,000</td><td>181,400</td></tr>
</table>

Source: Annual Employment Survey `1998, NOMIS.

Geographical distribution of employment

A.15 The vast majority of jobs in the West Somerset district are located in Minehead and a number of smaller settlements (Watchet, Williton, Porlock and Dulverton). Based on data from the Somerset Economic Assessment (Source 1991 census) these settlements account for over 74% of all employed and self-employed in West Somerset (district). The table below identifies the broad sectoral distribution of all employed and self-employed individuals in these key settlements.

Table2: Sector distribution of West Somerset employed and self-employed aged 16 years and above (main settlements), 1991

	Proportion of total employed and self employed residents aged 16 years and over						
Settlement	**Primary**	**Manuf. & mining**	**Constuc.**	**Distrib. & catering**	**Transport**	**Other services**	Total employed & self employed
Minehead	3	6	9	39	3	38	4,070
Watchet	7	26	9	23	2	32	1,410
Williton	6	13	7	35	2	34	880
Porlock	15	2	9	37	9	28	540
Dulverton	10	6	8	30	4	40	500

Source: 1991 Census

A.15 Unsurprisingly 77% of Minehead's employment is in the distribution & catering and other service sectors. This relates to the town's main function of tourist resort – of these 4000+ jobs, almost 35% are accounted for by one employer, Butlin's (anecdotal evidence). There is a heavy dependency in the town on what has been in employment terms (within West Somerset district) a declining sector, within this sector there is dependence on a single employer for many of the jobs available.

A.16 Analysis by Prism also identifies Watchet as having over 50% of local firms and employment in declining sectors, most notably manufacturing which has previously represented over one quarter of all employment in the town. The main source of manufacturing employment is accounted for by one employer, Wansborough Paper Mill.

A.17 Taking into account just these two examples the employment prospects of the settlements in Western Somerset do not encourage optimism. Employment growth from this perspective looks unlikely given the sectoral distribution and lack of current employment in key growth sectors (see later section). In the following sub-section past and future employment trends are examined in order to provide more detail on future growth prospects for the economy.

Current trends / Future prospects

A.18 By analysing data from the Annual Employment Survey for 1993-98 it can be seen that West Somerset district was, along with Bath & North East Somerset, the only local authority district to experience a decrease in employment (-7%). The majority of these jobs losses were as a result of structural changes with both the utilities and Tourism sectors affected (see table below).

A.19 Also interesting is the trend in tourism employment (distribution, catering and hotels) which declined by 20% over the period despite an increase across Somerset County for the same period.

Table 3:Change in employment – Broad industrial groups, West Somerset 1993-98

Broad Industrial Group	Change in number of employees 1993 to 1998		
	West Somerset		Somerset
	Nos.	%	
Utilities	-300	-22	-17
Manufacturing	+100	+13	+3
Construction	+290	+172	+68
Distribution, hotels & catering	-800	-20	+14
Transport & communications	#	-4	+9
Banking & business services	#	-3	+46
Professional services	+100	+41	+30
Other services	-100	-14	+5
Health & education	+100	+6	0
Public admin, & defence	-100	-23	-8
All West Somerset	-700	-7	+9

Source: Annual Employment Survey 1993-98

A.21 The West Somerset economy has a weak representation in the sectors predicted to grow most strongly in output terms. However employment projections by Cambridge Econometrics for the period from 2001-06 show a potential **net** increase of 240 jobs across all sectors in West Somerset. The majority of this increase is accounted for by the following sectors:

- Distribution, hotels & catering +190 jobs;
- Health & education +80 jobs; and
- Other services +60 jobs.

A.22 These are likely to be mainly part-time opportunities and are offset principally by losses in manufacturing (-120 jobs). This low growth in employment over the period to 2006 shows the importance for Western Somerset and its communities of linking into growth opportunities elsewhere – principally Taunton as in spatial terms this is feasible for commuting (see Labour market theme). However this would mean additional use of what are currently perceived as poor road links between Western Somerset and the County town. The figures in table 4a give an indication of the relative size of future employment growth in key sectors in the Taunton Deane local authority area compared to West Somerset district.

Table 4a: Predicted employment growth in selected sectors 2001-06 – Taunton Deane & West Somerset

Sector	Taunton Deane	West Somerset
Banking & Business services	+310 jobs	+30 jobs
Health & Education	+340 jobs	+80 jobs
Professional services	+360 jobs	+40 jobs
Distribution, Catering & Hotels	+650 jobs	+190 jobs

Source: Cambridge Econometrics

Issues arising from data analysis

High degree of self-employment –

A.23 Many people who are self employed or run a small business do not have the time to undertake training as they cannot afford to sacrifice the time away from their business.

Sector dependence

A.24 Tourism and Agriculture were consistently identified as the key economic sectors in Western Somerset in employment terms. It was felt that there was an over-dependence on these sectors and that there was a need to diversify agricultural and tourism activities, with a particular focus on quality. In addition it was recognised there was a need to diversify economic activity across the Western Somerset economy in order to build a stronger more "independent" economic base.

Tourism

A.25 The areas of image, marketing and branding formed a key part of all of the workshops. The main messages to come out of the discussions were:

- Somerset had a weak brand (in tourism terms) compared to areas such as Devon and Cornwall;
- There was a market for a relatively under developed tourism offer i.e. some people prefer an area which is less congested; and
- The Exmoor brand was far stronger than that of Somerset, although some identified this as a key opportunity to ally Western Somerset with Exmoor.

A.26 In terms of tourism locations it was perceived that the vast majority of visits to the area were short-term stays (defined by stakeholders as up to 3 days). This is backed up by figures produced by the Somerset Tourism Partnership which identified that over 67% of all visits to Western Somerset were for one day only.

A.27 The main tourism "draws" of the area were not sufficiently attractive to visitors to make Western Somerset competitive with foreign or other regional locations. Consequently improving the range and variety of attractions, particularly those suited to poor weather, was a key priority.

Identification of stakeholder issues/trends

Realism

A.28 Stakeholders felt that the strategy would need to be realistic about how much employment growth the Western Somerset economy could actually deliver. In a number of cases this type of growth was perceived to be relatively small in comparison to urban centres such as Taunton.

Flexible employment opportunities

A.29 Employment opportunities for the local population in Western Somerset often require the need for greater flexibility in terms of working hours – it was consistently cited that it was essential that the population living/working in rural areas had their own transport and that the primary mode was the car.

Employment growth

A.30 Healthcare and tourism were identified as the sectors most likely to provide the largest proportions of employment growth in the medium to long term due to the increasing proportion of the population in older age groups (healthcare growth) and the current dependence on tourism. Additionally the environmental sector (recycling, renewable energy, conservation etc.) was cited as a potential employment growth area. The rationale for this view being that the area already had expertise in related areas due to the designation of much of Western Somerset as an AONB (Area of outstanding Natural Beauty) and National Park.

Minehead

A.31 In discussions with various stakeholders it was recognised that the economic prosperity of Minehead was overly dependent on one main employer, namely Butlins. The facility currently employs 1400 people during peak season and around 800 during the off season. These figures expressed as a percentage of all employment across West Somerset mean that the facility accounts for between 8% (off-season) and 14% (peak season).

A.32 Another closely related issue is that many of the services in Minehead are reliant on the visitors that Butlins brings in to the local area. Consequently there is a danger that if the facility were to close the town would potentially lose a wide range of services as they become economically unviable due to reduced levels of business.

Linkages to other themes

A.33 The location of employment opportunities and future growth/decline in employment are key drivers of any decisions to undertake infrastructure investments. As the analysis both undertaken previously and detailed above shows there is only likely to be limited employment growth in Western Somerset.

A.34 However population projections to 2011 show that the working age population will grow by 2.7% over the period. Growth in employment in West Somerset is predicted to grow by over double this amount at 5.7%. These figures would indicate that there would potentially be greater opportunities for the working age population living in Western Somerset to also work in the area and could therefore reduce the level of out-commuting for employment purposes. The extent of these potential opportunities will depend to a certain extent on the future employment opportunities available, the nature of competition for these new "local" jobs from those living outside of Western Somerset and the suitability of the workforce to fill these opportunities.

A.35 Being realistic Western Somerset cannot compete with Taunton when it comes to both the quality and quantity of future employment growth. It is likely that Western Somerset will continue to have large numbers of people who commute to other districts for work and without significant improvements in the range and wage levels available in the area this will continue to be the case. Therefore it is essential that in conjunction with attempts to diversify the traditional sectors in the area efforts be made to attract new small businesses to improve the economic base of the area.

SMALL AND MEDIUM SIZED BUSINESS

Summary of key issues & trends

- Low SME formation rates.
- Comparatively larger proportion of SMEs.
- Lack of innovation in SMEs.
- Poor business / financial planning in small business.
- High degree of external control in larger businesses.
- Large numbers of micro-businesses (stakeholder defined as under 5 employees).
- Lack of fiscal incentives to encourage SME development.
- Evidence to suggest that small business support framework is fragmented.

Review of data/key trends

A.36 It should be noted that VAT registration/stock data covers businesses outside of the SME definition (fewer than 250 employees). However the data is the most accurate source available and allows an assessment of the structure, distribution and relative size of businesses.

Business stocks

A.37 West Somerset has the highest number of businesses per head of working age population. This is mainly a reflection of the large number of small agricultural and tourist related businesses in the area compared to other districts and the wider region. This is a common feature of rural economies, which tend to be dominated by relatively large numbers of small businesses. This is borne out by discussions with local stakeholders who identified that a large proportion of SMEs within West Somerset are single self-employed people.

A.38 There are relatively few medium and large employers within the Western Somerset area which has a number of likely knock on effects. These include a lower likelihood of spin-offs, decreased likelihood of business investment in employee training due to the fact that typically the businesses in Western Somerset have fewer employees and therefore cannot afford to lose staff for even short periods of time.

A.39 A large employer within Western Somerset is Butlin’s at Minehead which employs approximately 1400 people in peak season. This feature of local employment suggests the prosperity of the town over relies on the facility.

Inward investment vs Indigenous growth

A.40 Inward investment has a key role to play in the structure of a local economy. It is one of the few routes through which significant change can be achieved in the economic structure of an area over a relatively short period of time. However Foreign Direct Investments (FDI) also brings significant risks to an area and in times of economic downturn the jobs created by the investment are often vulnerable, as foreign owners look to cut costs – these “branch plants” are often first to be downsized.

A.41 Statistics on FDI into the UK by overseas firms are unfortunately not available at the local level. Analysis of the Invest UK database for 1998/99 and 1999/2000 shows that the South West received 6 of the

134 larger greenfield projects identified or 5% of the total of all similar projects. The South West represents 8.5% of the total population of the UK population and employment totals and therefore comparatively under performs against other regions when it comes to attracting FDI.

A.42 Analysis by Prism identifies that Somerset has received few direct investments in the last few years. The most notable recent involvement with a foreign company has been the joint venture between GKN Westland Helicopters (South Somerset) and Agusta of Italy.

A.43 Despite a relatively poor record in terms of attracting FDI, Somerset and to a lesser degree West Somerset (district) fare well on an analysis of intra UK company relocations into the area. West Somerset has experienced net gains of companies from movements in and out of the district over the past 4 years. These have been relatively modest gains – on average 3 companies per annum (see table 4b below).

A.44 Much of the movement into Somerset has been from firms in the Bath/Bristol area and London which accounted for approximately 38% of all relocations into the county.

A.45 This review of inward investment activity indicates that the most effective strategy for Western Somerset would be to target companies based in other regions of the UK rather than adopt an approach based on encouraging FDI. In addition the bulk of future employment growth will come from indigenous businesses and it is in this sector of the business market where efforts should be focused.

Table 4b: Composition of Company moves in Somerset county and West Somerset District, 1999

	Somerset			Balance of moves
Sector	Moves in	Moves out	Net	West Som'set
Primary	0	1	-1	0
Manf. food, drink	0	0	0	0
Manf. clothing, textiles	0	0	0	0
Manf. chemicals, plastics	0	0	0	0
Engineering	1	2	-1	0
Other Manufacturing.	4	3	+1	0
Utilities	0	0	0	0
Construction	5	8	-3	+1
Distribution	13	14	-1	+1
Hotels & Catering	0	0	0	0
Transport & Communication	3	1	+2	0
Financial Services	2	1	+1	0
Business Services	16	9	+7	+1
Other Services	6	1	+5	0
All sectors	**50**	**40**	**+10**	**+3**

Source: CREDO © Prism Research Ltd, 2001

Table 5: VAT registered businesses (absolute, per 10,000 population and per 10,000 working age population) in Somerset and sub-districts, 2001.

Area	Stock VAT registered businesses	VAT registered businesses per 10,000 head population	VAT registered businesses per 10,000 head population of working age
Mendip	3,775	376	642
Sedgemoor	3,475	332	564
South Somerset	5,225	337	576
Taunton Deane	3,090	308	528
West Somerset	1,380	422	812
Somerset	16,970	344	592
South West	149,715	303	508
UK	1,651,685	278	451

Source: DTI 2001

A.46 Table 6 below shows the relative change in the stock of businesses within the sub-districts of Somerset. Over the period (1991-99) the number of VAT registered businesses in West Somerset has decreased significantly (-13%). Stocks elsewhere in the county have also declined but not to the extent of West Somerset district when considering actual business numbers. Reasons for the decline in business numbers are primarily the inability of smaller rurally based business to compete with competition from larger rivals with greater economies of scale.

Table 6: Percentage change in business stocks, population and businesses per head 1991-1999

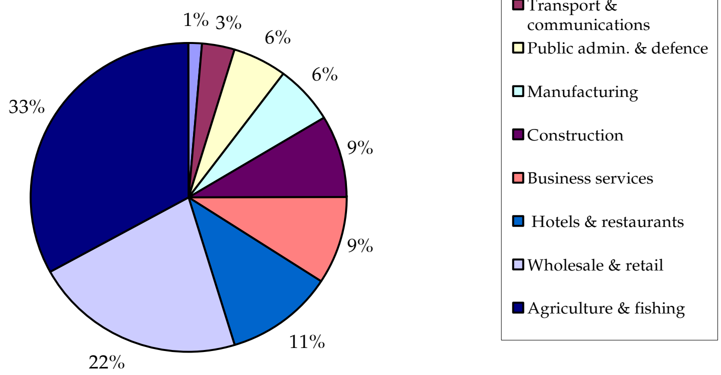
Area	Percentage change 1991-1999		
	Stock of VAT registered businesses	Population	Stock of VAT registered businesses per 10,000 head of population
Mendip	-13	+3	-16
Sedgemoor	-11	+5	-16
South Somerset	-11	+8	-17
Taunton Deane	- 9	+5	-13
West Somerset	-13	+2	-15
Somerset	-11	+5	-16
South West	-10	+5	-14
UK	-3	+3	-6

Source: DTI, ONS.

Sectoral distribution

A.47 On review of the sectoral distribution of VAT registered businesses the reliance of the West Somerset economy on declining sectors (as with employment distribution) can be seen. One third of all businesses are in agriculture with a further third being made up by the wholesale and hotel and restaurant sectors.

Figure 1: Sectoral distribution of VAT registered enterprises in West Somerset, 2000



Source: NOMIS

Issues arising from data analysis

A.48 There are a number of clear issues with the SME base in Western Somerset that become apparent on review of the data and these would need to be addressed by the economic strategy as far as is realistic. The nature of the Western Somerset area i.e. that it is primarily rural in nature and is perceived as being peripheral limits the business opportunities that can be developed due to relatively poorer access to markets and suppliers. The market opportunities that are available have led to an economy which has a high degree of very small businesses (anecdotal evidence suggests the vast proportion under 5 employees) with many being sole owners (the reason for the high levels of self-employment). These businesses are predominantly in declining sectors such as agriculture.

Identification of stakeholder issues/trends

Key role of SMEs

A.49 It was correctly identified that SMEs, in particular micro businesses (defined as under 5 employees) were a key part of the Western Somerset economy given that the vast majority of businesses (by number) fell into this category.

Lifestyle businesses

A.50 This issue was the most prominent/frequently mentioned in terms of the SME theme. The stakeholders' perception was that many small businesses in the area did not include growth amongst their key objectives. Further it was felt that many of the smaller businesses (up to 5 employees) are 'lifestyle' business that may have the potential to grow rapidly, but the owners are content to use the business to finance their own immediate lifestyle.

Supply chain restrictions

A.51 There was a perception from many of the stakeholders that SME's located in Western Somerset were at a disadvantage in cost terms when it came to sourcing supplies. This was related to the perception that suppliers charged a premium or limited deliveries to such businesses due to the additional costs to them of delivering to more remote rural locations. This was felt to be a result of the comparatively longer travel times to these areas which were partly a result of the comparatively poor transport infrastructure.

A.52 Following from this there was also a perception that improvements to the main A roads into Western Somerset would consequently reduce travel times and therefore improve the situation in regard to irregular delivery schedules and premium charges for deliveries to rurally based businesses.

A.53 On a similar theme there was a perception that a significant barrier to business growth/competitiveness in Western Somerset was the restrictions on some routes on vehicle size and type.

Lack of comprehensive business support

A.54 All workshop groups identified the lack of a coherent small business support framework as a key barrier to growth. The main concerns expressed were a lack of information in regard to the availability of premises, financial and technical support systems and perhaps more importantly confusion over the most appropriate point(s) of contact to gain this information.

Fiscal incentives for SMEs

A.55 A number of individuals suggested the use of fiscal incentives in order to boost business growth prospects or as it was termed "level the playing field" for SMEs based in rural areas. The main idea put forward was to reduce business rates for SMEs located in these areas in order to offset comparatively higher charges for deliveries and other transport costs (attending meetings etc.).

Competition from neighbouring areas

A.56 The workshops identified a perception that businesses in Western Somerset were at a distinct disadvantage in both competitive and growth prospects terms compared to businesses in areas such as Taunton and Bridgwater. This was based on the view that such locations had a far larger and varied premises offer (key for expansion) and superior physical links to their markets.

Linkages to other themes

A.57 One of the main linkages to be identified from the qualitative work was that between SME supply chain issues (deliveries to businesses) and the current state of the transport network. This is a key issue in determining the competitiveness of Western Somerset's businesses and currently restrictions on deliveries (anecdotal evidence) can seriously affect the operation and efficiency of remotely located rural businesses. Major transport investments are unlikely to improve this situation dramatically and it could be argued are economically unjustified for the level of expenditure that would be required to reduce travel times to previously remote rural areas and consequently facilitate an improved supply chain for small business. Current investments outside of the area, for example, Silk Mills and the Northern distributor road (Bridgwater) will influence strategic accessibility to/from Western Somerset.

LABOUR MARKET

Summary of key issues & trends

- Low economic activity rates.
- Generic skill deficiencies.
- No Higher education institution.
- Major out-commuting.
- Higher than average unemployment due to limited employment opportunities.
- Employment opportunities predominantly low wage/low skill.
- Ability of employed and unemployed to access training due to geographical and time barriers.
- Comparatively low percentages o workforce with higher level qualifications.
- Matching employer skill needs to vocational training opportunities provided.

Review of data/key trends

Economic Activity rates

A.58 Unsurprisingly West Somerset has the lowest economic activity rate of all districts within Somerset largely due to the significant proportion of the population which is retired. The table below shows how these rates compare against Somerset and the South West as a whole. Typically activity rates in the other Somerset districts are 60% or above.

Table 7: Economic Activity Rates for West Somerset, Somerset and the South West.

	Economic Activity Rates (16+)		
	West Somerset	Somerset	South West
Male	55.4	72.6	72.1
Female	52.6	57.1	56.2
All (16+)	**53.9**	**64.6**	**64.0**

Source: Labour Force Survey

Travel to work

A.59 Table 8 opposite shows that the West Somerset labour market has the largest proportion of its residents that travel outside of the area to their jobs commonly to the Sedgemoor and Taunton Deane local authority areas. Only 60% of those that live in West Somerset actually work within the area (Mendip district also exhibits similar characteristics). In contrast almost 80% of those living in the Taunton Deane borough also work in the area.

Table 8: Travel to Work patterns – (percentages of employed and self-employed over 16 years)

Home District	Work District						
	Men dip	Sedge-moor	South Somerset	Taunton Deane	West Somerset	Rest of South West	Rest of UK
Mendip	62	1	3	0	0	33	1
Sedgemoor	1	70	1	13	0	12	3
South Somerset	2	1	72	5	13	5	1
Taunton Deane	1	5	2	79	1	9	2
West Somerset	0	18	1	12	60	5	5
Somerset	14	17	25	21	8	12	2

Source: Somerset Household Survey, 2000

Income / Earnings

A.60 New Earnings Survey data shows that wages in Somerset are lower than the South West and UK averages[3]. Data indicates that in 2000 the average weekly wage for Somerset (male & female) stood at £366 compared with a regional figure of £379 and a national average weekly wage of £410.

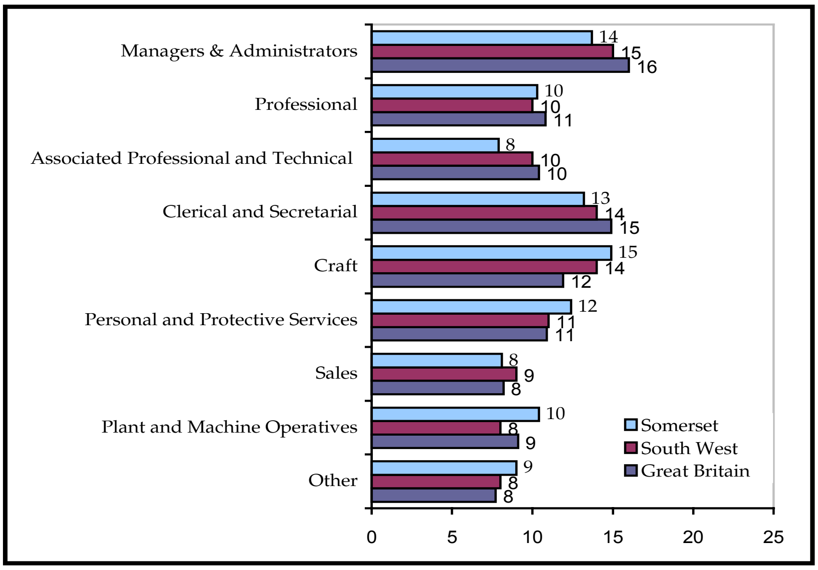
A.61 This disparity of income is also evident when comparing average incomes for both West Somerset and Exmoor against the Somerset average. According to figures for 2000 produced by CACI the mean annual income across Somerset is £21k. This compares to a figure of £18.6k in West Somerset and £16.7k for Exmoor[4]. The analysis also goes on to identify that 57% of households in West Somerset have incomes of less than £15k per annum.

A.62 It should also be noted that the black/cash economy is extremely important to many households in the Western Somerset area, particularly in the context of Exmoor. However it is extremely difficult to obtain any accurate figures on the extent of this activity.

Occupational structure

A.63 Accurate data at the West Somerset level is not available for the occupational distribution of employment; however at the County level the current distribution is shown overleaf. The data shows that employment in Somerset has larger proportions in the plant operative and craft occupational groupings than the region and Great Britain and corresponding low proportions in managerial, associated and professional occupations. Although data is not available for West Somerset it is likely given the key employment sectors and anecdotal evidence from previous workshops that this distribution in "lower skilled" occupations is likely to be more pronounced.

[3] Somerset Economic Assessment, Somerset Economic Partnership, PRISM Research, 2001.
[4] West Somerset Regeneration Profile, 2001, SCC Information Unit



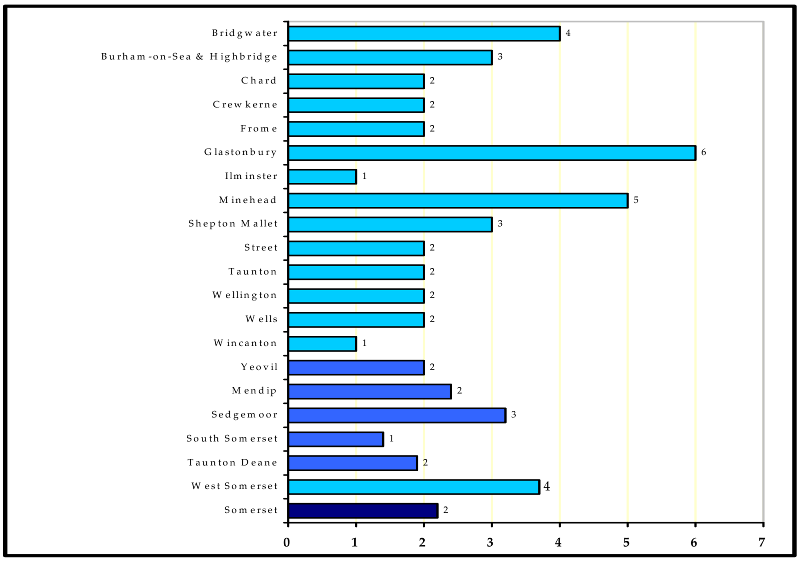
Source: Labour Force Survey 1999

Figure 2: Occupational structure: Somerset, South West, and Great Britain

Unemployment

A.64 Of all the local authority districts in Somerset, West Somerset has the highest claimant rate (April 2002) at 2.6% this compares with a figure of 1.8% for Somerset as a whole[5] and against 1.7% nationally. Seasonal unemployment is also a major feature of the economy in West Somerset given the dependency on the agriculture and particularly, tourism sectors and the increase in demand for labour in summer months. The district therefore has significantly higher rates of unemployment in the winter months. These figures also hide the fact that unemployment within certain settlements in Western Somerset is significantly higher, .as the data in the chart below shows:

Figure 3:Unemployment rates: Somerset Districts &key towns



Source: ONS & SCC Feb 2001

[5] Labour Market Trends, June 2002.

A.65 High unemployment rates are unsurprisingly concentrated in the towns of Somerset. Unemployment rates (based on the claimant count) in Minehead in February 2001 were second only to Glastonbury in terms of the major towns across Somerset.

A.66 Given the current dependency on the Butlins facility this comparatively high level of unemployment represents an additional problem for the main town within the strategy study area.

Qualifications

A.67 Analysis of the data presented in the Prism economic assessment shows that at both Key stage 2 (11 year olds) and GCSE level (16 years) Somerset has already achieved or is close to the National Learning targets and at GCSE level consistently outperforms the national average figures (see table below):

Table 9:Proportion of pupils achieving Level 4 or above at Key stage 2

% achieving level 4 or above at	English		Maths	
Key Stage 2 Targets: English 80% Mathematics 75	1996	2000	1996	2000
Somerset	61	75	56	70
England	56	75	53	72

Source: DfES

Table 10: Percentage of pupils achieving at least five GCSEs grades A-C 1997-2000

% gaining 5+ GCSEs (A-C)	1997	1998	1999	2000	Percentage change (1997-00)
Somerset	48.9	51.2	52.7	55.3	+13.1
England	45.1	46.3	47.9	49.2	+9.1

Source: DfES

A.68 Although these attainment levels commonly outperform the national figures and learning targets, performance outside the compulsory education system commonly lags behind the National figures (see table below):

Table 11: Average point score for 2 or more GCE A/AS Levels 1997-2000

Average point score for 2 or more GCE A/AS level	1997	1998	1999	2000	Percentage point change (1997-00)
Somerset	17.0	17.1	16.6	18.0	+1.0
England	17.3	17.8	18.2	18.5	+1.2

Source: DfES

Adult qualifications

A.69 When the highest qualifications of the workforce (both employed and economically active) are reviewed for both Somerset and the south west region a similar trend to the analysis of Key stage 2, GCSE and A-level attainment is apparent.

A.70 At NVQ levels 1-3 Somerset outperforms the regional average with a qualification at each of the three levels. However when comparing the percentage of the workforce with Level 4 and 5 qualifications attainment the figures for Somerset are lower than the regional average. This is likely to be a result of both the generally low skill employment base (less people with high level skills are demanded by the labour market) and a consequence of the outflow of graduates to seek Higher Education opportunities. The paucity of HE (and FE) courses is an issue across Somerset, however the problem is particularly acute in Western Somerset.

Table 12: Highest qualification held by economically active population, 2000

	Somerset	South West
	2000	2000
	All economically active of working age (percentage)	
Level 5	4	5
Level 4	22	28
Level 3	22	19
Level 2	21	20
Level 1	13	13
None/ below level 1	19	15
All	100	100

Source: South West TECs Household Survey, 2000

Issues arising from data analysis

Out commuting

A.71 One of the main features of the labour market in Western Somerset is the greater degree of commuting that its residents undertake compared to other districts within Somerset. This is partly a result of the limited employment opportunities available within the district – especially in professional and managerial occupations. This has a further implication for the transport network if this trend in commuting is to continue. This appears likely given the structure plan's emphasis on focusing development in the main settlements– Taunton and to a lesser extent Minehead in the Western Somerset context.

Low economic activity

A.72 Given the high percentage of population that are retired economic activity rates are generally lower in Western Somerset. These individuals by definition make less of an economic contribution to the local economy but conversely place additional pressure on key local services, particularly health and social services.

Low wage economy

A.73 The data available on both weekly wages and annual incomes suggests what anecdotal evidence and the data on employment structure seemed to suggest i.e. that the Western Somerset economy is predominantly low wage. This is due to the reliance on industrial sectors such as tourism and agriculture which in addition to low pay also commonly have unsociable hours.

Access to training

A.74 A key issue both for the employed and unemployed. In terms of those individuals in employment particularly in small businesses with few employees, the issue is one of being able to allow time for training. In many cases this is not feasible given that the business often depends on a few individuals and there is not the time available for training.

A.75 The main issue for the unemployed who wish to access training is actual access to sites where this is available. Transport costs to training facilities were identified as being prohibitive especially to those in rural areas. Provision itself was also perceived as limited.

Lack of higher level qualifications

A.76 Although there is no data available at the local level (West Somerset) in terms of educational attainment levels, the Somerset wide data available depicts a workforce with a lower proportion holding higher level qualifications. This suggests that employers looking for potential employees with higher level qualifications will have to extend their search area (and incur greater search costs) for suitable candidates. This may well not be an issue at the present time for Western Somerset but if efforts to move the economy away from its current low skill/low wage employment base in agriculture and tourism are successful this will become increasingly important for firms.

Identification of stakeholder issues/trends

IT training and infrastructure

A.77 It was felt that there was a lack of opportunity for the local workforce to access suitable ICT training and related to this, stakeholders also identified ICT infrastructure investment as a key area that the strategy needed to address if any serious attempt was to be made to attract hi-tech business into Western Somerset.

Low incomes

A.78 It was identified that due to the dominance of tourism and agriculture in employment terms the western Somerset economy was predominantly low waged with unsociable hours.

Local income levels & housing price mismatch

A.79 The mismatch between income levels and house prices was consistently cited as one of the major issues for the local population. Stakeholders recognised the dependence on both tourism and agriculture for employment and identified that both of these sectors were generally low wage. Conversely house prices across Western Somerset were felt to be out of the reach of the majority of people working in these industries – this it was perceived, had led to local people being forced to look for cheaper accommodation elsewhere due to the lack of affordable housing.

Skill shortages

A.80 A shortage of higher level skills in the local labour force was identified as one of the barriers to economic growth. It was perceived that this situation was partly a result of the low wages offered for professional occupations in Western Somerset compared to other regions for similar positions.

Economic activity levels

A.81 A number of individuals identified the comparatively lower levels of economic activity as a key issue. This was caused by changes in the population structure, specifically an increasing percentage of the Western Somerset population in older age groups (due to natural change and in-migration). This it was felt was a limitation on the growth prospects of the economy and exerted further pressure on public services (particularly healthcare).

Linkages to other themes

A.82 Interventions designed to encourage small businesses (particularly those in hi-tech sectors) from outside the region to locate in Western Somerset need to be considered in parallel with an appropriate skills strategy for the local workforce. Such businesses are likely to demand high level skills from the labour market and individuals with these skills need to be available. Similarly with attempts to increase the quality of the tourism market there will be further demands for quality customer care skills. Diversification of agriculture with possible developments relating to food processing, market development of local and regional products may also lead to increased demand for new skills from the local workforce.

A.83 What is apparent from the data is that interventions designed to encourage existing and new firms to locate and grow in the area will ultimately be hindered by a lack of generic skills in the available workforce. More worrying is a relatively high proportion of working age population with poor literacy and numeracy. The phasing of potential actions is therefore critical to the success of any long term strategy and implementing measures to address specific skills gaps is a priority in the short term.

LAND AND PREMISES

Summary of key issues & trends

- Limited supply of land & premises for employment purposes
- No large strategic sites
- Lack of speculative development by the private sector
- Limited housing supply/increasing demand
- House price increases
- High environmental quality which should be protected
- Indigenous rather than external demand for land & premises
- Difficulties in assessing level of demand
- Need for further research to investigate key sites in terms of their economic viability

Review of data/key trends

Industrial land

A.84 The data on industrial premises currently available shows the extremely limited supply and choice available to firms wishing to expand or locate in Western Somerset.

Table 13: Industrial premises currently available in West Somerset

Town	Floor space (m^2)	Number of units	Population 2000	Floor space per 1000 population (m^2)
Minehead	1,078	4	10,000	108
Dulverton	258	1	n/a	n/a
Crowcombe	465	1	n/a	n/a
Total	1,801	6	10,000	108

Prism: Land & Property Study, January 2002

Commercial premises - Location preferences

A.85 Survey work with businesses looking for new premises (undertaken as part of the land and property study) identified that the provision of ISDN/ASDL telecomms connection was essential to over 60% of businesses who were actively looking for new premises.

A.86 Sufficient car parking was seen as essential by 70% of those businesses surveyed. Other results also indicated a preference for locations in close proximity to a major town and easy access to a motorway or trunk road was a significant factor in choosing a location for 38% of those businesses surveyed.

Potential Employment Land

A.87 A large part of Western Somerset comprises the Exmoor National Park and given the development policies in the Somerset & Exmoor National Park Joint Structure Plan, the potential for large scale development in Western Somerset is restricted primarily to Minehead, Watchet and Williton and to a lesser extent Dulverton, Porlock, Lynton and Lynmouth[6].

A.88 West Somerset has a strategic requirement to develop 10 hectares of employment land between 1991 and 2011. At 1st April 2000, approximately 2 hectares had been implemented. A further 6 hectares of land is identified in the Local Plan although it is unlikely that more than 2 hectares will be brought forward for development in the next 2 to 3 years.

A.89 Additional land may also possibly become available from development of part of the unused or under-utilised Vulcan Road Car Park (between 0.3 and 1.0 hectares). Land is also allocated at Watchet (1 hectare) but only half of this site could realistically be developed.

Table 14: Potential employment sites in West Somerset, 2002

	Size (Ha)	Timescale	Limitations
Extension to Minehead Enterprise Park	2.2	Medium to long	
Expansion Williton Industrial Estate	3.3	Medium to long	Access provided by Williton by-pass
Total	5.5		

Prism: Land & Property Study, January 2002

Demand for land and premises

A.90 Based on the PRISM analysis it would appear that demand for land and premises is relatively weak. However stakeholders have suggested the majority of enquiries are for small units (up to 2,500 sqft) of which there is currently a limited supply. It has been historically difficult for agents and the local authority to identify trends for particular sizes/types of property.

A.91 It is generally accepted by local agents and the local authority that the main source of demand for premises is from indigenous firms rather than in-movers from outside the district or region[7]. Historically the south-west region have not been areas which have been successful in terms of attracting foreign direct investment. Figures for 2000 from the Invest UK database show the region to have attracted 5% (by number) of the total of all FDI (Foreign Direct Investment) projects. Since the south west accounts for approximately 9% of UK population and employment it is evident the SW is not a favoured location for FDI.

House prices

A.92 The house price data shows that West Somerset has the highest property prices across Somerset for semi-detached and terraces properties. This is mainly due to the fact that the area has become popular as a retirement location. With in-movers from relatively more prosperous regions buying an increasing proportion of the limited

[6] Land & Property Review PRISM, 2002
[7] Land & Property Review PRISM, 2002

housing stock the effect has been to increase prices and in some cases force the indigenous population out of the market.

Table 15: Average house prices –Districts, Somerset, and South West

	South Somerset	Taunton Deane	West Somerset	Somerset	South West
Detached	192,069	189,306	192,062	190,580	203,519
Semi-detached	108,347	116,274	113,835	111,586	120,589
Terraced	90,469	100,682	99,519	93,001	103,961
Flat/maisonette	58,247	73,071	73,613	66,805	99,495
Average Price	127,861	127,703	128,960	126,321	136,898

Source: Land Registry database, 2002

Issues arising from data analysis

Telecomms provision

A.93 The survey results outlined in the previous section would suggest that West Somerset is at a significant disadvantage to other locations when it comes to attracting new business. Based on anecdotal evidence the arrival of broadband connections to the area is not likely to occur in the short term and may take up to 10 years before there is sufficient demand to make the service viable to provider

House Prices

A.94 A review of the land and property study[8] Housing is becoming more expensive relative to incomes. Whilst incomes rose by just over 6% in Somerset between 1998 and 2000, house prices rose by almost 31%;

A.95 Since much of Western Somerset has National Park status the District has very few opportunities for commercial development and therefore it is extremely important for existing employment land not to be lost to residential use. However, high property prices often make this a resistible option for local developers who can achieve higher premiums from residential conversions than commercial re-developments or refurbishments.

Economic viability

A.96 A key issue is the extent to which many sites have genuine potential for development given the constraints in terms of infrastructure, and other development barriers that apply to them. There is a need for further research to investigate key sites in terms of the economic viability of their development.

Supply & demand for land & premises

A.97 The supply of employment land and premises in West Somerset is limited for a number of reasons:

- The designation of large parts of West Somerset as National Park restricting potential development;
- Low allocations of available development land for commercial/industrial in planning guidance; and
- Economic viability of developing identified sites due to lack of infrastructure, connectivity to transport networks.

[8] Land & Property Review PRISM, 2002.

A.98 There is a clear lack of speculative property development by the private sector in Western Somerset and this offers a potential opportunity for the public sector to take a role in the commercial property market. Before any actions can be brought forward a robust analysis of the local property market will need to be undertaken in order to ascertain the extent of both market failure and level of demand.

Identification of stakeholder issues/trends

A.99 There was broad independent agreement with the findings of the data review, the following issues were cited on a number of occasions:

House price increases

A.100 The influx of population in older age groups was a key trend that was identified and this had had the effect of increasing house prices in Western Somerset due to the limited supply and greater capacity of in-movers (especially from more prosperous areas) to pay higher prices for housing.

A.101 In Minehead there had been a trend of hotels closing due to financial difficulties. Subsequently developers had been moving in to purchase and subdivide these buildings into flats. This is also an issue in many other parts of Western Somerset.

Under utilisation of the housing stock

A.102 A number of individuals also perceived that the available housing stock was being under utilised due to an increase in the number of second and holiday homes owned by individuals from outside of the region.

Lack of premises for small business start ups and expansion

A.103 This issue has already been identified under the SME theme, however it does highlight the need for a strategy which adopts a holistic approach rather than looking at particular areas of intervention in isolation.

Available land & housing development

A.104 A number of stakeholders felt that development land that was available was more commonly developed as residential rather than for commercial/industrial uses mainly due to the greater return on investment offered by residential property.

SOCIAL EXCLUSION

Summary of key issues & trends

- High levels of debt;
- High proportion of West Somerset population claiming benefits;
- Low incomes in rural areas; and
- Poor access to basic services.

Review of data/key trends & issues

Debt levels

A.105 The County Council's Poverty Commission considered debt in Somerset, and concluded that it was a major issue. In the previous three years the County's Citizens Advice Bureaux had assisted clients in finding solutions to about 7,000 debts, of which 60% were debts to consumer goods suppliers (compared with 10% in respect of the utilities). The average client owes about £6,500 on personal loans and credit cards. The commonest reasons for debt identified included the breakdown of relationships, loss of jobs, business failure, sickness, disability or death of a partner and easy credit and over-spending.

Benefit dependency

A.106 Across Somerset, benefit claimants are distributed in approximately equal parts between the main towns, the market towns and the rural areas. In 1998 a series of studies undertaken jointly by the county council and district councils indicated that the receipt of benefits was as shown below.

Table 16: Income Support and Housing Benefit/Council Tax Benefit Claimants

Area	Income Support (1998)	HB/CTB (1998)
England	3,255,825	16.8%
SW England	274,188	14.0%
Somerset	25,125	13.8%
Mendip	5040	13.2%
Sedgemoor	5922	13.8%
South Somerset	6826	12.7%
Taunton Deane	5450	14.9%
West Somerset	1887	18.2%

Source: Benefit Dependency Reports undertaken jointly by Somerset County Council and Districts (1998).

Incidence of deprivation

A.107 The most obvious concentrations of need, as indicated by the Index of Multiple Deprivation are in the wards of the main towns however these indices are commonly more suited to identifying deprivation in urban areas given the relative concentrations of "deprived" populations identified using this approach. In rural areas the distribution of deprived individuals is more dispersed and data availability at a suitably small spatial scale is commonly unavailable.

Additional Analysis

A.108 The Health and Social Needs analysis Group (HSNAG) has produced a Somerset wide dataset which presents a range of poverty and deprivation indicators down to ward level within each of the District Council areas. The latest analysis produced in 2002 identifies a range of priority wards within West Somerset for specific groups (children, the over 65 and population as a whole). The results are presented for the five most deprived wards based on the use of a methodology developed by the HSNAG(se table 17 below).

Table 17: Priority Wards in West Somerset

Children		**People aged 65+**		**All ages**	
Ward (1999)	Rank	**Ward (1999)**	Rank	**Ward (1999)**	Rank
Williton	1	Watchet	1	Watchet	1
Minehead South	2	Dulverton & Brushford	2	Williton	2
Alcombe East	2	Alcombe West	3	Minehead South	3
Carhampton & Withycombe	2	Minehead North	4	Alcombe West	4
Dunster	5	Alcombe East	4	Minehead North	4

Source: Health and social needs in Somerset 2002, HSNAG

A.109 On analysis of benefit claimant data it appears that there are significant numbers on low incomes in the rural areas.[9]. There are particularly high rural incidences of such low incomes in the upland areas, especially of Exmoor. This is likely to reflect the present low incomes in the farming and the tourism sectors.

Linkages to other themes

A.110 Access to services is a key issue in rural areas. It is often more difficult for rural communities to have the same access to quality services as urban areas. Distances and travel times are often significant barriers to rural communities and transport improvements may have a role to play in facilitating improved access.

A.111 There is also a need to consider innovative ways of delivering services and information given the physical remoteness of some communities. Therefore appropriate linkages to any ICT infrastructure investment and strategy will need to be developed.

[9] West Somerset Regeneration Profile, Somerset County Council Information Unit, 2001.

TRANSPORT

Summary of key issues & trends

Traffic flows

- Traffic flows are seasonal. Due to tourism the highest peak occurs during the summer in which flows are 30% higher than other periods.
- There was an increase in traffic between 1988-1998 of approximately 14% on the A358 and a maximum of 13% on the A39. This compares to a national and county traffic growth of 21% and 13% respectively.

Transport Links

- The A39 and A358 main roads generally have a narrow carriageway width with few opportunities for overtaking.
- Bottlenecks in villages along the A358/ A39 corridor.
- West Somerset-South Wales Ferry Service.
- Potential to explore ferry links between West Somerset and Wales. A sea crossing from Minehead to Cardiff would take approximately 35 minutes.
- Market research studies deem that a ferry link project would be feasible, dependent on funding.

Rail & bus services

- The West Somerset Railway offers little potential for passenger services due to slow line speeds (40kph) compared to the private car. A train journey from Minehead to Bishops Lydeard takes one hour and 15 minutes. The equivalent journey by car takes approximately half an hour.
- Bus services are perceived to be slow and expensive. A bus journey from Minehead to Bishops Lydeard takes approximately 55 minutes, compared to approximately 30 minutes by car.

Community Transport

- This plays an important role in transport provision in West Somerset. Overlapping of services, however, affects the efficiency of service provision.

Walking, cycling & horse riding

- Community severance is felt along the main routes to Minehead due to heavy traffic flows & minimal pedestrian facilities.

Freight

- Junction 24 of the M5 is the signed route for commercial traffic from the north from West Somerset.
- A39 is the preferred freight route.
- LTP funds have been provided for an HGV signing scheme in Dunster to help divert long vehicles away from the narrow bends and steep hills, which could potentially result in a vehicle being stuck.
- Freight traffic from Hinkley Point is not judged to be of concern.

Review of data/key trends

Traffic Count Data

A.112 Table 18 compares average two-way vehicular flows for weekly Automatic Traffic Count (ATC) sites.

A.113 The results show that the highest peak period is August where traffic flows are approximately 30% higher than in winter periods. Traffic flows are particularly high at Ellicombe, which is situated on the A39 between Minehead and Dunster. This is the only road access to Minehead from the east. Traffic flows are higher in the summer months due to tourism traffic.

Table 18:Automatic Traffic Count Data

Road	Town	May 2001	August 2001	Sept 2001	Jan 2002	Feb 2002	May 2002
A39	Swang	7765	N/A	7887	N/A	6385	7956
	Holford	5385	N/A	5550	N/A	3966	5123
	Ellicombe	16297	19381	N/A	12699	N/A	16156
	Dragons Cross	5927	6458	5951	N/A	N/A	N/A
A396	N Dunster	4680	5442	N/A	3525	N/A	N/A
B3224	Handy Cross	N/A	N/A	1052	N/A	1179	N/A
A358	Bicknoller	6800	N/A	7203	N/A	6148	6722

Note: Traffic flows are a two way 5-weekday 24-hour average with the exception of Dragons Cross, which is a two way monthly 24-hour average traffic flow.

A.114 Table 19 compares growth in annual average daily traffic (AADT) between 1988 and 1998. The average 1998 August 16-hour traffic flows have also been included to provide an indication of the large increases in traffic that occur during this month, largely as a result of tourism.

Table 19: Comparison of traffic flows 1988-1998

Road	Census Point	1988 (AADT)	1998 (AADT)	Growth % (1988-98)	1998 Av. August traffic (16hr)
A39	West of Porlock	1550	1300	-16.13	2350
	East of Porlock	4300	4000	-6.98	6200
	East of Minehead	12650	13800	9.09	17250
	West of Washford	8740	9930	13.62	12330
	Holford	4600	4950	7.61	6900
	Wembdon	11850	12750	7.59	14300
A358	Bicknoller	5200	5900	13.46	6600
	East of Bishops Lydeard	10700	12200	14.02	12800

A.115 The principal cause of congestion within the study area is holiday traffic, and much of this goes to Butlins in Minehead. Traffic levels are often high at changeover periods, occurring on Fridays and Mondays. Attractions such as Dunster Castle, the Quantock Hills and Exmoor National Park are also key traffic generators in the area.

A.116 It is assumed that traffic on the A39 and A358 has grown by approximately 8% for the period 1988-1998 except for Porlock, where traffic levels have reduced by 16%. This reduction of traffic is due to the construction of the North Devon Link Road. Traffic growth in West Somerset is less than the national average of 21% and the Somerset average of 13%.

Origin-Destination Data

A.117 Roadside interview data was collected at two sites (A39 Wembdon & B3227 Norton Fitzwarren) as part of the data collection exercise for the development of the Taunton Area Road Traffic (TART) model.

A.118 The top five origin-destination pairings (westbound traffic) are provided in Tables 20 and 21.

A.119 A select link analysis using the TART model is being undertaken on the A39 and A358 to obtain a more detailed appreciation of traffic movements, in particular on the A358. Unfortunately, these results are not available at the time of writing.

Table 20: A39 Westbound (near Bridgwater) am Peak Origin-Destination Data

	From	To	No of journeys
1	Bridgwater town	Holford	172
2	Bridgwater town	Cannington	136
3	Bridgwater town	Minehead	30
4	Taunton-south of Toneway	Holford	21
5	Burnham on Sea	Holford	21

Table 21: A39 Westbound (near Bridgwater) pm Peak Origin-Destination Data

	From	To	No of journeys
1	Bridgwater town	Cannington	400
2	Bridgwater town	Holford	98
3	Bridgwater town	Watchet	52
4	Taunton-south of Toneway	Cannington	46
5	Bridgwater town	Minehead	36

A.120 In summary, the results show that Cannington and Holford are the major destinations for trips from Bridgwater town centre in both the AM and PM peak periods. It is estimated that 113 vehicles trips in the AM peak travel from the M5 north, exiting at Junction 23. From the M5 south of Bridgwater, 145 vehicles exit at Junction 24.

A.121 In the PM peak 168 trips travel from the M5 north exiting at Junction 23 with 162 trips travelling from the M5 south exiting at Junction 24.

Transport Links

A.122 The main points of access to the study area are the A39 Northern corridor (from Bridgwater) and the A358 through Taunton. Despite being classed as County routes, both are narrow single carriageway roads for the majority of the route and suffer from bottlenecks at several points, most notably in villages and settlements along the route. Furthermore 30mph speed limits have recently been introduced through all villages.

A.123 Anecdotal evidence suggests that some B-class roads are quicker routes than on the A39 or A358. For instance the B3224 has recently been subject to minor improvements as identified by the County's Freight Partnership which has improved the quality of the road.

A.124 The last major improvements to the highway in the study area came in 1994 with the Cannington Bypass and Seaward Way in Minehead. There have also been minor improvements on the B3224. Further improvements have been suggested, encompassing on-line and off-line solutions to the traffic problems experienced in Western Somerset.

Bristol Channel Ferry Crossing

A.125 Several investigations have been undertaken looking at the feasibility of constructing a pier at Minehead for cross-Bristol Channel ferries to South Wales. The conclusions drawn are that a ferry service would be feasible but may be subject to seasonality. Various options and routes were drawn up to include Swansea, Barry, Cardiff, Minehead, Illfracombe and Weston Super Mare.

A.126 The cost of setting up the service for all tidal situations by completely rebuilding the Minehead pier is put at around £5 million. However a functional structure that could allow access to ferries at nearly all tidal heights would cost between £1.5 million and £2 million. A 1994 report by consultants Beckett Rankine estimated that the scheme would create 100 new jobs and an annual income of £3.5 million. It is estimated that 35% of visitors from South Wales to the Minehead area would use the ferry, in effect removing 230 vehicles from the average daily flows in August.

A.127 A sea crossing from Minehead to Cardiff would take approximately 35 minutes. It should also be noted that a ferry scheme is identified by the Minehead Coastal Towns Initiative as a priority within the programme's action plan.

Bus Services

A.128 Bus services are limited in the Western Somerset area. The rurality and sparsity of the area means that there is little incentive for private operators to run some services. Services are disadvantaged by the need to leave the main roads to serve communities that lie close to it, increasing journey time. A bus journey from Minehead to Bishops Lydeard takes approximately 55 minutes, compared to approximately 30 minutes by car.

A.129 It is recommended by the Taunton-Bridgwater to Minehead Corridor Report that existing services could be made more attractive through better timetabling information and improvements to stops/interchanges. There is no specific service that has a frequency of greater than one bus per hour between Minehead and Taunton on routes through rural settlements. The introduction of the Quality Bus Route on service 28 (Taunton-Minehead) in 2002 shows the potential for partnership between bus operators and local councils.

West Somerset Railway

A.130 Rail services comprised peak summer services run by the private heritage firm West Somerset Railway which runs from Minehead to Bishops Lydeard. There is potential to rejoin this branch line to the mainline at Norton Fitzwarren (and introduce the possibility of a TOC operating from Taunton) but the required signalling and points upgrades have been put on hold by Railtrack. Speed restrictions are set at 40kph and it is unlikely that this could be improved due to the high number of at-grade vehicular and pedestrian crossings on the route.

A.131 A train journey from Minehead to Bishops Lydeard takes one hour and 15 minutes. The equivalent journey by car takes approximately half an hour.

A.132 A bus service link with the railway is provided by First Southern National (bus service 28A) which provides a regular service between Taunton and Bishops Lydeard. Parking is free at Bishops Lydeard and Williton stations. There are 'Pay and Display' car parks adjacent to Minehead and Watchet stations.

Community Transport

A.133 Community transport is overseen by Somerset County Council, and is essentially driven by volunteers in an ad hoc way. Somerset County Council are now seeking to integrate and manage the provision of this service.

A.134 There are 16 voluntary organisations providing community transport services in the county of Somerset. Most operate independently of one another with little or no co-ordination. Demand for community transport is increasing because:

- The population is ageing;
- A more mobile population means that the elderly and disabled are becoming more isolated from their families and friends; and
- People are becoming more aware of Community Transport.

A.135 The operators within the Western Somerset area are:

- West Somerset Community Vehicle Scheme: three minibuses and ten cars;
- Sedgemoor Community Transport: four minibuses that make approximately 600 trips per week for disabled people;
- Taunton Deane Community Transport Ltd: three minibuses (600 trips per week) and 48 cars (850 journeys per week);
- Lydeard Lifts caters for people who do not have access to public transport. A fleet of 14 cars make on average 10 journeys per week;
- Bicklifts operates a Social Car Scheme catering for all members of the public and is run by volunteers using their own cars;
- Exmoor Community Bus runs between Dulverton and Minehead and intermediate villages. This service travels once a week; and
- The County and District Council are supporting the new West Somerset Community Car Scheme, recognising that West Somerset is not particularly well served by community transport.

A number of local community car schemes include: Brompton Parish Lifts, Crowcombe Cars and Porlock Pals.

A.136 Through the Local Transport Plan process, funding will be provided to set up new schemes and for continued funding for successful on-going schemes. These include:

- Somerset Moped Loan Scheme. This scheme was originally operational for a twelve-month trial period for young people in West Somerset. The service was fully introduced in April 2000 with a fleet of 34 mopeds. The service is very successful and currently oversubscribed;
- West Somerset Community Car Scheme: The DETR provided £91,000 to help establish a West Somerset Car Scheme; and
- Community Transport: A grant of £1,629,000 has been allocated to Community Transport as part of the Rural Access, Integration and Management Scheme as part of the LTP process.

Walking, cycling & horse riding

A.137 Cycling and pedestrian facilities are limited between and within town and village centres. Improvements could encourage modal shifts, particularly for journeys to work. In Minehead there is a limited network of cycle routes but there is clearly scope to develop this further as part of the National Cycle Network.

A.138 Narrow verges and little or no footpaths inhibit walking movements on many roads in Western Somerset, especially the A39, A358 and A396. A sense of community severance is felt in many of the communities along the A39 and A358 due to the heavy traffic that passes through them. In some villages there is not enough road width to cater for two HGVs passing in opposite directions at the same time. Health problems are exacerbated by high traffic flows.

A.139 Regarding recreational use, horse riders, walkers and cyclists experience problems as bridleways tend to be scattered and do not form coherent networks. This is a countywide problem, and not just confined to Western Somerset.

Accident rates

A.140 Within the Minehead Urban Area accidents involving personal injury have remained reasonably constant over the years. The accident rates vary between 15 and 21 injuries each year. This may be because traffic volumes have also remained broadly similar. Minehead has not experienced the same level of traffic growth as other towns, probably due to the lack of through traffic and the relatively slow rate of development.

A.141 Safety on the A39 is a critical issue given its status as a County freight route, the high volumes of traffic that uses it daily, and the narrow, winding nature of the road. Accident rates are shown in Tables 22 to 25. These have been broken up into two sections between Washford/Bilbrook (Table 24) as a speed camera and speed limit were introduced in April 1998. Accident rates on the A39 are less than the national average, 91 accidents per million veh/km, compared to the

A39 at Williton (65m veh/km), A39 Washford/Bilbrook (41m veh/km) and A39 Carhampton (38m veh/km)[10].

Table 22: Accidents on the A39 Williton

	Fatal	Serious	Slight	Total
1995	0	0	4	4
1996	0	0	2	2
1997	0	0	2	2
1998	0	0	4	4
1999	0	0	3	3
Total	0	0	15	15

Table 23: Accidents on the A39 Williton to Washford

	Fatal	Serious	Slight	Total
1995	1	0	2	3
1996	0	0	1	1
1997	1	1	2	4
1998	0	0	1	1
1999	0	0	2	2
Total	2	1	8	11

Table 24: Accidents on the A39 Washford/Bilbrook

	Fatal	Serious	Slight	Total
1995	0	2	4	6
1996	0	1	2	3
1997	0	0	4	4
Before April 1998	0	0	1	1
After April 1998	1	1	3	5
1999	0	2	3	5
Total	1	6	17	24

Table 25: Accidents on the A39 Carhampton

	Fatal	Serious	Slight	Total
1995	0	0	0	0
1996	0	0	2	2
1997	0	0	1	1
1998	0	0	4	4
1999	0	0	0	0
Total	0	0	7	7

Freight

A.142 The M5 carries the majority of long distance freight between the southwest and the rest of the country. The signed route from the M5 to West Somerset is Junction 24 of the M5. The alternative route via the A358 is limited to freight due to several low bridges between Taunton and Williton. The completion of the Bridgwater Northern Distributor Road (NDR) will see Junction 23 become the main signed route for commercial traffic from the north. This will help to divert some HGV traffic away from some residential areas of the town.

[10] Somerset Major Schemes Review, Scoping Report, November 2000.

A.143 A total of 290 HGVs passed through Dragons Cross on the A39 in 1998 compared to 300 vehicles in 1988, which indicates that there has been little growth in freight traffic. At Mamsey Bridge, west of Williton 420 HGVs per day were recorded compared to 380 in 1998. This is equal to a rise of 11%.

A.144 HGV signing in Dunster has been recognised as a problem and £15,000 has been provided by the LTP process to help improve the situation. The key generators of freight traffic in the area are Butlins and Hinkley Point Power Station. Butlins is a significant generator of goods vehicles within the study area. The deliveries are staggered to avoid on-site congestion and this has substantially improved the situation.

A.145 .The HGV traffic from Hinkley Point power station is not judged to be causing a significant adverse impact. Traffic amounts to no more than three or four outward-bound trips per week.

Exmoor National Park

A.146 The vast majority (93%) of visitors to Exmoor National Park travel by car. The number of visitor days spent in the park was estimated at 1.4 million in 1994, of which 25% were day-trippers. Eighty percent of these day-trippers come from areas within easy reach of the Park. People on holiday came from all over the United Kingdom with 6% coming from overseas. Most (56%) came from the south with 15% coming from the West Midlands.

A.147 Signing strategies are used to direct tourists away from many of the narrow routes. Through traffic is directed away from Exmoor via the A361to Devon or Cornwall. The National Park Authority is working with local Councils to develop a range of bus services to Exmoor from local towns such as Minehead.

A.148 The National Park Authority cites Dunster as an example of how congestion affects the tranquillity of an Exmoor village. In a survey carried out in 1993, 50% of visitors indicated that something had spoiled their visit. The majority (70%) were traffic related problems. Potential solutions suggested over the years have included a resident's only parking scheme, by-passes, more car parks and a park & ride service. The Local Transport Plan has set aside funding to deal with car parking problems in Dunster along with minor pedestrian improvements.

Issues arising from data analysis & potential solutions

Transport Links

A.149 Public perception is that Western Somerset comprises of Minehead and Exmoor National Park and travel on the principal A roads is slow. The potential opening of a ferry service from Minehead to South Wales may change this perception.

A.150 Proposals for bypasses along the A39 & A396 routes have been suggested for some time now but none have been taken forward to detailed design stage. It is proposed to build a flyover over the rail line at the A3065 Silk Mills in Taunton by 2005. Furthermore there is also a NDR under construction at Bridgwater. The possibility of introducing overtaking & climbing lanes on the A358 has also been suggested. Bypass proposals are centred on the villages between Minehead and Williton. Costs vary due to the different engineering requirements of each scheme. Figure 2 below sets out the villages where schemes have been proposed. There are many variations and they are composed of schemes at:

- Washford/Bilbrook;
- Williton;
- Carhampton;
- Dunster; and
- Porlock.

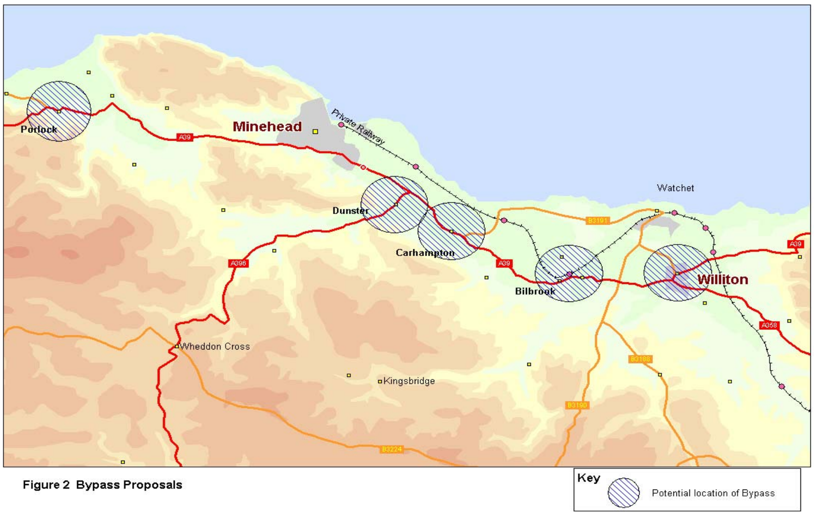


Figure 2 Bypass Proposals

Climbing lanes have been suggested at:

- A39 East of Williton, Rydon Hill;
- A358 South of Bicknoller, Halsway Hill (500m);
- A358 South of Bicknoller, Halsway Hill (1000m);
- A358 Crowcombe to Flaxpool; and
- A358 South of Triscombe.

A.151 Overtaking lanes have been suggested at the A39 to the north of Holford and at Higher Street, a hamlet near West Quantoxhead. A section of the A39 to the east of Nether Stowey towards Cannington has been identified as a potential stretch to build a dual carriageway section. Figure 3 overleaf identifies the locations where climbing & overtaking lanes have been suggested.

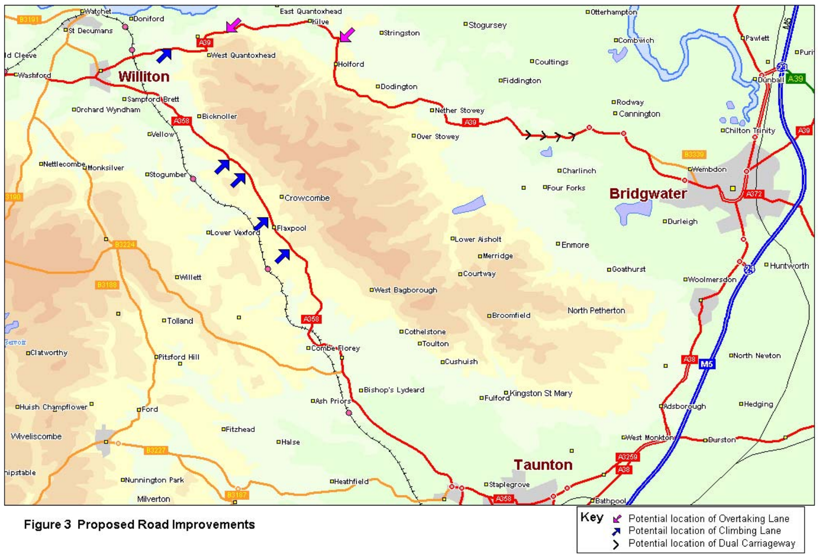


Figure 3 Proposed Road Improvements

Rail

A.152 The upgrading of the West Somerset Railway line to cater for commuter transit is not feasible. Line speeds are too slow due to the antiquated nature of the railway, the number of stations and the many at-grade foot and vehicle crossings. Significant improvements to journey times to compete with the private car are not feasible. Even if this were to happen then many question whether this is the best way forward in providing public transport improvements. Potentially the impact on bus services would result in some services being unviable due to low bus passenger numbers. Freight traffic flows in the area are potentially not high enough to make a freight inter-modal terminal viable. It is therefore recommended that the line's future will continue to be centred on tourism and heritage.

A.153 There are proposals as part of the Minehead Transport Strategy to develop an interchange at Minehead Railway Station. This would include a bus shelter and other facilities such as coach parking and a taxi rank as well as considering ways of improving the accessibility to the Town Centre. This interchange would help develop local bus services and services to Exmoor & Porlock (tourist destinations). This is dependent, however, on an increase in service frequency on the West Somerset Railway. Furthermore, the proposed site is currently a car park and thus investigation is needed into the effect that its reconstruction will have. A new multi-model interchange (road, rail, sea, cycle) is also proposed as part of the development at Watchet, which could be made another focal point in Western Somerset due to the recent re-development of Watchet Marina.

Bus

A.154 Public transport costs and journey times are perceived to be higher than similar car journeys through the corridor. The need for buses to serve small communities off the main road further hinders the ability to reduce journey times. Industries and employment in the area are typically based around agriculture and tourism and therefore not typically 9am – 5pm jobs. This means regular daytime buses may not be suitable for users needs.

A.155 The Somerset County Council Bus Strategy has identified a number of concerns and solutions for the bus network as a whole. The low quantity and quality of the bus network is a considerable concern and one that is consistently raised at public consultations. As the majority of the network is provided commercially, it will be difficult to deal with all these concerns, without additional funding either from public sources or increased patronage.

A.156 It has been identified that monitoring network performance and liaising with network operators is required to ensure that maximum efficiency of services is upheld. This will be through a number of initiatives including:

- The network being continually monitored and reviewed using the new Rural Accessibility Model (RAM) and ongoing consultation with operators and the public;
- Somerset County Council working closely with operators through the Quality Bus Partnership concept to improve levels of service on a commercial basis where possible. This will include the corridor Taunton to Minehead (service 28). Other key consultees include the District Council, Exmoor National Park, local businesses, developers and major employers;
- Implementing a 'Best Value' improvement plan to maximise efficiency of all passenger transport services by seeking to integrate schools, colleges, social services and community transport, including the consideration of a Corporate Passenger Transport Unit. These resources will be considered as an alternative, support or shared form of public transport;
- Somerset County Council investigating the use of cross-subsidy; reduce service on larger contracts in order to contribute to contracts under threat;
- Imposing penalties for poor reliability of subsidised routes;
- Developing bus priority measures to assist in journey time improvements. Consideration will be given to the use of bus only links to give more direct access to attractors and bus gates and transponders to selectively provide advantages to busses at key locations on the road network;
- Developing partnership between the council and operators for issues such as integrated ticketing and discount fare regimes to encourage regular travel;
- Supporting and publicising functions that will make the best use of modern technology. For example Real Time information and developing websites and the Public Transport Information initiative (PTI2000) will continue to progress and provide up to date data;
- Developing Rural Interchange Sites across the county including the Dulverton rural interchange;
- Ensuring all new buses are fully accessible to elderly and disabled people from 2005 and by 2015 all buses will meet this criteria; and
- Development initiatives must allow easy/priority access to public transport.

A.157 Anecdotal evidence suggests that little profit is made on bus services in the region and that the only consistent revenue generated is from school runs.

Rural Interchanges

A.158 A grant of £120,000 was provided from the 2000/2001 interim LTP settlement to develop pilot rural interchanges. A further £3 million of funding has been earmarked for this project over the ten year Transport Plan period for the whole of Somerset. It is likely, given the rural nature of Western Somerset, that a substantial part of this grant will be used in this area. It is recommended in the West Somerset Access Strategy: Draft Scoping Report that rural interchanges be built in Bilbrook and Washford on the A39, regardless of whether bypasses are built or not.

Community Transport

A.159 The overwhelming factor to emerge from this area is that more flexibility is required in the provision of community transport. This extends to the operators not doubling up on services so that efficiency of services can be maximised.

Walking, cycling & horse riding

A.160 Cycle parking facilities are to be provided at Minehead station. Various other cycle network improvements in Minehead are proposed as part of the LTP process. West Somerset District Council is keen to develop cycling facilities further and integrate cycle routes as part of a National Network. Dunster will receive £40,000 to improve pedestrian facilities in the village.

Freight

A.161 The County council’s freight strategy recommends that HGV routes in Western Somerset should be:

County Freight routes

- A38, M5 Junction 27, via Taunton, to M5 junction 24;
- A358 Taunton to Williton; and
- A39 Bridgwater – Williton – Taunton.

Local Freight Route

- B3224.

A.162 With regards to infrastructure freight strategies will be integrated with highway and bridge maintenance strategies.

A.163 The impact of goods vehicles on the environment will be addressed through providing environmental enhancement schemes within vulnerable communities, ‘Sharing the load ‘between alternative routes where appropriate; and managing the loading and unloading of vehicles in busy town streets.

PRIORITY ISSUES

A.164 A number of priority issues for Western Somerset can be identified based on the review of data and views presented in this section. These are summarised in the following table.

Priority issues

1. Ensuring sustainable economic development;
2. Promote quality sustainable tourism initiatives of economic benefit to the sub-region;
3. Developing an image for Western Somerset which has linkages to and maximises the Exmoor and Quantocks brand image;
4. Improve co-ordination of business support framework;
5. Increase number & range of flexible premises for business;
6. Encourage sustainable diversification of existing rural businesses;
7. Strengthen economic base through attraction of knowledge/niche businesses;
8. Upgrading/improvement of electronic infrastructure and development of knowledge economy;
9. Up-skilling the existing workforce;
10. Attract and retain young skilled individuals;
11. Avoiding social polarisation / improving access to opportunities for all; and
12. Co-ordinate economic and infrastructure interventions & investments.

appendix b

POLICY CONTEXT

policy context

INTRODUCTION

B.1 It is important that the Economic and Access strategy for Western Somerset is set in the context of wider regional and national policy initiatives. This will allow the final strategy to be developed in line with both regional and national policies and provide a clearer picture of the array of policy instruments.

B.2 This section is not intended to be an exhaustive list of all the relevant national and regional initiatives but more provide a flavour of the current and emerging policy direction and demonstrate the strategic fit of the Western Somerset strategy.

NATIONAL POLICY

UK Rural Policy Objectives

B.3 Preparation for the 2000 Comprehensive Spending Review included an Interdepartmental Cross-Cutting review of Rural Policy which agreed a series of high level objectives for rural and countryside policy to be taken forward in Departmental Public Service Agreements and to inform the development of the Rural White Paper. Five objectives were identified designed to:

- Facilitate the development of dynamic, competitive and sustainable economies in the countryside, tackling poverty in rural areas;
- Maintain and stimulate communities secure access to services which is equitable for those who live or work in the countryside;
- Conserve and enhance rural landscapes and the diversity and abundance of wildlife (including the habitats on which it depends);
- Increase opportunities for people to get enjoyment from the countryside and to open up public access to mountain, moor, heath and down and registered common land by the end of 2005; and
- Promote government responsiveness to rural communities.

Our Countryside: The Rural White Paper (RWP)

B.4 The RWP sets out a vision for rural areas which incorporates

i) A living countryside with thriving rural communities and access to high quality public services to be achieved via:

- Supporting vital village services;

- Modernising rural services;
- Providing affordable homes; and
- Delivering local transport solutions.

i) A working countryside with a diverse economy giving high and stable levels of employment to be achieved by:

- Rejuvenating market towns and local economies; and
- Setting a new direction for farming.

ii) A protected countryside in which the environment is sustained and enhanced and which all can enjoy to be achieved by:

- Preserving what makes rural England special; and
- Ensuring everyone can enjoy an accessible countryside.

iii) A vibrant country which can shape its own future to be achieved by:

- Giving local power to country towns and villages; and
- Rural proofing.

The England Rural Development Plan (ERDP)

B.5 The ERDP develops a range of actions consistent with the approach advocated by the Common Agricultural Policy's Rural Development Regulation. The RDR is known as the second pillar of the CAP and requires member states to draw up Rural Development Plans for the period 2000-2006.

B.6 The ERDP defines these actions based on a set of key national priorities that are broader in content and outlook than the RDR (see next page). These are designed to enable an integrated approach to support for rural development using both EU and national resources.

National Priorities for the Rural Economy

B.7 **Priority 1**: to facilitate the development of dynamic, competitive and sustainable economies in the English countryside, tackling poverty in rural areas;
Priority 2: to maintain and stimulate communities, and secure access to services which is equitable in all the circumstances, for those who live or work in the countryside;
Priority 3: to conserve and enhance rural landscapes and the diversity and abundance of wildlife (including the habitats on which it depends), to safeguard their integrity and value for future generations and to provide a source of economic opportunity; and
Priority 4: to increase opportunities for people to enjoy the countryside.

ERDP Programme, Priorities and Measures

B.8 The ERDP has been designed to focus on two priorities – creating a productive and sustainable rural economy and conservation and enhancement of the rural environment – as the basis of the Programme to 2006. The following tables outline the range of activities to be supported under the Programme.

Table : ERDP Priority A Profile – Creation of a productive and Sustainable Rural Economy

Priority Level Objectives	Measure Level Objective	Actions to be implemented
Projects to: Create more diverse and competitive agriculture and forestry sectors; Create new jobs in the countryside; Encourage the development of new projects, market outlets and greater collaborations; and Provide targeted training to support these new activities	Investment in agriculture holdings to support the development of more sustainable and competitive farming businesses with improved agricultural incomes, redeployed production and diversified farm activities	A new Rural Enterprise Scheme providing grant aid for capital investments in agricultural diversification and a new Energy Crops Scheme providing grant aid for the establishment of miscanthus.
	Training to broaden the skills base of the agricultural and forestry workforce to enable it to meet the challenges of the re-orientation of agriculture and forestry and contribute to the new demands of the rural economy.	The introduction of a new regionally targeted Vocational Training Scheme to facilitate the delivery of other measures under the Programme.
	Improving processing and marketing of agriculture projects to encourage innovation and investment to achieve added value for English primary products and to enable market opportunities.	The re-introduction of Processing and Marketing Grants.
	Afforestation of agriculture land and other forestry measures to improve the landscape, habitats, wildlife and amenity value of agricultural and non-agricultural land by planting woodland, creating employment and diversifying land use to improve the ecological and social functions of existing forests; and to encourage the growth and collaborative production of short rotation coppice as a contribution to tackling climate change.	The existing Woodland Grant and Farm Woodland Premium Schemes and a new Energy Crops Scheme.
	Adaptation and development of rural areas to provide targeted assistance to support the development of more sustainable, diversified, enterprising rural economies and communities, assisting regeneration and adjustment to the declining importance of agriculture and to the new demands of the rural economy.	A new Rural Enterprise Scheme to involve setting-up of farm relief and farm management services; marketing of quality agricultural projects; basic services for the rural economy and population; diversification of agricultural activities and activities close to agriculture to provide multiple activities or alternative incomes; agricultural water resources management; development and improvement of infrastructure connected with the development of agriculture; encouragement for tourist and craft activities.

Table : ERDP Priority B Profile – Conservation and Enhancement of the Rural Environment

Priority Level Objective(s)	Measure Level Objective	Actions to be implemented
Projects to: Significantly increase the area covered by agri-environment schemes over the Programme period and to maintain the sustainable management of an appropriate area for the Less Favoured Areas	Agri-environment support to conserve and improve the landscape, wildlife and historic heritage of the countryside, contributing directly and indirectly to economic activity and social objectives in rural areas.	The existing Environmentally Sensitive Areas and Countryside Stewardship Schemes and the re-opened Organic Farming Scheme.
	Less Favoured Areas (LFA) support to help preserved the farmed upland environment through sustainable management and to contribute the maintenance of the social fabric in upland communities.	The introduction of a new Hill Farm Allowance Scheme (HFAS).
	Adaptation and development of rural areas to provide targeted assistance to support the development of more sustainable, diversified, enterprising rural economies and communities; assist their regeneration and adjustment to the declining importance of agriculture and to the new demands of the rural economy.	A new Rural Enterprise Scheme to renovate and develop villages; protect and conserve rural heritage and protect the environment in connection with agriculture.

B.9 Within the programme, the Environmentally Sensitive Areas, Organic Farming, Hill Livestock Compensatory Allowance and Hill Firm Allowance Schemes are operated on a national basis only. The Countryside Stewardship, Farm Woodland Premium, Woodland Grant and Energy Crops schemes have some degree of regional discretion in targeting but operate within a national framework while Processing and Marketing Grants, the Rural Enterprise and the Vocational Training Schemes are directed through Regional Programming Committees.

Other Policy Initiatives

B.10 Other structures of relevance include the UK Biodiversity Action Plan and Sustainability Plan and the England Forestry Strategy along with recent reports/strategies from the Countryside Agency, the Hills Task Force, the Better Regulation Task Force, the Rural Task Force and the Association of National Park Authorities

Policy Commission on Farming and Food

B.11 In the wake of FMD, the Government established a Policy Commission on Farming and Food to advise on the creation of a sustainable, competitive and diverse farming and food sector that contributes to a sustainable rural economy, advances environmental, economic, health and welfare goals, and is consistent with its aims for CAP reform, enlargement of the EU and increased trade liberalisation. The commission reported in January 2002 and provided a series of recommendations based on these relating to profit, the environment and people.

REGIONAL POLICY

RDA Rural Development Research and Priorities

B.12 In the wake of the FMD crisis, the English RDAs commissioned an exercise to examine key issues affecting rural areas, identify future scenarios and associated challenges and suggest priority actions . The proposed actions included:

- Help shape farming by influencing UK/EU approaches to CAP reform;
- Strengthen role in reintegrating agriculture and land management into rural economies;
- Reinvigorate the development and promotion of tourism;
- Encourage an enabling planning system that promotes sensitive economic development;
- Ensure rural businesses/locations are integral to RDA strategies;
- Address economic/service decline through innovation in market towns;
- Take the lead in new institutional arrangements and influence the development of rural policy;
- Think rural' by improving rural coordination and 'proofing' at regional level;
- Promote rural recovery/regeneration as an integral part of regional development; and
- Understand rural – improve indicators data collection and intelligence gathering.

South West Regional Economic Strategy

B.13 The current draft version (December 2002) of SWRDA's Regional Economic strategy identifies the following strategic objectives and actions:

- **Objective 1** :To raise business productivity by:
  - i. Developing a skilled and adaptable workforce;
  - ii. Delivering a supply of appropriate land and property for business needs; and
  - iii. Developing the South West as a leading region for innovative and knowledge-based businesses.
- **Objective 2**: To increase economic inclusion by:
  - i. Accelerating economic participation by working locally to stimulate employment and business start-ups; and
  - ii. Supporting the regeneration of disadvantaged communities in the South West.
- **Objective 3**: To improve regional communications and partnership by:
  - i. Improving the strategic communications infrastructure to support business needs;
  - ii. Promoting the South West in order to attract new businesses, employees and investment;

iii. Conserving and enhancing the region's physical and cultural capital to provide major benefits to tourism and the wider economy; and

iv. Improving the way the region works - delivering quality regional intelligence, effective partnership and increased influence.

B.14 There are major linkages and synergies between the RES and the Western Somerset strategy with a number of complementary objectives and actions identified at both geographical scales. In this way the Western Somerset strategy aims to contribute towards wider regional objectives as well as identifying interventions tailored to local circumstances within Western Somerset.

Regional Planning Guidance

B.15 RPG 10 was published in September 2001 and sets out the overall land-use and transport policies for the south west. The guidance provides a strategic framework for Local Transport Plans (LTPs) and development plans and forms the basis for investment and operational plans of relevant agencies in the region. The main elements are as follows:

Principal Urban Areas

B.16 The RPG focuses development on the larger urban areas known as PUAs. In Somerset there is one settlement designated as a PUA – Taunton. By directing development in this way the RPG aims to offer the best opportunity for accommodating development in the most sustainable way. In this context it is crucial for the Western Somerset strategy to effectively link the area with the future opportunities available in Taunton.

Rural areas & market towns

B.17 The regional strategy in this respect is to locate development to support rural areas primarily in market towns. In the context of West Somerset, Minehead has been designated as the Market Town (Structure and Local plan) with Watchet and Williton as rural centres (West Somerset Local Plan) and Dulverton and Porlock in the context of the Exmoor National Park Local Plan.

B.18 The need for local authorities to adopt development policies which support the restructuring of the rural economy and the provision of jobs is also stressed in the RPG. The strategy area falls mainly within the identified western sub-region where an emphasis is placed on promoting economic growth and diversification.

The coast

B.19 Key objectives are to regenerate coastal towns and communities and to conserve the environment of the coast and coastal waters.

Regional Transport investment

B.20 The main priority identified within the RPG that will impact on Western Somerset will be the management of traffic at M5 Junction 25. A need to alleviate remoteness through investment in transport infrastructure and other communications networks is also defined as a sub-regional objective.

COUNTY, DISTRICT AND LOCAL POLICY

B.21 There are a wide range of policies at these spatial scales which will both impact upon and be influenced by the Western Somerset economic and access strategy. The following list identifies some of the plans in this respect:

- Somerset and Exmoor National Park joint Structure Plan;
- Local Transport Plan;
- Exmoor National Park Local Plan;
- West Somerset Local Plan;
- Exmoor National Park Management Plan;
- West Somerset DC Economic development strategy; and
- SEP Economic strategy.

appendix c

NEXT STEPS

next steps

DEVELOPING THE VISION & SPATIAL STRATEGY

C.1 Based on the priority issues (see appendix A – A.164) for Western Somerset the next step was to identify the long term vision for the area. In parallel with the vision for Western Somerset, the spatial strategy was developed, based on the economic and transport analysis undertaken to date.

FOCUSING ON DELIVERY

C.2 In order to structure the strategy and focus on implementation and delivery it was necessary to develop a range of objectives based on the issues and priorities identified in the data analysis and the first set of workshop sessions. These objectives were then divided into the following thematic areas (some objectives will inevitably cut across two or more of the areas):

1 **Communication & promotion**
- Develop a West Somerset Brand and image which links into the Exmoor and Quantocks brand image.

2 **Attract and support sustainable businesses**
- Encourage sustainable diversification of existing rural businesses;
- Strengthen economic base through attraction of niche and technology orientated business;
- Improving business support framework; and
- Promote quality sustainable tourism initiatives of economic benefit to sub-region.

3 **Developing rural workspace and the electronic infrastructure**
- Upgrade and improve electronic infrastructure and develop the knowledge economy; and
- Improve number & range of flexible premises for SMEs.

4 **Transport & Access**

5 **Developing the human resources of West Somerset**
- Up-skilling the existing workforce; and
- Attracting young skilled individuals.

6 **Supporting and involving communities**
- Increasing the supply of affordable housing; and
- Avoid social polarisation / improve access to and range of opportunities for all.

TESTING THE VISION, THEMES, OBJECTIVES AND ACTIONS

C.3 The vision, strategic themes and objectives and spatial strategy were then tested in a second set of stakeholder workshops. This enabled the refinement of the initial ideas and helped to achieve local ownership of the strategy.

C.4 A number of broad actions were also developed in order to achieve the objectives under each of the themes. These identified the key organisations who could potentially be involved, the indicative funding resources, the time scale for implementation and linkages to other initiatives and strategies.

C.5 These actions or interventions were then tested against the ideas of the stakeholders in the second series of workshops. These were then reviewed to identify a consensus view of the broad actions to be incorporated in the strategy.

C.6 Having reviewed the current and potential future socio-economic context from both the statistical data available and the local knowledge of stakeholders it is necessary to outline the policy context for the strategy. This will help to ensure a complimentary approach for the Western Somerset strategy and enable a better “strategic fit” with wider policies, increasing the chances of successful delivery of the broad actions outlined in the strategy.

appendix d

STRATEGY ACTION PLAN & RECOMMENDATIONS

Strategic Themes & objectives	Indicative Actions	Lead & supporting partners	Indicative resources	Timescale
THEME 1: COMMUNICATION & PROMOTION				
Objective: 1.1 Develop an image for Western Somerset which links into the Exmoor and Quantocks "brand".	1. Review current marketing linkages of West Somerset with other sub-regions; assess marketing options for West Somerset. 2. Integration of local "countryside" products marketing with wider sub-regional marketing initiatives. 3. Development of West Somerset Identity.	SW Tourist Board, SWRDA, Local Authorities, ENPA, Small Business Service/Business Link, Private sector, Somerset Tourism P'ship, SW Tourism.	Objective 2, SWRDA, SW Tourist Board.	S S,M,L
THEME 2: ATTRACT AND SUPPORT BUSINESSES IN WEST SOMERSET				
Objective: 2.1 Encourage sustainable diversification of rural businesses.	1. Seed funding for potential value added food initiatives with quality advice and information for agricultural businesses. 2. Initial research into the potential of organic farming in West Somerset. 3. Joint working with initiatives designed to identify and promote local/regional produce and review of previous pilots such as Sainsbury Supplier Review. 3. Support for local farmers markets. 4. Development of co-operative working between farmers engaged in "value added" activities to increase economies of scale and improve sales efficiency.	RDA, Local Authorities, Private Sector, Small Business Service, Federation of Small Business SW, GOSW, Countryside Agency, ENPA.	Objective 2, DEFRA, RDA.	S,M S S,M S,M S,M,L
Objective: 2.2 Strengthen economic base through the attraction of small "footloose" technology based and niche businesses.	1. Initiate entrepreneurship mentoring programme. 2. Review of potential in Western Somerset to establish renewable energy demonstration projects. 3. Stronger marketing of current capabilities and successes in the key sectors of ICT and Environmental technologies.	RDA, Local Authorities, Private sector, Small Business Service, Federation of Small Business SW, GOSW.	Objective 2 Priority 2.3, DEFRA.	M S,M S,M
Objective: 2.3 Improving business support framework.	1.Review of the roles and remit of agencies involved in Business Support and identification of most appropriate lead agency in light of SBS centralisation 2. Comprehensive Start-Up Scheme:	RDA, Local Authorities, Businesses, Small Business Service/Business Link, FSB SW,	Objective 2, DEFRA.	S S,M

Strategic Themes & objectives	Indicative Actions	Lead & supporting partners	Indicative resources	Timescale
Objective: 2.4 Promote quality sustainable tourism initiatives of economic benefit to sub-region.	1. Audit of current attractions and gaps in tourism offer. 2. Improve Accommodation and Niche Targeting: 3. Developed improved intelligence capabilities to identify emerging customer needs and preferences and new market opportunities.	RDA, SW Tourist Board, Local Authorities, Private Sector, Small Business Service, Federation of Small Business SW, Somerset Tourism Partnership, South West Tourism.	Objective 2 (Measures 2.3,2.4, 2.5) South West TASC, RDA.	S S,M,L S,M
THEME 3: DEVELOPING RURAL WORKSPACE AND THE ELECTRONIC INFRASTRUCTURE				
Objective: 3.1 Upgrade and improve the electronic infrastructure.	1. Satellite Broadband Pilot with small rural businesses 2. Lobbying group to facilitate roll out of broadband throughout West Somerset.	RDA, Local Colleges, Private Sector, Business support organisations.	Objective 2, RDA Single Pot, local authority funding, Private sector telecoms.	S,M M,L
Objective: 3.2 Improve number & range of flexible premises for SMEs.	1. Comprehensive audit of current information sources detailing premises availability, develop one stop shop service for disseminating available property information/advice. 2. Review of currently allocated employment land across West Somerset and timescales for availability. 3. Feasibility studies into suitability of development at identified growth nodes in spatial strategy. 4. Provision of Affordable, Flexible Incubator Space: The aim will be to establish a small network of e-business centres throughout the sub region that have access to state of the art broadband communications. 5. Support for the conversion of existing buildings for use as workspace.	RDA, Local Authorities, Agents, Private sector Federation of small business, Small Business service/Business Link.	Objective 2 Measure 2.4, SWRDA Core Funding.	S S,M S M,L M,L

Strategic Themes & objectives	**Indicative Actions**	**Lead & supporting partners**	**Indicative resources**	**Timescale**
THEME 4 IMPROVING THE EXISTING TRANSPORT INFRASTRUCTURE **Objective 4.1** Upgrade and improve the transport system in parallel with economic development strategy.	See transport framework (p.78) and detailed recommendations (p.79).	Department for Transport [DfT], Government Office for the South West, Highways Agency [HA]), SWRDA, Somerset Strategic Planning Conference, Local Authorities (SCC, WSDC & ENPA), FirstBus, West Somerset Railways, Freight Operators (Freight Transport Association [FTA], Road Haulage Association [RHA]).	Central Government , Local Authority Capital Funds (Community Highway & Transportation Highway Fund [CHTEF]), Rural Bus Grant, Rural Bus Challenge, SWRDA Core Funding, , Public Private P'ships, Tourist Attractions.	S, M, L (see earlier section paragraph XXX for further detail)
THEME 5: DEVELOPING THE HUMAN RESOURCES OF WESTERN SOMERSET				
Objective: 5.1 Upskilling the existing workforce.	1. Support for work based Training programmes: 2. Interventions to facilitate the effective use of the retirement population: 3. Innovative delivery methods for skills training 4. Expansion of FE courses.	Learning & Skills Council, Local Authorities, Business, Colleges, HE & FE institutions, Employment Service, Connexions.	Learning and Skills Council, WSDC, RDA, Local Colleges, UFI. LEA.	S,M M,L S,M,L
Objective: 5.2 Attracting/retaining young skilled individuals.	1. Exploration of potential to establish new HE institution. 2. Development of STEP initiative with focus on rural business.	Learning & Skills Council, Local Authorities, Business, Colleges, HE/FE institutions.	Objective 2, Learning & Skills Council.	M,L S,M

Strategic Themes & objectives	Indicative Actions	Lead & supporting partners	Indicative resources	Timescale
THEME 6: SUPPORTING AND INCLUDING COMMUNITIES IN WESTERN SOMERSET				
Objective 6.1 Provision and promotion of affordable housing.	1. Review of currently available housing needs information. 2. Review of current planning policy in order to identify possible changes to facilitate affordable housing development. 3. Review of current provision for disseminating advice and information on housing issues. 4. Research examining the feasibility of developing new build and conversion live/work accommodation in Western Somerset settlements including review of similar schemes in other rural areas. 5. Pilot self build housing scheme.	Private Sector, Housing Associations, Local Authorities, RDA, Local communities.	Central Government (ODPM), Private Sector, Housing Associations, Local Authorities, RDA.	S,M,L
Objective 6.2 Avoid social polarisation and improve access to and range of opportunities for all.	1. Development of a Western Somerset resource group to provide local community, voluntary and charitable groups with the preliminary support required to write funding bids, financially manage and design projects etc with the view to becoming a Community Trust. 2.. Support for development of social economy initiatives. 3. Prioritisation of initiatives geared to the retention or creation of local community centres.	RDA, Local Authorities, Private sector, Community & voluntary sectors.	Objective 2, Rural Renaissance, Private sector.	S,M S,M,L S,M

appendix e

WORKSHOP ATTENDEES

STAKEHOLDER CONSULTATION ATTENDEES LIST:

Workshops 1-4: identifying the issues and priorities

Name	Organisation
Martin Evans	Exmoor National Park Authority
Chris France	Exmoor National Park Authority
Trevor Shaw	West Somerset District Council
Andrew Fowler	West Somerset District Council
Don Bowman	
Cllr. Barbara Child	West Somerset District Council
Cllr. Ann Foxhuntley	West Somerset District Council
Cllr. Roger Webber	West Somerset District Council
Cllr. Steven Pugsley	West Somerset District Council
Cllr. Anthony Trollope Bellew	Somerset County Council
Cllr. John Edwards	Somerset County Council
Judy Carless	Living Exmoor
Mark Smith	West Somerset Railway plc
Mike Clothier	Chairman Federation of Small Businesses
Jeremy Roberts	Tourism Consultant
Mr F Barnes	Minehead Coastal Town Initiative
G B Belton	Minehead Pier Association
Rob Batstone	Somerset County Council
Martin Wilsher	Somerset County Council
Roy Steele	Somerset County Council
David Peake	Somerset County Council
Jeremy Callard	Somerset County Council
Brian Hensley	Somerset County Council
Jenny Hastings	Somerset County Council
Paul Chant	Somerset County Council
Emma Cockburn	Somerset County Council

STAKEHOLDER CONSULTATION ATTENDEES LIST:

Workshops 5 & 6 – Testing the strategy elements

Name	Organisation
Andrew Fowler	West Somerset District Council
Tim Howes	West Somerset District Council
Trevor Shaw	West Somerset District Council
Bruce Lang	West Somerset District Council
Chris France	Exmoor National Park Authority
Martin Evans	Exmoor National Park Authority
Angela Parker	Porlock Parish Council
Richard Stenner	Porlock Parish Council
Denise Marsh	West Somerset District Council
Cllr. Anthony Trollope Bellew	Somerset County Council
Cllr. John Edwards	Somerset County Council
Cllr. Christine Lawrence	Somerset County Council
Cllr. Tim Carroll	Somerset County Council
Cllr. Colin Hill	Somerset County Council
Cllr. Barbara Child	West Somerset District Council
Cllr. Roger Webber	West Somerset District Council
Cllr. Anne Foxhuntley	West Somerset District Council
Cllr. Steven Pugsley	West Somerset District Council
Arminel Goodall	Somerset County Council
Brian Hensley	Somerset County Council
Claire Pearce	Somerset County Council
David Peake	Somerset County Council
Joanna Davies	Somerset County Council
Michael Jennings	Somerset County Council
Mike Bellamy	Somerset County Council
Rani Budd	Somerset County Council
Roy Steele	Somerset County Council
Martin Wilsher	Somerset County Council
Richard Grove	Somerset County Council
Chris Warren	Williton Chamber of Commerce
Brian Martin	Exmoor Holiday Group
Bryan Leaker	Business (Butlins)
Gerry Belton	Minehead Pier Association
Ian Aldridge	Willition Parish Council
Michael Hawkins	Exmoor Society
Mark Westcott	Cardiff University
John Malin	Coastal Towns Initiative
Fred Barnes	Coastal Towns Initiative
Ray Woods	

appendix f

TRANSPORT APPRAISAL TABLES

TABLE F1: OVERVIEW OF PARKING POLICY IMPROVEMENTS

<table>
<tr><th colspan="2"></th><th>Taunton</th><th>Williton</th><th>Washford/Billbrook</th><th>Carhampton</th><th>Dunster</th><th>Porlock</th></tr>
<tr><td colspan="2"></td><td>Parking costs relatively low £1.50 compared to public transport costs</td><td colspan="2">Poor parking facilities at railway interchange</td><td>No railway station</td><td colspan="2">On-street parking on narrow streets in historical and sensitive urban environments, particularly by Tourists</td></tr>
<tr><td rowspan="3">Environment</td><td>Noise/Air Quality</td><td colspan="3">Slight beneficial impact due to potential modal change to public transport</td><td>No impact</td><td colspan="2">Slight benefit as traffic removed from town centre</td></tr>
<tr><td>Landscape</td><td colspan="6">Minimal impact</td></tr>
<tr><td>Townscape</td><td colspan="4">Slight beneficial impact as potential reduced car usage in towns</td><td colspan="2">Slight benefit as traffic removed from town centre</td></tr>
<tr><td>Safety</td><td>Accidents</td><td colspan="6">Slight beneficial impact if car trips reduced to and within the settlements</td></tr>
<tr><td>Economy</td><td>Reliability</td><td colspan="6">No impact</td></tr>
<tr><td rowspan="2">Accessibility</td><td>Severance</td><td colspan="6">Slight beneficial impact if car trips reduced</td></tr>
<tr><td>Access to system</td><td rowspan="2">Little impact</td><td colspan="2" rowspan="2">Slight beneficial impact</td><td colspan="3" rowspan="2">Little impact</td></tr>
<tr><td>Integration</td><td>Transport Interchange</td></tr>
<tr><td colspan="2">Priority of Implementation</td><td>3</td><td>4</td><td>5</td><td>6</td><td>1</td><td>2</td></tr>
</table>

TABLE F2: OVERVIEW OF OVERTAKING/CLIMBING LANES APPRAISAL

	Overtaking/ Climbing Lanes	1. A39 West of Higher Street	2. A39 North of Holford	3. A39 Dualling west of Bradley Green	4. A39 East of Williton	5. A358 South of Bick-noller (west of Hals-way)	6. A358 South of Bick-noller (east of Halsway)	7. A358 Crowcombe to Flaxpool	8. A358 South of Trisco-mbe
	Existing Traffic Flows - 1998 24 Hr AADT (HGV %) [% increase in August 1998 Average 16 Hr] compared to AADT i.e. summer peak traffic	A39 west of Bradley Green = 7200(4.6)[26], related to scheme 3, i.e. A39 Dualling west of Bradley Green A39 Holford = 4950 (4.2)[39], related to scheme 1, 2, 4 A39 Mamsey Bridge = 10250 (4.1)[24], related to scheme 4 A358 Bicknoller = 5900 (3.2)[12] related to scheme 5, 6, 7, 8							
Environment	Noise/Air Quality	Slight adverse impact as more traffic may be attracted to the route							
Environment	Landscape	Slight adverse impact			Modera te adverse impact	Slight adverse impact	Slight to moderate adverse impact	Slight adverse impact	
Environment	Townscape	Minimal impact							
Safety	Accidents	Slight benefit with increase in formal overtaking facilities							
Economy	Reliability	Slight benefit due to improved journey times							
Accessibility	Severance	No impact							
Accessibility	Access to system	N/A							
Integration	Transport Interchange	N/A							

Length (M)	400	600	1900	400	500	1000	300	400
Estimated number of vehicles can overtake*	5	9	30	5	7	16	4	5
Feasibility	Visibility of merge & diverge an issue	No major issues		Cutting required	No major issues	Visibility an issue Some embankments required	Buildings on roadside	Possible visibility issue
Scheme Costs	Unknown							
Priority of Implementation	5	2	8	4	1	3	7	6

*Assuming lead vehicle speed = 30 mph

TABLE F3: OVERVIEW OF PUBLIC TRANSPORT IMPROVEMENTS APPRAISAL

<table>
<tr><th colspan="2" rowspan="2">Public Transport</th><th rowspan="2">Quality Bus Partnerships</th><th rowspan="2">Community Transport</th><th rowspan="2">Minehead - South Wales Channel Crossing</th><th colspan="2"></th><th colspan="3">Rural Interchange Improvements</th></tr>
<tr><th>Passenger Service Improvements</th><th>Tourism Service Improvements</th><th>Watchet</th><th>Washford/Billbrook</th><th>Williton</th></tr>
<tr><td colspan="2">Public Transport Current Issues</td><td colspan="8">Public transport usage, subject to seasonality (particularly tourist rail service and potential Minehead – South Wales crossing)
Are public transport routes serving necessary locations?
Channel crossing tides
Rail journey times compared to car (1 hour 30 mins rail, 30 mins car Taunton to Minehead)
Poor bus timetabling
Poor bus and rail interchanges
Bus fleet not always compatible to accessibility standards</td></tr>
<tr><td rowspan="3">Environment</td><td>Noise/Air Quality</td><td colspan="8">Slight beneficial impact due to the improvement in public transport with subsequent reduction in traffic</td></tr>
<tr><td>Landscape</td><td colspan="2">No impact</td><td>Slight beneficial impact</td><td colspan="5">No impact</td></tr>
<tr><td>Townscape</td><td colspan="8">Slight beneficial impact</td></tr>
<tr><td>Safety</td><td>Accidents</td><td colspan="8">Slight to moderate beneficial impact due to potential reduction in traffic levels</td></tr>
<tr><td>Economy</td><td>Reliability</td><td colspan="2">Slight beneficial impact due to reduction in traffic</td><td>Slight to moderate beneficial impact due to reduction in traffic</td><td colspan="5">Potential slight beneficial impact on journey times</td></tr>
<tr><td rowspan="2">Accessibility</td><td>Severance</td><td colspan="8">Slight beneficial impact</td></tr>
<tr><td>Access to system</td><td colspan="5" rowspan="2">Slight beneficial impact due to improved interchange times and improved access to transport system</td><td colspan="3" rowspan="2">Moderate beneficial impact</td></tr>
<tr><td>Integration</td><td>Transport Interchange</td></tr>
<tr><td colspan="2">Modal Shift</td><td colspan="2">Unknown</td><td>Reduction of 230 vehicles from August AADT</td><td colspan="5">Unknown</td></tr>
<tr><td colspan="2">Feasibility</td><td colspan="2">Good – no works required, commercial and political cooperation</td><td>Demand exists. Port infrastructure and vessels required</td><td>Not economically viable</td><td colspan="4">Good – enhancement and integration of existing facilities</td></tr>
<tr><td colspan="2">Scheme Costs</td><td colspan="8">Unknown</td></tr>
<tr><td colspan="2">Priority of implementation</td><td>1</td><td>2</td><td>3</td><td>8</td><td>4</td><td>5</td><td>7</td><td>6</td></tr>
</table>

TABLE F4: OVERVIEW OF TRAFFIC MANAGEMENT IMPROVEMENTS

<table>
<tr><th colspan="2">Traffic Management Improvements</th><th>Freight Quality Partnership</th><th>HGV Route Management – B3190/B3224</th><th>Williton</th><th>Washford/ Billbrook</th><th>Carhampton</th><th>Dunster</th><th>Porlock</th><th>A358, Taunton - Williton</th><th>A39 Bridgwater - Williton</th><th>A39 Williton - Porlock</th><th>A396 Dunster – Wheddon Cross</th></tr>
<tr><td colspan="2">Current Issues</td><td colspan="11">Poor crossing facilities
Community severance</td></tr>
<tr><td colspan="2">Existing Traffic Flows - 1998 24 Hr AADT (HGV %)
[% increase in August 1998 Average 16 Hr compared to AADT]</td><td colspan="11">A39 Holford = 4950 (4.2)[39] – A39 Bridgwater – Williton/Williton
A39 Mamsey Bridge = 10250 (4.1)[24] Williton
A39 Dragons Cross = 9930 (2.9)[24] Washford/Billbrook/Carhampton/Dunster
A39 Ellicombe = 13800 (2.1) [25] Dunster
A396 North of Dunster = 4200 (1.4)[25]
A396 South of Dunster = 2500 (2.0)[22] } Dunster
A39 east of Porlock = 4000 (1.5)[55]
A39 west of Porlock = 1300 (2.3)[81] } Porlock
A358 Bicknoller = 5900 (3.2)[12] A358 Taunton - Williton
A358 South of Bishops Lydeard = 12200 (2.7)[5] – A358 Taunton - Williton
B3190 Ralegh's Cross = 1620 (3.7)[40] HGV Route Management – B3190/B3224</td></tr>
<tr><td colspan="2" rowspan="3">Potential Improvements</td><td colspan="2" rowspan="3">Improved coordination of freight traffic. Reduced HGV use of unsuitable routes.</td><td colspan="5">Signalised pedestrian crossings</td><td colspan="4"></td></tr>
<tr><td colspan="9">Improved footways and cycleways</td></tr>
<tr><td>Signalised junction A39/A358</td><td colspan="2">-</td><td colspan="2">Enhanced junction arrangements</td><td colspan="4">-</td></tr>
<tr><td rowspan="3">Environment</td><td>Noise/Air Quality</td><td colspan="11" rowspan="2">Slight beneficial impact due to improved efficiency of journey times</td></tr>
<tr><td>Landscape</td></tr>
<tr><td>Townscape</td><td colspan="11">Slight to moderate beneficial impact</td></tr>
<tr><td>Safety</td><td>Accidents</td><td colspan="11">Slight beneficial impact due to lower speeds</td></tr>
<tr><td>Economy</td><td>Reliability</td><td colspan="11">Minimal impact</td></tr>
<tr><td>Acces sibilit</td><td>Severance</td><td colspan="11">Slight to moderate beneficial impact due to improved efficiency of journey times</td></tr>
</table>

<table>
<tr><td></td><td>Access to system</td><td colspan="11" rowspan="2"></td></tr>
<tr><td>Integration</td><td>Transport Inter-change</td></tr>
<tr><td colspan="2">Scheme Costs</td><td colspan="11">Unknown</td></tr>
<tr><td colspan="2">Feasibility</td><td colspan="11">Good – quick wins possible with schemes relatively easily implementable</td></tr>
<tr><td colspan="2"></td><td></td><td></td><td>1</td><td>4</td><td>5</td><td>2</td><td>3</td><td>7</td><td>9</td><td>6</td><td>8</td></tr>
</table>

TABLE F5: OVERVIEW OF WALKING, CYCLING & EQUESTRIAN PROVISION

Walking, Cycling & Equestrian Provision		Williton	Washford/ Billbrook	Carhampton	Dunster	Porlock	A358, Taunton - Williton	A39 Bridgwater - Williton	A39 Williton - Porlock	A396 Dunster – Wheddon Cross
Current Issues		• Poor facilities of footways and bridleways • Few or no controlled pedestrian crossings • Intermittent footways (no coherent network) • National Freight Route on A39 and A358, local freight route B3224.								
Potential Improvements		• Introduction of controlled pedestrian crossings in each settlement • Increase in extent of footways and cycleways in each settlement (on or off line) (All in conjunction with possible junction and traffic management improvements)					• Increase in extent of footways and cycleways (All in conjunction with possible junction and traffic management improvements)			
Environment	Noise/Air Quality	Slight beneficial impact due to modal shift			Slight to moderate beneficial impact		Slight beneficial impact			
Environment	Landscape	Slight beneficial impact								
Environment	Townscape	Slight beneficial impact due to modal shift			Slight to moderate beneficial impact		Slight beneficial impact			
Safety	Accidents	Slight to moderate beneficial impact due to improved facilities for vulnerable road users along the A39 within and between each settlement								
Economy	Reliability	Minimal impact								
Accessibility	Severance	Slight to moderate beneficial impact due to improved facilities for pedestrians and cyclists								
Accessibility	Access to system									
Integration	Transport Interchange									
Scheme Costs		Unknown								
Feasibility		Good quick wins possible with schemes easily and cheaply implementable								
Priority of Implementation		3	4	5	1	2	9	8	6	7

Table F6: Overview of Bypass Appraisal Summary Tables

Bypass		**Williton**	**Washford/Bilbrook**		**Dunster**	**Porlock**
		▪ Bottlenecks due to narrow carriageway ▪ Pedestrian and cycling facilities poor ▪ Junctions sub-standard ▪ Severance			▪ Bottleneck due to narrow carriageway ▪ Pedestrian facilities poor ▪ Parking/deliveries	
		A39 Holford = 4950 (4.2)[39] A39 Mamsey Bridge = 10250 (4.1)[24]	A39 Dragons Cross = 9930 (2.9)[24]	A39 Dragons Cross = 9930 (2.9)[24]	A39 Dragons Cross = 9930 (2.9)[24] A39 Ellicombe = 13800 (2.1) [25] A396 North of Dunster = 4200 (1.4)[25] A396 South of Dunster = 2500 (2.0)[22]	A39 east of Porlock = 4000 (1.5)[55] A39 west of Porlock = 1300 (2.3)[81]
Environment	Noise/Air Quality	Slight to moderate beneficial impact for residents of each settlement due to reduction in traffic.				
	Landscape	Moderate to severe adverse impact with crossings of Doniford Stream and West Somerset Railway required.	Moderate to severe adverse impact with crossings of Washford River and West Somerset Railway required.	Slight to moderate adverse impact traversing sensitive coastal lowlands	Severe adverse impact due to the severe and sensitive historical nature of the terrain	Moderate to severe adverse impact due to sensitive nature of coastal lowlands
	Townscape	Slight beneficial impact due to reduction in severance			Slight to moderate beneficial impact due to removal of through traffic from narrow streets	
Safety	Accidents	Slight to beneficial impact due to reduction in conflict between vehicular and non-vehicular road users in each settlement				
Economy	Reliability	Slight to moderate beneficial impact due to improved journey times				
Accessibility	Severance	Slight to moderate beneficial impact for dwellings fronting the existing road, due to reduced traffic flows				

	Access to system	Negligible impact				
Integration	Transport Interchange	Negligible impact				
Feasibility		Large highway structures required due to river and rail crossings		No significant difficulties	Very difficult due to extreme topography and sensitive nature of terrain	Difficult due to sensitive nature of terrain and proximity to existing settlement
Scheme Costs		£6M	£11.5M	£4M	Unknown	Unknown
Priority of Implementation		1	3	2	5	4

Note: Scheme costs based on costs from previous studies