PART 2
BACKGROUND PAPER
FOR THE EXAMINATION IN PUBLIC

Background Paper 4
'Facts and Figures'

This paper sets out background facts and figures that may be relevant for the discussions at the Examination in Public in June 2003. The data is based on a range of information available at April 2003 and is indicative of the Structure Plan Authorities' current understanding of the facts, some of which may need further verification.

May 2003

PART 2 - FACTS AND FIGURES

1. Local Plans and Other Initiatives

Local Plans

1.1 **A range of Local Plans** prepared by Devon County Council, Plymouth Council and Torbay Borough Council (Unitary Authorities), Dartmoor National Park Authority and District Councils are currently in the process of being reviewed to take into account the policies and proposals of the Structure Plan to 2011. It is anticipated that in most cases Revised Deposit Plans for consultation will be published by the Autumn 2003, in some cases much later than most of the original programmes suggested. The current programme for the initial deposit, revised deposit and Inquiry etc of Local Plans is set out in **Figure 1**. All Local Plan Reviews to 2011 are now expected to be adopted during 2004 and 2005**.**

Local Transport Plans

1.2 **Local Transport Plans (2001 to 2006)** were published by Devon County Council, Plymouth Council and Torbay Council in July 2000. These set out the strategic approach to travel and transport in Devon over the coming years and include a bid to government to fund five year implementation programmes. Local Transport Plans for the period 2006 to 2011 will be published in July 2005.

Local Plans to 2011	Initial Deposit	Revised Deposit	Inquiry	Inspector Report	Modifications	Approval / Adoption
Devon Minerals	Jan 00	March 01	Jan 02	Aug 02	May 03	-
Devon Waste (to 2016)	Feb 03	Autumn 03	-			
Dartmoor National Park	March 02	April 03	Autumn 03	-		
East Devon: First Review	Jan 02	Summer 03	-			
Exeter: First Review	Jan 01	May 02	Apr-Jun 03	-		
Mid Devon :First Alteration	Oct 01	Sept 02	July 03	Jan 04	-	
North Devon:	Nov 01	Summer 03	-			
Plymouth: First Alteration	Jan 02	Sept 03	-			
South Hams: First Review	Jan 02	Sept 03	-			
Teignbridge: First Review	Jan 02	Aug 03	-			
Torbay	Jul 99	Oct 00	Nov 01	April 03	Mid 03	Late 03/4
Torridge	Oct 99	Jan 01	Jan-Sept 02	June 03	Late 03	Early 04
West Devon: First Review	Sep 00	April 02	Jan 03	Oct 03	-	

Local Transport Plans	2001 to 2006	2006 to 2011
Devon Local Transport Plan	July 2000	Summer 2005
Plymouth Local Transport Plan	July 2000	Summer 2005
Torbay Local Transport Plan	July 2000	Summer 2005

Figure 1: Programme for the preparation of Local Plans and Transport Plan (shading shows progress at April 2003)

2. Overall Indicators of Change

Population

Population Change 1961 to 2001

2.1 The population of Devon continues to grow primarily as a result of in-migration. On average each year about 43,000 people move into Devon, while about 35,000 leave to live elsewhere. The population of the area covered by the Devon Structure Plan at 2001 totalled 1,076,500 people. **Figure 2** shows the population change in Devon for the period 1971 to 2001.

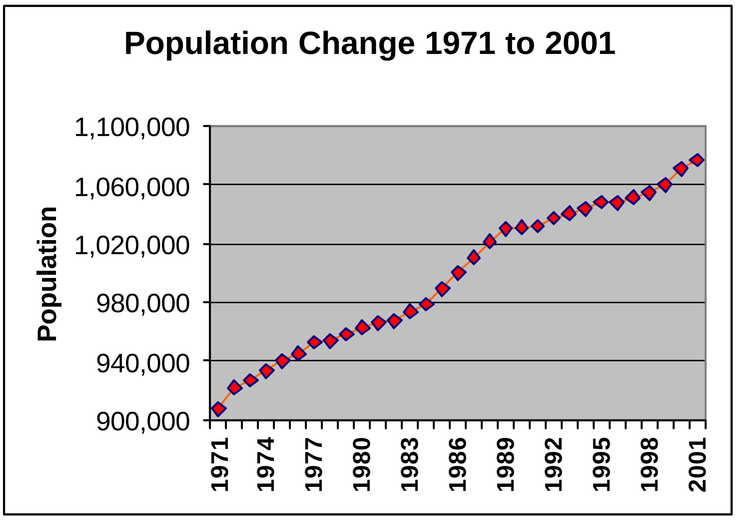


Figure 2: Population Change 1971 to 2001

Births and Deaths

2.2 The number of births and deaths in Devon continues to result in a natural population decrease in the County of approximately 2,000 a year (i.e. more deaths than births). The level of change illustrated in **Figure 3** shows that since about 1970 deaths have exceeded births.

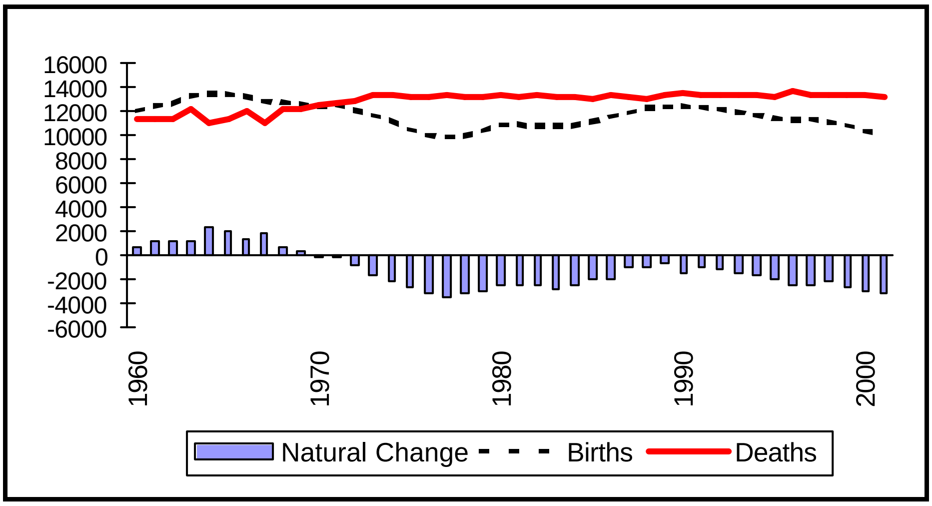


Figure 3: Graph of Births, Deaths and Natural Change 1970 to 2001

Further information can be found at: http://www.devon.gov.uk/dris/demog/dv_bd.html

Migration

2.3 The main factor affecting population growth in Devon is migration. The annual net migration over the past 30 years is illustrated in **Figure 4**. Recent levels of net migration have varied considerably, between + 1,800 and +13,300 per annum over the last 6 years. Rates of net inward migration have averaged about +7,400 over the last 20 years and therefore a rate of +7,400 is considered broadly in line with the most recent patterns of population movement.

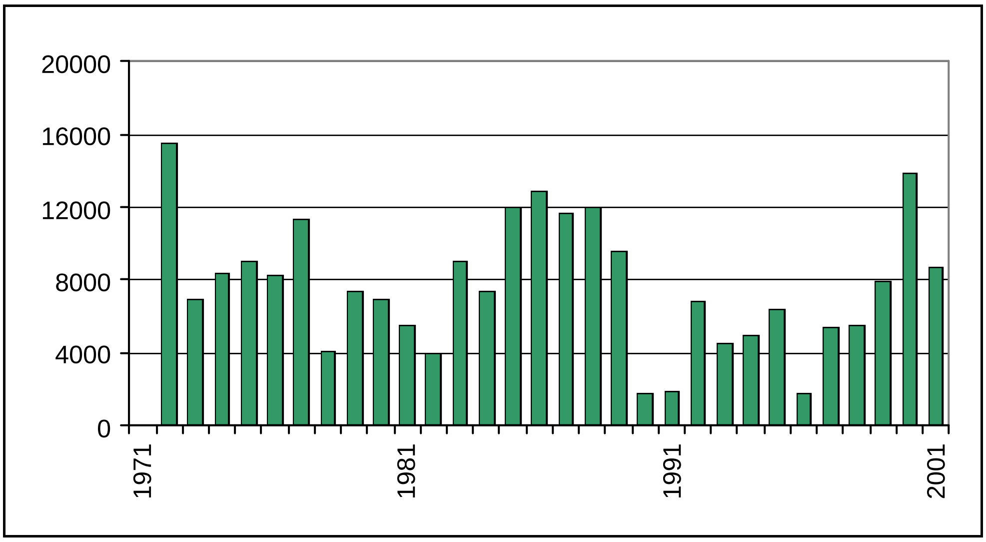


Figure 4: Annual Net Migration 1961 and 2001

Population distribution in Devon

2.4 The distribution of population in Devon is illustrated in **Figure 5**. This shows that Plymouth, Torbay, Exeter accommodates about 45% of Devon's population, a number of smaller towns accommodate about 35% of the population and the balance is elsewhere in Devon.

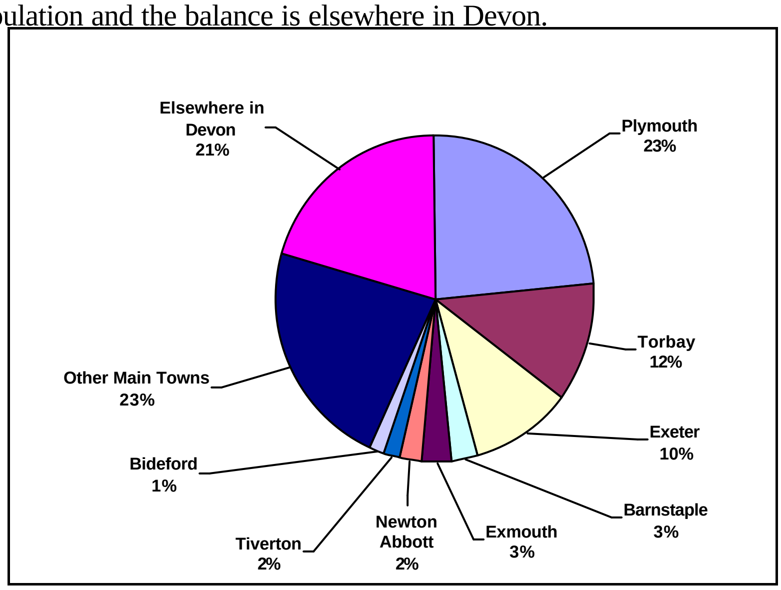


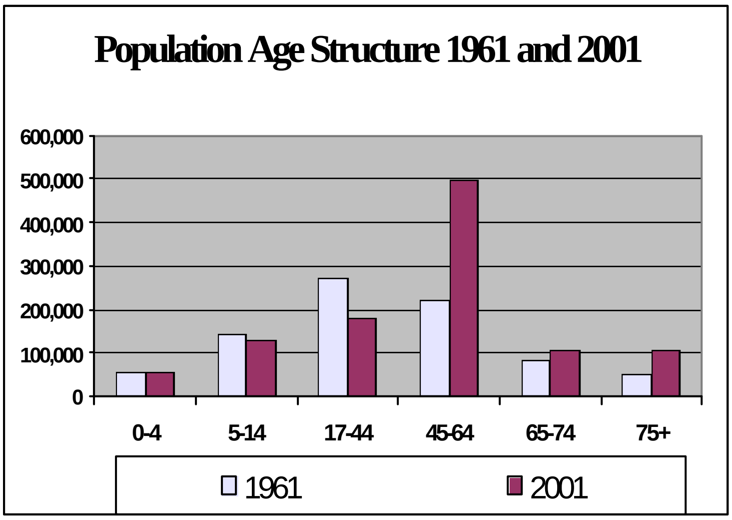
Figure 5: Population Distribution in Devon

Population Age Structure

2.5 The age structure in Devon's population at 1961 and 2001 is illustrated in **Figure 6.** The average age of Devon's population is rising as people live longer – as in the country as a whole. As a result the numbers of elderly will rise significantly over the next 10 to 15 years.

There is also likely to be a continued increase in the number of smaller families – particularly couples, young single people, single parent families, and elderly people living alone.

Social changes mean that even if population numbers were to remain static, more houses would be needed to provide homes for the same number of people.



	1961		2001	
Age	No.	%	No.	%
0-4	57,400	7.0	54,200	5.0
5-14	141,100	17.1	130,500	12.1
17-44	271,700	33.0	180,400	16.8
45-64	222,600	27.0	495,800	46.0
65-74	83,200	10.1	107,400	10.0
75+	49,200	6.0	108,300	10.0
Total	825,200	100	1,076,600	100

Figure 6: Population Age Structure

Population Change by District

2.6 The relative population change in each District over the 1995 to 2001 period illustrated in **Figure 7**, indicates that only Plymouth's population fell. In all the other Districts there was an increase in population, with the greatest gains occurring in Teignbridge.

Further information can be found at: http://www.devon.gov.uk/dris/demog/dv_pop95.html

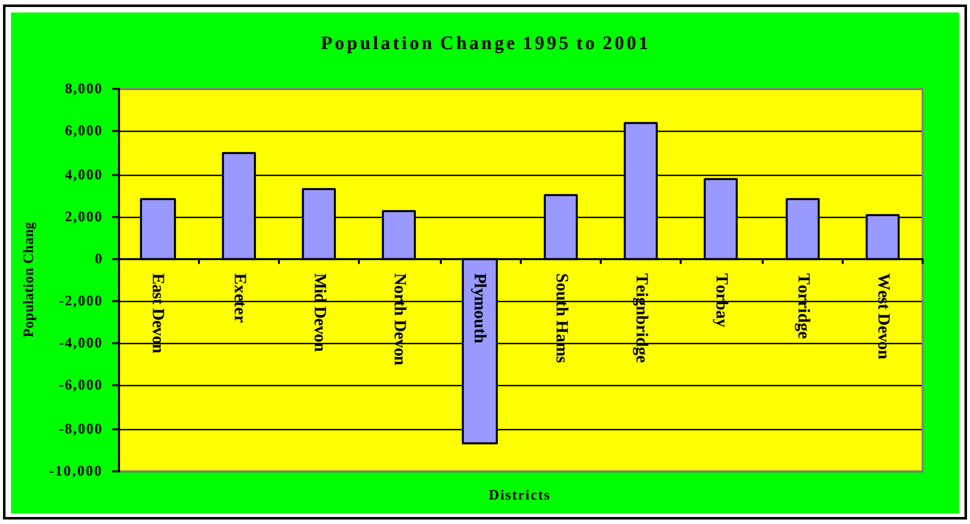


Figure 7: Graph of Population Change between 1995 and 2001 by District (source: Registrar General's Mid Year Population Estimates)

Housing

2.7 Between 1995 and 2002 about 29,400 dwellings were built in Devon. **Figure 8** illustrates over the period 1995 to 2002 dwelling completions averaged about 4,200 dwellings per year. This is significantly below the annual average provision of about 4,730 dwellings in the adopted Structure Plan. The dwelling provision in the Devon Structure Plan 2001 to 2016 (Deposit Draft) makes provision for an annual average of 4,300 dwellings, reflecting the provisions of the Regional Planning Policy and the lower annual average provision over the last few years.

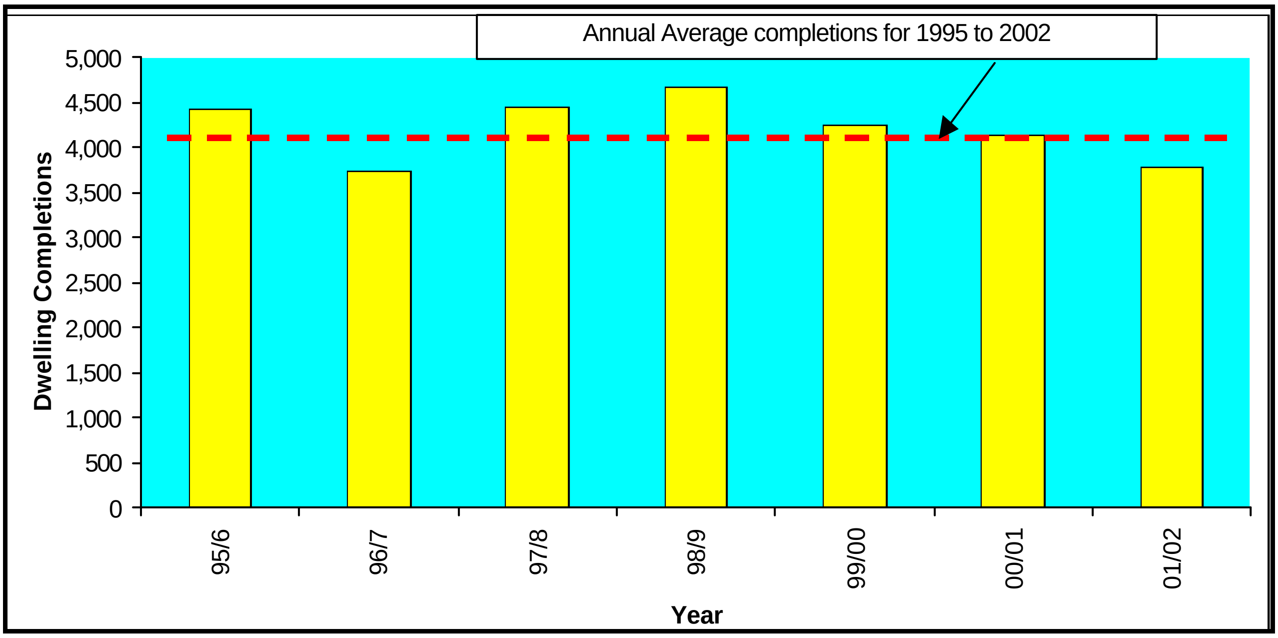


Figure 8: Annual Dwelling Completions for Devon - 1995 to 2002

2.8 Dwelling completions by District are illustrated in **Figure 9**. The annual average completions compared with Structure Plan provisions are illustrated in Figures **10 and 11**.

District	1995/96	1996/97	1997/98	1998/99	1999/2000	2000/01	2001/02	Total for 1995-2002
East Devon	580	505	604	551	584	591	395	3,810
Exeter	440	497	502	338	344	499	391	3,011
Mid Devon	373	413	421	322	357	358	358	2,602
North Devon	546	358	404	617	450	528	379	3,282
Plymouth	477	482	475	436	656	397	436	3,359
South Hams	484	248	406	505	398	263	229	2,533
Teignbridge	479	477	636	614	294	275	316	3,091
Torbay	574	285	432	679	460	452	573	3,455
Torridge	266	242	332	426	418	436	444	2,564
West Devon	123	113	193	143	240	240	160	1,212
Dartmoor NP	79	108	35	27	53	100	90	492
Total	4,421	3,728	4,440	4,658	4,254	4,139	3,771	29,411

Notes: **Mid Devon:** has not provided data for 2002 - the same figure as 2001 has been used.
West Devon: West Devon provided a completions total of 479 for the period 1999 – 2001, which has been divided by 2.

Figure 9: Annual Housing Completions by District 1995 to 2002

2.9 **Figure 10** shows the adopted Structure Plan provisions for 1995 to 2011, the Deposit Draft provisions for 2001 to 2016 and the number of dwellings built from 1995 to 2002.

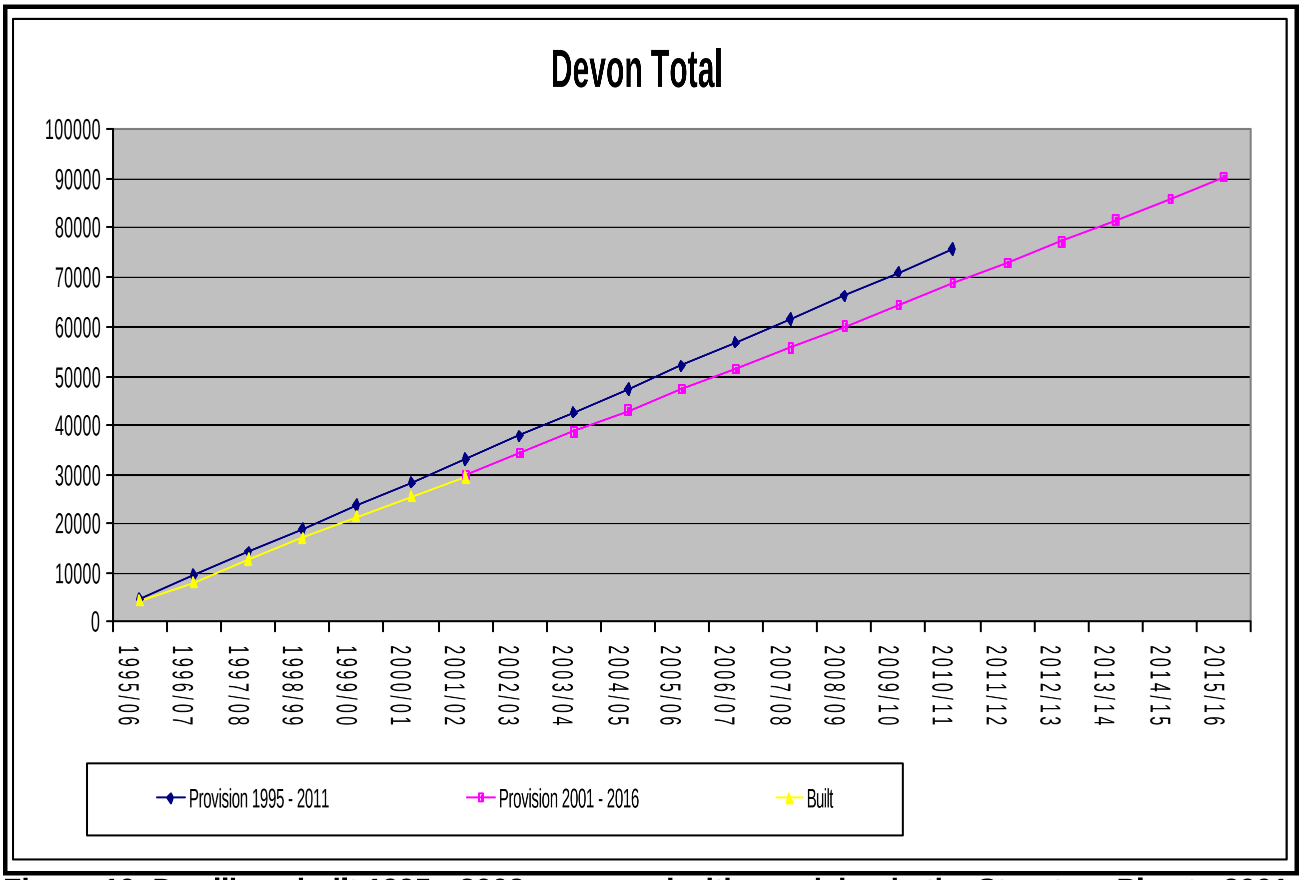
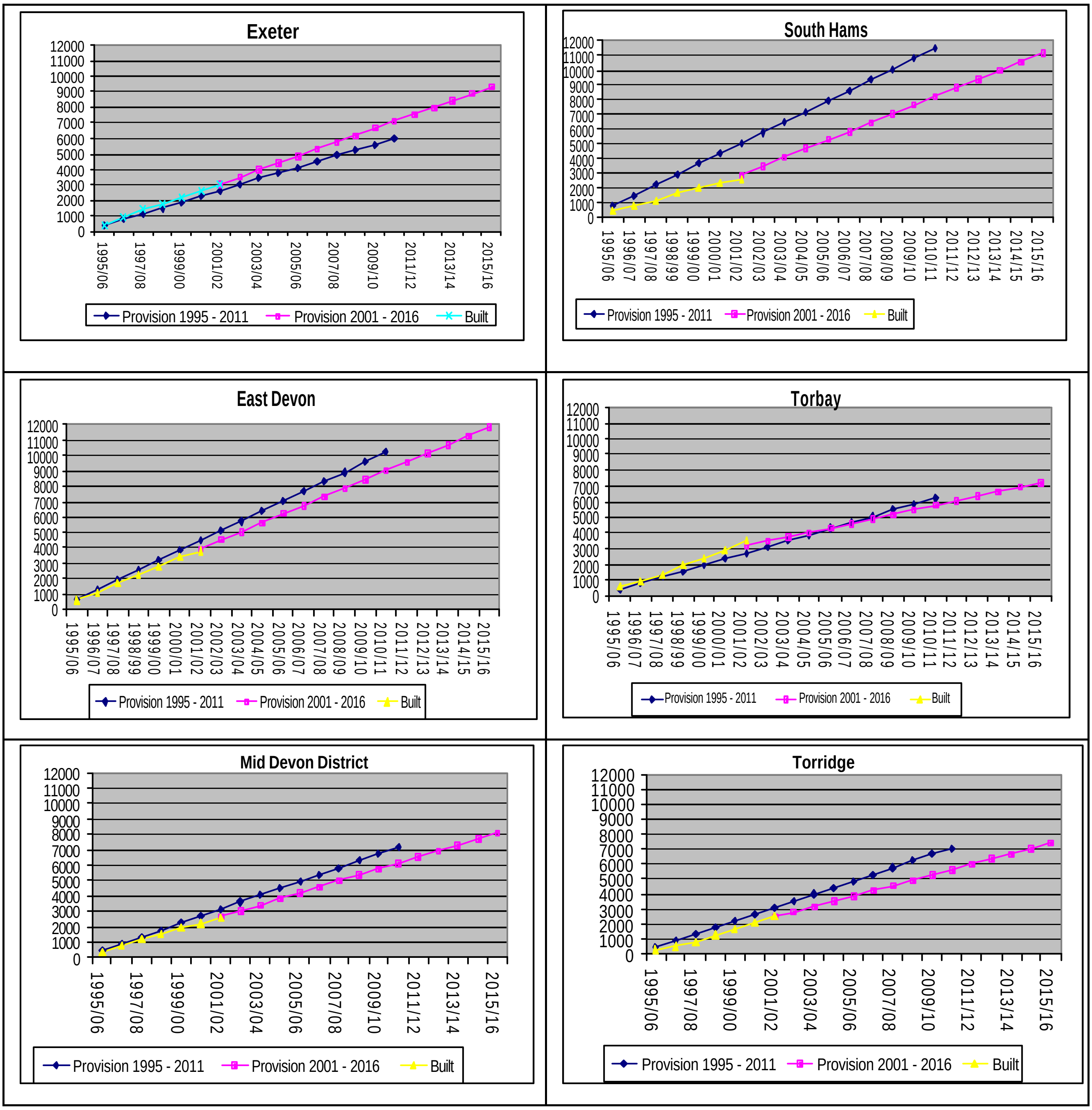


Figure 10: Dwellings built 1995 - 2002 compared with provision in the Structure Plan to 2001 and 2016

2.10 This overall pattern of change has not been reflected evenly across the Local Planning Authorities in Devon. **Figure 11** illustrates that in Exeter City, North Devon, and Torbay the annual rate of development has been slightly higher than that anticipated in the adopted Structure Plan, were similar to expectations in Teignbridge, Plymouth and Dartmoor National Park, but were below expectations in East Devon, Mid Devon, Torridge, West Devon and South Hams. These variations may reflect a range of factors – including market demand or local shortages of land readily available for development.



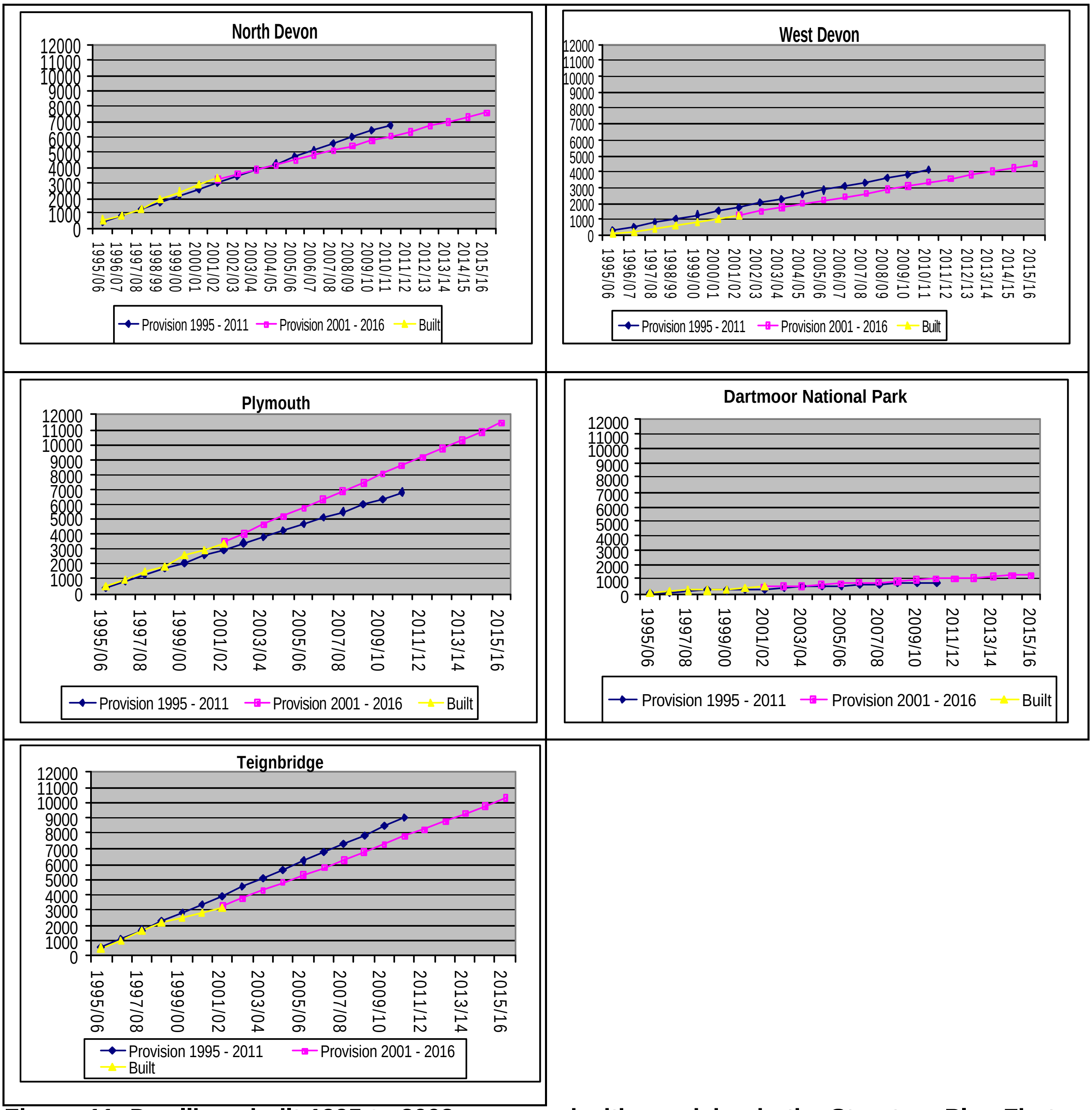


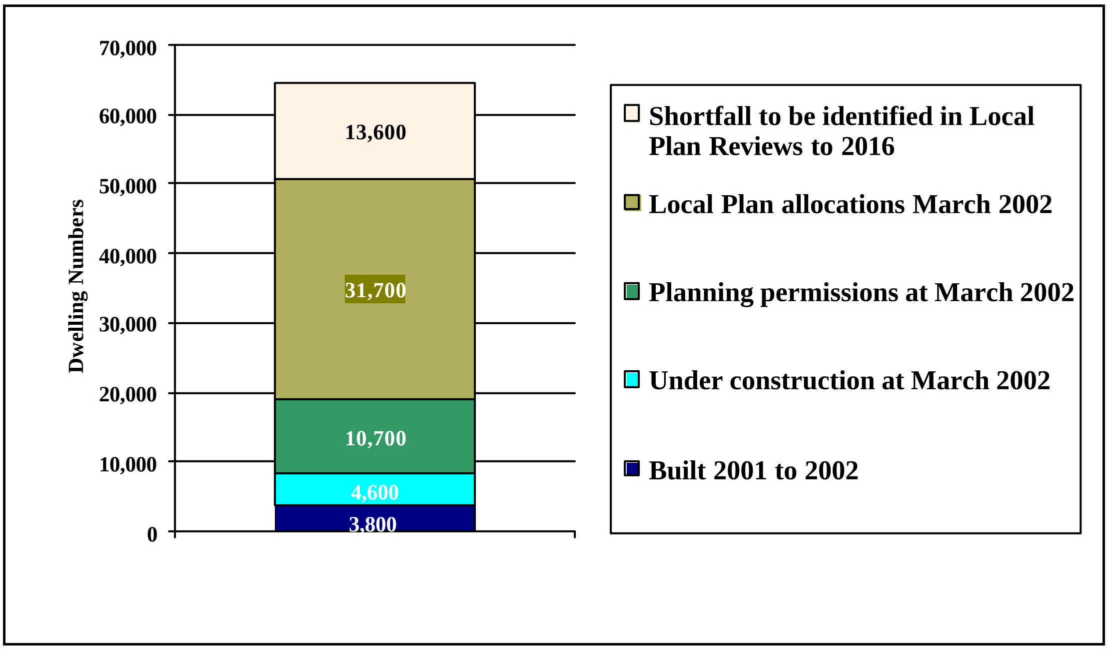
Figure 11: Dwellings built 1995 to 2002 compared with provision in the Structure Plan First Review (By District)

Further information can be found at: http://www.devon.gov.uk/dris/house/dd_hc89.html

Assessment of existing housing commitments

2.11 Proposal ST17 (in the Pre-Examination in Public Changes to the Deposit Draft) indicates the distribution of housing development for the whole of the period to 2001 to 2016. It should be noted that a significant element of this is already provided for in existing Local Plans currently being prepared by Local Planning Authorities in Devon.

2.12 **An assessment of existing housing commitments** at March 2002 indicates that the overall level of commitments remaining in draft Local Plans to at 2011 is adequate to accommodate housing demand to about 2013. This leaves a shortfall of about 13,600 dwellings to be identified in the Reviews of Local Plans to 2016.



District	Completions 1995-2001	Completions 01/02	Under Construction 01/02	Planning Permission 01/02	Local Plan/ Section 106 01/02	Commitments 2001/02	Total Commitments 2001 - 2011 (at 2002)
East Devon	3,415	395	476	1,729	4,209	6,414	6,809
Exeter	2,620	391	551	264	2,772	3,587	3,978
Mid Devon	2,244	358	713	1,385	2,500	4,598	4,956
North Devon	2,903	379	535	718	2,265	3,518	3,897
Plymouth	2,923	436	317	1,042	4,286	5,645	6,081
South Hams	2,304	229	244	655	6,198	7,097	7,326
Teignbridge	2,775	316	484	1,216	4,209	5,909	6,225
Torbay	2,882	573	213	1,223	1,424	2,860	3,433
Torridge	2,120	444	568	1,549	1,907	4,024	4,468
West Devon	1,052	160	301	635	1,953	2,889	3,049
Dartmoor NP	402	90	212	319	0	531	621
Total	25,640	3,771	4,614	10,735	31,723	47,072	50,843

Note: Mid Devon has not provided data for 2002 – the figures for 2001 have been used.

Figure 12: Dwelling Commitments and Provision to 2016

Broad Strategic Areas

2.13 The Development Strategy as set out in the adopted Structure Plan and in Deposit Draft to 2016 identifies three broad strategic areas within Devon:

i) the **Areas of Economic Activity** (AEA) focused on Plymouth, Exeter, Barnstaple and Torbay/Newton Abbot;
ii) the rural **Priority Area for Rural Regeneration;** and
iii) the **Strategic Landscape and Development Constraint** areas.

2.14 The Plan indicates that the four **Areas of Economic Activity** (AEA) should accommodate the bulk of new provision for housing and economic development - and provide for an increased proportion of development provision over the period to 2011 and 2016, particularly at the Principal Urban Areas of Plymouth, Exeter and Torbay.

2.15 In the **Priority Area for Rural Regeneration** it is proposed that past rates of development should be maintained, while in the **Strategic Landscape and Development Constraint Area** of the Plan a reduced rate of growth is proposed.

2.16 **Figure 13** sets out a comparison of the actual level of housing development in the AEA and elsewhere in Devon over the period 1981 to 1995 (column a) and 1995 to 2002 (column b) with the provisions in the adopted Structure Plan 1995 to 2011 (column c) and the Structure Plan proposals for the period 2001 to 2016 (column d).

Strategic Area	**Actual Completions 1981 to 1995** (a)		**Actual Completions 1995 to 2002** (b)		**Structure Plan Provisions 1995 to 2011** (c)		**Structure Plan proposals for 2001 to 2016** (d)	
	Dwellings	**(%)**	**Dwellings**	**(%)**	**Dwellings**	**(%)**	**Dwellings**	**(%)**
Areas of Economic Activity	39,700	(52)	16,070	(55)	42,000	(55)	37,900	(59)
Elsewhere	36,500	(48)	13,340	(45)	33,700	(45)	26,600	(41)
TOTAL	**76,200**		**29,410**		**75,700**		**64,500**	
Principal Urban Area			10,410	(35)	26,900(i)	(36)	28,150	(44)

(i) Using the definition set out in the pre-EIP Changes document

Figure 13: Actual Housing Completions 1995 – 2002 compared with Structure Plan Housing provision 1995 to 2011 and 2001 to 2016 and completions 1981 – 1995.

Assessment of the dwelling provision and dwelling commitments at 2002

2.17 An assessment of the distribution of existing provision and the development provision required by Devon Structure Plan to 2016 illustrated in **Figure 14** shows the distribution of provision by Districts and Structure Plan sub areas. The commitments information in column (c) is based on dwelling completions and local plan provisions at 2002.

Local Planning Authority (a)	Dwelling Provision 2001 – 2016 (b)	Commitments for the period 2001 to 2011 (2) (c)	Additonal provision required above that in current plans (d)
East Devon	**8,450**	**6,810**	**1,640**
Exeter AEA	4,000	3,020	980
Elsewhere	4,450	3,790	660
Exeter	**6,700**	**3,980**	**2,720**
Mid Devon	**5,850**	**4,960**	**890**
North Devon	**4,700**	**3,900**	**800**
Barnstaple/Bideford AEA (1)	2,800	2,190	610
Elsewhere (1)	1,900	1,710	190
Plymouth	**8,500**	**6,080**	**2,500**
South Hams	**8,850**	**7,330**	**1,520**
Plymouth AEA	5,000	3,960	1,040
Elsewhere	3,850	3,370	480
Teignbridge	**7,500**	**6,225**	**1,275**
Torbay/Newton Abbot AEA	3,100	2,250	850
Exeter AEA	300	130	170
Elsewhere	4,100	3,850	250
Torbay AEA/PUA	**4,300**	**3,433**	**867**
Torridge	**5,300**	**4,470**	**830**
Barnstaple/Bideford AEA (1)	3,200	2,650	550
Elsewhere (1)	2,100	1,820	280
West Devon	**3,450**	**3,050**	**400**
Dartmoor National Park	**900**	**620**	**280**
DEVON TOTAL	**64,500**	**50,840**	**13,660**

(1) Indicative distribution of dwellings in North Devon and Torridge not previously specified in Pre-Examination in Public Changes Policy ST17

(2) Includes completions in 2001/02, dwellings under construction, planning permissions and Local Plan allocations to 2011 that are currently in the process of preparation at least to First Deposit stage (as at March 2002).

Figure 14: Indicative Distribution of Existing Commitments, Local Plan Provisions to 2011, and Additional Needs to 2016 – Districts (as at March 2002)

2.18 The provision for the **Areas of Economic Activity** derived from Figure 14 is set out in **Figure 15** below. About 75% of the additional provision to be provided in Devon in the period 2011 to 2016 is proposed to be accommodated in the four AEA's, with provision of between 3000 and 4000 dwellings in the Exeter and Plymouth AEA's.

Areas of Economic Activity (AEA) (a)	Dwelling Provision 2001 – 2016 (b)	Commitments for the period 2001 to 2011 (2) (c)	Additional provision required above that in current plans (d)
Exeter AEA	**11,000**	**7,130**	**3,870**
Plymouth AEA	**13,500**	**10,040**	**3,460**
Torbay / Newton Abbot AEA	**7,400**	**5,700**	**1,700**
Barnstaple / Bideford AEA	**6,000**	**4,840**	**1,160**
TOTAL AEA's	**37,900**	**27,710**	**10,190**

Figure 15: Distribution of Existing Commitments, Local Plan Provisions to 2011, and Additional Needs to 2016 – AEA's

2.19 The anticipated contribution in the **Principal Urban Areas** from each of the Districts is set out in **Figure 16** below. About 80% of the provision within the AEA's is proposed within the PUA's.

Principal Urban Areas (a)	Dwelling Provision 2001 – 2016 (b)	Commitments for the period 2001 to 2011 (2) (c)	Additonal provision required above that in current plans (d)
Exeter PUA	**10,850**	**7,010**	**3,840**
Exeter	6,700	3,980	2,720
East Devon	3,900	2,900	1,000
Teignbridge	250	130	120
Plymouth PUA	**13,000**	**9,590**	**3,410**
Plymouth	8,500	6,080	2,420
South Hams	4,500	3,510	990
Torbay PUA	**4,300**	**3,450**	**840**
Torbay	4,300	3,430	860
South Hams	0	20	-20
TOTAL PUA's	**28,150**	**20,056**	**8,090**

Figure 16: Distribution of Existing Commitments, Local Plan Provisions to 2011, and Additional Needs to 2016 – PUA's

Employment Land

2.20 At this stage it is not possible to give a comprehensive picture of employment land development in the County because of variations in the data available from the District Councils. The latest data available on what has been built and committed, illustrated in **Figure 17** indicates that about 65ha still need to be defined in Local Plans reviews to 2016 for employment purposes.

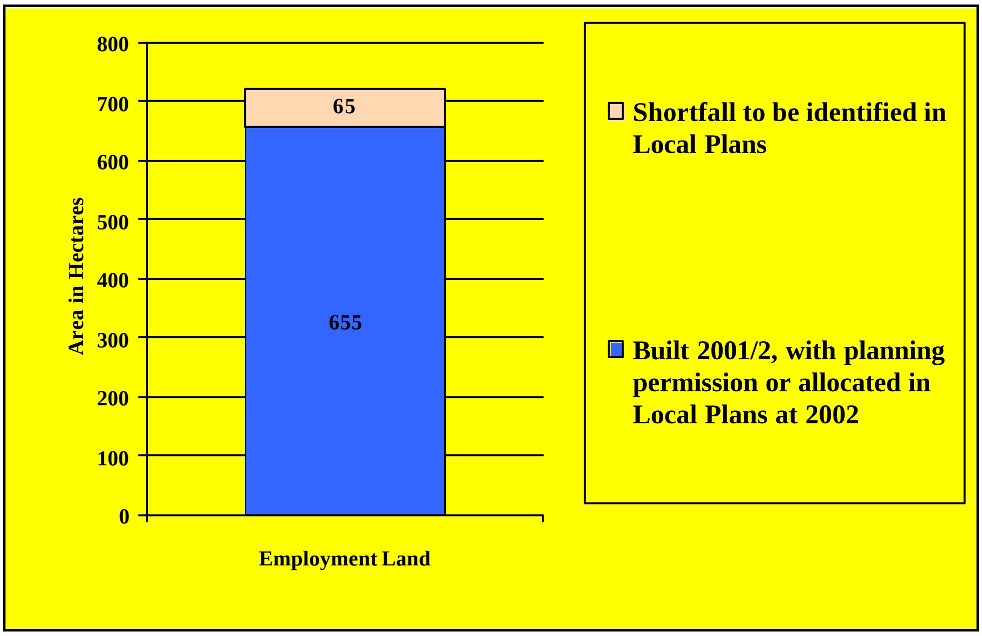


Figure 17: Employment land Commitments and Provision to 2016

2.21 Existing commitments will allow for site choice, flexibility and scope to accommodate differing requirements over the period of the Plan, a range of employment sites capable of accommodating a variety of employment needs ranging from inward investment through to the expansion of existing firms. The fact that not all employment land is interchangeable to meet different firms' needs has to be recognised, as does the fact that unless the land is immediately available then the opportunity for attracting investment may be lost. It should also be noted that not all the provision in the Structure Plan is expected to be developed within the Plan period. The additional 65 ha reflects the increased provision for employment development at the Exeter PUA, Plymouth PUA, Barnstaple and Newton Abbot identified in the Pre-Examination in Public Changes (published Jan 2003) principally for Strategic Development Sites to be identified and safeguarded for major investment proposals.

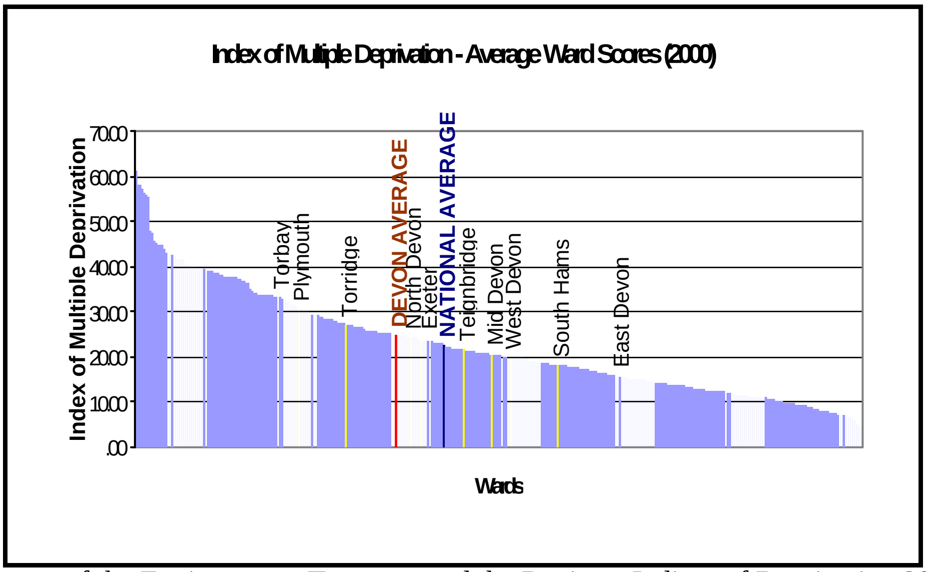
2.22 Not all types economic development requires the take-up of employment land, however economic changes within Devon have resulted in a fall in unemployment rates.

3. Deprivation in Devon

Index of Multiple Deprivation

3.1 The Index of Multiple Deprivation [IMD] is a measure which combines data on education, employment, income, health, housing and accessibility. Scores are ranked to show the relative degree of deprivation of any ward in England.

3.2 Devon as a whole performs slightly worse than the National Average, with Teignbridge, Mid Devon, West Devon, South Hams and East Devon being slightly higher than the National Average. However, Exeter, North Devon, Torridge, and in particular Plymouth and Torbay are below the National Average. **Figure 18** shows the average for wards within each District relative to all wards in England.



(Source Department of the Environment, Transport and the Regions, Indices of Deprivation 2000)

District	Average of ward scores
Torbay	33.16
Plymouth	30.35
Torridge	26.87
Devon Average (inc P&T)	24.70
North Devon	24.38
Exeter	23.82

District	Average of ward scores
National Average	22.45
Teignbridge	21.51
Mid Devon	20.46
West Devon	19.99
South Hams	18.16
East Devon	15.64

Figure 18: Index of Multiple Deprivation - Average Ward Scores

3.3 However, there are significant variations across the County. Of the 10% most deprived wards nationally there are 7 wards in Devon – in Plymouth, Exeter, Torridge and North Devon (see **Figure 19**).

Local Authority	Ward	Index of Multiple Deprivation Rank
Plymouth	**St Peter**	249
Exeter	**Wonford**	458
Torridge	**Westward Ho!**	509
North Devon	**Trinity**	651
Plymouth	**Ham**	660
Plymouth	**Budshead**	678
North Devon	**Ilfracombe Central**	710

Source: Department of the Environment, Transport and the Regions, Indices of Deprivation 2000
Note: out of 8,414 wards nationally. A rank of 1 being the most deprived and 8414 the least deprived.

Figure 19: IMD 2000: Rank of ward index - Shows the bottom 10% nationally in Devon

3.4 **Figure 20**, based on ward level data, clearly highlights the urban and coastal resort 'hotspots' in Devon, with significant concentrations of deprivation in Torbay, Plymouth, Exeter, North Devon, and smaller clusters associated with coastal resorts, notably Dawlish, Teignmouth, Westward Ho!/Bideford, Ilfracombe/Combe Martin.

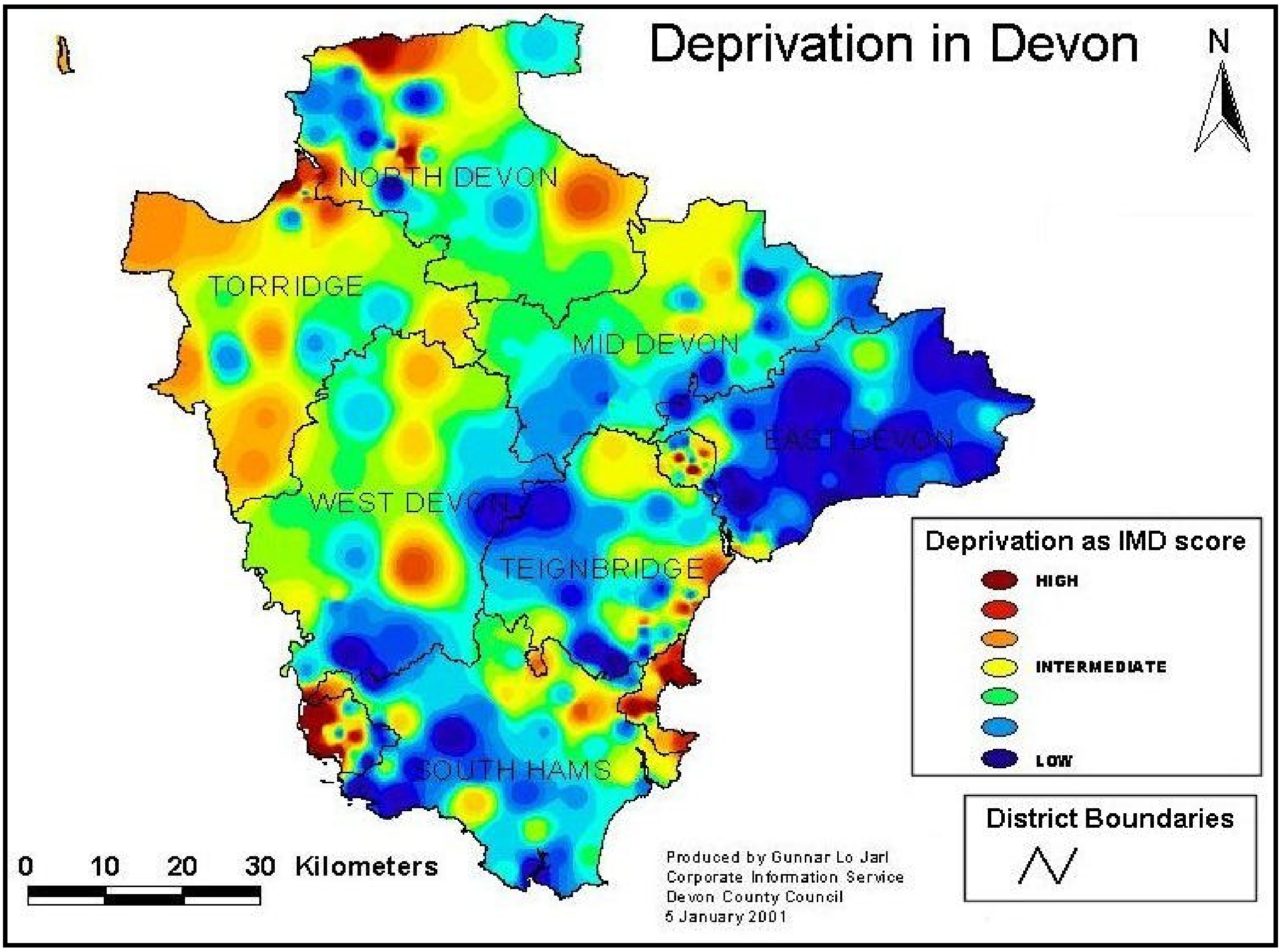


Figure 20: Deprivation in Devon Map

4. Conservation

4.1 The environment of Devon makes a major contribution to the quality of life of its residents and is one of its principal assets. The Structure Plan aims to conserve and enhance the quality of Devon's environment and its local distinctiveness.

Landscape

4.2 The **quality of Devon's landscape** has been widely acknowledged, both as a whole and in terms of certain identified areas. This has led to about half of the County being designated for the quality of its landscape.

4.3 **National Parks**, **Areas of Outstanding Natural Beauty** (AONBs), **Areas of Great Landscape Value** (AGLV) and Coastal Preservation Areas (CPAs) are areas where only limited development is anticipated, such as that which meets a specific local need. Local Planning Authorities need to ensure that only permissible exceptions to development occur in these areas. The areas designated and the distribution of the areas are illustrated in **Figures 21 and 22.**

4.4 The **Coastal Preservation Area** (CPA), most of which is within AONBs, is not a landscape policy designation as such. However, the CPA represents a finite resource both in County and National terms where types of development are strictly limited to that which needs to be located in the CPA.

4.5 Local Plans have progressively considered the detailed boundaries of the Areas of Great Landscape Value and Coastal Preservation Areas since 1995.

Designation	Area in sq miles	(sq kms)	% of Devon
National Parks	**442**	**(1144)**	**17**
Dartmoor National Park	365	(945)	14
Exmoor NP (in Devon)	77	(199)	3
Area of Outstanding Natural Beauty	**497**	**(1133)**	**19**
East Devon AONB	103	(267)	4
North Devon AONB	66	(171)	3
South Devon AONB	128	(332)	5
Blackdown Hills AONB	160	(259)	6
Tamar/Tavy AONB (in Devon)	40	(104)	2
Area of Great Landscape Value	**388**	**(1005)**	**15**
13 Areas of Great Landscape Value	388	(1005)	15
Total Landscape Areas in Devon	**1327**	**(5421)**	**51**
Total Area of Devon	**2588**	**(6703)**	

Figure 21: Table of Landscape Policy Areas

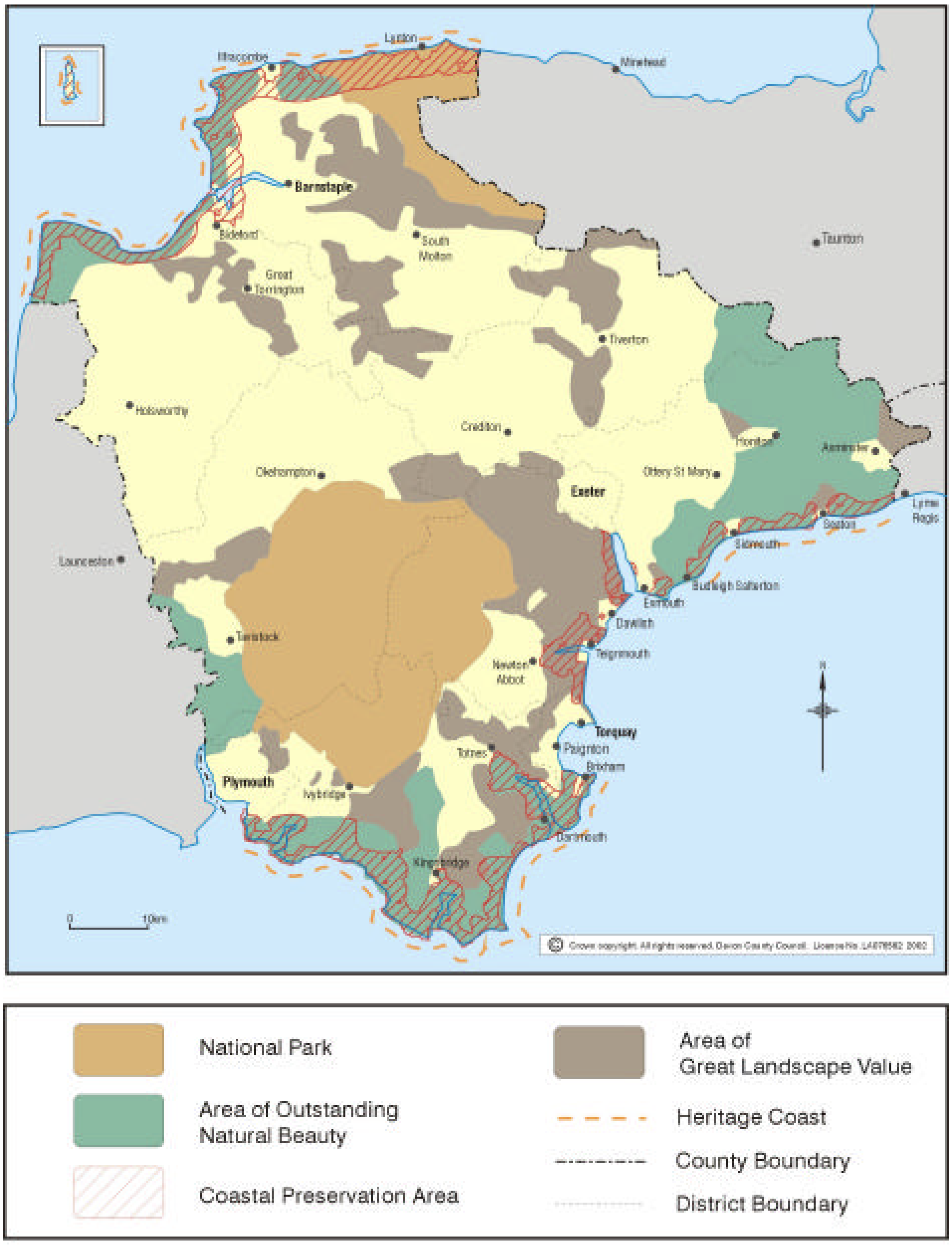


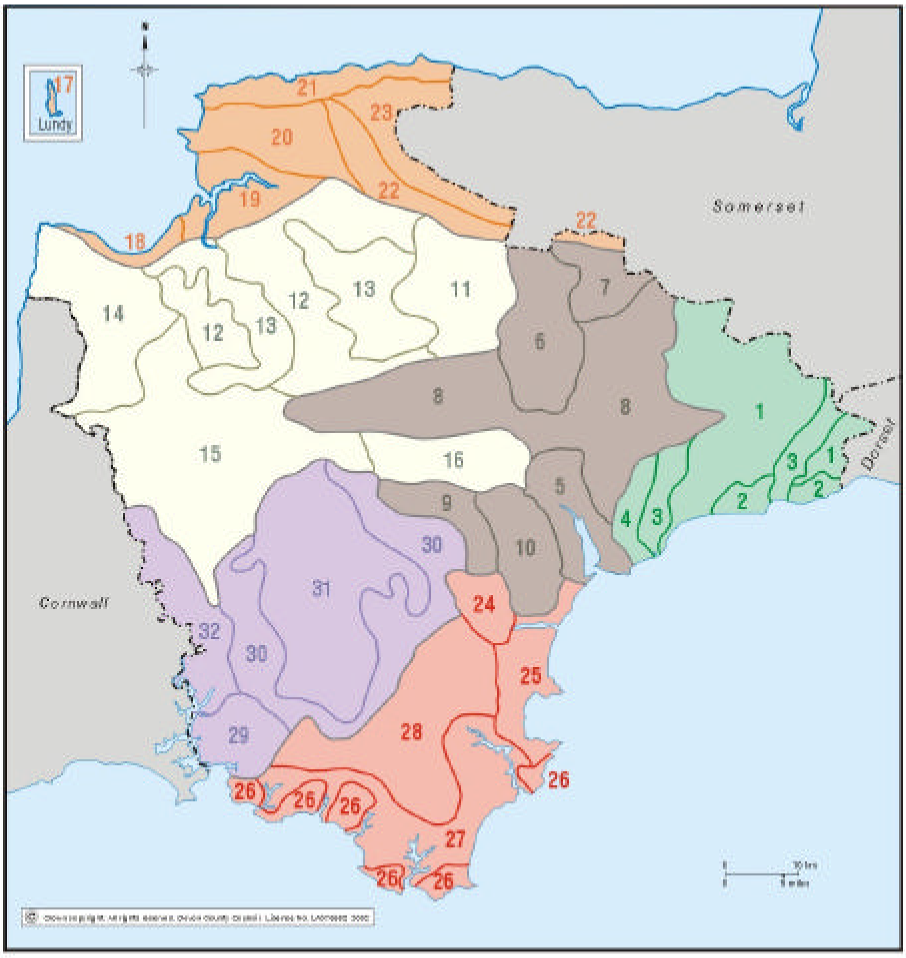
Figure 22: Map of Landcape Policy Areas (Map 10 in Deposit Draft)

Landscape Strategy

4.6 Devon County Council is in the process of preparing a Landscape Strategy for Devon in three stages as set out in **Figure 23.**

Stage 1.	May 2002	An Appraisal of Devon's Landscape published. The Landcape Character Zones identified in the Strategy are illustrated in **Figure 24**
Stage 2	Late 2003/early 2004	Policies / Priorities and Proposals document about the management measures to conserve and enhance the themes and Zones
Stage 3	Interim version Autumn 2003	Action Plan concentrating on specific actions to achieve the Policies and Proposal

Figure 23: Preparation of the Devon Landscape Strategy (anticipated programme)



Eastern Devon
1. Greensand Ridges
2. Coastal Chalk Plateaux
3. Axe and Otter Valleys
4. Pebble Bed Heaths

Central Devon
5. Exeter and Estuary Fringe
6. Exe Valley and Environs
7. Bampton and Beer Downs
8. Mid Devon Farming Belt
9. Teign Valley
10. Haldon Ridge

Culm Measures
11. Witheridge - Rackenford Moor
12. High Culm Ridges
13. Taw and Torridge River Systems
14. Hartland and Atlantic Coast Interior
15. Broadbury and Western Devon Ridges
16. Tedburn St Mary Area

Northern Devon
17. Lundy
18. Clovelly Coast
19. Taw - Torridge Estuary
20. North Devon Downs
21. Exmoor and North Devon High Coast
22. Exmoor Fringe
23. Exmoor Upland

Southern Devon
24. Bovey Basin
25. Tourist Riviera
26. South Devon Coastal Plateaux
27. Ria Coastline
28. Under Dartmoor

Dartmoor and West Devon
29. Plymouth City, Estuary and Environs
30. Dartmoor - Enclosed
31. Dartmoor - High Moor
32. Tamar and Tavy Valleys

Figure 24: Landscape Character Zones (Map 9 in Deposit Draft)

5. Transport

5.1 Transportation Planning in Devon, as elsewhere, is going through a period of transition. The traditional objective of improving personal mobility through the enhancement of the highway network is being replaced by one based upon the development of a balanced integrated transport system which seeks to promote the use of alternatives to the private car.

5.2 Traffic data is collected on a regular basis, and is supplemented by special projects and other data from agencies including the Highways Agency. *"Travel and Transportation Statistics"* for Devon County Council are published regularly in conjunction with the *"Devon on the Move - Devon Local Transport Plan"*. Recent figures include:

- Annual Car Registrations in Devon over the last 10 years vary between 20,000 to 25,000 registrations (source DTLR (DVLA))
- Cars owned by residents in Devon increased from 414,900 in 1991 to 528,900 in 2001, i.e. a 27% increase over 10 years or an annual average increase of over 11,000 cars (source 2001 Census).
- Traffic in Devon grew by 2.4% between 2000 and 2001 – much of this increase was on trunk roads
- Traffic crossing the East Devon Screen line grew by 3% between 2000 and 2001.

Movement of People and Goods

5.3 Personal travel and freight are dominated by the reliance on the road network; about 90% of all people journeys and 80% of freight journeys are made by road. Although vehicle travel provides significant opportunities for mobility and freedom there are negative impacts of increasing traffic growth on global warming, noise and air pollution, damage to health, congestion etc. These are of concern and dealt with in more detail elsewhere in this report.

5.4 The average distance travelled by people in the South West is about 7,200 miles per year. Of this total, 89% is by car, 7% by public transport, 3% by walking and 1% by pedal cycle, as illustrated in **Figure 25**. In total about 97% of travel is road based. An equivalent breakdown for people in Devon is not available.

5.5 An analysis of the distance for each trip indicates that about 50% of all trips are less than 2 miles and 70% of the trips are less than 5 miles.

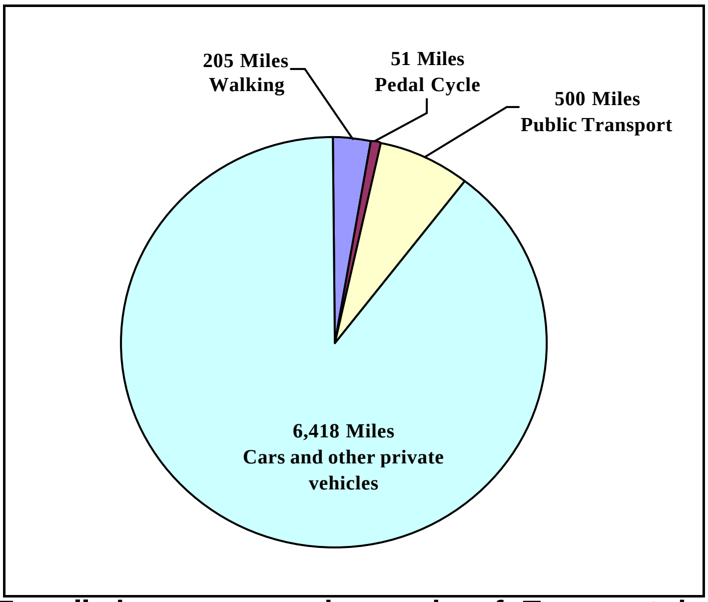


Figure 25 : Miles Travelled per person by mode of Transport in 1994 (South West) (Source: National Travel Survey DETR)

Buses

5.6 Public transport provides for short, medium and long distance travel, with buses being best suited to short and medium distances and rail and express coaches for medium to long journeys. Some of the implications of bus use are set out in the following paragraphs.

5.7 There has been a significant change in level of bus travel - travel by bus nationally has been declining. In the early 1950's bus was the dominant passenger transport mode and now accounts for only 6% of all passenger kilometres in Great Britain. This decline is illustrated in **Figure 26.** Bus travel currently represents about two thirds of all public transport journeys, which is well over 4 billion bus journeys a year. The Government in their paper titled 'From Workhorse to Thoroughbred: A better role for Bus Travel' (published March 1999) makes it clear that the bus has a crucial part to play in future transport policy.

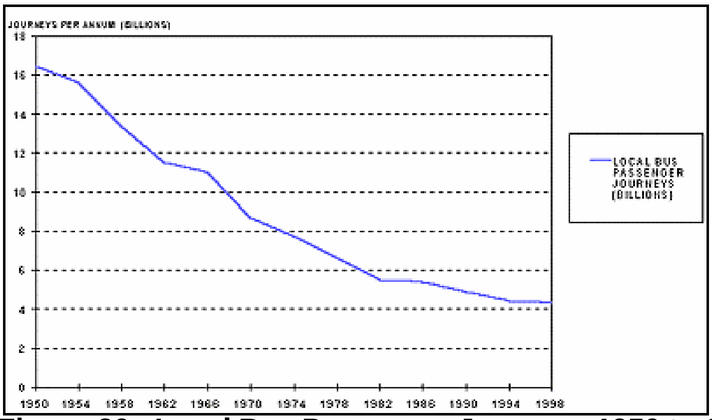


Figure 26: Local Bus Passenger Journeys 1950 to 1998

Rail

5.8 Rail travel is particularly important to Devon. It offers a sustainable mode for linking Devon to the rest of England, combating peripherality of the South West and is a key component of the integrated transport strategy for local journeys within Devon. The existing and proposed rail network is illustrated on **Figure 27**.

Figure 27: Devon Rail Network

5.9 The rail industry has changed significantly since privatisation in 1990's. Network Rail own and manage the rail infrastructure. The Shadow Strategic Rail Authority (SSRA) sets the minimum service levels (Public Service Requirements) in the various rail franchises. Train Operating Companies (TOCs) enhance the PSR level on a commercial basis.

5.10 Devon County Council, Plymouth Council and Torbay Council have a significant input to the planning and development of rail services in Devon. The Councils are in regular dialogue with the Shadow Strategic Rail Authority (SSRA), Network Rail and Train Operating Companies (TOCs) and seek to influence the development of the rail network in a positive way through a partnership approach in respect of the management of the network, franchise planning and renewal, timetabling, and public consultation.

Travel to work

5.11 In Devon the percentage of people travelling to work by car between 1991 and 2001 has remained virtually the same. In 1991, 62.1% of people in employment travelled to work by car, and in 2001 62.5% of people in employment travelled to work by car with just under 7% travelling as car passengers. This implies that at least 90% of people who drive to work travel on their own.

5.12 Proportionally fewer people walk to work in 2001 compared to 1991, and the level of bicycling to work remained the same. The proportion of people working at home increased from 8% of the working population to 12% in 2001. This is illustrated in **Figure 28**.

Mode	1991 (%)	2001 (%)
People who work from home	8.2	12.1
Public transport	6.6	6.5
Motorcycle, scooter; moped	2.6	1.7
Car or van	54.4	55.8
Passenger in a car or van	7.7	6.7
Cycle to work	2.3	2.3
Walk to work	15.1	13.9
Other	3.2	10.9

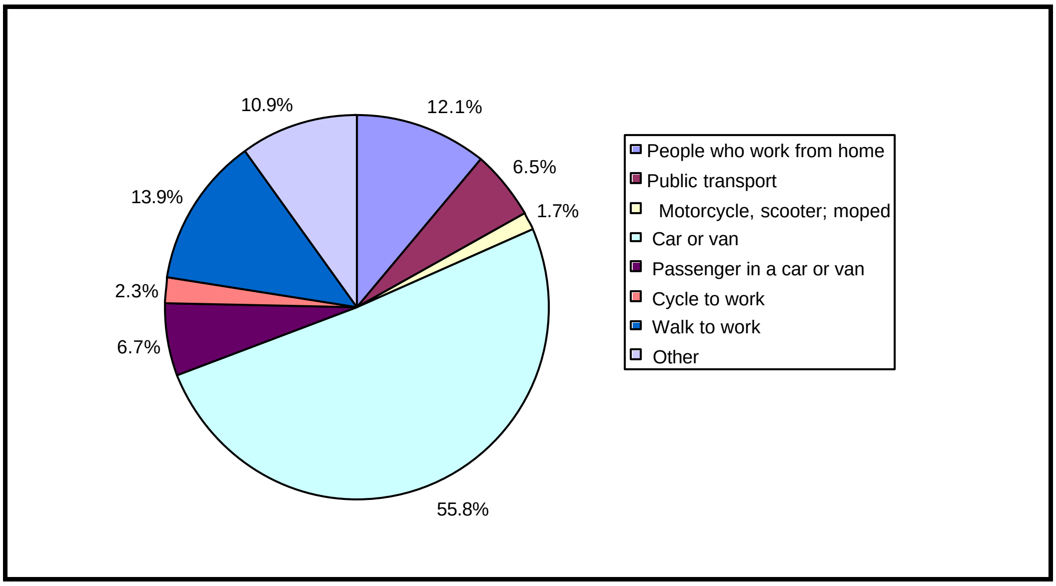


Figure 28: Mode of Transport for Travel to Work

Traffic Volumes

5.13 Traffic volumes in Devon since 1986 (based on the East Devon Screenline) have increased by nearly 55%, which is significantly above the rate of national growth. This increase is illustrated in **Figure 29**.

Further information can be found at: http://www.devon.gov.uk/dris/trans/dv_travo.html

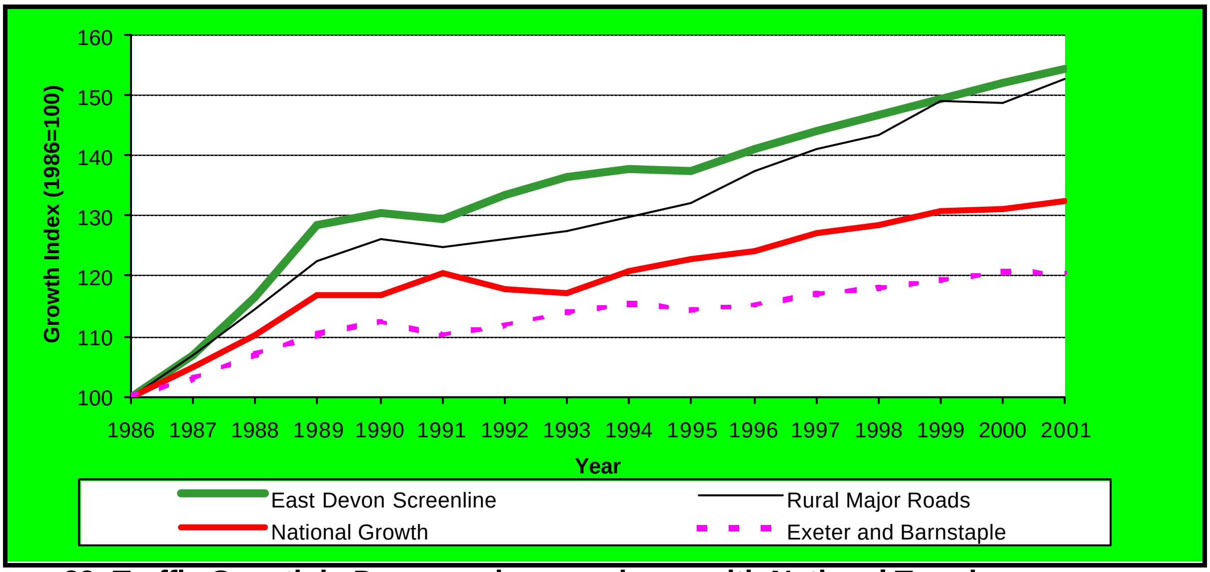


Figure 29: Traffic Growth in Devon and comparisons with National Trend

5.14 The distribution of the changes between 1996 and 1999 are illustrated in **Figure 30** and annual average daily traffic flows in 1999 are illustrated in **Figure 31**. Traffic volumes, if unrestricted, are expected to continue to increase. Trends in personal travel have moved towards a greater use of the private motorcar for the majority of trips. The average length of trips has also increased from 4.7 miles in 1972/73 to 6.4 miles in 1996/98.

Figure 30: Illustrative 5 year traffic growth 1995 to 2000

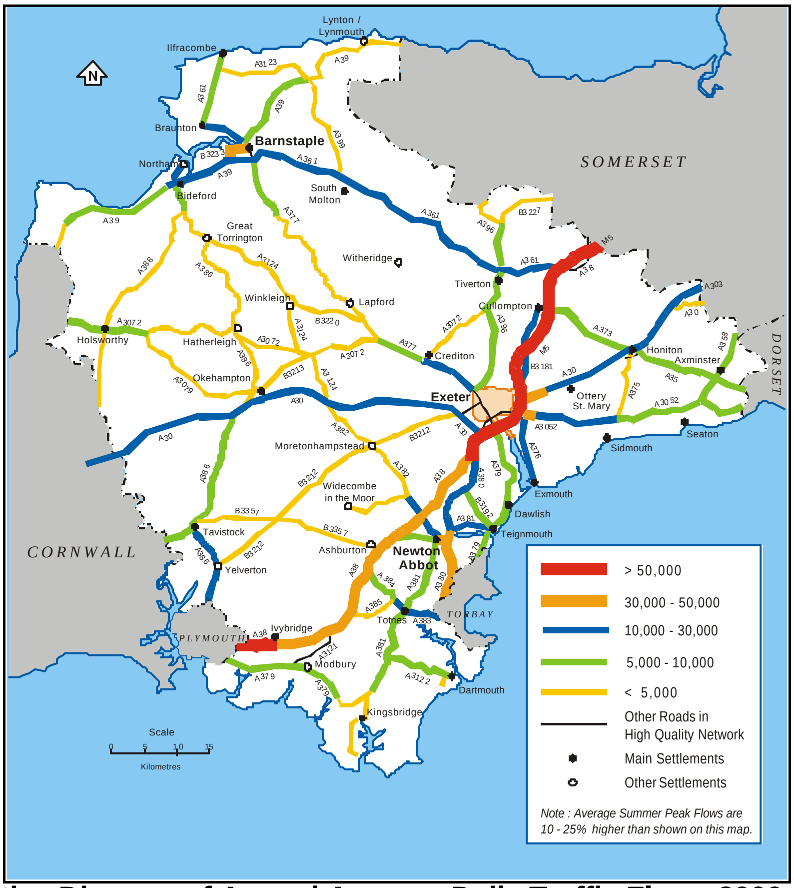


Figure 31: Illustrative Diagram of Annual Average Daily Traffic Flows 2000

5.15 Over the last five years some success has been achieved in containing the growth of traffic in the urban areas through traffic management and improvements to walking, cycling and public transport, helping to reduce or minimise the environmental impacts of transportation on the environment. The initiatives and data in relation to walking, cycling, public transport, highways, freight, ports and airports are set out in more detail in *"Devon on the Move - Devon Local Transport Plan"* and the accompanying *"Travel and Transportation Statistics"*.

Management of Travel Demand

5.16 The Devon Structure Plan Authorities are committed through the Structure Plan and Local Transport Plans to policies that manage the demand for travel and in particular the demand for travel by private car by:

a) Promoting awareness through the Travelwise campaign, Green Travel Plans, School Travel Plans, and Employers Forums.

b) Actively pursuing a hierarchy of modes to set scheme priorities and promote the safe use of the most sustainable forms of transport, having regard to the hierarchy of: 1) Walking, 2) Cycling, 3) Public Transport, and 4) Private Vehicles.

c) Policy development reflecting the need for road traffic reduction through transportation and planning demand management.

5.17 Following the submission of Local Transport Plans (covering the period 2001 - 2006) for Devon, Plymouth and Torbay in July 2000, the Government announced in December 2000 the following indicative settlements for capital funding of Integrated Transport and Highway Maintenance over the five -year period 2001 - 2006: Devon County Council £92.7m, Plymouth City Council £26.3m and Torbay Council £12.2m. In addition, the Government provisionally approved its support for the major scheme of construction of the Barnstaple Western Bypass, at an estimated cost of £30.4m.

6. Housing

Housing

6.1 The overall level of completions and their distribution are discussed in Sections 2.7 to 2.18 above.

Use of previously developed land (awaiting for updated information)

6.2 Policy S3 in the approved Structure Plan and Policy ST2 in the Deposit Draft to 2016 recognise the need to minimise the loss of greenfield sites to built development and propose that priority should be given to the development of land within existing built up areas, particularly land available for redevelopment.

6.3 Government Planning Policy Guidance on Housing (PPG3) places emphasis on 'maximising the re-use of previously developed land and empty properties and the conversions of non-residential buildings for housing in order to re-develop land within existing built up areas' (often referred to as development on 'brownfield' sites). The national target is that by 2008, 60% of additional housing should be on previously-developed land and through conversions of existing buildings (PPG3 para 23). For the South West, the Regional Planning Guidance (published September 2001) requires at least 50% of new housing provision on previously developed land (including the conversions of existing buildings). Government advice titled "Tapping the potential – Assessing urban housing capacity: Towards better practice" was published in December 2000 which provides advice on determining the potential capacity of previously developed and other land.

6.4 Current data available from eight Districts for the period 1995 to 1999, illustrated in **Figure 32**, indicates that in Devon an average of about 50% of new dwelling occurs as a result of conversions or on previously developed land (i.e. a net gain of about 6,400 dwellings over the four year period). **Figure 32** also illustrates that there is a wide variation between the Districts. A closer consideration of the annual figures in any one District also illustrates a fairly wide variation between individual years.

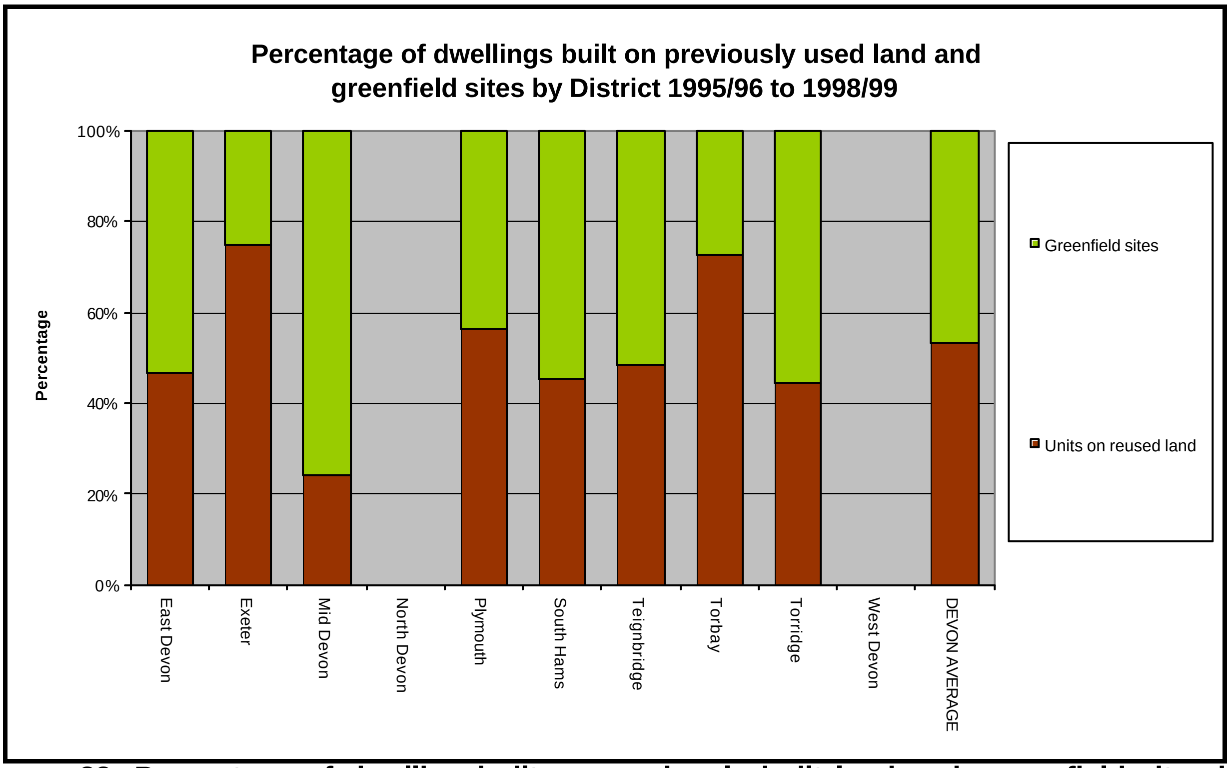


Figure 32: Percentage of dwelling built on previously built land and green field sites by District 1995/96 to 1998/99

6.5 In terms of the change in the proportion of dwellings resulting from conversions and the development of brownfield sites, **Figure 33** illustrates an increase to 56% in 1997/98 and a fall to 49% in 1998/99. At this stage it is too early to draw any conclusion about the use of previously developed land and figures will need to be verified in accordance with the requirements of PPG3 in subsequent monitoring reports and compared with the additional provision which will also be made in Local Plan Reviews.

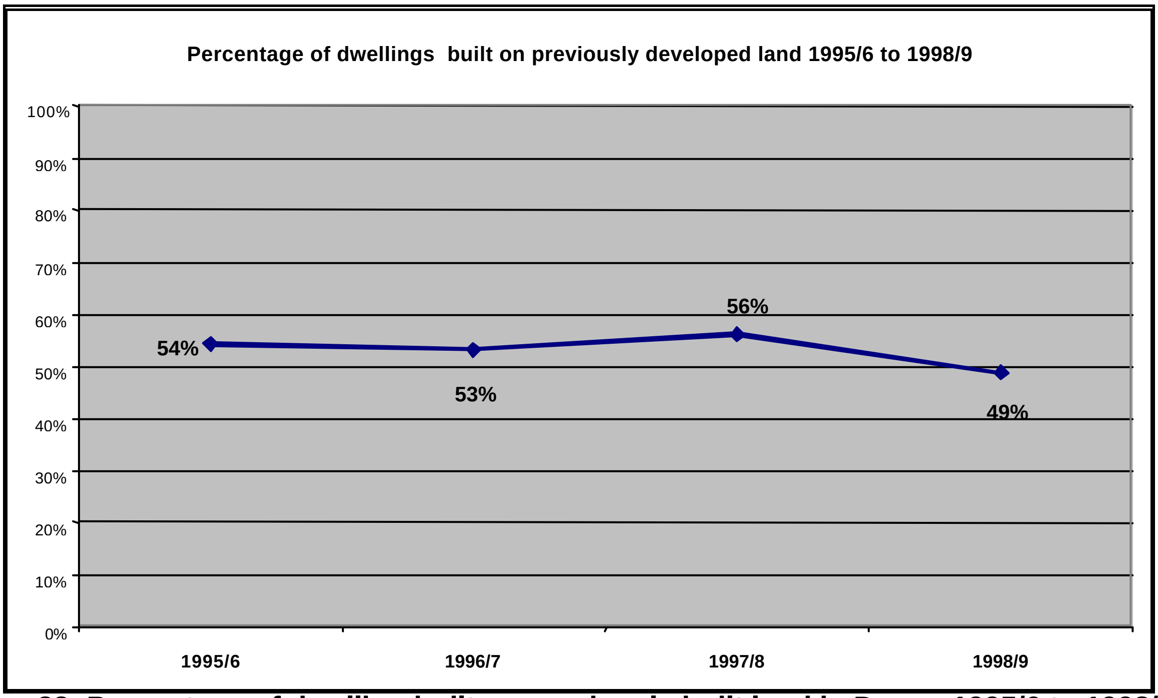


Figure 33: Percentage of dwelling built on previously built land in Devon 1995/6 to 1998/99

House prices

6.6 The HM Land Registry monitors average prices for all house sales, including those without mortgages. The data for Devon (including Plymouth and Torbay) indicates that the cost of houses in the 1995/96 period was relatively stable, since when it has gradually increased over the period to 2002. This change is illustrated in **Figure 34**, which also illustrates for example that prices of detached houses have increase more rapidly than other types of houses.

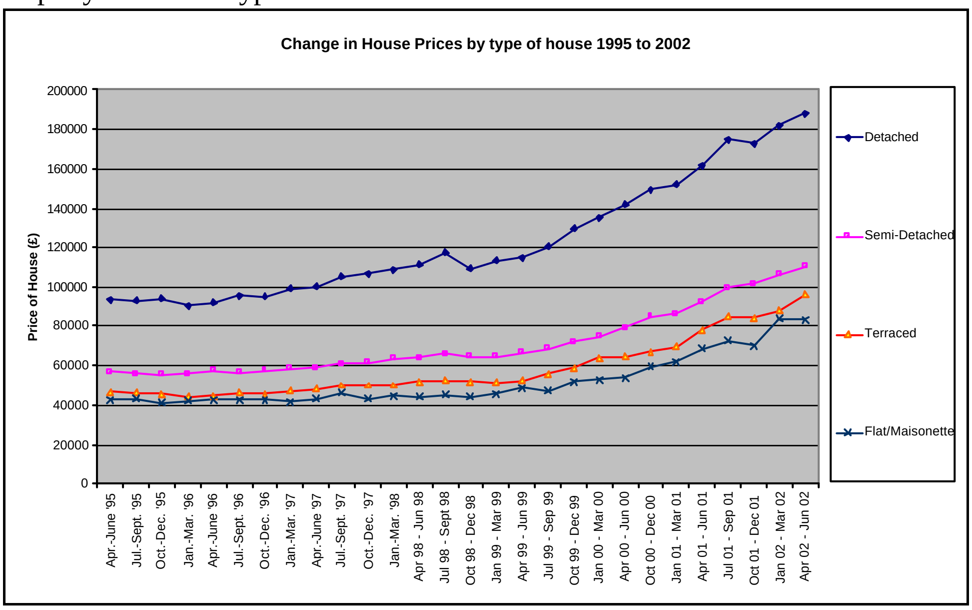


Figure 34: Change in house prices by type of house 1995 to 2002

Further information can be found at: http://www.devon.gov.uk/dris/house/ndv_ahp.html

6.7 However there are considerable variations in average house prices across the Districts of Devon. An index of average house prices over the last five years, illustrated in **Figure 35,** indicates this differential - for example average house prices in South Hams District are about 25% above the average for the County whereas average house prices in Plymouth are about 30% below the average for Devon.

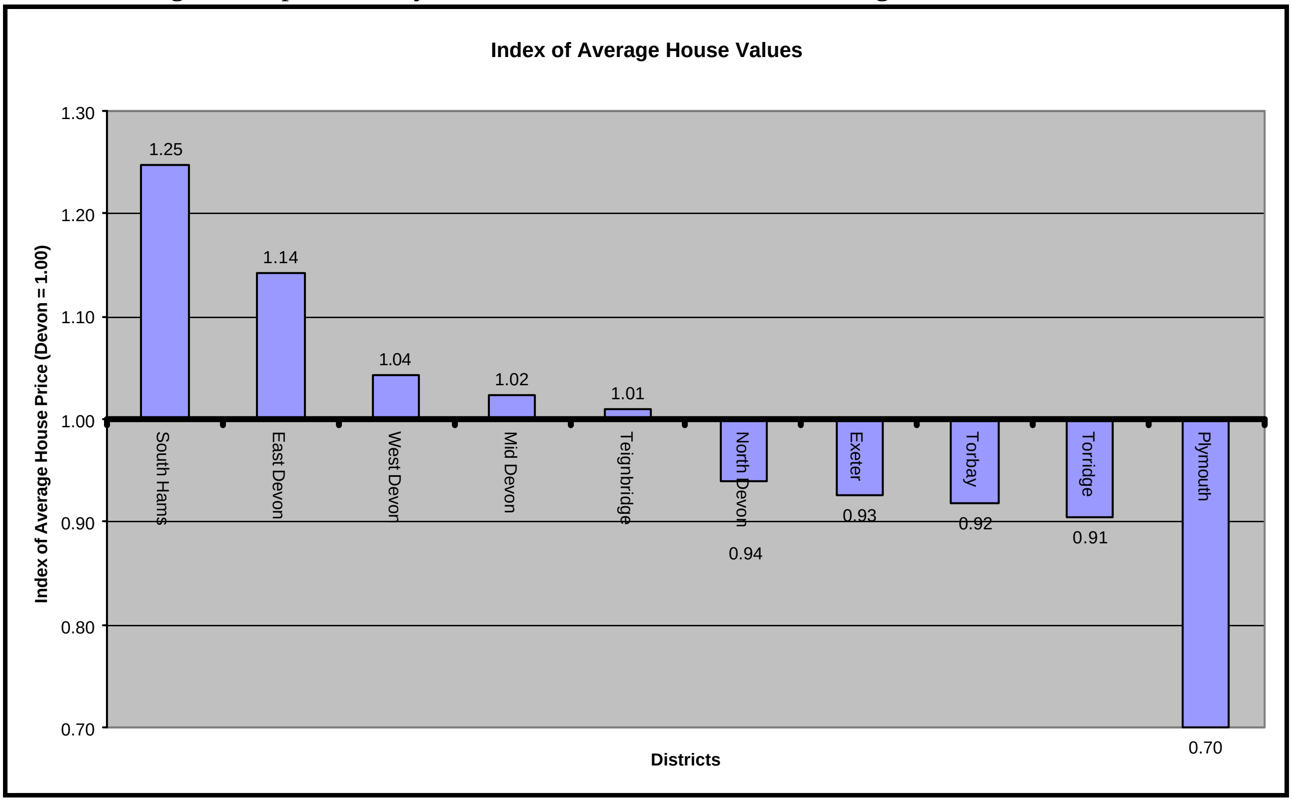


Figure 35: Index of average house values by District for 1995 to 2000 period

Further information can be found at: http://www.devon.gov.uk/dris/house/dv_hspr8.html

6.8 Other housing information - about housing supply (e.g. sales, affordable housing), dwelling characteristics (variety of type, size and density) and provision for gypsies will be considered in more detail in future monitoring reports.

New Communities

6.9 The Structure Plan 2001 to 2016 Deposit Draft (July 2002) proposals make provision for a new community of at least 3,500 dwellings within South Hams and a new community of at least 3,000 dwellings within East Devon in the period to 2016. East Devon District Council and South Hams District Council are currently assessing the detailed implications of these proposals. The new community proposals will be a matter for the District Councils to clarify in the preparation of their Local Plans.

6.10 The County Council, South Hams District Council and East Devon District Council have prepared advice titled ‘Sustainable Development Guidance’, to illustrate the vision and opportunities for sustainable design, construction and operation that need to be taken on board in development proposals in Devon.

7. Economy

Employment Land

7.1 The overall level of employment land development in Devon is discussed in Sections 2.20 – 2.22 above.

General Economic Situation

7.2 The overall aim of the Structure Plan is to ensure the economic well being of Devon by enabling the local economy to develop and improve in a sustainable way recognising Devon's specific economic assets.

7.3 Recent evidence from the latest (April 2000) Devon Quarterly Economic Review showed the economic situation for Devon as relatively good, but it also identified potential difficulty for some of Devon's industries - tourism and agriculture, in particular. Significant factors affecting Devon's economy in the immediate future will be the high value of the pound relative to European currencies and the impact of Foot and Mouth Disease outbreak in 2001.

Further information can be found at: http://www.devon.gov.uk/dris/economic/qrapr001.html

Gross Domestic Product (GDP) figures

7.4 Devon continues to lag behind the UK and SW Region in terms of GDP per Head. Figures for 1995 and 1998 show Devon having an index of 82 and 79 compared with the UK index of 100 for each year respectively (the second lowest in the Region after Cornwall and Isles of Scilly), while the corresponding index for the SW Region was 93 and 91.

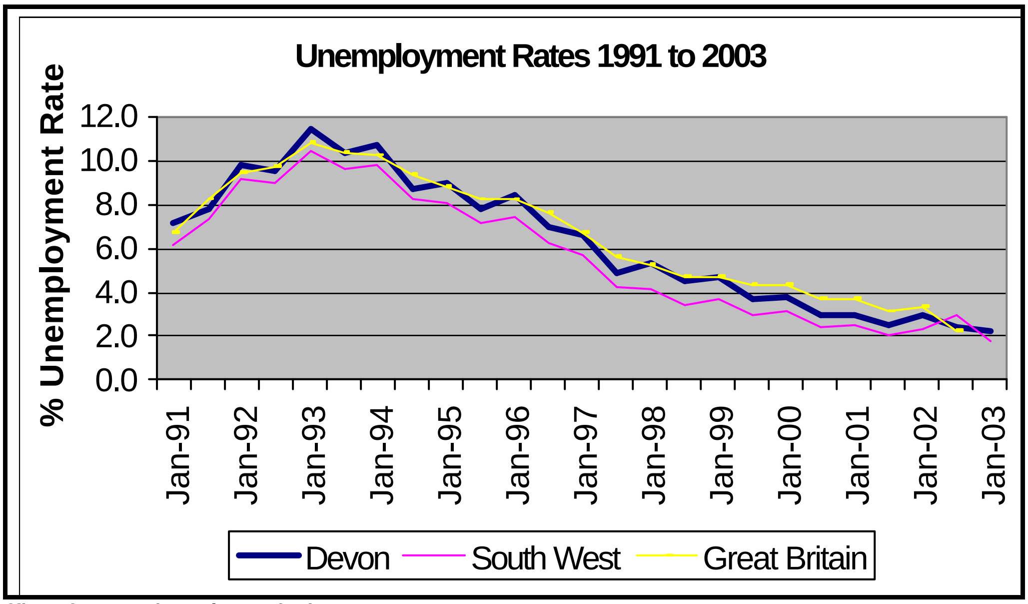
Earnings

7.5 The New Earnings Survey (Annual 2000) continues to show Devon wage rates as being among the lowest in Britain: average gross weekly earnings for full-time employees in Devon were £342.00 compared to the national average of £410.60.

Further information can be found at: http://www.devon.gov.uk/dris/economic/dv_earn.html

Unemployment figures

7.6 Unemployment in Devon has reflected the steady decline experienced both regionally and nationally since the peak of 1993 as shown in **Figure 36**. Over the five years to January 2003, the unemployment rate for Devon has more than halved and stood at 2.2% in January 2003, with a total of 14,291 claimants.



Source: Office for National Statistics

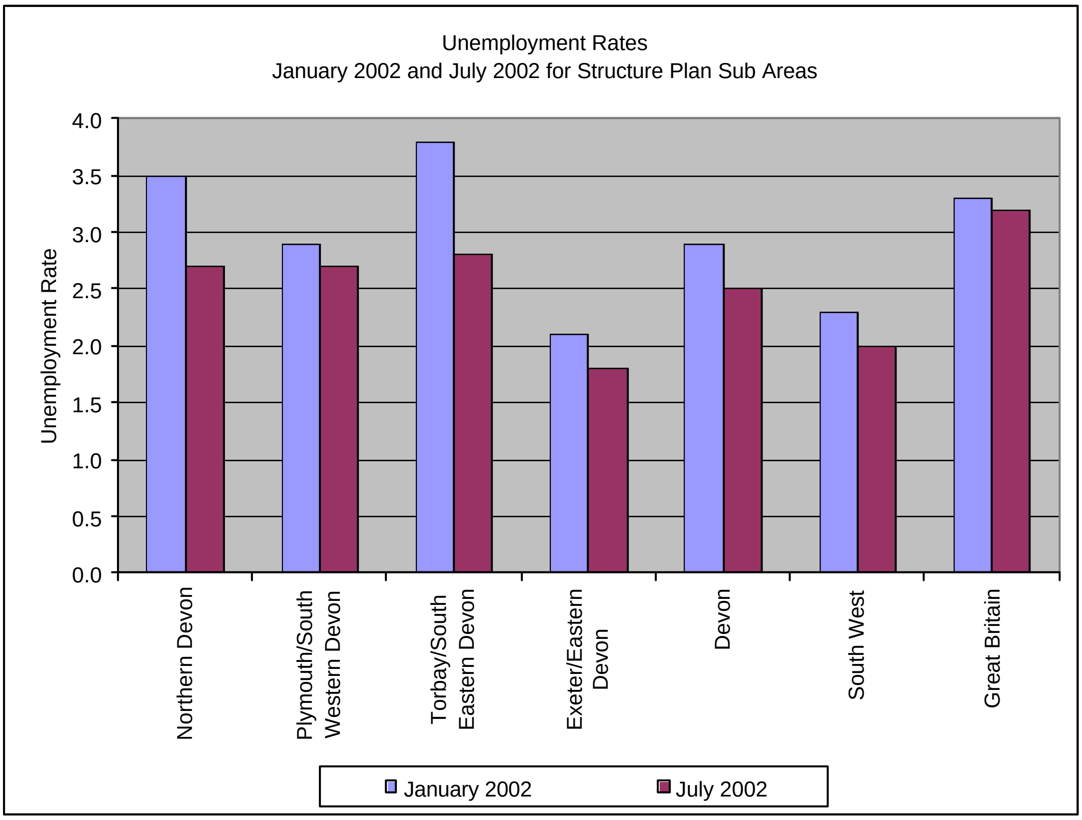
Figure 36: Unemployment Rate (%) 1991 to 2003 in Devon, South West and Great Britain

7.7 During this period rates for Devon have consistently remained above those for the South West Region. Generally rates for Devon have been higher than national rates in winter months, reflecting the more seasonal nature of unemployment in the County.

Structure Plan Sub Areas

7.8 Unemployment rates in the Structure Plan Sub Areas compared with rates for Devon, the South West and Great Britain are illustrated **Figure 37**. Plymouth, Torbay and Northern Devon Sub Areas all experience rates which are above rates for the County and the South West Region. It is important to note that:

- the Torbay Sub Area experiences the highest rate, which was 3.8% in January 2002 and 2.8% in July 2002.
- the Torbay and Northern Devon Sub Areas have the greatest seasonal swing in rates reflecting the importance of the holiday industry in these areas.
- the Plymouth and South West Devon Sub Area has the highest number of unemployed persons which, at just under 5,000 persons in July 2002, accounted for 39% of the total number of persons unemployed in the county.



	January 2002		July 2002	
Structure Plan Sub Areas	**Nos. Unemployed**	**% Unemployed**	**Nos. Unemployed**	**% Unemployed**
Exeter and Eastern Devon	3,064	2.1	2,708	1.8
Northern Devon	2,492	3.5	1,917	2.7
Plymouth and South Western Devon	5,330	2.9	4,967	2.7
Torbay and South Eastern Devon*	4,313	3.8	3,175	2.8
Devon	**15,199**	**2.9**	**12,767**	**2.5**
South West		**2.3**		**2.0**
Great Britain		**3.3**		**3.2**

Note * Torbay figures are for the unitary authority area

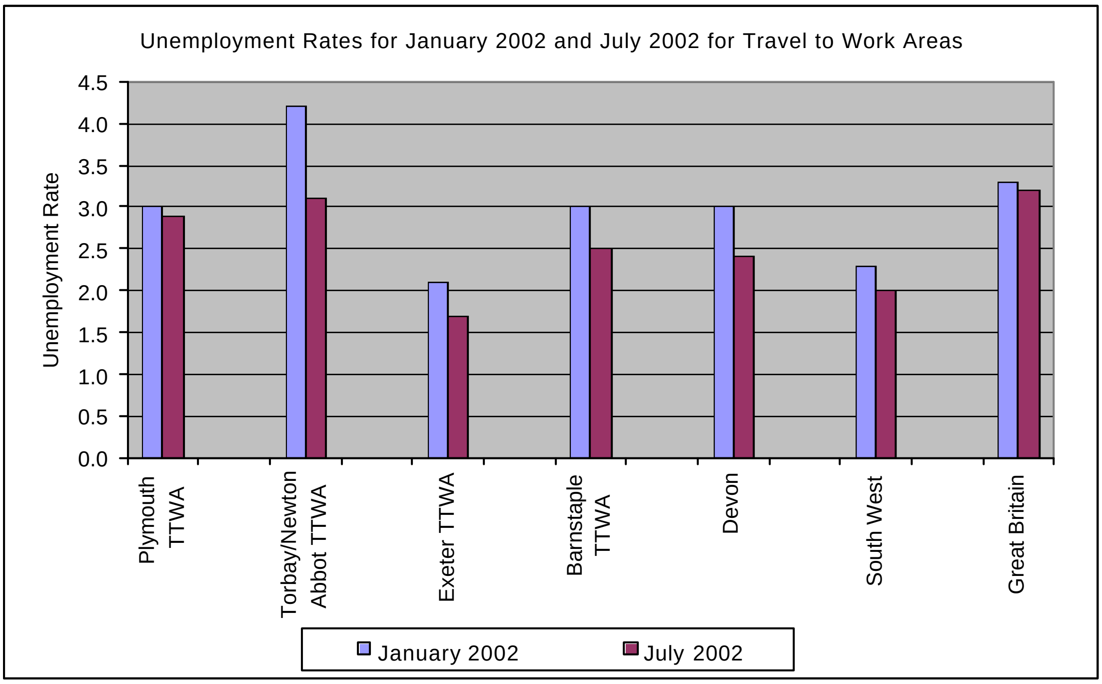
Figure 37: Unemployment Rates - January 2002 and July 2002 for Structure Plan Sub Areas

Principle Urban Areas and Sub Regional Centres

7.9 Unemployment data based on Travel to Work Areas is illustrated in **Figure 38**. This shows that:

- the Torbay/ Newton Abbot Travel to Work Area has significantly higher rates than the Devon, South West and Great Britain rates.

- the Exeter Travel to Work Area has the lowest rates, which are below county, regional and national rates.



Travel to Work Areas (TTWA)	January 2002		July 2002	
	Nos. Unemployed	% Unemployed	Nos. Unemployed	% Unemployed
Barnstaple	874	3.0	716	2.5
Exeter	2,958	2.1	2,490	1.7
Plymouth	5,073	3.0	4,802	2.9
Torbay*	3,081	5.8	2,184	3.9
Newton Abbot	804	2.2	642	1.8
Devon	**15,199**	**2.9**	**12,767**	**2.5**
South West		**2.3**		**2.0**
Great Britain		**3.3**		**3.2**

Note * Torbay figures are for the Unitary Authority area

Figure 38: Unemployment Rates in Travel to Work Areas for January 2002 and July 2002

7.10 The wards with unemployment rates above the Great Britain rate for January 2002 are illustrated in **Figure 39.** This demonstrates the concentrations of higher rates of unemployment in:

- the Principal Urban Areas particularly at Plymouth, and Torbay and the Sub Regional Centre of Barnstaple;
- the Coastal Resorts such as Ilfracombe, Combe Martin, Westward Ho! and Teignmouth, and
- outside the Principal Urban Areas, the preponderance of wards with higher unemployment in Northern Devon, in particular in Barnstaple, Bideford and coastal resorts and parishes.

Area	**% Unemployment January 2002**
Devon	**3.0**
South West	**2.3**
Great Britain	**3.3**
Ward	
East Devon	
Exmouth Littleham (coastal)	4.0
Exeter	
Polsloe (urban)	3.5
Rougemont (urban)	5.4
Whipton (urban)	3.6
Wonford (urban)	4.4
North Devon	
Bishops Tawton	4.7
Combe Martin (coastal)	4.7
Ilfracombe Central (coastal)	6.6
Ilfracombe East (coastal)	6.1
Ilfracombe West (coastal)	4.0
Instow (coastal)	5.7
Morthoe (coastal)	3.6
Barnstaple Longbridge (urban)	4.6
Barnstaple Newport (urban)	3.5
Barnstaple St. Marys (urban)	7.0
Barnstaple Trinity (urban)	6.4
Barnstaple Yeo (urban)	3.7
Plymouth	
Budshead (urban)	4.4
Efford (urban)	3.5
Ham (urban)	4.5
Honicknowle (urban)	3.8
Keyham (urban)	5.4
Mount Gould (urban)	4.3
St Budeaux (urban)	4.5
St Peter (urban)	8.5
Stoke (urban)	4.5
Sutton (urban)	5.8
South Hams	
Kingswear (coastal)	3.7
Totnes	4.6
Teignbridge	
Teignmouth East (coastal)	4.5
Torbay	
Blatchcombe (urban/coastal)	5.0
Cockington with Chelston (urban/coastal)	3.8
Coverdale (urban/coastal)	7.1
Ellacombe (urban/coastal)	5.4
Furzeham with Churston (urban/coastal)	4.7
Preston (urban/coastal)	3.9

St Marychurch (urban/coastal)	4.0
St Michaels with Goodrington (urban/coastal)	4.2
St Peters with St Marys (urban/coastal)	4.9
Shiphay (urban/coastal)	3.7
Tormohun (urban/coastal)	6.7
Torwood (urban/coastal)	7.5
Torridge	
Appledore East (coastal)	4.1
Appledore West (coastal)	4.9
Bideford East (urban)	4.2
Bideford North (urban)	7.2
Bideford South (urban)	3.8
Hartland Point (coastal/rural)	5.6
Northam Central (coastal)	3.4
Northam West (coastal)	4.3
Rolle (rural)	3.4
Torrington	4.1
Westward Ho! (coastal)	8.4

Figure 39 - Wards with Unemployment Rates above Great Britain Rate for January 2002

Tourism

7.11 Tourism is one of Devon's leading industries and makes a significant contribution to employment and the local economy. Devon continues to be dependent primarily upon the traditional long summer holiday, despite recent successes in extending the holiday season. During the past decade there has been a growing interest in developing tourism in rural areas which has compensated for a reduced market share in the traditional resorts.

7.12 According to County Council Surveys, about 31.3 million tourist nights were spent in Devon in 2001. This figure is equivalent to nearly 8 million visitors, and represents over one third of tourism to the South West and nearly 5% of England's tourism as a whole. In 1995 a figure of 31.5 million tourist nights were recorded, which increased to 34 million in 1997 but declined to 31.3 million in 2001, as illustrated in **Figure 40**. The number of tourist nights in 2001 was affected by the outbreak of Foot and Mouth Disease in 2001. It is too early to tell whether is the downward trend since 1999 will continue.

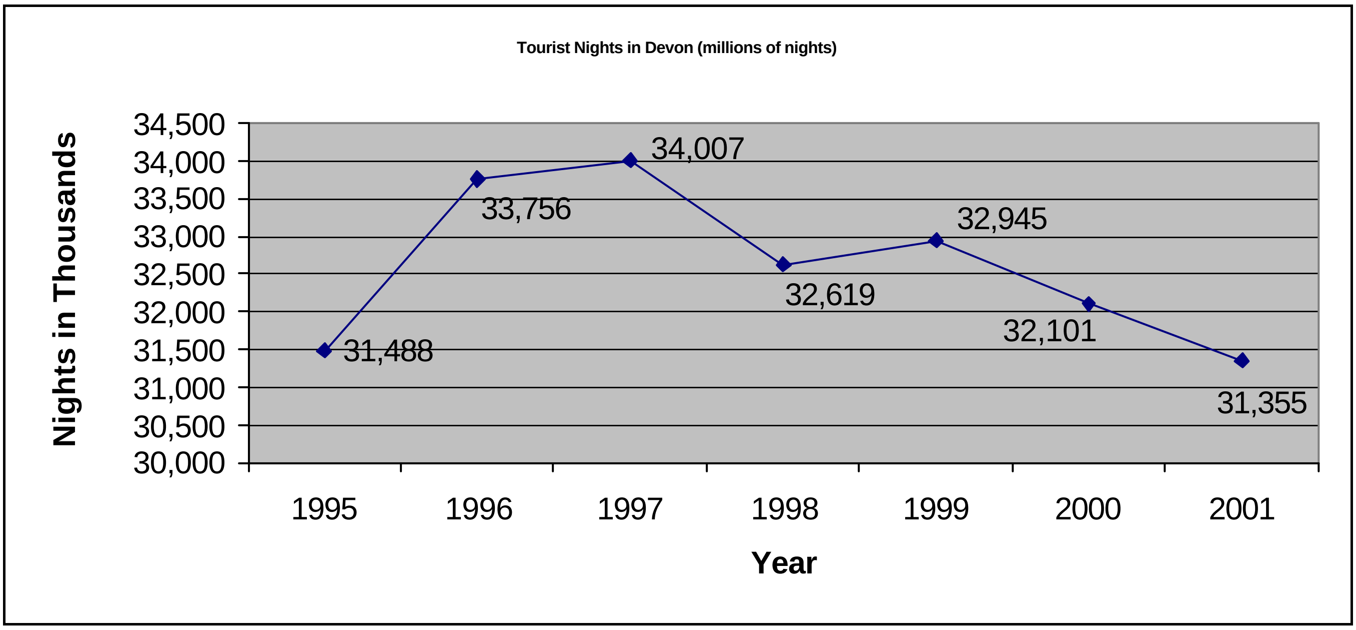


Figure 40: Tourist Nights in Devon 1995 to 2001

7.13 In 2001, a total of £1,023 million was spent by tourists staying overnight. It is calculated that about £381 million of this total remained as income to Devon.

7.14 In addition to this, on the basis that one third of the region's activity takes place in Devon, it is estimated that 44 million leisure day trips took place within the County with an associated spending of £857 million.

7.15 Employment generated by tourist activity is an important element in the County's economy. It is estimated that at least 32,500 jobs are generated directly by the tourist industry in Devon and many more are created indirectly through the multiplier effect.

7.16 Tourist activity is concentrated mainly along the South Devon coast from Plymouth to Seaton and in north Devon the coast from Westward Ho! to Ilfracombe. Torbay is the most popular destination attracting over a quarter of the total, although its 27% share in 2001 is a large decline from 39% in 1975. North Devon (19%) and East Devon (15%), two other resort based areas, are the second and third most popular followed by South Hams (13%) and Teignbridge (11%). Other areas only attract a small percentage of total tourists related to their lower bedspace capacity, although Exeter and Plymouth are very popular day visitor destinations by those staying elsewhere.

7.17 The capacity of Devon's tourist accommodation is measured in bedspaces for all types of accommodation including caravans and tents; currently around 212,500 bedspaces are available. This excludes places in private houses with casual bed and breakfast or visiting friends and relatives.

7.18 In the last ten years available bedspaces in the resorts and tourist centres have fallen by nearly 10% from 132, 500 in 1990 to 119,000 in 2001. At the same time there has been a slight compensatory increase in bedspaces in the rural areas outside resorts.

7.19 The largest accommodation sector is now touring caravan and camping pitches, which in terms of estimated bedspaces accommodate 32% of Devon's stock, followed by serviced accommodation in hotels, guest houses and farm houses (30%), bedspaces in chalets and static caravans at holiday parks (27%) and lastly self-catering flats and houses (11%).

7.20 The distribution of tourist nights by type of accommodation illustrated in **Figure 41** indicates that between 1995 and 2001 touring pitch use fell more significantly than other types of accommodation.

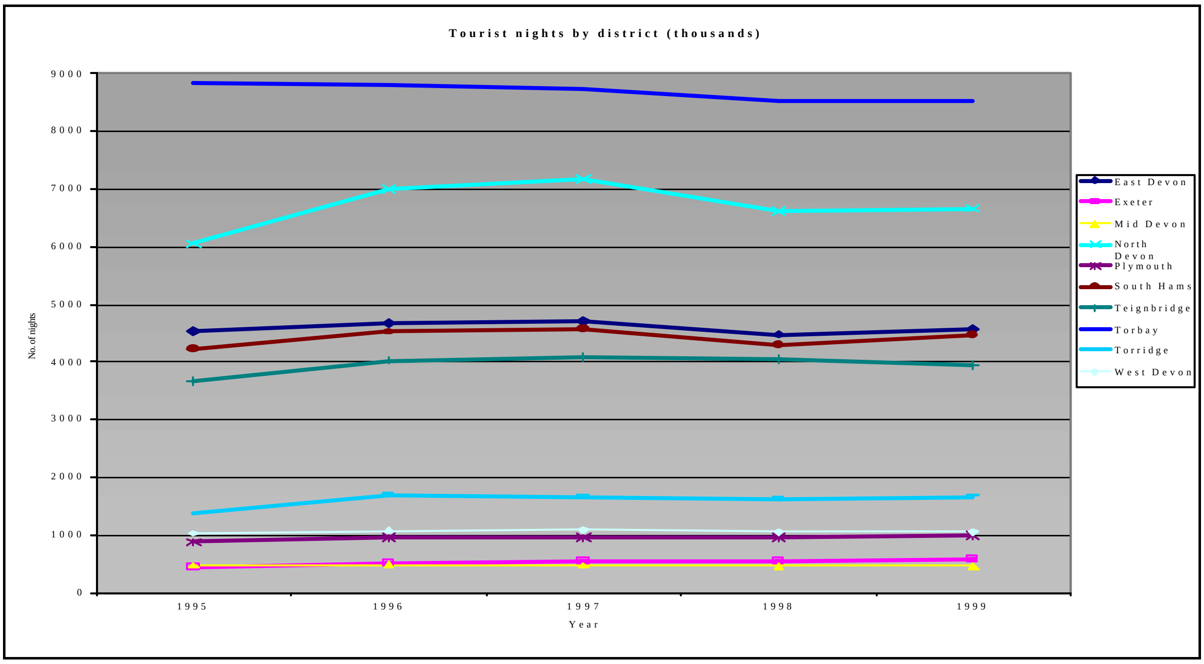


Figure 41: Tourist Nights in Devon by Type of Accommodation 1995 to 2001

7.21 In economic terms, the hotel and guest house sector is the most important. Occupancy rates are a good indication of performance: in 2001 the overall annual rate was 37.9%, ranging from 21% in January to 65% in August, reflecting the seasonality of the industry in Devon. Larger establishments with a wide range of facilities but still offering value for money, do achieve levels of well over 75% in the height of the season. Occupancy levels in the non-serviced sectors show an even greater variation through the season.

7.22 During the busiest weeks, an additional quarter of a million (236,400) visitors are staying in Devon compared to average annual figures. Attempts are being made to reduce this seasonality and the dependence on the school holiday period. Some success is being gained in increasing the length of the holiday season through an increase in weekend and off-peak breaks through more leisure time, structural improvements to tourist accommodation, new attractions and increased accessibility.

7.23 There are over 200 varied tourist attractions in Devon, widely distributed throughout the County. Some of the most popular in 2000 are set out in **Figure 42**. Seven of the top 10 historic attractions are National Trust Properties.

Lynton and Lynmouth Cliff Railway	585,678
Dartington Cider Press Centre,Totnes *	550,000
Crealy Park, Exeter *	508,000
Paignton Zoo	444,936
Exeter Cathedral	450,000
Woodlands Leisure Park,Totnes *	395,000
Buckfast Abbey, Buckfastleigh *	361,809
National Marine Aquarium, Plymouth *	351,000
Cockington Country Park	350,000
Babbacombe Model Village,Torquay *	255,000
Dartington Crystal,Torrington *	250,000
Stuart Line Cruises	240,000
Royal Albert Memorial Museum, Exeter *	216,001
Clovelly Village *	213,000
Northam Burrows Country Park	200,000

Figure 42: Visitor Numbers at the Most Popular Tourist Attractions in 2000

Note: *1999 figure (2000 not available)
Source: South West Tourism – 2001

Further information can be found at: http://www.devon.gov.uk/dris/tourism/tourism4.html

Minerals

7.24 Mineral extraction continues to be important to Devon, and there are some 3,000 hectares of land with planning permission to extract minerals. The total employment in Devon (including Plymouth and Torquay) in mining and quarrying increased by 25% between 1995 and 1998 from 806 to 1,008, whereas in the same period in the South West Region employment fell by 8%.

Shopping

7.25 The retailing industry makes a major contribution to the economy and employment in Devon. Approximately 9% of the working population is employed in retailing whilst the turnover is estimated to be in excess of £2.4 billion. The effects of the changes occurring in retailing will be considered in more detail in future Monitoring Reports.