

Research

**Spring
2017**



Great Western Electrification: Unlocking future growth

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Setting the scene

235 miles of railway to be electrified

Over 100 million passengers a year are predicted to travel on Great Western services by 2019, according to Network Rail, in addition to road and bus commuting in the region. Investment in road, bus and rail networks is essential to accommodate these growing numbers of commuters to unlock future economic growth in key areas along the Great Western route, ensuring our Core City Region remains the only City outside of London to positively contribute to GDP.

The electrification of the Great Western Main Line (GWML) will deliver a significant enhancement to the connectivity and capacity of services in the West of England. The project will bring new high-speed electric trains, a major redevelopment of Bristol Temple Meads and Paddington Stations (to be known as Paddington Place), and modernisation of signals and stations along 235 miles of railway corridor.

Future growth in the West of England will also be delivered through local and national infrastructure schemes that run in parallel to the electrification of the GWML. These include Crossrail, MetroWest, Bus Rapid Transit schemes and proposed investment in additional motorway junctions along the M49 and M4.

Our report focuses on four key locations in the West of England region: Bath, Bristol, Chippenham and Swindon, all of which will benefit from electrification by having a commuting distance of under 90 minutes to London and enhanced interurban services. We will examine how transport connectivity, local infrastructure projects, and investment in station upgrades (to accommodate capacity and commuter flow) will play a critical role in unlocking new economic growth and development hot spots in these areas.

“Electrification will deliver a significant enhancement to the connectivity and capacity of services.”

The journey

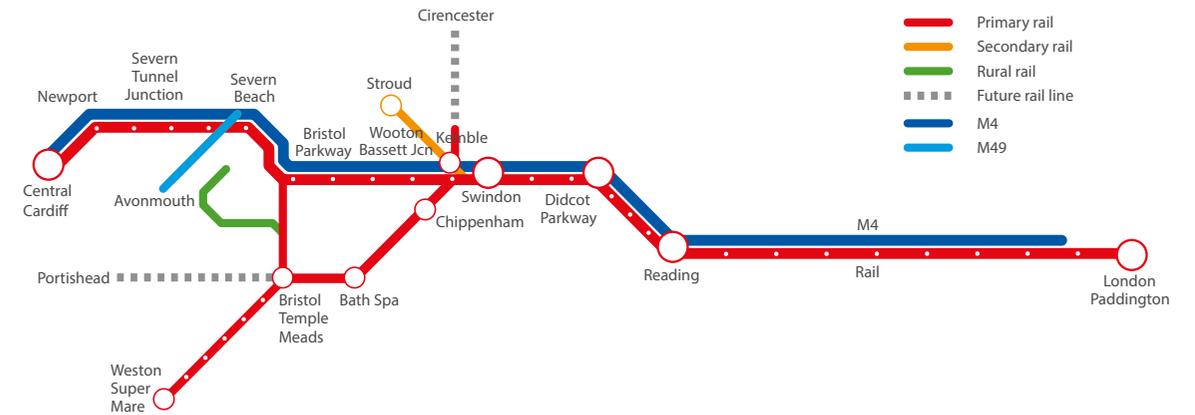
Fast interurban links between English and Welsh capital cities

The upgraded GWML will run from London to Bristol improving line links between London and the South West and to Wales. Extending from this are radial routes to Oxford, the Cotswolds, Birmingham and the South Coast.

The core of the GWML is the high speed section from London Paddington through the Thames Valley, Swindon and Bristol Parkway, and on to

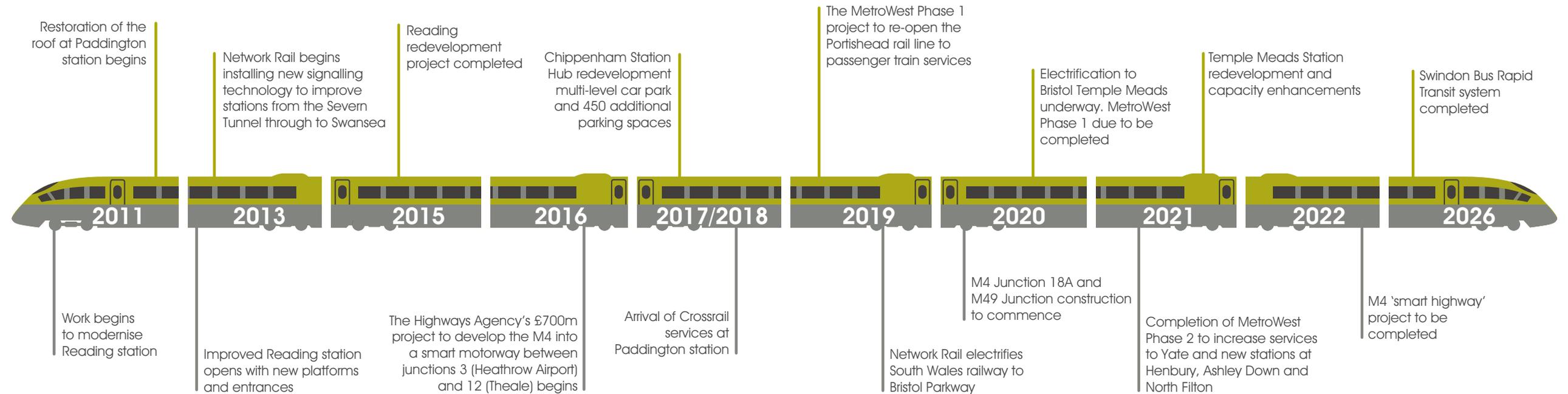
the Severn Tunnel (for Wales). This key corridor along an east to west route provides fast interurban links between the English and Welsh capital cities. The route diverges at Wootton Bassett Junction, to the west of Swindon, towards Chippenham and Bath, and also at Bristol Parkway towards Bristol Temple Meads (see figure 1).

Figure 1: Electrification of the Great Western Main Line route and relationship with motorway corridor



Source: Network Rail

Timeline of infrastructure and connectivity



Delayed benefits

Government committed to modernising GWML

Following the National Audit Office's November 2016 report, which was highly critical of Network Rail's management of the project, the Government announced that it was postponing electrification between Didcot Parkway and Oxford; Bristol Parkway and Bristol Temple Meads; Bath Spa and Bristol Temple Meads; and the branches to Henley and Windsor. The postponed work is expected to move into the 2019–2024 period, when Network Rail will have a new funding agreement with the Government.

The Government believes that it can bring improvements expected by passengers – newer trains with more capacity – without electrification. Nevertheless, the Government remains committed to modernising the GWML and ensuring these improvements are achieved.

Key benefits from the completed electrification project will enhance reliability, performance and capacity of services. Projects completed successfully during 2016 include the digital upgrade of large sections of signalling to improve reliability, the modification of over 100 bridges and structures, flood alleviation work and improvements to the Severn Tunnel.

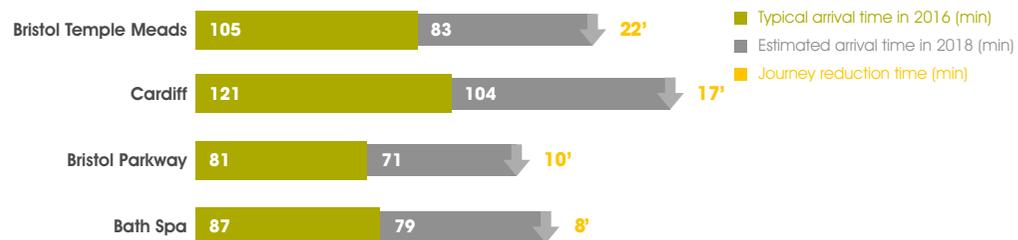
When the project has been delivered in full, electric trains are expected to improve reliability on some of the busiest routes as the trains require less maintenance, reducing carbon emissions by 20-35% at the point of use and improving air quality in pollution hot spots such as city centres.

New in-cab signalling will likely improve train performance by replacing traditional railway signals with a computer display inside every train cab. Trains will also include a Railway Communications System (RCS) which will provide secure communication between drivers and signallers.

The Western Route Journey Time Improvement (JTI) Programme is reviewing opportunities to reduce journey times either via a change in calling patterns, rolling stock and/or line speed improvements. Network Rail has estimated that the journey time between London Paddington and Bristol Temple Meads could see a significant reduction of 22 minutes (from 105 to 83 minutes), while the time between London Paddington and Cardiff could be reduced by up to 17 minutes (from 121 minutes to 104). Increased regularity of services and station improvements will also improve capacity and reliability on the network.

Figure 2: Journey times along the Great Western Mainline

London Paddington to



Source: Department for Transport





Station to station

Station improvements enhance connectivity and capacity

The Office of Rail and Road (ORR) found that the busiest station on the GWML in 2014/15 was Paddington with almost 36,000,000 estimated entries and exits by commuters, followed by 16,339,602 commuters in Reading (see figure 3). Both stations are undergoing improvements to enhance passenger facilities and to prepare for the electrification scheme and Crossrail.

Bristol Parkway and Bristol Temple Meads stations both recorded a 6% rise in the number of commuters entering and exiting between 2013 and 2014. Bristol Temple Meads and surrounding sites fall within the Bristol Temple Quarter Enterprise Zone, which is planned to undergo comprehensive redevelopment over the next 25 years, including a new student population as Bristol University invests £300 million in a new campus at the former Sorting Office site – the gateway into the city. Temple Meads Station upgrades are under preparation, including a plan to expand the station area and increase train services to cater for the growing rail demand in Bristol, where passenger numbers are expected to increase by 44% over the next ten years. The GWML provides Bristol with excellent connectivity to London, South West

and Wales, which will help boost the Temple Quarter Enterprise Zone as a destination for innovation, creativity and digital excellence.

The ORR data found that commuter flow in Swindon and Chippenham stations increased by 5% and 4% respectively between 2013 and 2014. To improve station usage, the Chippenham Station Hub project has been awarded funding via the Swindon and Wiltshire Local Enterprise Partnership to build a multi-level car park on both the north and south sides of the station with a link bridge over the railway to allow electrification of the line. The capacity of the corridor between Swindon and Kemble has been increased by redoubling the track, which means trains can now head simultaneously to and from Kemble in Gloucestershire into North Wiltshire.

Station usage in Bath Spa rose by 4% to 6,222,126 commuters between 2013 and 2014. Bath Spa station recently underwent improvements to enhance station accessibility for commuters and electrification could create many opportunities for Bath Quays, which sits within the Bath and North East Somerset Enterprise Area.

Figure 3: Station Usage

Station name	Entries & Exits 2013-14	Entries & Exits 2014-15	% increase
PADDINGTON	35,093,628	35,724,684	2%
READING	15,673,400	16,339,602	4%
BRISTOL TEMPLE MEADS	9,522,840	10,099,526	6%
BATH SPA	5,990,274	6,222,126	4%
CHIPPENHAM	1,826,343	1,895,980	4%
SWINDON	3,350,444	3,503,982	5%
KEMBLE	340,766	356,078	4%

Source: Office of Rail and Road

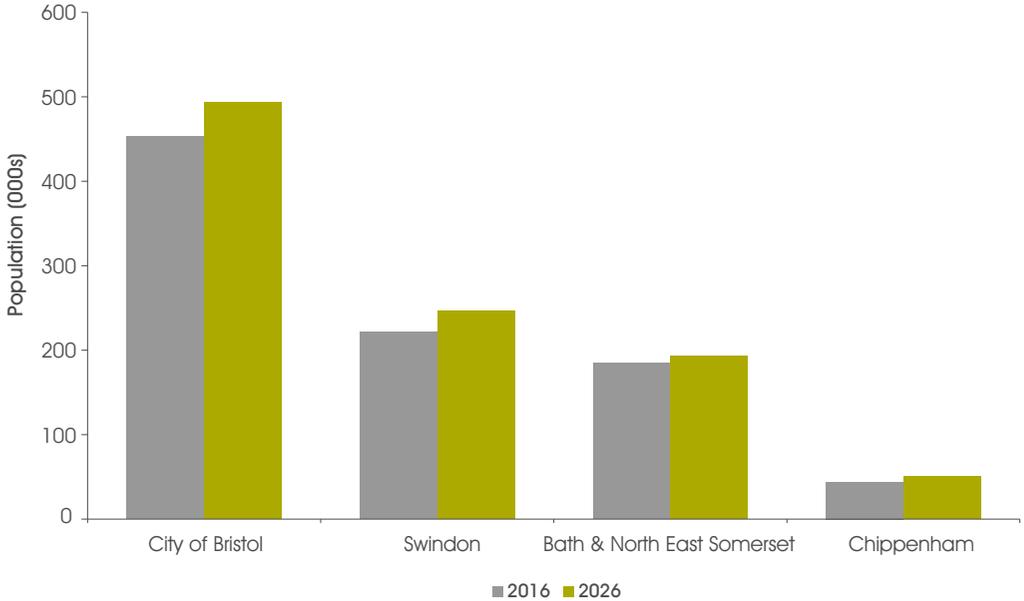
Population growth and commercial development

Enterprise zones stimulate jobs growth

Efficient transport networks can serve to increase the density of a location by increasing the number of people who can access an area quickly and easily, expanding the prospective pool of talent for businesses in our sub-regional economy. Our forecasts for our four chosen locations show how much population growth we expect to see between 2016 and 2026.

Investment in infrastructure will unlock employment in Enterprise Zones. It is estimated that for every £1 billion spent on infrastructure, GDP is increased by £1.3 billion and housing sites, in the right locations, can facilitate accelerated economic growth, according to research conducted by Core Cities.

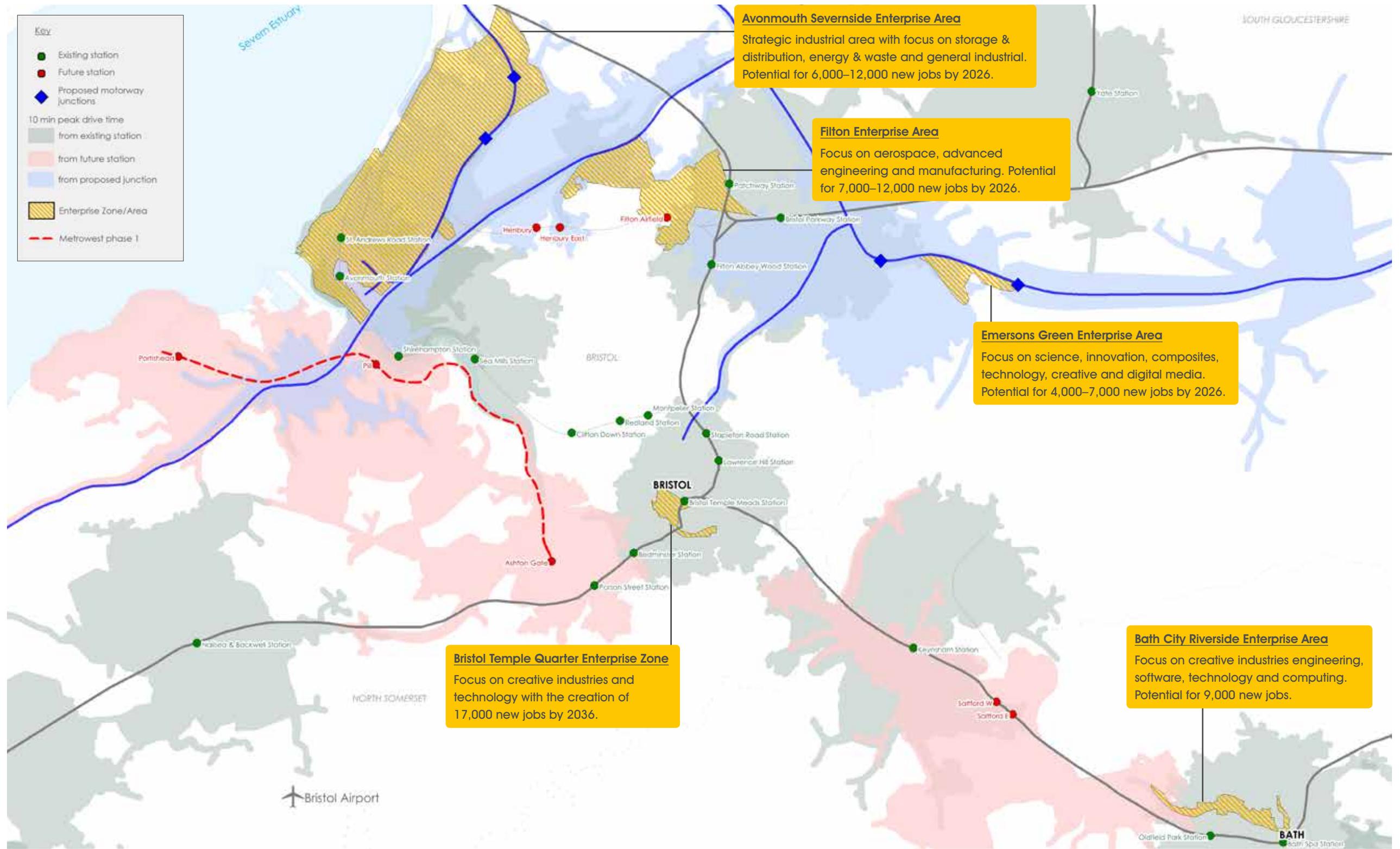
Figure 4: Population forecast over 10 years (000s)



Source: Experian, Wiltshire Council



Figure 5: Enterprise Zones/Areas



Source: GVA, West of England LEP

Bristol

Bristol is the largest city in the South West and the 8th largest in England. With an estimated population of 448,000 people, Bristol is expected to reach a population of half a million by 2027, according to Experian. The ONS' Annual Population Survey revealed that almost 81,000 people commute into Bristol each day compared with 55,000 who commute out of the city, whilst over 120,000 people live and work in the city.

Bristol City Council recently approved proposals to double the size of the Bristol Temple Quarter Enterprise Zone by a further 70 hectares to contribute to funding redevelopment of Temple Meads Station. The current Enterprise Zone offers development potential for more than 2.0 m sq ft of new accommodation for commercial, residential, retail and leisure uses and a target to deliver 2,200 new homes.

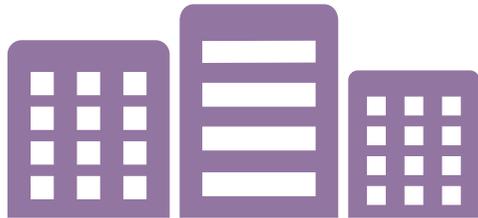
Key developments in the pipeline include a new hotel development and conference centre; a 12,000 seat Arena, which benefits from planning permission and is set to start construction in 2017; Bristol University's new campus; and 350,000 sq ft mixed-use commercial development at the former Guardian Royal Exchange site (now known as Glassfields). The Zone also encompasses three key business development hubs: Engine Shed, Paintworks and Temple Studios.

Bristol City Council hopes the new 'urban quarter' will create 17,000 jobs and regenerate the area around Temple Meads Station. In addition, a planning application has now been submitted that could see the derelict George and Railway site near to the station redeveloped into a home for the expanded Engine Shed Enterprise Hub (Engine Shed 2), which is expected to accommodate approximately 800 new jobs.

Filton Enterprise Area, five miles north of Temple Meads, is one of a select group of strategically important employment locations across the West of England that complements the Temple Quarter Enterprise Zone. It is located on the north fringe of Bristol and is in close proximity to the M4/M5 motorway. The Filton Area has 50 hectares of greenfield employment land located within the Cribbs/Patchway neighbourhood with further capacity for development of around another 50 hectares on surrounding sites.

The West of England LEP states that the Area has the potential to create 12,000 jobs by 2026, focused on the industries such as aerospace, advanced engineering and manufacturing. Once completed, frequent MetroBus services from the north fringe to the city centre will connect more commuters to Filton in the future and help boost job growth in the Enterprise Area.

The Avonmouth Severnside Enterprise Area provides a regionally important industrial and employment area with significant economic potential to create a further 8,000 jobs. This could be unlocked by a new junction on the M49. Since the Government's announcement for the new junction in 2014, work has been underway to assess the proposed location of the junction. An announcement is anticipated in early 2017, with work commencing later in the year. Bristol Airport is also undergoing a programme of new developments to increase capacity for international visitors to the region. The development includes expansion of the passenger terminal, additional car parking and a public transport interchange to enhance connections to and from the city.



**BRISTOL TEMPLE
QUARTER EZ
2.6 m sq ft
RENTABLE
SPACE**





Bath

Bath and North East Somerset has an estimated population of 184,000, which is expected to rise to 193,000 by 2026, according to Experian. Commuter flow data from the ORR showed that over 29,000 people travel to Bath every day, compared with the 55,000 that commute daily from the city. Almost 44,000 people live and work in the city. Investment in connections to and from the city is therefore critical to ensure a liveable city that can grow as a place to live or work.

Bath & Bristol is the second largest digital technology cluster in the UK after London, with over 60,000 people employed in the industry. Firms such as Aardman, Oracle and IBM Sony have helped attract and develop talent, with Tech Nation 2016 reporting that the cluster recorded turnover of 53% between 2010 and 2014.

The cluster has a strong set of support networks available to digital entrepreneurs including Bristol & Bath Science Park, SETSquared, Engine

Shed, The Guild, BathSPARK, TechSPARK, WebStart Bristol, Bristol Games Hub and Invest Bristol & Bath, providing start-ups in the area with extensive industry specific support opportunities. Connectivity between the two cities is essential to support the growing technology sector, which will help stimulate job growth and property investment to these locations in the future.

Bath's Riverside Enterprise Area has been designated as a key zone for economic growth by the West of England Local Enterprise Partnership. The £1bn Enterprise Area is made up of nine riverside development sites and aims to create 9,000 jobs, 650,000 sq ft of workspace and 2,500 new homes. At the heart of the Enterprise Area are the North and South Quay projects. The Quays will be home to commercial, residential and retail developments, with Bath and North East Somerset Council aiming to create up to 1,700 jobs by 2019.



BATH AND BRISTOL
60,000
EMPLOYED IN
DIGITAL INDUSTRIES

Swindon and Chippenham

Wiltshire has a population of 680,000 with Swindon representing 32% of the total, according to the 2011 census. Wiltshire is expected to grow to 775,000 by 2026. Over 50% of the population is located in the north of the county, between Swindon and Corsham, which is forecast to grow to 395,000 by 2026.

Chippenham and Corsham are expected to reach a population of 50,000 and 24,000 respectively by 2026 – which together will comprise 10% of Wiltshire's total population.

More people commute out of Swindon each year (25,000) than into the town (9,000), according to the ORR. Almost 68,000 people live and work in the same local authority.

Comprehensive redevelopment of the 20 hectares Kimmerfields site, which is five minutes' walk from Swindon station is underway after receiving outline planning permission in May 2012. This will bring forward 990,000 sq ft of mixed use development of offices, retail and leisure floorspace. Further phases of the development will include the transformation of the bus interchange to ensure optimum connectivity to the town centre and the development of a new business district within Swindon. This will provide further employment opportunities within easy reach of the GWML.

Swindon and Wiltshire's Growth Deal, which includes redevelopment of Swindon's town centre and rapid transit bus scheme, could create up to 3,000 jobs, build 2,000 homes and provide up to £80 million of public and private investment.

In Chippenham, our final strategic station hub, significant redevelopment of a key 48-acre employment park was given the green light by councillors in September 2016. Alongside 400 residential units, 146,000 sq ft of new employment space, a new hotel and supermarket are planned to be built at Langley Park, together with a café, public open space and highway improvements.

The existing units at the park, currently occupied by tenants, including Siemens, IXYS and Schneider, would be retained and improved. It is estimated that the Langley Park development would support the creation of 470 jobs and boost Chippenham's economy.

In addition, round three of the Local Growth Deal includes an indicative award of a further £116.3 million funding from 2017 onwards. The funding will support a package of road and transport infrastructure schemes and a new science park at Porton Down, creating up to 1,500 jobs and generating around £70 million in public and private investment.



SWINDON
GROWTH DEAL
£80M
PUBLIC/PRIVATE
INVESTMENT



Other transport projects set for delivery

Commuter flows set to increase

Journeys made to and within the Great Western corridor have increased by 23 million – or 40% – in the ten years to 2007, according to Network Rail. To complement the growing number of commuters, there are many wider infrastructure projects either planned or already underway to plug into the GWML.

MetroWest Phases 1 & 2

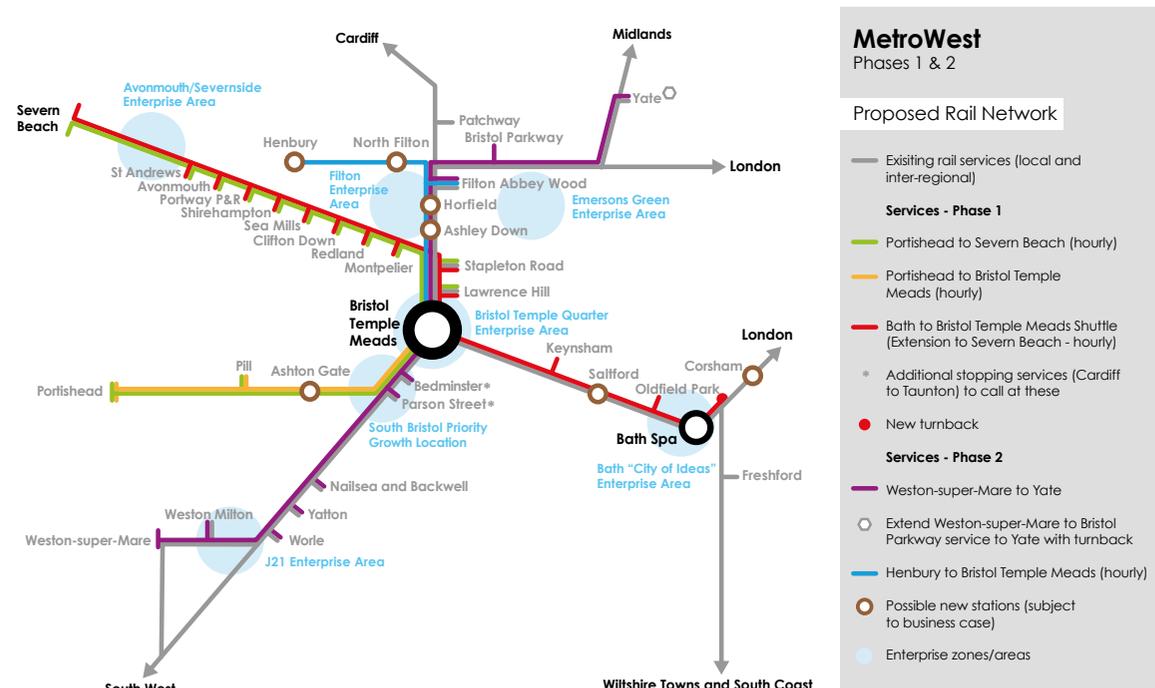
The much anticipated 'West of England' project is MetroWest Phases 1 and 2, which will ultimately deliver half hourly cross-Bristol rail services, including reopening the Portishead and Henbury rail lines.

Phase 1 has been delayed, however, it is set to be completed in 2020 with the long awaited Portishead line, which will eventually increase

Bristol's passenger rail network by ten miles and connect an extra 35,000 people to the railway network. It will also improve services in other areas (Severn Beach line, Yate to Weston-super-Mare and Temple Meads to Bath corridor) by increasing the regularity of services from Yate to Bristol Temple Meads and the Severn Tunnel Junction.

This will reduce dependence on cars for journeys and improve access to employment growth areas. Rail infrastructure projects alone could create up to 1,800 jobs in Bristol by 2030 in the growth areas of Temple Quarter and Filton, according to consultancy firm Atkins, which increases demand for residential growth and development also coming forward in these areas.

Figure 6: MetroWest route map for phases 1 & 2



Source: Travelwest

MetroBus

The long-awaited Bristol MetroBus project includes three rapid transit routes (Ashton Vale to Bristol City Centre, North Fringe to Hengrove Package and the South Bristol Link) forming a network that will use high quality, hybrid drive, single deck vehicles with fast boarding smartcards. The three schemes in the Bristol urban area will improve public transport access on key corridors and significantly reduce traffic delays. According to Atkins, Bristol's MetroBus project could unlock additional development of up to 7,000 jobs at Temple Quarter, South Bristol and Filton. The planned route also links into major residential development sites at Hengrove, Bedminster Green and Filton Airfield, with potential to connect to any further development at the edge of Bristol near Long Ashton.

Beach and Easter Compton – crosses the M49 motorway, south of the existing distribution park. A final decision on the location of the new junction is anticipated in early 2017 with construction to start later in the year. This new junction will help unlock growth in the Avonmouth/Sevenside Enterprise Area – the largest brownfield site in Western Europe – opening it up and linking it to other key centres in the South West. Avonmouth, which is 84 hectares in size, is expected to deliver 3.0 m sq ft of commercial floor space within 25 years, and potential job growth of 6,000 by 2026, according to the West of England LEP. Sevenside, which is 462 hectares in size, is expected to deliver 14 m sq ft of commercial floor space, and potential job growth of 12,000 by 2026.

Bath Transportation project

Bath & North East Somerset Council has been carrying out a significant upgrade of the local transport network through the Bath Transportation Package since 2012. The package, which could create up to 1,300 jobs includes enhancing Park & Ride sites and upgrading nine main bus routes into the city, which could provide commuters with real time information and improved bus shelters. The Bath Package has increased the capacity of Park & Ride for travel into Bath by around 40%, will deliver 2,860 spaces, plus consultation on a proposed site for a new Park & Ride east of the city to provide an additional 1,100–1,400 spaces has been undertaken with a decision due imminently.

Swindon & Wiltshire's Growth Deal

As part of Swindon and Wiltshire's £141m Growth Deal, a series of measures is being introduced to encourage greater use of walking, cycling and public transport across Swindon, including a rapid transit bus scheme. This will give commuters faster access to Swindon town centre.

M4 'smart motorway'

There is also proposed investment in additional motorway Junctions. The M4 will turn into a 'smart motorway' between Heathrow (Junction 3) and the Thames Valley (Junction 12), using cameras, information signs and signals to relieve congestion by varying speed limits, improve journey time reliability and road safety. The Government is also looking at calls for a new turn-off on the M4 – Junction 18a – in an attempt to ease congestion and provide significantly faster and improved access to Bristol's Emersons Green Enterprise Area. Key strategic development areas identified within the emerging West of England Joint Spatial Plan at Yate and Coalpit Heath would also benefit from motorway access to Bristol, Bath, Chippenham and Swindon.

M49 Avonmouth Junction

A new junction off the M49 at Avonmouth is part of the series of roads improvements announced by the Government. The junction is proposed for the area where Farm Lane - linking Severn

Figure 7: Major infrastructure projects in the West of England

Project	Type of project	Project status	Cost	Start date	End date
MetroWest Phase 1	The project will re-open the Portishead rail line to passenger train services, and enhance local train services on the Severn Beach and Bath to Bristol lines	Delayed	£58.2m	2017	Mid 2020
MetroWest Phase 2	Re-open the Henbury Line to an hourly spur passenger service and increase train services to Yate with a half-hourly service. The plans include new rail stations at Henbury, North Filton and Ashley Down	Proposed	£42.3m	2021	TBC
M49 Avonmouth Junction	Construction of a new junction on the M49 in the Avonmouth region	Planned	£25m–50m	TBC	TBC
M4 Junction 18a	Feasibility study to look at options for linking A4174 Ring Road with the new M4 junction	Proposed	£42m	TBC	TBC
M4 Junctions 3–12	Conversion to a Smart Motorway	Planned	£586m–862m	Mar-17	Mar-22
Bath Transport Strategy Park and Ride	Development of a new Park and Ride east of the city	Proposed	£10 million	TBC	TBC

Source: Travelwest, UK Government, Network Rail, Highways Agency

Future direction

New transport links to unlock future economic growth

We have identified a number of potential areas that may benefit from major connectivity projects that are currently underway or in the pipeline.

Saltford Station

As the MetroWest project gets underway, there has been a local campaign to get Saltford station, which sits between Keynsham and Oldfield Park, reinstated. Bath & North East Somerset Council is reviewing a timetable space for a half-hourly stop at Saltford as part of the new MetroWest service. If Saltford station is reopened, it will be part of phase 2 of the project, which involves an hourly service on the Avonmouth freight line serving new stations at North Filton and Henbury. The council has estimated that the demand for Saltford station, assuming a two train per hour frequency in each direction, would equal 203,700 trips per annum. This represents an average of 647 trips per day. Re-opening Saltford would help support the Bath Enterprise Zone and Filton Enterprise Area, and enhance connectivity for local commuters. This could also unlock the significant economic development potential of the Broadmead Peninsula, which is being promoted by Bath and North East Somerset Council through the Joint Spatial Plan process.

Ashley Down, North Filton and Henbury

New stations at Ashley Down, North Filton and Henbury are also expected to open as part of MetroWest Phase 2 creating an hourly service on these lines, and enhance connectivity for local

commuters by providing more frequent trains to Yate, which is set for strategic growth of up to 2,600 new homes through the emerging West of England Joint Spatial Plan.

Royal Wootton Bassett and Corsham

New railway stations at Royal Wootton Bassett and Corsham are currently at the feasibility stage. Last year, Wiltshire Council commissioned Atkins to assess the case for stations in the two towns. It had “identified markets” for both rail stations particularly in relation to journeys to and from Bath and Bristol. Forecasts indicate Royal Wootton Bassett station could carry up to 330,000 passengers per year, while Corsham would carry up to 400,000 passengers annually. The report said that future development plans would be expected to further increase passenger numbers.

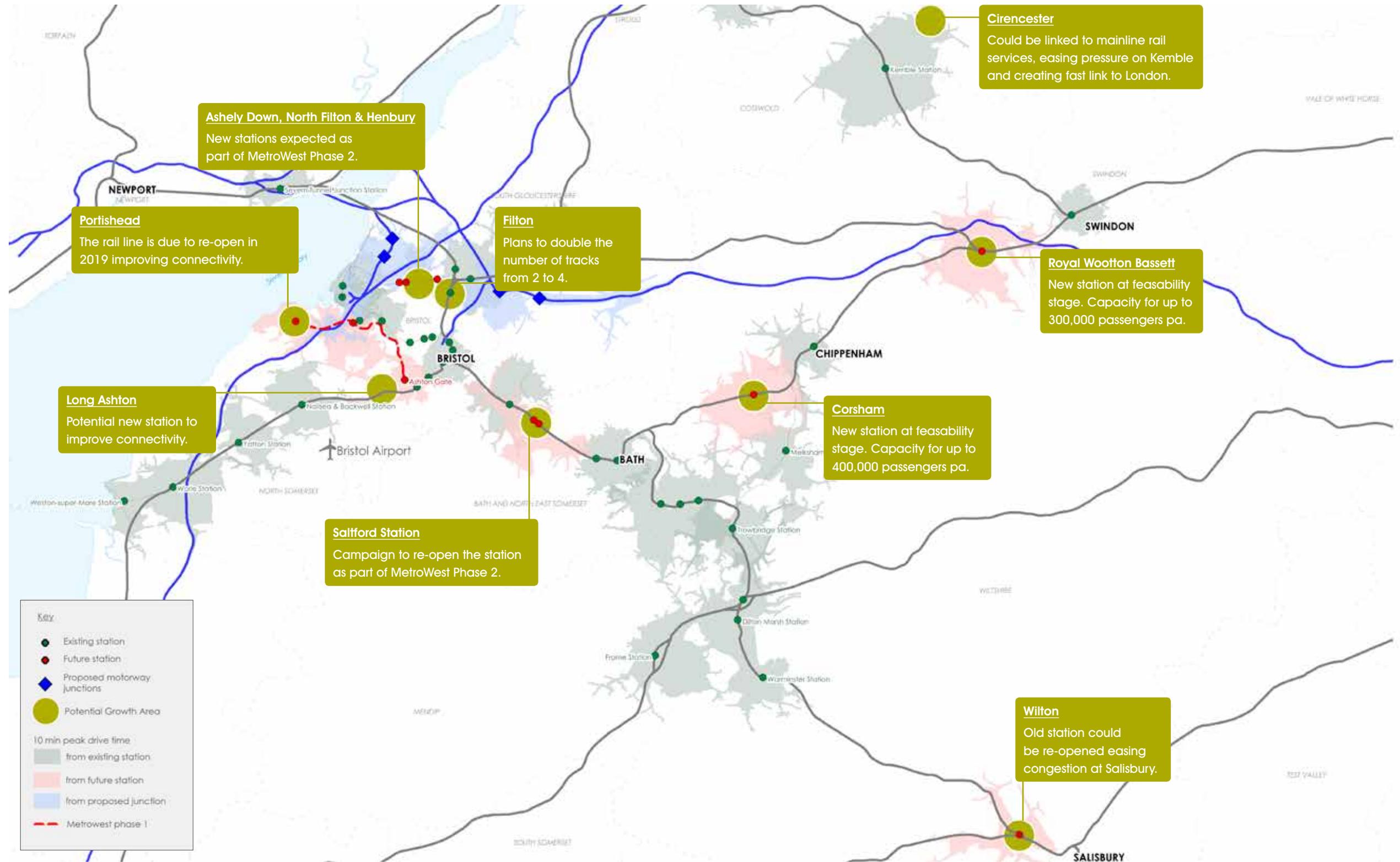
“An initial analysis indicated it could be viable to introduce a new hourly train service between Bristol and Swindon to serve a new Corsham station, with possible extensions to Oxford or Cardiff”, is stated in a report, conducted by Atkins on behalf of Wiltshire Council. The report added that the main obstacle to a Corsham railway station is the provision of a suitable and viable train service. It found that a regular direct London service “is not considered to be feasible due to incompatibility with wider rail industry goals to improve the quality of intercity services on the Great Western Main Line.”

Long Ashton

The University of Bristol has said it recognises

“Re-opening Saltford station would help support the Bath Enterprise Zone and Filton Enterprise Area, and enhance connectivity for local commuters.”

Figure 8: Future areas of growth



the importance of a new station at Long Ashton. Plans were submitted to reopen the station as part of the University's Fenswood Farm development, which is being promoted through the emerging West of England Joint Spatial Plan process. The proposal could comprise some 1,000 houses, 129,000 sq ft business floor space and a primary school. The new station would be located up to one mile west of the original location. Long Ashton currently benefits from public transport services including Park & Ride facilities which are undergoing an upgrade as part of the MetroBus scheme, and has two existing bus service connections to Bristol city centre. Great Western Railway currently operates local and inter-city passenger services past the site, linking Cardiff and Bristol with Weston-super-Mare and the South West. The proposed station would positively enhance connectivity to Bristol's Temple Quarter Enterprise Zone.

Wilton

The station in Wilton closed more than 40 years ago but it could be reopened to improve transport in the area. Many more passengers are using the county's rail network, which is up by 24% since 2004 at Salisbury and 66% at Westbury. Wilton Parkway station would be on the Salisbury to Bristol line and would be part of the Trans Wilts route which will run north to south in the county. It could improve journey times between Swindon, Westbury and Salisbury. Plans for a proposed station could allow commuters to use the nearby Wilton Park and Ride, easing parking problems at Salisbury railway station and raise the profile of the town. The service would also help create a gateway to Stonehenge, which received 1.3 million visitors in 2014. Trans Wilts Rail has said that Salisbury and South East Wiltshire are set to see major economic growth with up to 10,000 new jobs by 2031.

Filton

Railway electrification work in Bristol is supporting the Filton Bank Four Tracking Capacity scheme, which will see the number of tracks between Temple Meads and Filton Abbey Wood doubled from two to four by 2018. This will mean greater passenger capacity and will allow maintenance to be carried out without disrupting services. To accommodate the new trains, a fourth platform will be built at Filton Abbey Wood station.

Portishead

Portishead, which sits on the Bristol Channel, is one of the fastest growing towns in Britain. Much of that growth has been around the Marina where there has been growing demand for waterfront living. A consortium of housebuilders, including Crest Nicholson and Persimmon, have built around

1,200 homes since 2000. Taylor Wimpey has submitted proposals to develop a further 70 homes alongside the 117 homes already being built along the Harbour Edge.

The growth of Portishead looks set to continue, thanks to MetroWest, which will reopen the rail line to Bristol in 2019. The journey would take 17 minutes to get to Bristol, reducing commute journeys by over 43 minutes by car. The improved connectivity could also be an opportunity to attract businesses in North Somerset to Portishead: major employers include Capita and Avon and Somerset Constabulary's headquarters.

“Portishead, which sits on the Bristol Channel, is one of the fastest growing towns in Britain.”

Cirencester

In the future, Cirencester could be linked to mainline rail services. Cirencester station was closed as part of the Beeching Report in 1964, along with thousands of smaller stations across the country deemed 'unprofitable,' leaving only services from the nearby village of Kemble.

According to Cirencester Community Railway, the £13m proposals include a new station in Cirencester at Chesterton and a bridge being built over the A429 at Kemble. The scheme could also alleviate parking issues in Kemble. A new train line would give commuters a fast link to London.

This infrastructure would complement plans for 2,500 houses to be built in the south west of Cirencester that includes creating a community hub at Chesterton Farm. Additionally, promoters of the redevelopment of Kemble Airfield, Commercial Estates Group (CEG), have also confirmed that the site will continue to be promoted for development of a new village with around 2,000 new homes.

Kemble lies four miles from Cirencester with good transport links, two A-roads and a station that is currently being upgraded as a result of the electrification of the GWML.

Conclusion

The corridor along the Great Western Mainline (GWML) is undergoing significant change with growth and pressure for new housing fuelled by economic investment and development at designated Enterprise Zones and Enterprise Areas around Bristol, Bath, Swindon and Chippenham. The economic success of the region underpins housing growth forecasts. The West of England area alone is considering a target to provide 85,000 new homes in the next Local Plan period through the emerging Joint Spatial Plan. Connectivity and accessibility are critical to delivering housing that supports this economic development in a sustainable way.

Improvements in capacity and accessibility to new or improved stations will not only support a burgeoning commuter market across the route, but also encourage job creation. New locations for residential development will be needed to support this growth in employment and it is critical to begin planning for change now. Re-opened rural railway stations at places such as Salford, Royal Wootton Bassett, Wilton and Corsham provide important opportunities to

consider as locations for sustainable, long-term residential growth. Other locations that will be increasingly connected to the GWML corridor through new stations or capacity improvements such as Portishead, Cirencester and Long Ashton would also support a mix of uses with new floorspace for businesses.

Transport and connectivity are key drivers of economic growth in the West of England. Continued investment in infrastructure schemes will play a significant role in unlocking further new growth in key employment sectors. We expect new corridors between rural and urban stations to be achieved as a result of the enhanced connectivity on the GWML. In addition, enhanced inter-urban connections between the key cities in the region will provide a wider talent pool for employers as the catchment for those commuting to work will grow. This could lead to companies relocating from London as workers are retained in places like Bristol, which is the only city outside of London to contribute positively to GDP.



London
Birmingham
Bristol
Cardiff
Dublin
Edinburgh
Glasgow
Leeds
Liverpool
Manchester
Newcastle

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Should you wish to discuss the findings of our research in greater detail please do not hesitate to contact:

Jo Davis

Senior Director, Planning Consultancy
020 7911 5224
jo.davis@gva.co.uk

Daniel Francis

Head of Research
020 7911 2363
daniel.francis@gva.co.uk

Simret Samra

Senior Researcher
020 7911 2303
simret.samra@gva.co.uk

Charlotte Taylor

Senior Planner
020 7911 5321
charlotte.taylor@gva.co.uk

Daniel Rich

Surveyor
020 7911 5332
daniel.rich@gva.co.uk

Philippa McFeat

Regional Marketing
020 7911 5439
philippa.mcfeat@gva.co.uk

08449 02 03 04
gva.co.uk/research