2 REVIEW OF THE STUDY AREA

Introduction

2.1 Our review of the study area emphasises that it has generally achieved strong economic growth in the recent past but there remain relative generic weaknesses still to be overcome. There are parts of the study area (specifically Corby, Bedford and Luton) which, to a greater or lesser extent, struggle economically more than others in the study area. Corby and Luton have been identified[4] as priorities for economic regeneration. Similarly we identify weaknesses in the area's community and transport infrastructure and we draw attention to the relative under-performance of three of the main urban centres in the Area. But these weaknesses must be set in the context of an area which has attracted large numbers of new residents and businesses over recent years and which has a growing population. We postulate that the attractions of the study area, besides its location, are its wide range of employment and housing opportunities and an environment which, if not spectacular, has sufficient variety and gentle attraction to make it one of the area's assets.

Economic Trends and Structure

Growth in Jobs and Businesses

2.2 In 2000 there were 700,000 employees in employment in the study area, 2.8 per cent of the Great Britain total. The districts in the study area fall into three distinct groups. Milton Keynes (at just over 120,000 employees) and Northampton (at just under 120,000 employees) are the largest centres of economic activity. Luton, Bedford and Aylesbury Vale each have between 60,000-80,000 employees, whilst the remaining districts have between 20,000-40,000 employees.

2.3 In terms of jobs, over the last decade half of the districts have grown at above the national average and half below. South Northamptonshire and Milton Keynes have been amongst the fastest growing districts in the country in percentage terms. Corby and the Bedfordshire districts have experienced below average growth.

Table 2.1: Employment Growth

Rank of 408 GB Districts	District	2000	1991-2000	% Change
3	South Northamptonshire	24,641	9,740	68.2%
26	Milton Keynes	124,772	36,262	42.7%
74	Daventry	28,593	6,414	30.3%
107	Northampton	117,865	22,089	24.3%
139	Wellingborough	33,262	5,424	20.4%
155	East Northamptonshire	23,368	3,561	19.0%
182	Mid Bedfordshire	36,371	5,161	17.0%
	GB	**25,138,289**	**2,975,090**	**14.0%**
245	Aylesbury Vale	63,661	6,250	11.3%
246	Kettering	32,077	3,107	11.3%
261	Corby	30,589	2,803	10.5%
285	South Bedfordshire	43,210	3,203	8.3%
305	North Bedfordshire	64,198	3,539	6.0%
357	Luton	77,940	636	0.9%

[4] In regional planning guidance and regional economic strategies.

2.4 VAT registrations show the rate of formation of new businesses and are a good measure of economic expansion. As shown in Table 2.2, over the period 1995-99 most districts performed close to the national average. However both Milton Keynes and Wellingborough performed well above this level resulting in an increase in stock of VAT registered businesses of 17 per cent and 14 per cent respectively, compared with a national increase of just 3 per cent. Bedford, Luton and Corby) all experienced business growth but at rates below the national average and well below the rates for Milton Keynes and Wellingborough.

Table 2.2: New Business Formation

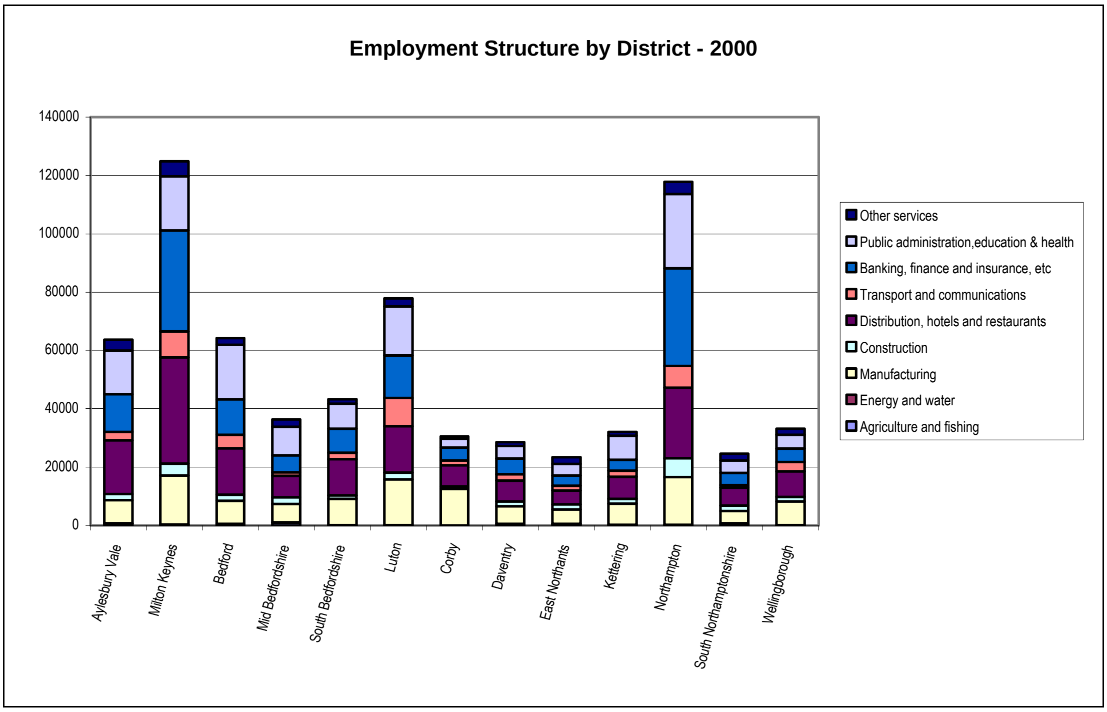
	Registrations as % of Total Stock Average 1995-99	Net-change in Total VAT Stock 1995-99
Aylesbury Vale	11%	8%
Milton Keynes	15%	17%
Bedford	10%	2%
Mid Bedfordshire	11%	5%
Luton	12%	1%
South Bedfordshire	11%	3%
Corby	11%	2%
Daventry	10%	5%
East Northamptonshire	10%	0%
Kettering	12%	0%
Northampton	12%	2%
South Northamptonshire	10%	6%
Wellingborough	15%	14%
Study Area	**12%**	**6%**
Great Britain	**11%**	**3%**

Employment Structure and Clusters in the Economy

2.5 Taken as a whole, the economic structure of the study area closely mirrors that of the country, although employment in manufacturing is higher than the national average (17.6% against 15.1%) and employment in public administration, health and education is correspondingly below the national average (20.2% against 24.1%). The overall structure masks significant variations within the study area.

2.6 Manufacturing employment constitutes a higher share of the total in Northamptonshire. In Corby it makes up 41 per cent of all employment, it accounts for 25 per cent in Wellingborough, for 23 per cent in Kettering and for 21 per cent in Daventry and East Northamptonshire. Of the other districts only Luton and South Bedfordshire (both with 20%) have a fifth of total employment in the manufacturing sector. Figure 2.2 shows the employment structure for each of the districts in the study area.

Figure 2.2 : Employment Structure



2.7 Looking beneath the broad analysis of economic structure we have identified a number of clusters of businesses in the study area. We have identified eleven sectors which may be considered to be clusters. They are:

- Freight transport by road
- Manufacture: miscellaneous other special machinery
- Wholesale: other industry machinery etc
- Retail sale of hardware/paints/glass
- Hardware (IT) consultancy
- Sale of motor vehicle parts/accessories
- Courier activities
- Maintenance and repair of motor vehicles
- Miscellaneous repairs
- Other wholesale
- Operation of sports arenas and stadiums

2.8 These eleven can be characterised as primarily distribution and vehicle related sectors, reflecting the area's locational strength at the heart of the motorway network and its ability to service a wide population. These same characteristics can be used to explain to the appearance of 'operation of sports stadiums and arenas in the same list'. The one sector that, on the face of it, stands out as somewhat different, is hardware consultancy. But again this can probably be explained by the favourable location of the area, which is able to service a wide customer base. Other industrial sectors identified by stakeholders and the Steering Group include food processing and advanced automotive industry, both of which have a strong base in the study area.

Wealth in the Economy

2.9 Analysis of gross domestic product (GDP) provides an indication of the level of wealth in an area. GDP per head (for which information is available at county and unitary authorities) demonstrates something of a north/south trend across the study area. Milton Keynes has the highest per capita GDP and has achieved the strongest growth in GDP over the latter part of the 1990s. Bedfordshire is the only part of the study area which has GDP below the national average and is slipping further behind as growth in GDP has also been below national levels. Northamptonshire is in between the performance of Bedfordshire and 'north Buckinghamshire' with GDP per head above that of the East Midlands but below that of the South East. Luton's performance is also worth noting. On a range of other indicators (for example, job growth, incidence of deprivation) Luton's performance is amongst the poorest in the study area but in terms of GDP it is one of the strongest[5].

Table 2.3 : Gross Domestic Product (GDP) at Current Prices

	1998			1998	
	GDP per head (£)	UK=100	93-98 % pa	GDP(£million)	93-98 % pa
South East	13,731	109.4	6.2%	109,797	6.9%
Berks, Bucks and Oxfordshire	16,207	129.2	6.0%	33,972	7.0%
Milton Keynes	17,557	139.9	6.8%	3,547	9.0%
Buckinghamshire cc	13,813	110.1	6.7%	6,616	7.2%
East	12,973	103.4	6.1%	69,607	6.8%
Bedfordshire and Hertfordshire	13,363	106.5	5.1%	21,201	5.8%
Luton	14,400	114.8	5.6%	2,632	6.2%
Bedfordshire cc	11,874	94.6	4.4%	4,425	5.1%
East Midlands	11,848	94.4	5.4%	49,413	5.9%
Leics, Rutland and Northants	12,978	103.4	5.4%	20,047	6.0%
Northamptonshire	13,369	106.5	5.9%	8,211	6.6%
ENGLAND	12,845	102.4	5.4%		
UNITED KINGDOM	12,548	100.0	5.3%		

Comparative Performance Around the Study Area

2.10 The comparative under-performance of the Bedfordshire economy can be traced to its ageing economic structure. Many of the companies in Luton and Bedford date from the beginning of the 20th Century and the ageing premises and activities have been squeezed by global economic competition. The latest high profile example of this is with the closure of Vauxhall and the knock-on supply chain effects through motor industry reductions as a whole, for example at Ford and Rover.

2.11 Yet Bedfordshire and in particular Luton are well located in relation to the motorway network and have fast rail services to London. Luton has the added advantage of an international airport which is a strategic asset for the study area as a whole. Luton Airport is one of the UK's fastest growing airports and the 7th largest in the UK with 78 per cent of passengers flying on scheduled services and 72 per cent of all passengers on international flights. Passenger numbers are likely to rise in the short term in response to increased demand for air travel in the South East. This matters to the town (and the wider study area) as Luton Airport is one of the biggest employment sites in the study area and over 8,200 people work there. It is estimated that for each additional million passengers, 1000 airport jobs are created.

2.12 With all these advantages, it remains something of a conundrum why Luton (and the wider Bedfordshire economy) has found it so difficult to adjust to global economic forces. One reason advanced has been land supply constraints and the difficulties both Luton and Bedford have in delivering high quality new

[5] GDP per head estimates based on workplace data

premises as well as new housing to retain and attract a quality workforce. In Chapter Five we examine these issues in more detail and conclude that land supply is particularly constrained in and around Luton but not in Bedford, so land constraint does not provide all the answers.

2.13 By contrast, the Milton Keynes economy has shown strong growth (well above national averages) and by its very nature is an economy of a more recent vintage. It has attracted new activity from a variety of different sectors. But when looking to the future, in order to maintain its competitive edge, at some point there will be a need to renew its current stock of activity. Similarly Aylesbury Vale would appear to be experiencing strong demand pressures as Thames Valley influences ripple out northwards.

2.14 Northamptonshire has also grown above the national average with manufacturing in Corby and Wellingborough increasing against the national trend. However, there is concern within Northamptonshire that the external perception of the County is of an area for distribution and light industry and as a consequence it has difficulty in attracting higher value activity. It was suggested that there has been little office or R&D development in Northampton and the inward investment which has been attracted has been of B2 and B8 uses (i.e. primarily manufacturing and distribution).

2.15 Corby stands out as being different from the rest of Northamptonshire. Its recent history as a town dominated by the steel industry and the severe problems it experienced when the industry withdrew have been well documented, as has the improvement in its economic fortunes achieved over the last 20 years, based on wholesale, distribution and food. Nevertheless it is a more isolated economy and has yet to gain advantages from its proximity to the A14. In this respect it is less favourably placed than its near neighbour Kettering, whilst nearby Wellingborough has direct access to the A45. Both Wellingborough and Kettering also have the advantage of being on the Midland Main Line. Corby does not and is pressing to address this relative disadvantage, supported in its efforts by EMDA.

Value of Work and the Skills of the Workforce

2.16 Stakeholders in the study area are concerned to shift the economic structure of the area towards a newer, higher tech and higher value future. The issue is relevant across the whole Area but was particularly important in Northamptonshire and Bedfordshire - the former because of the high proportion of jobs in distribution and the latter because of the difficulties experienced as the economy moves away from its manufacturing heritage.

2.17 Analysis of the knowledge based economy (which covers both service and manufacturing jobs) shows that at present 15.2 per cent of employment in the study area is in this sector of the economy compared with 17.7 per cent nationally. Again, there is variation between districts, with the knowledge based economy accounting for 28 per cent of employment in East Northamptonshire and 25 per cent in Milton Keynes, but less than 10 per cent in Wellingborough, Corby and South Bedfordshire[6].

2.18 Whilst it would be foolhardy to argue that any area should be made up solely or even largely of knowledge based jobs, the study area is lagging behind in this respect. Future economic growth which did not achieve a better representation of these sorts of jobs would, in our opinion, not achieve the study area's full potential.

2.19 In doing this, the study area should expect to broaden the range of occupations in the economy and to continue the trend away from lower towards higher skilled jobs. As things stand, the occupations of workers in part of the study area still, to some degree, reflect the lower value manufacturing heritage of parts of its economy and this is reflected in sluggish economic growth in those areas.

2.20 The highest proportion of people in professional occupations is found in the Buckinghamshire Learning Partnership (LP) area, with 13 per cent of the population. At just over 11 per cent the Milton Keynes LP

[6] See report by Robert Huggins

has a very similar level to that of the England and East of England averages (11%). This compares with 12 per cent in the South East. Bedfordshire and Luton LP has a slightly lower level of professional occupations at 10 per cent, in line with the East Midlands' average. The position is worse in Northamptonshire with just 8 per cent of people in professional occupations.

2.21 Whilst striving for a higher skilled, more knowledge based economy, there is concern that the relatively low levels of qualification across the workforce will inhibit this. Many employers are already reporting difficulties in recruiting staff because of skills shortages (where employers are unable to source the skills they require within the labour market) and skills gaps (where there is an absence of the required skills in the existing workforce). For instance, a third of employers in the Milton Keynes, Oxfordshire and Buckinghamshire LSC area reported concerns with the shortage of suitable people. Although any slowing in the economy will ease the recruitment situation in the short term, longer term occupational and sector growth trends still point towards the need to ensure the availability of an expanded, highly skilled workforce.

2.22 In 2000, 22.3 per cent of the working age population were qualified to NVQ level 4 (graduate level) or above across the study area, compared with 23.2 per cent for England as a whole. The variation within the study area is considerable. The proportion of workers qualified to NVQ4 is well below the national level in Northampton, East Northamptonshire, Kettering, Luton and Wellingborough. On the other hand Mid Bedfordshire, South Northamptonshire, Aylesbury Vale and Bedford all have a higher level of NVQ4 qualified workers than the average for the South East region. Even here, though, this level of workforce qualification compares unfavourably with other parts of the South East, for example Surrey (34%) and Oxford (43%) with whom the study area must compete.

2.23 The relatively low level of skills in the current workforce is mirrored by a relatively modest performance at GCSE and GCE A/AS levels. For instance at A/AS and Advanced GNVQ level, both Buckinghamshire and Bedfordshire LEAs perform better than the South East. However, all other LEAs in the study area achieve a lower points score than the national and regional averages.

Table 2.4: Mean Score achieved by 17 year old GCE A/AS and Advanced GNVQ candidates 1999/2000 (all entries)

	1999/2000
Buckinghamshire	19.3
Bedfordshire	17.9
South East	17.6
England	17.2
East of England	17.1
East Midlands	17.1
Northamptonshire	16.2
Milton Keynes	14.9
Luton	12.6

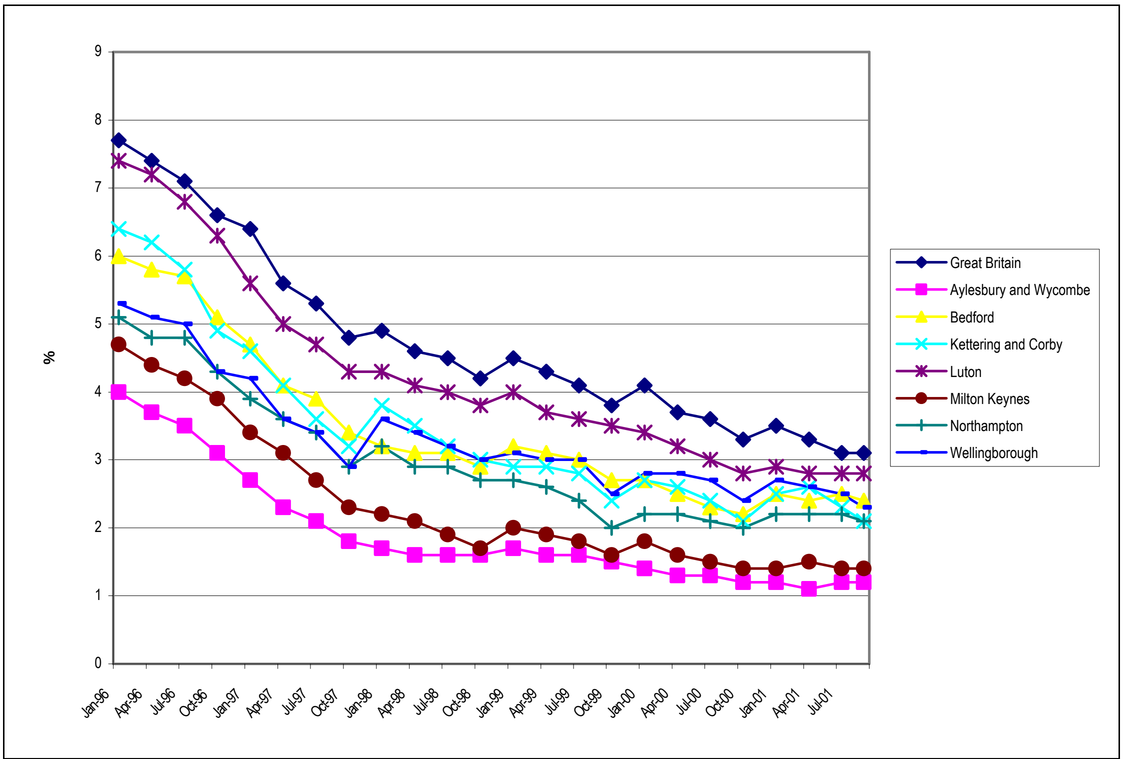
Source: DfEE Statistics of Education

2.24 Although improved local provision of HE courses could be expected to improve participation rates, particularly amongst those from lower socio-economic groups, we must also recognise other factors which influence skill levels in the workforce. The progression of increased numbers of young people into HE alone will not generate a higher skilled workforce. Most young people will continue to move away from their home to Study and on graduation will enter the labour market elsewhere. In order for graduates to be attracted into an area they must perceive that it will offer sufficient opportunities for their career and personal life. The quality of life found in competing areas for their skills will influence their preferred location.

Unemployment

2.25 Unemployment rates for all parts of the area have been falling in line with the national trend. In the past year the decline in unemployment has flattened off and in the case of Bedford there has even been a rise in the unemployment rate. However the labour market remains tight and in May 2002 there were 20,400 claimant count unemployed in the study area, (2.1% of the total workforce).

Figure 2.3 : Unemployment Rates



2.26 The unemployment data suggests limited scope for quantitative increases in existing employment, a point reinforced by the high level of female labour force participation although there may be some scope for increased economic activity among those over 50. However, as we have stressed already there is significant scope for qualitative improvements in the labour force

Wages

2.27 The level of qualifications and make-up of occupations in the study area is reflected to some extent in the difference in wage rates, with wage rates follow a striking north–south pattern. All districts in Northamptonshire along with Bedford, have wages below the national average. Average wages in Luton are the same as the national average. Other districts in Bedfordshire and Milton Keynes and Aylesbury Vale have wages above the national average.

Commuting Patterns

2.28 Data on commuting is limited. The most authoritative source is the 1991 Census Travel to Work data, but this is now over ten years old. All other things being equal, it is likely that the 2001 Census will show a greater propensity to commute and to commute for longer distances but the broad patterns of movement are likely to be broadly similar.

2.29 In 1991 there were significant variations in self-containment by district within the study area. In Corby 84 per cent and in Northampton 83 per cent of the resident workforce worked in the district. By contrast in South Northamptonshire it was 45 per cent.

2.30 The table below also shows the patterns of movement outside their own district of residence. We include the southern Buckinghamshire districts in this table to make the point that although London was the major draw for them (with between 10-25 per cent of the workforce commuting there) in the study area, London's influence on commuting patterns was far more muted. In north Buckinghamshire and Bedfordshire, London provided the workplace for between 5-10 per cent of the resident workforce, whereas for the Northamptonshire districts it was only between 1-2 per cent.

2.31 The only significant cross-county movements within the study area were residents of South Northamptonshire (11.5% of employed residents) and South Bedfordshire (3.9% of employed residents) who commuted to Milton Keynes while 6.4 per cent of employed residents of East Northamptonshire worked in North Bedfordshire.

Table 2.5: Area of Workplace by District of Residence

	Workplace				
	District	**Beds**	**Bucks**	**Northants**	**G London**
Resident					
Luton	68.4%	10.0%	1.3%	0.2%	8.9%
Mid Beds	52.2%	18.8%	3.5%	0.4%	5.7%
North Beds	77.7%	8.4%	2.6%	1.6%	4.4%
South Beds	53.2%	18.9%	6.6%	0.3%	8.3%
A Vale	68.0%	3.0%	11.1%	0.7%	5.5%
Chiltern	50.4%	0.5%	15.0%	0.0%	21.7%
M Keynes	79.3%	6.0%	2.2%	2.0%	6.3%
South Bucks	36.9%	0.0%	7.6%	0.0%	25.7%
Wycombe	66.5%	0.2%	9.1%	0.1%	11.1%
Corby	84.1%	0.2%	0.0%	11.8%	0.6%
Daventry	57.5%	0.6%	1.9%	24.4%	1.2%
E Northants	57.6%	7.1%	0.6%	23.8%	1.8%
Kettering	66.9%	0.8%	0.5%	23.9%	1.6%
Northampton	82.9%	1.2%	3.0%	8.0%	1.7%
S Northants	45.3%	1.5%	14.2%	21.2%	2.3%
Well'borough	66.3%	2.7%	1.9%	25.0%	2.0%

Source: 1991 Census Travel to work 10% sample

2.32 To provide a more up to date indication of commuting we have compared resident based workforce estimates from the Labour Force Survey with the workplace based ABI estimates (see Table 2.6). Although the difference in the data sources adds a cautionary note to the interpretation, this nevertheless provides a good indication of whether an area is a net importer or exporter of labour. A negative number means that out commuting outweighs in commuting and a positive number means that there are more in commuters than out commuters.

Table 2.6 : Net Commuting 1998

	Net Commuting
Mid Bedfordshire	-22,100
South Bedfordshire	-15,100
Aylesbury Vale	-13,200
East Northants	-11,500
South Northamptonshire	-9,900
Daventry	-4,100
Kettering	-1,300
Luton	-300
Wellingborough	3,200
Bedford	5,700
Corby	6,900
Milton Keynes	15,300
Northampton	26,400

2.33 Although net commuting between the study area and the rest of the country is broadly neutral, the individual districts within it show very different net commuting patterns. There are a group of districts (Mid and South Bedfordshire, Aylesbury Vale and East Northamptonshire) which have more workers than jobs and where net out-commuting is a significant feature. Milton Keynes and, even more so, Northampton are the largest centres for net in-commuting. The two centres of Kettering and Luton are broadly in balance. But this must not be confused with self–containment, since small net-commuting figures can mask large gross flows into and out of the districts.

Emerging Economic Opportunities

2.34 Whilst starting from a different base and for different reasons, each of the three county economies is seeking to shift its current economic structure towards a newer, higher skilled, higher tech and higher value future. The two major constraints to achieving this vision are the skills of the existing workforce discussed above and east-west transportation links. The east-west rail link is high on the priority list of the agencies in the area as is investment in telecommunications infrastructure, particularly broadband communications.

2.35 This vision has been given expression in the Oxford Cambridge Arc, which seeks to change perceptions about the economic characteristics of the area by aligning it with the internationally recognised higher education facilities at Oxford and Cambridge and the associated clustering of high tech business parks that they have induced. Proponents of the Arc believe that parts of the study area are able to offer land and labour to develop a high tech industrial base.

People and Housing

Population Trends

Growth in Population

2.36 There are approximately 1.55 million people living in the study area[7]. About 38 per cent of this total (or 590,000 people) live in the administrative areas of Milton Keynes, Luton and Northampton. The

[7] 1999 mid year estimate – Source Nomis, ONS

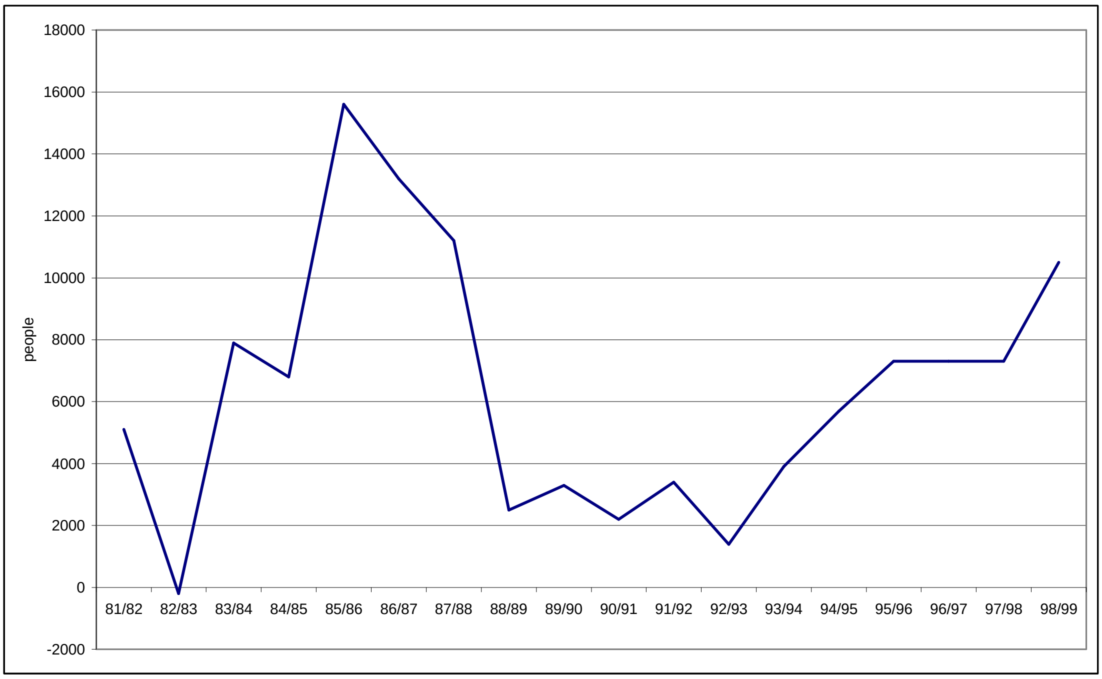
population of the study area has been growing steadily, from around 1.30 million in 1981 and from 1.45 million in 1991. This is a 7.2 per cent increase 1991 to 1999, which is higher than the average for the South East (at 5.2%). But population growth in the study area has not been exceptional in comparison with other economically successful areas in the south of the country. For instance, the population of Berkshire increased by 6 per cent 1991 to 1999 and that of Cambridgeshire by 8 per cent.

2.37 Unsurprisingly, Milton Keynes has been the fastest growing part of the study area with a population increase of over 15 per cent between 1991 and 1999. The adjoining districts of Mid Bedfordshire and South Northamptonshire grew in this period by more than 10 per cent. Corby stands out as a place where the population has declined.

Migration Trends

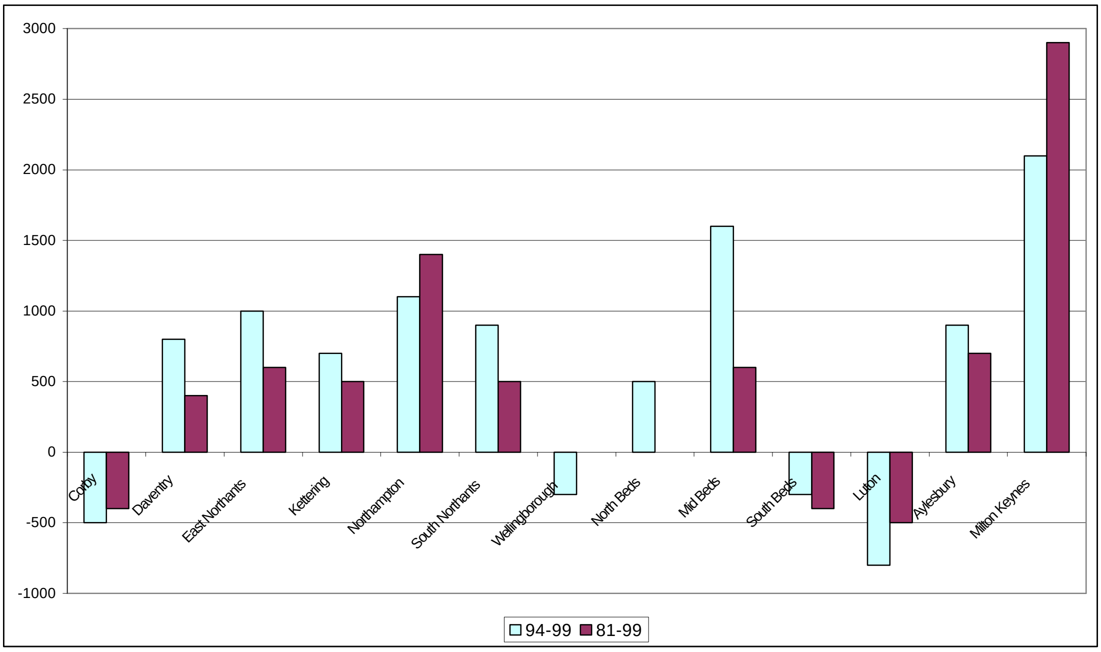
2.38 Net migration rates have varied significantly for the study area. They have varied over time and varied between local authority areas. The chart which follows shows a sharp and sustained decline in in-migration in years of economic downturn (the late 1980s and early 1990s) and much higher levels of net in-migration during times of economic buoyancy.

Figure 2.4 : Net migration Between 1981 and 1999



2.39 In recent years (1994 to 1999) net in-migration into the study area has been around 7,600 people per year. This is a higher level than the long term (1981 to 1999) annual average of 6,400 people. Some districts in the study area have consistently gained from net in-migration whilst others have actually experienced population losses through migration. The chart below demonstrates this by showing average annual rates (to the nearest 100) of net migration for the long term (1981 to 1999) and the short term (1994 to 1999).

Figure 2. 5 : Annual Average Rates of Net Migration, 1994 to 1999 and 1981 to 1999

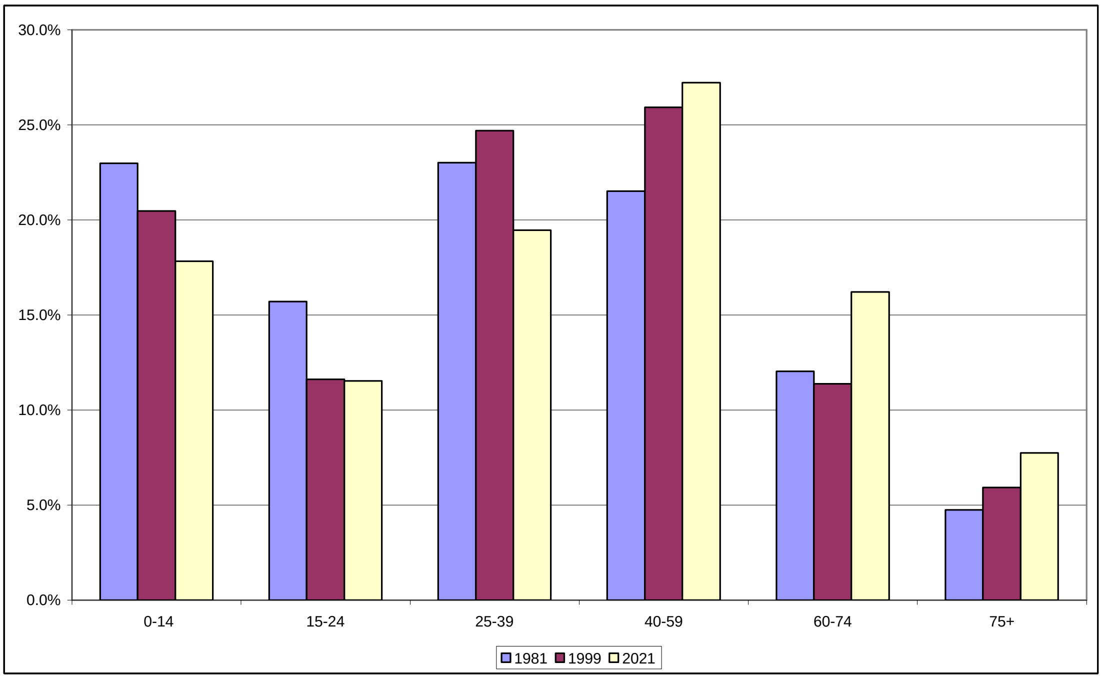


2.40 Corby, South Bedfordshire and Luton have been net exporters of people. With the exception of Wellingborough, all the other districts have been net gainers from migration both in the short and long term. Milton Keynes has consistently experienced the highest levels of net in-migration but with numbers which have been reducing over time. Northampton has followed a similar pattern, albeit at generally lower levels. The districts where migration has been higher in the recent past than over the longer term are the more rural parts of the study area - Daventry, East Northamptonshire, Kettering, South Northamptonshire, North and Mid Bedfordshire and Aylesbury Vale. Between 1994 and 1999, Mid Bedfordshire became the second largest importer of people.

Changing Population Structure

2.41 In line with national trends, the population of the study area has been ageing although it remains relatively youthful in comparison with other parts of the country. For instance, in 1981 39 per cent of the study area population was aged under 25 years but by 1999 this figure had fallen to 32 per cent. The following chart shows this and highlights that the population will continue to age in the coming years. The information we have used comes from the ONS and DETR 1996 based projections. We have not drawn on these to develop our growth options (described later in the report) but they do highlight the kinds of change which might be anticipated in the make up of the population (albeit only to 2021).

Figure 2.6 : Changing Age Structure of the Study area



2.42 Between 1981 and 1991, the proportion of single person households increased from around 19 per cent to about 27 per cent. This trend is projected to continue so that, again using the 'official forecasts', by 2021 single people are shown to represent about a third of all households in the study area.

2.43 It is now generally recognised that the growth in single person households will be a phenomenon of the middle aged (and older people). These may well be people with some kind of continuing family responsibilities and with housing aspirations (and the financial means) similar to their 'married'counterparts. This has implications for future housing provision and it would be wrong simply to assume that more smaller households in the future inexorably leads to the need for many more smaller units.

The Housing Market

2.44 House prices[8] across the study area tend to decline from the highest values found in the south west of the area (e.g. £150,000 in Aylesbury Vale) gradually down to the lowest values in the north east (£60,000 in Corby). These values compare with the national average figure of £111,000 and an average figure for the South East of about £140,000.

2.45 During the late 1990s the housing market became more differentiated as the gap between the highest and lowest prices across the Area increased (from 114% in 1995 to 150% in 2001). Price rises of over three quarters have been experienced in Milton Keynes, Bedford, South Northamptonshire and Aylesbury Vale (all in the south of the study area) while for Daventry and Corby, the increase 1995 to 2001 has been less than 60 per cent.

2.46 In this Study we can only scratch the surface of the issue of housing affordability and the potential impact on households and businesses. But from the bald facts and our experience, it is safe to say that there is an affordability issue for the study area which, although less acute than in some other parts of

[8] All property house prices – Her Majesty's Land Registry Jan-March 2001

the country, is much more of an issue in the south of the area and is one, on current trends, which is growing. A proper assessment of the amount and types of affordable housing required is beyond the scope of our work. However, consultation with stakeholders indicates that policy is moving towards affordable housing provision of the order of 25% social rented and 10% intermediate tenure. We have used this level to come to a view on the amount of public investment required in the area over the next 30 years (see chapter 8), recognising that the need for affordable housing could vary significantly around the study area. Local housing needs assessments will be needed to address affordable housing needs locally and to provide the foundation for local plan policies and housing strategies

Housing Stock

2.47 Predominately in private ownership[9], the housing stock of the study area (around 650,000 dwellings[10]) is generally in good order and is almost fully utilised, (with vacancy levels at only 2.4%[11] compared with the national average of 3.7%). Problems of fitness of the stock are most acute in Luton. Luton (along with Northampton and Bedford) also experiences the highest levels of local authority or housing association dwellings identified as 'difficult to let'.

Deprivation and Social Exclusion

2.48 The study area is not one of the poorest parts of the country and deprivation and social exclusion are not widespread. But there are parts of the study area where wealth is generally lower and pockets where deprivation becomes a concern of sufficient scale that it has more than local implications.

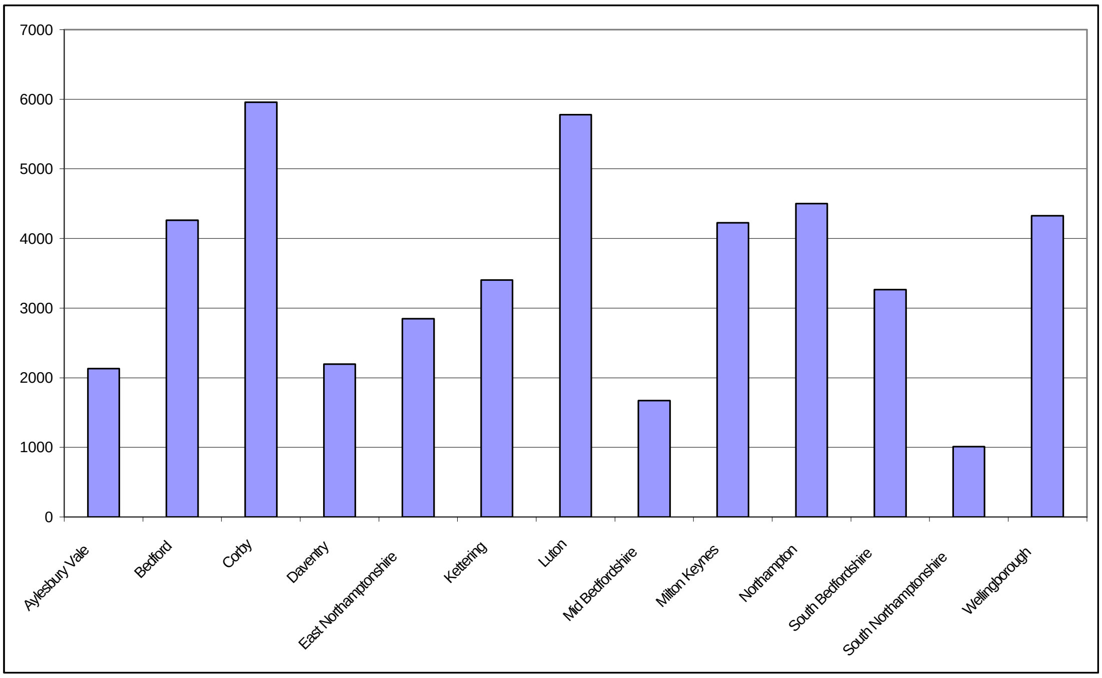
2.49 Using the Index of Multiple Deprivation (IMD) of 2000, it is clear that at 'district' authority level Corby and Luton are the more deprived areas with places such as Mid Bedfordshire and South Northamptonshire, the least. The chart below shows the average of ward ranks where 8414 is the national score showing the most deprived 'district'.

[9] At almost 82% of the stock

[10] HIP returns for April 2000 – source DTLR web pages

[11] HIP returns for April 2000 – source DTLR web pages

Figure 2.7 : Index of Multiple Deprivation 2000 - Average of Ward Ranks



2.50 IMD data also looks at the extent of deprivation and does this by showing the proportion of a district's population living in the wards which rank within the most deprived 10 per cent of wards in the country. Only three study area districts have wards which fall into this category (Bedford, Milton Keynes and Luton). Their relative proportions are 5 per cent, 6 per cent and 13.6 per cent. The implication of this is that although Corby is a generally more deprived area than other parts of the study area the problems found there are not of extreme deprivation. Whilst Bedford and Milton Keynes have pockets of more acute deprivation it is Luton which is both the most deprived part of the study area generally and experiences the highest levels of acute deprivation. Across other more detailed measures (e.g. employment and income deprivation) Luton again fares least well and using the IMD figures about 46,000 Luton residents were income deprived in 2000 - more than any other part of the study area.

The Main Urban Centres

Diversity of Function

2.51 Town centres serve as the focal point for most leisure, cultural, heritage and retail activity. Whilst the shopping function underpins town centres, their strength comes from the mix of interdependent uses such as leisure and entertainment facilities, heritage features, as well as their commercial life and resident population. In the study area, it was the stakeholders who first alerted us to the possible under-performance and lack of investment in the main urban centres – although they tended not to include Milton Keynes in this. The stakeholders appreciated the diversity of character and style of the different centres but were conscious that their development had not kept pace with the growth of population in the Area and that they were losing out to nearby competitors.

Retail

2.52 Looking first at retail performance, Table 2.7 sets out indicators for the main centres within the study area and also for other centres outside the Area which serve as comparators and, in many cases, competitor destinations.

Table 2.7: Town Centre Performance

Centre	Local Authority Population (1)	Total Retail Floorspace (sq. m.) (2)	2001 Retail Ranking (3)	1995/96 Retail Ranking (3)	Zone A Rents (£/sq. ft. p.a. (4)	Yield (%) (5)	Vacant Floorspace (sq. m) (2)
Centres within study area							
Milton Keynes	207,000	167,300 **(6)**	29	57	225	4.75	N/A
Northampton	196,000	145,300	37	38	120	6	9400
Bedford	142,000	67,200	87	73	90	6	4500
Luton	183,000	136,400	93	84	160	5.75	8400
Aylesbury	161,000	34,000	151	139	80	6.5	N/A
Kettering	83,000	54,000	184	187	70	6.75	N/A
Corby	51,000	19,659	259	269	50	7.5	2600
Wellingborough	69,000	25,773	282	290	60	6.75	2600
Centres outside study area							
Reading	148,000	N/A	8	30	225	6.5	N/A
Cambridge	121,000	N/A	47	9	225	5.25	N/A
Oxford	144,000	N/A	35	39	200	4	N/A
Leicester	294,000	N/A	11	13	200	5	N/A
Coventry	304,000	N/A	37	33	150	5.25	N/A
Nottingham	287,000	N/A	2	4	221	4.75	N/A
Bristol	402,000	N/A	18	9	175	5	N/A

Notes

(1) 1999 Mid Year Estimate for centres within the study area; 1998 MYE for centres outside the study area.

(2) Latest available information obtained from local authorities.

(3) Management Horizons Europe UK Shopping Index 2001 (the MHE). [12]

(4) Colliers Conrad Ritblat Erdman Ltd "In Town Retail Rents 2001".

(5) Valuation Property Market Report, Spring 2001

(6) Includes Midsummer Place (39,000 sq. m), opened in 2000.

2.53 The rankings show that, whilst Milton Keynes' position has improved over time, the relative performance of Northampton has remained constant but both Bedford and Luton have slipped several places down the ranking list and are likely to be losing trade to competitor destinations such as Milton Keynes and Cambridge. The relative ranking of the main centres is reflected in their catchment areas with the Milton Keynes' catchment area being the most extensive.

2.54 Zone A rents give a measure of private sector confidence and investment potential in the centres. Again Milton Keynes is performing ahead of the rest in the study area and is well up with the comparators we have used. But this does not mean that investment in the other centres will be held back by the market. For example, Northampton has recently proposed a 37,000 sq. m. extension to the Grosvenor Centre to help achieve the Town Centre Partnership's vision of a *"prosperous, vibrant, safe and attractive town centre of regional significance".*

2.55 Of the smaller centres, Corby and Wellingborough are doing least well. The very low rents for Corby are a sign of real lack of private sector confidence. The Corby position is not a surprise and we are well aware that much effort is being made to regenerate the town and its centre. More surprising is the poor showing for Wellingborough which was not highlighted as a problem by stakeholders.

[12] The MHE Index is calculated using a weighted system which takes account of each location's provision of non-food multiple retailers and anchor store strength.

Leisure and Heritage

2.56 Leisure and heritage features are found in urban areas throughout the study area. The widest range of leisure facilities is in Milton Keynes where facilities range from Milton Keynes Theatre and Gallery to Xscape (an indoor recreation centre including a ski slope and multiplex cinema) to extensive amounts of public open space and parkland. Other centres, especially Northampton and Bedford also accommodate a range of cultural and sporting activities, many of which (e.g. the Derngate in Northampton) have an established and quality reputation across the study area.

Community Infrastructure - Health

2.57 One of the key messages to come from stakeholders is that the community infrastructure of the study area has not kept pace with the rate of growth experienced, particularly in the new and expanded towns - with both acute and primary health provision highlighted in this respect. On the acute side we note that there has been minimal expansion of Milton Keynes general hospital since 1991, yet the population which is served by the hospital has increased by a fifth. Stakeholders also advised that Bedford General Hospital is struggling to cope with population growth. The situation in Northampton is less clear, although existing facilities are under pressure. At the primary healthcare level, stakeholders also raised concerns about the difficulties of finding a place on a GP's list in Milton Keynes and Northampton. However, this would at least partly appear to be a function of the national shortage of doctors exacerbated by rapid population growth.

Community Infrastructure - Further and Higher Education

2.58 There are six universities or university colleges in the study area delivering higher education and another ten further education colleges. The amount of higher education provision is currently being reduced as De Montfort is closing its campus at Bedford in order to concentrate on its main centre at Leicester. Although there are proposals for higher education provision in an education sector in central Milton Keynes these are not yet clearly defined.

2.59 Feedback from stakeholders indicates concern that the education sector in the study area has a lower profile than in neighbouring areas. In terms of reputation and identification, none of the local universities acts as a flagship for the study area.

2.60 The Oxford to Cambridge Arc concept has drawn attention to the need to strengthen links between higher education and high-tech businesses. As things stand, Cranfield has the strongest reputation as a technology research university. It set up a Technology Park in 1991, which now includes an Innovation Centre. Luton also has an Innovation Centre, on a smaller scale and there are proposals for a new larger innovation centre at Butterfield Park. There are also Open University proposals for an enterprise hub near Bletchley Park and at Wyboston Lakes, Bedford.

The Existing Transport Network

2.61 The attached map (Figure 2.8) shows the existing transport network in the study area and highlights those parts of the highway network which already regularly experience congestion.

Highways Provision

2.62 Key highway routes within the study area are the M1, A6, and A1 running north-south, and, the A43, A14 and A505 running east-west. The LSM has identified that the M1, the busiest road in the study area carries up to 130,000 vehicles per day past Luton and is overloaded all day throughout the study area; 50,000 of these daily movements are estimated to have origins and destinations outside the study area.

2.63 Although they already carry substantial volumes of traffic, initial indications from the LSM are that, away from key junctions, the other north-south routes currently have spare capacity. When junctions at Thrapston have been grade-separated during 2003, the A14 is expected to provide a high quality east-west route throughout the northern part of the study area.

2.64 The Highways Agency is currently studying options to improve M1 Junction 19 to the north of the study area. If implemented, these would further enhance the role of the A14 as a high speed/high capacity connection between the West Midlands and the East of England.

2.65 Concerns have been expressed about the poor quality of east-west routes further south and the LSM has identified overloading on the A421 between M1 J13 and the A1. In addition, the LSM has identified overloading on the A5 between Dunstable and the M1 and stakeholders have specifically mentioned congestion at M1 J14 (Milton Keynes), within Northampton and Dunstable town centres and on the approaches to Luton Airport.

Dealing With Road Traffic Congestion

2.66 Although stakeholders considered that there was a case for selected highways improvements, for example to improve the environment in Dunstable town centre, they accepted that wholesale road building was not a sustainable long-term solution. This is the central thrust of Government policy (as set out in PPG13 and carried forward at a regional level in such policies as TDM1 of RPG8 and T1 of RPG9), which is to reduce the overall demand for travel and to encourage the use of modes other than the private car. The key means of achieving these aims are to:

- Improve existing public transport services to a standard which is perceived as an attractive alternative to car use.
- Increase use of walking and cycling for shorter distance trips, by improving the facilities available to pedestrians and cyclists.
- Direct new development to locations which are already well-served or have the potential to be well-served by public transport.
- Reduce journey distances between homes, workplaces, hospitals, education establishments and other facilities by improving the mix of land uses in any one area.

2.67 By directing development to locations which can realistically be served by public transport, the amount of additional traffic generated can be kept to a minimum. However, future plans will still need to acknowledge and find acceptable ways of managing car-borne traffic.

Freight Provision

Road freight

2.68 Estimates from the LSM of key movements to/from locations in the study area are given in the table below. The LSM has also identified congestion on the M1 and the lack of good East-West road links to Milton Keynes as issues for road freight within the study area.

Table 2.8 : Key Goods Vehicle Movements

Movement	Daily volume (two-way)
Milton Keynes - Leighton Buzzard	6,500
Milton Keynes – Bedford	6,000
Milton Keynes – Northampton	4,200
Milton Keynes - Luton/Dunstable	4,100
Luton/Dunstable - Leighton Buzzard	4,600
Luton/Dunstable - Ampthill/Flitwick	3,800
Luton/Dunstable – Bedford	3,300
Northampton – Corby	3,400
Luton/Dunstable - London and the South East	25,200
Aylesbury - London and the South East	14,200
Sandy/Biggleswade - London and the South East	13,100

Source : LSM study

Rail freight

2.69 At a national level, Government is encouraging the transfer of freight from road to rail. Daventry International Rail Freight Terminal has recently been established on the West Coast Main Line to the south of Rugby, offering a state-of-the-art intermodal facility. Corus and car distribution terminals at Corby also have direct connections to the rail network. There is also a railfreight terminal at Bletchley. In their Local Transport Plan, Northamptonshire County Council have ambitions for railfreight terminals at Northampton and Corby. Construction of additional facilities will assist with removing lorry trips from sensitive routes and will bring local economic benefits, however they are unlikely to significantly reduce traffic congestion.

Water-borne freight

2.70 Following conclusion of a favourable feasibility study in 2001, British Waterways are currently in the process of identifying a preferred route for a new canal linking the Grand Union Canal at Milton Keynes with the River Great Ouse at Bedford. The project would be principally funded by the private sector, via such mechanisms as landfill tax credits, surface water drainage charges and Section 106 contributions from realisation of local development opportunities.

Airport Provision and Proposals

2.71 Luton Airport is the only passenger airport located within the study area and was used by 6 million passengers during 2000. Although predominantly used by charter traffic, Luton is being increasingly used by business travellers, with scheduled services operating to destinations including Amsterdam, Athens, Barcelona, Dublin, Edinburgh, Geneva, Glasgow, Madrid, Nice and Zurich.

2.72 Public transport access has recently been substantially improved with the opening of Luton Airport Parkway station. Further benefits would flow from the implementation of Translink, which is a central part of Luton Airport's ambitions to increase its passenger throughput to 10 million passengers per annum.

2.73 The LSM has assumed that Luton Airport could be handling 25 million passengers per annum by 2031. As previously indicated, the existing runway has the capacity to accommodate 30 million passengers per annum.

2.74 Despite an increase in business traffic at Luton, Heathrow and Gatwick are still viewed as the key airports for business journeys by the stakeholders. Whilst Gatwick has direct rail access from Bedford and Luton, Heathrow is only accessible by changing trains in Central London or using the M1 and M25.

Birmingham Airport is also accessible by rail from Milton Keynes and Northampton. Connex recently curtailed services between Rugby and Gatwick to operate only south of Watford, resulting in the loss of direct rail connections to Gatwick from Northampton and Milton Keynes.

Rail provision

2.75 Existing rail services within the study area are as follows:

- West Coast Main Line. Long distance trains between London Euston and the Midlands/North West serve Milton Keynes. Silverlink trains serve intermediate stations between London Euston and Birmingham via Milton Keynes and Northampton;

- Midland Main Line. Long distance trains between London St Pancras and the East Midlands/South Yorkshire serve Luton Airport Parkway, Bedford, Wellingborough, Kettering and Market Harborough. South of Bedford, Thameslink trains serve intermediate stations via London to Gatwick, Brighton and Sutton;

- East Coast Main Line. West Anglia Great Northern trains between London Kings Cross and Peterborough serve Arlesey, Biggleswade and Sandy;

- Chiltern Line with commuter trains running from London Marylebone to Aylesbury via Amersham and Princes Risborough. Chiltern trains between London and Birmingham also serve Haddenham and Thame Parkway;

- The Marston Vale line, which forms the only east-west link within the study area. Silverlink trains run a shuttle service calling at a series of halts between Bletchley and Bedford. The route is operated with outdated rolling stock and stakeholders have expressed dissatisfaction with the reliability of services on the route, with unannounced cancellations occurring during periods of staff shortages. At the time of writing, the Strategic Rail Authority has announced proposals to upgrade signalling.

2.76 The LSM has identified that Milton Keynes, Bletchley, Bedford and Luton are the busiest stations within the study area. We have been unable to obtain details of passenger flows to analyse further these basic trends.

2.77 As already noted, Connex has recently withdrawn its services on the WCML from Rugby to Gatwick Airport.

Bus Provision

2.78 Networks of urban bus routes operate within the major settlements, however some cross-town bus journeys have to be made by interchange (for instance to hospitals).

2.79 Regular bus services link the major settlements but with a relatively low level of usage (less than 100 passengers/hour on the busiest approaches to the Luton-Dunstable conurbation). Away from major roads and in more rural parts of the study area, taxis are often the only form of public transport.

2.80 However, as noted at the stakeholder meetings, there is considerable dissatisfaction with the quality of existing bus services, particularly in Milton Keynes. The overall perception within the study area is that bus services are a mode of last resort, when a car or train is not available for the journey. It is evident that step change improvements are required to make bus services attractive in their own right, with areas of improvement consistently mentioned by stakeholders including:

- More frequent services
- Faster and more reliable journey times

- Better network coverage
- Higher quality buses and passenger information systems
- Lower fares.

Utilities

2.81 Consultation with the major service providers has identified that provision of utilities should pose no major constraints to growth. There are two more severe constraints, however.

2.82 The first relates relates to the capacity of the water supply network in the part of the study area around and to the north of Kettering, Corby and Oundle. Nevertheless, this need not be a restriction on development within these areas, as with some augmentation of the transfer network, additional water supplies could be drawn from Rutland Water.

2.83 The second, relates to the issue of water contamination around Aylesbury and the need to improve the standard of ammonia treatment in the sewage treatment works by increasing the target standard from 2 to 1 mgs of ammonia/litre. This will necessitate construction of a new treatment works.

Environmental Assets and Natural Resources

2.84 We are concerned about the Area's environment in its own right - as an intrinsic asset. Our concern is also about the balance which has to be struck between development and conservation of the environment and the implications of the latter for future directions of development.

2.85 One of the key aims of any sustainable development strategy must be to conserve those places that already exist. Development of greenfield land raises inevitable land use conflicts with natural features and environmental assets. However, a planned approach to a development strategy can ensure that these conflicts are minimized by directing development to the least environmentally damaging sites. Moreover, it will also be important to ensure better integration of local features of biodiversity interest into development schemes. The river valleys, water courses and extensive landscape buffers within Milton Keynes provide a good example of how features of wildlife interest can be integrated into new development. The challenge here, and elsewhere, will to conserve/create areas of importance for biodiversity whilst increasing overall development densities. Urban wildlife sites can be important for biodiversity too, particularly in a local context, and offer good opportunities for learning and Studying wildlife.

2.86 The starting point for consideration of environmental assets in the wider countryside of the study area, is a description of the Natural Areas and Character Areas which form the building blocks for the natural environment. The Countryside Agency and English Nature have sub-divided the UK into a number of natural/character areas. The boundaries of these areas are based on the distribution of wildlife and natural features, and on the land use pattern and human history of each area.

2.87 The following Natural/Character areas are found wholly or partly in the study area:

- Rockingham Forest
- Northamptonshire Uplands
- Northamptonshire Vales (part of a larger area)
- Yardley-Whittlewood Ridge
- Bedfordshire Claylands (part of a larger area)
- Bedfordshire Greensand Ridge
- Upper Thames Clay Vales (part of a larger area)
- Midvale Ridge
- Chilterns (north eastern edge)
- Cotswolds (eastern extremity)

2.88 These Natural/Character Areas have been subject to a number of common forces for change, largely resulting from development pressures and changes in farming practices, including:

- Agricultural intensification and farm amalgamation, leading to larger field sizes and hedgerow/field tree removal;
- Pressures to reduce areas of traditional parkland for cultivation, forestry or tourism;
- Reduction of rare and unusual habitats;
- Pressures for mineral extraction/ waste disposal;
- Encroachment of settlements.

2.89 These changes have all contributed to a loss of variety in the environment and have eroded local distinctiveness. Ongoing changes in the agricultural sector are reducing some of the pressures on the countryside and creating opportunities to provide a strong environmental framework for future growth.

2.90 The study area includes the Marston Vale Community Forest. This is beginning to enhance the character of the Vale and improve quality of life. The project is being implemented as a partnership towards a long term vision of varied countryside within a woodland framework, with wide benefits.

2.91 There is a wide range of planning designations designed to control development in relation to some of the most important environmental assets of the study area. National planning policy guidance affords the highest levels of protection to the designated areas, but the Natural/Character Areas underline the fact that features of environmental importance exist throughout the countryside and need to be respected in any future development strategy.

2.92 The main planning designations we have considered are:

- Agriculture (best and most versatile agricultural land - ALC grades 1,2 & 3A)
- Landscape
- Nature conservation (Biodiversity)
- Policy designations to control settlement patterns
- Other locally defined designations

2.93 The plan on the next page (Figure 2.9) shows their distribution. The key features of this are that:

- Throughout Bedfordshire, the quality of agricultural land is very high, with 44 per cent in the top two grades, the highest of any South East county and nearly double the Rest of the South East (ROSE) average [13].

- Landscape designations, including national, strategic (i.e. county) and local designations are generally related to the main physical features (e.g. topography, landform). The most important of these is the Area of Outstanding Natural Beauty (AONB). The Chilterns AONB extends into the south of Bedfordshire around Luton and Dunstable, and to the extreme south east of Aylesbury Vale, around Wendover and on the border with Bedfordshire. Nearly 90% of the AONB in Bedfordshire is located within South Bedfordshire, the remainder being in Mid Bedfordshire and Luton.

- There are a variety of nature conservation designations throughout the Study area, designed to promote and protect important species and habitats (biodiversity). However, there are no areas designated as being of international importance although there are approximately 160 SSSI in the study area.

[13] Bedfordshire CC structure plan review

- The main policy instrument designed to control settlement patterns and prevent urban sprawl is the green belt.[14]. Within the study area the Metropolitan Green Belt extends into Buckinghamshire and Bedfordshire. In Buckinghamshire, the boundary extends to the foot of the Chilterns ridge and coincides largely with the boundary of the AONB. In Bedfordshire, it extends much further inland to include land around the settlements of Luton, Dunstable, Leighton Buzzard, Woburn Sands and Ampthill. Overall just under one-quarter of the county lies within the green belt. Seven-eighths of South Bedfordshire is within designated green belt, and one-sixth of Mid Bedfordshire.

Flood Risk

2.94 Flood risk imposes potentially serious constraints on future development in some parts of the study area. The plan on the next page (Figure 2.10) illustrates the Environment Agency's Indicative Flood Plain Maps [15]. Government guidance (PPG 25) suggests that, outside developed areas, these areas are generally not suitable for residential, commercial and industrial development. Where, exceptionally, development is permitted, it should be provided with the appropriate minimum standard of flood defence and should not impede flood flows or result in a net loss of flood-plain storage. Significant development growth in the future will require strategic solutions which need to be in place at an early stage. This will require careful planning and effective liaison between the Environment Agency, the local authorities, developers, landowners and any other interested parties.

2.95 Most acutely affected is the River Nene and its tributaries which drain about three-quarters of Northamptonshire and which flows through the major urban areas of Northampton and Wellingborough. In Chapter 5 we explore the potential future direction of development for the main urban centres and the flood risk in Northampton becomes a major issue constraining where development can occur (because of it's flood history, a 1:200 year flood standard is applied in Northampton). To a lesser extent flood risk is also an issue with the River Ouse where there are extensive floodplains around Newport Pagnell, Olney, Bedford, Tempsford and other areas downstream.

Waste

2.96 The safe management of waste, ensuring the protection of the environment, is essential for sustainable development and the protection of the environment. At the local level, demands for landfill can give rise to serious conflicts over the use of land (generally former quarries or brownfield land, which may also be considered suitable for other forms of development.) Nationally, suitable sites for landfill are in very short supply and the Bedfordshire clay pits, mainly in the Marston Vale area, have performed a regional role for waste disposal.

2.97 There are currently three operational landfill sites in Bedfordshire capable of taking both inert and biodegradable wastes and, as at May 2001, there were outstanding planning applications for a further two new landfill sites, each capable of taking both inert and biodegradable wastes. At the strategic level of this Study, it will be important to consider the major land use issues regarding the future use of land in the Marston Vale. This area is of regional or wider significance for landfill [16] but has also been identified as the Marston Vale Community Forest and as a potential strategic development area. Northamptonshire has no waste incinerators, so all the waste is disposed of via landfill. Daventry with three major waste disposal facilities, handles the largest amounts (circa 34%) followed by Corby and South Northants (18% each) and Kettering (15%). In Bucks there are three landfill sites which are licensed to receive both domestic and industrial waste.

[14] PPG 2, para 1.4

[15] The maps represent the best available current information on the extent of flood risk. They are being revised and updated over time. They are based on the approximate extent of floods with a 1% annual probability of occurrence for rivers under present expectations or, where this is greater, the extent of the highest known flood. They take no account of existing flood defences.

[16] Bedfordshire CC 1996, Minerals and Waste local plan

Summary and Conclusions

2.98 The study area is a complex place which exhibits a wide range of differences within it but where a number of key themes emerge from our review of the area and which we encapsulate below:

- Past rates of economic growth and wealth creation have been high but not exceptionally so in comparison with other economically successful areas but the potential for continued economic growth is apparent.

- Performance of the study area's economy has been patchy with Milton Keynes developing a stronger and more balanced economy than elsewhere, whilst structural change is still holding back growth in some parts (notably in Corby, Bedford and Luton). It is these three places, and particularly Luton, where issues of social exclusion are more marked.

- The study area has yet to fully resolve skill deficiencies in the workforce.

- The study area needs to achieve more higher value knowledge based enterprise in order to develop a more rounded economy - the Oxford to Cambridge Arc has caught the imagination and may prove a catalyst for this.

- The transport network is predominantly roadbased heavy reliance on private transport. East/west links are weak and although there are aspirations to improve these and other urban transport systems, only Translink in Luton is at an advanced stage of planning. Luton also has the valuable asset of a developing airport.

- The urban centres have distinct and complementary characters which is an asset but, with the exception of Milton Keynes, they are showing signs of stagnation in terms of the range, scale and quality of what they have to offer. New investment is being made to address some of these weaknesses.

- Only a small proportion of the study area is afforded the highest levels of protection from development (and this is mainly to the south of the area) but there is a richness in the character and heritage of the countryside across the study area which is highly valued.