

LONDON BOROUGH OF CAMDEN	WARDS: ALL
REPORT TITLE: 2023 School Place Planning Report	
REPORT OF: Head of Education Commissioning and School Organisation	
FOR SUBMISSION TO: Schools Forum	DATE: 5 December 2023
<p>EXECUTIVE SUMMARY OF REPORT:</p> <p>Over the last 5 years there has been a significant reduction in demand for school places within Camden and the wider London area. Forecasts of pupil demand have also been created in times of unprecedented change and challenge for families in Camden. Specifically, the effects of the COVID-19 pandemic have fundamentally altered people’s lives and changed patterns of migration within central London and Camden Borough specifically. The impacts of these have reduced the anticipated level of demand for school places. These factors also created a significant degree of uncertainty, and a less stable environment in which to plan ahead. Our modelling aims to account for these as best as they can, but they also rely on assumptions of future trends that can only be accurately assessed over time.</p> <p>In response to these changing local demographics the Council has taken a proactive approach to school place planning. Since 2018 the Council, in partnership with its family of schools, has removed 10 forms of entry from our reception intake, responding to a 24% reduction in birth rates across the borough. These difficult decisions including four school closures, the most recent being the closure of St Dominic’s Catholic Primary School, ensure that our family schools remain both sustainable and responsive to the needs of their communities.</p> <p>Forecasts up to 2021 indicated a significant ongoing decline in pupil numbers. At that stage the Council indicated some caution in those figures as potentially over-estimating the ongoing impact of reduced migration caused by both Brexit and the Pandemic. In September 2021 and 2022 entry into the Boroughs Secondary and Primary Schools were above the forecast for those years and this is a positive position for Camden Schools. During this period Camden Schools also welcomed a large number of Afghan and Ukrainian Families as part of the Afghan resettlement programme and the Homes for Ukraine programme. Whilst a number of the pupils have relocated within the UK, a proportion have also settled within Camden and bolstered pupil numbers as a result. As the national position has stabilised and our local position has taken account of these trends our most recent forecasts indicate a more consistent position and now show an increase in pupil demand towards the end of the decade.</p> <p>The forecast data does however still show suppressed birth rates within London and Camden alongside the continued effect of reductions in families moving into Camden during the COVID period.</p>	

Primary:

The surplus over the reception year admission number is estimated to rise 7% in 2023/24 to 13% by the middle of the decade before falling to 4% by 2032/33.

Secondary:

The Secondary Year 7 surplus is estimated to increase from 10% in 2023/24 to 21% by 2032/3.

This level of anticipated surplus provision within both phases does require responses overtime to ensure the sustainability of our school offer.

Ensuring Camden has the right number of school places is both the Council's statutory responsibility and aligns with our [We Make Camden](#) principals. Preventing schools becoming financially vulnerable and thus subject to unplanned change, helps maintain strong, safe and open communities. Good and outstanding schools promote independent healthy lives and support robust growth and jobs.

The data and forecasts of the demand for school places within Camden is reviewed annually by the authority and made publicly available. Our review incorporates all underlying demographic data including: existing provision and capacity, actual registered births and fertility, the latest GLA forecasts for births and their relationship to school rolls, together with the additional pupils associated with new housing developments. The analysis is used to help us make informed decisions about the future organisation of school places.

Our understanding of the current demographic pressures facing schools has also informed the development of Camden's Education Strategy 'Building Back Stronger'. A significant part of the purpose of the of that strategy, and our continued school organisation work, is to ensure that our school system is sustainable and stable, maximising the opportunities for school level collaboration.

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RECOMMENDATION:

Schools' Forum is asked to comment on and note the contents of the report.



Signed: _____

Nicholas Smith, Head of Education Commissioning and School Organisation
Date: 27 November 2023

1. INTRODUCTION

- 1.1. The authority, in its role as commissioner of school places, has a statutory duty to ensure there are sufficient school places in the borough for every child who wants one. The Council also has to ensure that there are not too many school places which would affect the viability of schools now or in the future. The changing face of school provision over the past decade has added complexity to the Local Authority role. Specifically, changes to education legislation through the Academies Act 2010, introducing academies/free schools across all sectors, and allowing existing schools to convert to academy status has led to a fragmentation of the education system. Almost uniquely within England, Camden has not had any converter academies during this period, and with the inception of Camden Learning, the education community has collectively supported the Camden family of schools.
- 1.2. The education landscape and demand for pupil places has changed considerably over the past decade. Initially, this has impacted on our primary schools following a significant and sustained fall in registered births. The COVID-19 pandemic has added further complexity, significantly impacting on families lives, patterns of migration and our assumptions about future birth rates. These are national and London wide issues, not just impacting on Camden, with effects being experienced across the education landscape.
- 1.3. The Council has continued working closely with schools, providing ongoing support to those whose viability is put at risk by falling numbers. As part of this process the Council has, with the support of our schools, taken a number of difficult decisions to reduce the number of available school places. Since 2018 this has resulted in the removal of 10 forms (classes) of entry across the Primary estate and further supported reductions in the admission number within the Secondary sector.
- 1.4. The significant issues identified within this paper were also central to the development of the Council' education strategy. Building Back Stronger is a comprehensive, 10-year education strategy for Camden and helps inform our approach to school organisation.
- 1.5. Financial pressures are also becoming more significant throughout our schools. Following a funding freeze, in place since 2011, with small 0.5% increases in 2018/19 and 2019/20, Camden schools have seen their real terms income decrease by almost 25% since 2010. The impact of COVID-19 on school rolls and response to the crisis has put additional pressures on school finances. Significant further pressures resulting from the level of inflation within the economy, specifically impacting upon energy costs, are also being felt acutely by Camden Schools.
- 1.6. In recent years, school place planning analysis highlighted volatility at national and local level. Specific concerns range from the impact of HS2 development, Brexit and the effects of COVID and global migration arising from world events that have altered short and long-term population trends, creating a less stable environment in which to plan ahead. The impact these variables will have on migration, local employment and residency,

and of how the UK forges other world relationships in the years ahead, also alter future population assumptions.

- 1.7. Covid significantly affected all areas of daily life. This has had other longer-term, currently unquantified impacts, such as families choosing to leave London with the extension of more flexible working patterns, allowing people to live further from their place of work. Officers continue to monitor these significant events very closely through our London wide networks and updating analysis with newly available data. The latest GLA forecasts in 2023 account for the modelled COVID-19 pandemic impact over the next decade and show an increase on the picture taken from last year specifically towards the end of this decade.

2. Summary Data Analysis

Births

- 3.1 Camden actual registered births reached a high in 2012 at 3,084, but have followed a downward trend to their latest low in 2022 at 2,072. Whilst falls in birth were reported across London and nationwide between 2012 and 2022, Camden at a 34% reduction, has experienced a greater fall compared to London and England at 17%, although similar to some inner-London Authorities such as Westminster. The most recent, GLA 2022 birth forecasts are above those received last year and now incorporate more detailed COVID-19 modelling and show a potential increase in births from 2023-24.
- 3.2 Total Fertility Rate (TFR – the average number of children born to a woman over her lifetime) in the Borough is very low. Camden at 1.02 was second to only Westminster out of any local authority area, with Inner London at 1.28 and England and Wales at 1.61. All of these have reduced from 2018, and over the last decade, and are below 2.1, the number that is required to retain existing levels of population without any additional inward migration.

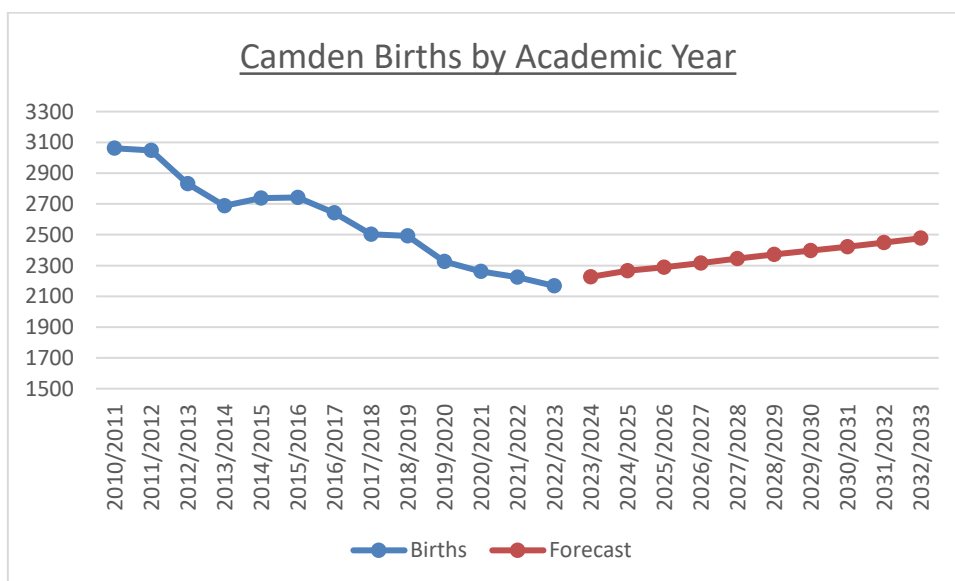


Fig 1: Chart showing reduction in forecast future birth rates

Latest Housing and Estimated Child Yield

- 3.3 New housing has the potential to increase demand for school places as new families move into new homes. Historically we have been conscious that the effect of new build on pupil numbers can be over-estimated. However, additional Camden housing units anticipated to 2036/37 are estimated at 16,665, representing a positive net gain that is included within this analysis. For the purposes of analysis, we arrange schools in to five planning areas (PAs) of roughly equal size that reflect local geography. Camden's planning areas and school locations are identified in Appendix D. The greatest additional housing development is anticipated in our central-southern area PA4 (3,856), with the lowest in the central PA2 (2,952). Anticipated additional demand for school places within Camden from these units are between an additional 7.6FE to 9.8FE in year groups up to 2036/37.

School Roll projections Primary and Secondary

- 3.4 The Primary 2023 borough forecast, shown below, whilst an increase on last years forecast, continues to report surplus capacity anticipated over the middle of the decade with demand increasing to 2032/33. The anticipated surplus before Council decisions ranges from 16% to 13%, with agreed and future anticipated changes the surplus ranges from 7% (2023) rising to 13% (2027) before falling to 4% (2032).

Reception Entry Pupil Demand Forecasts in Camden

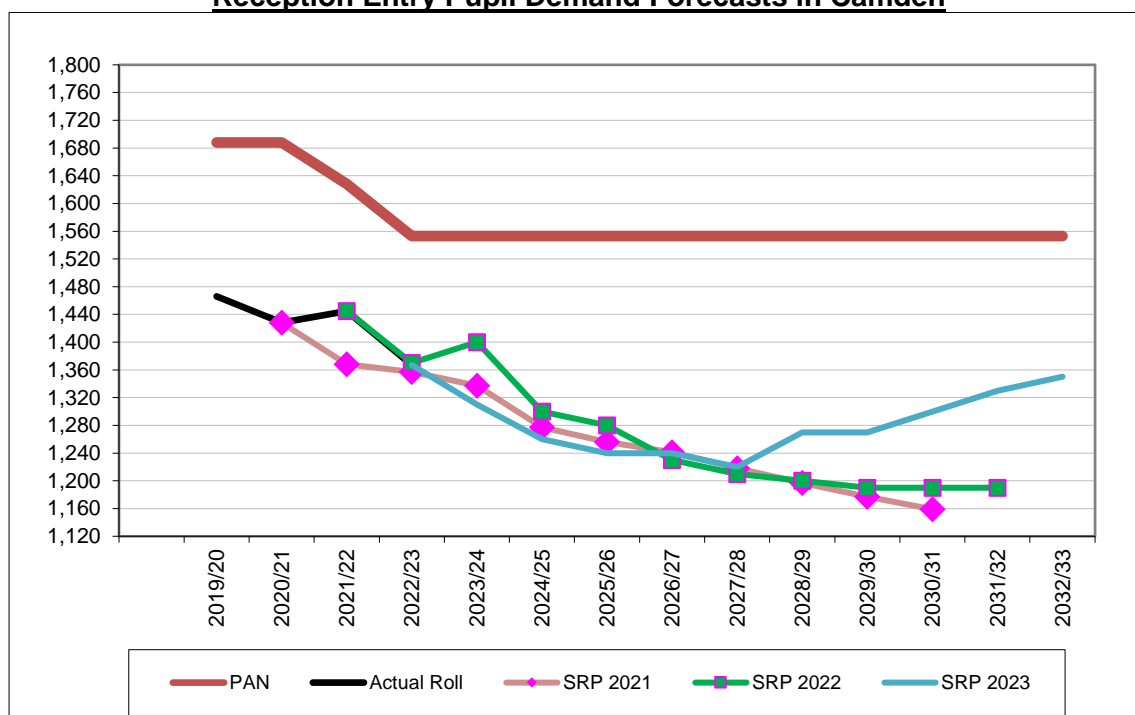


Fig 2: chart showing latest GLA SRP 2032, and previous historic GLA SRP 2022 and 2021 forecasts with planned admission number (PAN): [Borough Reception](#)

- 3.5 Secondary borough forecasts, shown on below, are slightly increased compared to the 2022 forecast. Surplus capacity is still however anticipated to increase in the period up to 2032/33. Year 7 PAN surplus is estimated to increase from 7% in 2022/23 to 21% 2032/33, equating to over 10FE of school places.

Year 7 Entry Pupil Demand Forecasts in Camden

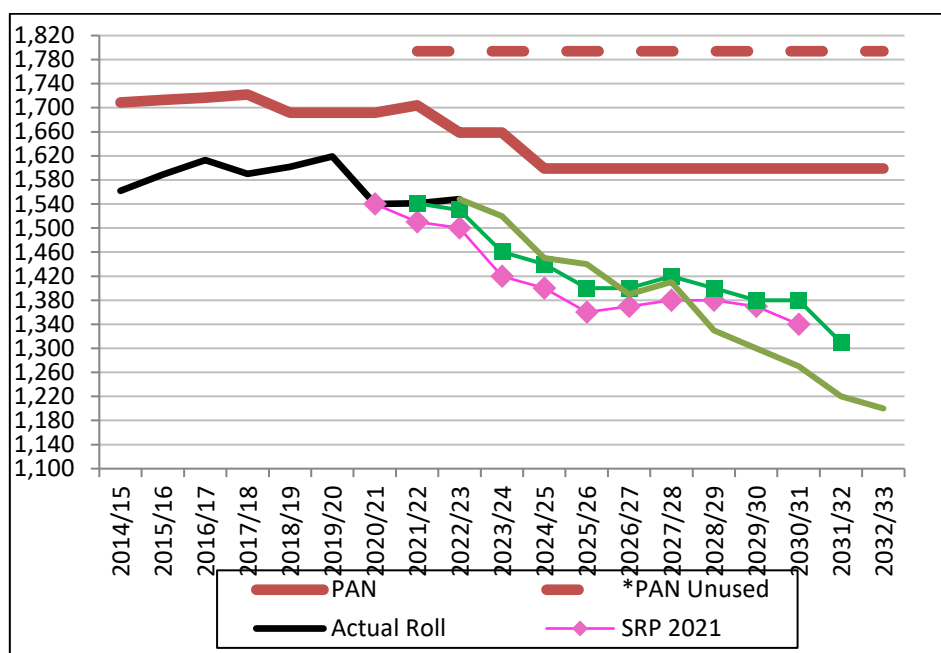


Fig 3:— chart showing latest GLA SRP 2023, and previous historic GLA SRP 2022 and 2021 forecasts with planned admission number (PAN): [Borough Year 7](#)

- 3.6 Falling school rolls are not unique to Camden and are discussed widely across London due to the sudden and significant falls in actual registered births impacting on most authorities. Neighbouring authorities have provided updates of school planning data. At primary level all reported reduced demand for reception offers 2022/23 from a low base, with most showing high surplus in reception for the current academic year. At secondary the majority reported reduced demand at year 7 offers for 2021/22. A number of Camden’s neighbouring authorities and inner London authorities are under-taking widescale reviews of primary provision including Islington, Haringey and Lambeth.
- 3.7 The proportion of Camden pupils attending Independent schools and has been estimated based on updated underlying data and latest resident forecasts. The estimates in 2022/23 for primary at 30% are similar to recent years. At secondary level the estimated proportion of pupils attending independent schools rose to 38% during the pandemic, from 34% in 2018/19. Recent analysis has shown this proportion to be falling to 32%
- 3.9 Two other key developments are also incorporated within school places planning analysis: (i) new Camden 2022 wards, and retrofitting of existing data to new ward boundaries, (ii) 2011 ONS Census data underpinning analysis was updated with 2021 ONS Census data potentially in spring/summer 2022 and anticipated for inclusion in 2022 GLA forecasts next year. These changes to baseline data have meant that the Council has had to alter school planning areas in order to effectively report information to the DfE. Data for the new planning areas is incorporated within this paper.

3. ACTION TAKEN BY THE COUNCIL

3.1. PRIMARY

- 3.1.1. Camden has reviewed provision at a number of schools with unsustainable levels of surplus places. The Council has, with the support of schools, taken a number of difficult decisions to remove or reduce pupil numbers. St Aloysius RC 2FE primary school (PA4) closed in December 2019, the school had 63% surplus reception places in 2018/19. St Aloysius pupils were accommodated at the nearby Our Lady's RC primary (PA4) in available school places and a temporary classroom, whilst others took up school offers in other local schools. Following significant consultation Carlton primary school (PA2) closed as a legal entity in July 2021, the school had 72% reception surplus in 2020/21, merging under the leadership of nearby 2FE Rhyl primary (PA3), the Carlton site remains open for education and community use. In addition, Kingsgate (PA1) has reduced by 1FE. From 2023 the effect of the closures at St Michael's (PA4) and St Dominic's Primary (PA3) will also be reflected in future capacity forecast. Further PAN reductions have been taken forward at Netley Primary School, Argyle Primary School.
- 3.1.2. This brings the total reduction in the period up to 2023 of 10FE across all Camden Primary Schools.

3.2. SECONDARY

- 3.2.1. Haverstock school permanently reduced PAN by 1FE from 2018/19 due to changes in parental/student preferences resulting in lower school rolls; the school currently operates as 6FE provision. Consultation has been undertaken to remove a further **1.5FE** taking effect from entry this year. The Council is working with the Secondary sector to consider the existing pattern of school provision and will bring forward, where appropriate, proposals to reduce provision to take account of the existing forecasts, migration and school preference patterns.

4. DETAIL OF ANALYSIS AND AREA COMMENTARY

- 4.1. Effective planning analyses an array of information. In reviewing current and anticipated future trends, this report has been derived from the latest available data from August 2022 including:
- Latest actuals, including the capacity of schools, surplus places and/or immediate increasing or decreasing pressures, births, school rolls.
 - Projected future 'need', including the latest planned housing development trajectory, feeding into: births, population and school roll projections produced by the GLA.
 - Local variances and updated intelligence within the borough.
 - Latest school places planning summaries in neighbouring authorities.
- 4.2. The analysis of school places is considered for the borough as a whole for both primary and secondary, with further analysis completed at primary by five smaller localised borough planning areas (PAs). Planning areas are considered helpful for analytical purposes only, and this analysis model is similar to other local authorities. Planning areas do not

provide an indication of catchment areas for admission purposes, and pupils are not constrained by them.

- 5.3.1 School roll projections anticipate trends over the next decade, and are updated every year, based on the latest underlying data. This includes actual registered births, GLA birth forecasts, fertility, migration, latest Camden development, GLA population forecasts, and this year include COVID-19 modelling. Detail is also reported reflecting new boundary and planning area changes.
- 4.2.2. The majority of London boroughs, including Camden, use the Greater London Authority (GLA) school roll projection service expertise and modelling.
- 4.2.3. Forecasts are not actuals but are based on the latest known position in boroughs, updated base data, and latest roll trends within schools. They aim to provide an estimate of future 'need' within the borough for the next ten years. Every year background consistency checks are completed as part of the school place planning process, in addition to those already completed by the GLA. The accuracy of GLA forecasts is carefully reviewed against new school rolls, with the aim of continued development, renewal, and improvement. Last year 2020/21 was challenging on many fronts, which led to an increase in the gap between forecast and actual at borough level for both primary and secondary, although with an error still considered at a reasonable level within +/-5%. Latest school roll forecasts provided by the GLA in 2022, include updated underlying data and in particular the COVID-19 migration assumptions over the planning period, resulting in significantly lower overall forecasts.
- 4.2.4. The GLA school roll projection model is a simplification of complex real-world processes and as with any model there are limitations interpreting output based on a considerable number of changing variables including:
- changes to future patterns of births or fertility,
 - changes in patterns of migration or anticipated development,
 - changes to parental preferences for schools,
 - capacity constraints of schools, future changes to school provision
 - changes to the future character of local areas,
 - the impact of welfare reforms,
 - global, national or local events such as COVID 19.
- 4.2.5. The GLA SRP model calculates the proportion of children attending mainstream state schools by national curriculum year group and gender, based on the GLA population projections and wards of residence. The GLA model explicitly accounts for cross border mobility using information on pupil home ward from the DfE national pupil database (NPD). Appendix D, Figure 5 provides background SRP information including the model.
- 4.2.6. The GLA model continually evolves through discussions with borough subscribers and other key stakeholders to identify future enhancements. Enhancing accuracy and robustness of forecasts continues, as new sources of information become available. The GLA continue to negotiate with the DfE regarding the potential use of London School Preferences

information submitted nationally in DfE statutory returns for reception and year 7 school offers data.

4.2.7. The Local Government Boundary Commission for England (LGBCE) reviewed electoral arrangements and ward boundaries for the majority of London boroughs, including Camden between 2018 to 2020. The existing 18 Camden wards in existence since 2002, were recommended to increase to 20 following consultation by the LGBCE, these were approved by the UK Parliament in October 2020. The boundaries of all Camden wards will change with the exception of Regent's Park, in addition to new names and changes to existing names. These new Camden ward boundaries came into effect from January 2022, whilst the new electoral arrangements will be effective at the local elections in May 2022. A map detailing the new Camden wards from 2022 are shown in Appendix D, Figure 6. These changes have impacted school places planning analysis from 2022 this change can make year on year referencing difficult, however the Council has provided the complete data for reference.

Planning Area Commentary

- **Planning Area 1, North West Camden**

Situated in the north-west part of the borough, this planning area saw sustained rising pressure for a number of years, with school rolls remaining at higher levels to 2015/16, before falling. Historically this greater demand for school places in PA1 was also affected by rising demand in the immediate area, the western PA3 Swiss Cottage ward. PA1 continued with the lowest levels of reception surplus of any Camden planning area and saw an increase in reception pupils in 2023. PAN capacity has been reduced by 1FE, although PAN surplus is estimated to increase to 4.7% in 2022/23 to a potentially significant 16% or 2FE by 2033/34. This is a change from historic forecasts for this area and links to reductions in births and migration that have not been experienced in this area to this point. Whilst increases are anticipated towards the end of the planning period, we will need to carefully monitor this position.

- **Planning Area 2, North East Camden**

Situated in the north-east area of Camden. PA2 reception school rolls have fallen from the last relative high in 2015/16, with surplus the highest of any other planning area in 2020/21. In 2022 new boundary areas and changes to the planning area composition have altered the forecast position making year to year comparisons problematic. However, actual reception school rolls fell by just under 2.5FE from 2015/16. The Council, after significant consultation took the difficult decision to close Carlton primary school (2FE) in July 2021. The latest forecast indicate a reduction in demand for Reception school places with surplus levels increasing to 20% before falling to 14% by 2033/34 equivalent to 2FE.

- **Planning Area 3, Central Camden**

Planning Area 3 comprises of the main east to west central belt of Camden. Demand was historically higher in the western Swiss Cottage ward bordering PA1. Reception school rolls have fallen from the last relative high in 2015/16, and the number of surplus places has increased consequently. In 2022 new boundary areas and changes to the planning area composition have altered the forecast position making year to year

comparisons problematic. Following detailed consultation, Camden in cooperation with the Westminster Diocese approved the closure of St Dominics Catholic Primary School from 2023. Inclusive of this decision the latest forecasts indicate an increase in demand for Reception school places with surplus levels reducing from 10% to 5% by 2033/34.

- **Planning Area 4, South**

Situated in the south of the borough between central and far southern areas, including Somers Town, King's Cross and St Pancras areas. This area is of highest anticipated development growth in Camden over the next ten years and beyond, developments are included in all GLA forecasts. In 2022 new boundary areas and changes to the planning area composition have altered the forecast position making year to year comparisons problematic. Reception school rolls did however fall sharply from the last high in 2015/16 by over 3FE. The current forecasts however indicate a stabilisation in demand for reception pupils. Reception PAN surplus is anticipated to remain at 20% or 2FE throughout the planning period. Caution should be exercised when interpreting PA4 forecasts considering the high anticipated new development, as developments or phasing can change as plans alter through the planning process.

- **Planning Area 5, South of the Euston Road**

Situated in the far south of the borough, and South of the Euston Road. PA5 has the lowest population of any other Camden planning area. Reception population has fallen significantly over the last 5 years. Total reception surplus is however forecast to remain stable at approximately 2FE throughout the planning period.

- **Borough PRIMARY**

Borough reception school rolls fall from the last high in 2015/16, with surplus rising consistently to 2021. Overall demand for places in 2023/24 has reflected the position last year and is above the previous GLA forecasts. Despite this demand remains depressed and total Borough surplus without Council action was forecast to increase from 16% to 23% over the planning period. With already agreed Council changes our current models anticipate surplus provision rising to 13% in 2027/28 before falling to 4% by the end of the planning period.

- **Borough SECONDARY**

4.2.8. Our secondary school population, reflecting the location of Camden's secondary schools, is different to that of our Primary cohort, therefore the future population profile does not track directly to that of the Camden primary schools. However future demand for school places is anticipated to fall throughout the planning period. PAN capacity reductions of 1.5FE in 2022/23 have been approved at Haverstock school to alleviate rising surplus a further reduction of 2FE at La Sainte Union School is in local consultation for implementation in 2024/25.

4.2.9. The latest updated GLA SRP 2023 forecasts for borough secondary are marginally higher than previous forecasts. Year 7 PAN surplus is however estimated to increase from 7% in 2022/23 to 21% in 2032/33 equating to just 13FE of school places.

- 4.2.10. The Council will be working with Secondary Schools to share and understand data. The Council and schools will come forward collectively with proposals, where appropriate, to match demand with a sustainable pattern of school provision.
- 4.2.11. Camden is a 'net importer' of pupils from other boroughs at secondary age. More non-Camden borough residents attend Camden schools (2,812), than Camden residents attend out-borough schools (1,936). The GLA SRP for Camden are buoyed by this considerable number of non-residents attracted to our excellent Camden schools.

5. INDEPENDENT SCHOOLS ESTIMATE

- 5.1. In Primary, actual Camden residents attending state provision fell over recent years. The estimated primary population educated within the independent sector in 2018/19 was 32%, reducing 31% in 2019/20, with the latest 2020/21 figure standing at 30%. Figures for 2021/22 indicate a similar proportion but require further validation. Whilst still a high proportion potentially attending primary independent schools, estimated numbers have reduced in recent years. In Secondary, actual Camden residents attending state provision decreased to 2020/21. The estimated secondary population education with the independent sector in 2018/19 was 34%, reducing to 31% in 2019/20, with the latest 2020/21 rising to 38%. This is a high proportion of pupils potentially attending secondary independent schools, with numbers estimated as increasing especially in the latest year. Early indications show that this year's figures have returned towards 34% but this figure requires further validation. Estimates should though be treated with caution and can change as underlying base data is updated. We also know that the economic impacts of COVID-19 are yet to be fully felt and that the response to this could materially affect the proportion and take up of private school places.

6. CONCLUSIONS

- 6.1. The conclusions from this report and analysis are based on the latest known position to **August 2023**, fully reflective of newly revised underlying data, derived trends, and information since December 2021.
- 6.2. 2022 saw the lowest number of recorded births in Camden in 30 years, with a drop of 34% from 2012 (compared to a 14% drop across London and 17% nationally over the same time period). Last years forecasts also accounted for the significant reduced inward and increased outward migration experienced during the period of COVID restrictions and the continued impact of Brexit. This years forecasts show a marginal improvement from the position from last year and are reflective of the caution expressed at the time. Specifically at the primary sector forecasts are now indicating. However, the continued depressed demographic position gives pause for concern for all our schools especially when set alongside the significant financial pressures being experienced as a response to the cost of living crisis and ongoing inflationary pressures.

- 6.3. The monitoring of school place demand will continue within the borough, linking closely with schools and other colleagues across Camden and other London Boroughs to share and integrate relevant data. In addition a continued commitment to the aims of Building Back Stronger and supporting the placed based and collaborative response to the existing challenges facing the schools sector will be required.

7. LEGAL COMMENTS

- 7.1. By virtue of sections 13 and 14 of the Education Act 1996, as amended by the Education and Inspections Act 2006, the Council has a statutory duty to ensure that there are sufficient school places available for the children in the borough. In addition, the Council must increase parental choice. The Council needs to undertake a school roll projection to ensure that there are sufficient school places to meet the need.
- 7.2. The Council must take into account its equality duties when exercising its functions, namely to have 'due regard' to the need to: eliminate discrimination, harassment and victimisation and other conduct prohibited under the Act; to advance equality of opportunity between people who share a relevant protected characteristic and those who do not; and foster good relations between people who share a relevant protected characteristic and those who do not (which involves tackling prejudice and promoting understanding). Under the Duty the relevant protected characteristics are age, disability, gender reassignment, pregnancy and maternity, race, religion, sex, sexual orientation. In respect of the first aim only i.e. reducing discrimination etc, the protected characteristic of marriage and civil partnership is also relevant. It appears from the report that the Council in undertaking its statutory duty for school planning, acts in accord with its equality's duties.
- 7.3. The updated 2021 Admissions Code, the first major revision since 2014, contains an expanded definition of previously looked after children to include children who were in state care outside of the UK but were subsequently adopted. And the Fair Access Protocol now encompass more children including the unplaced, the vulnerable and those who are unable to secure a school place in-year.
- 7.4. Although there has been no statutory requirement to publish a School Organisation Plan since 2004, it is considered good practice to produce a plan related to pupil place planning. This will show local communities the present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. In addition, the plan sets out the statutory framework for making changes such as opening, closing, or enlarging schools in the Borough.

8. FINANCE COMMENTS

- 8.1. The revenue costs of a school (staffing, running costs) are funded by the Dedicated Schools Grant which is distributed on a formula basis. DSG allocations are on a per pupil basis so the funding received by a school will rise and fall in line with increases or decreases in pupil numbers. National DSG funding allocations have not kept pace with costs which

creates a financial pressure for schools. The over supply of school places exacerbates the financial pressures in the school system as no funding is received for vacant places.

9. ENVIRONMENTAL IMPLICATIONS

- 9.1. There are no decisions that result from this report. Ensuring that our school estate best meets the demographic pressures of the area means that our resources are efficiently used. In addition, having school buildings that are embedded in their local area, providing high quality educational outcomes ensures that residents are attracted to local provision avoiding unnecessary journeys.

REPORT ENDS