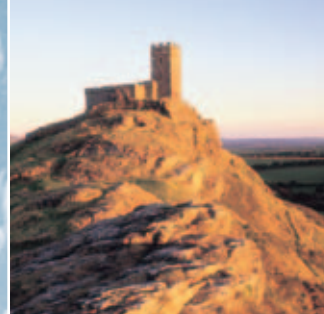
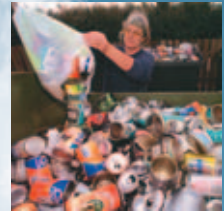




Devon Structure Plan FIRST REVIEW

Monitoring Report 2000



September 2001



Devon Structure Plan First Review 1995 to 2011 MONITORING REPORT 2000

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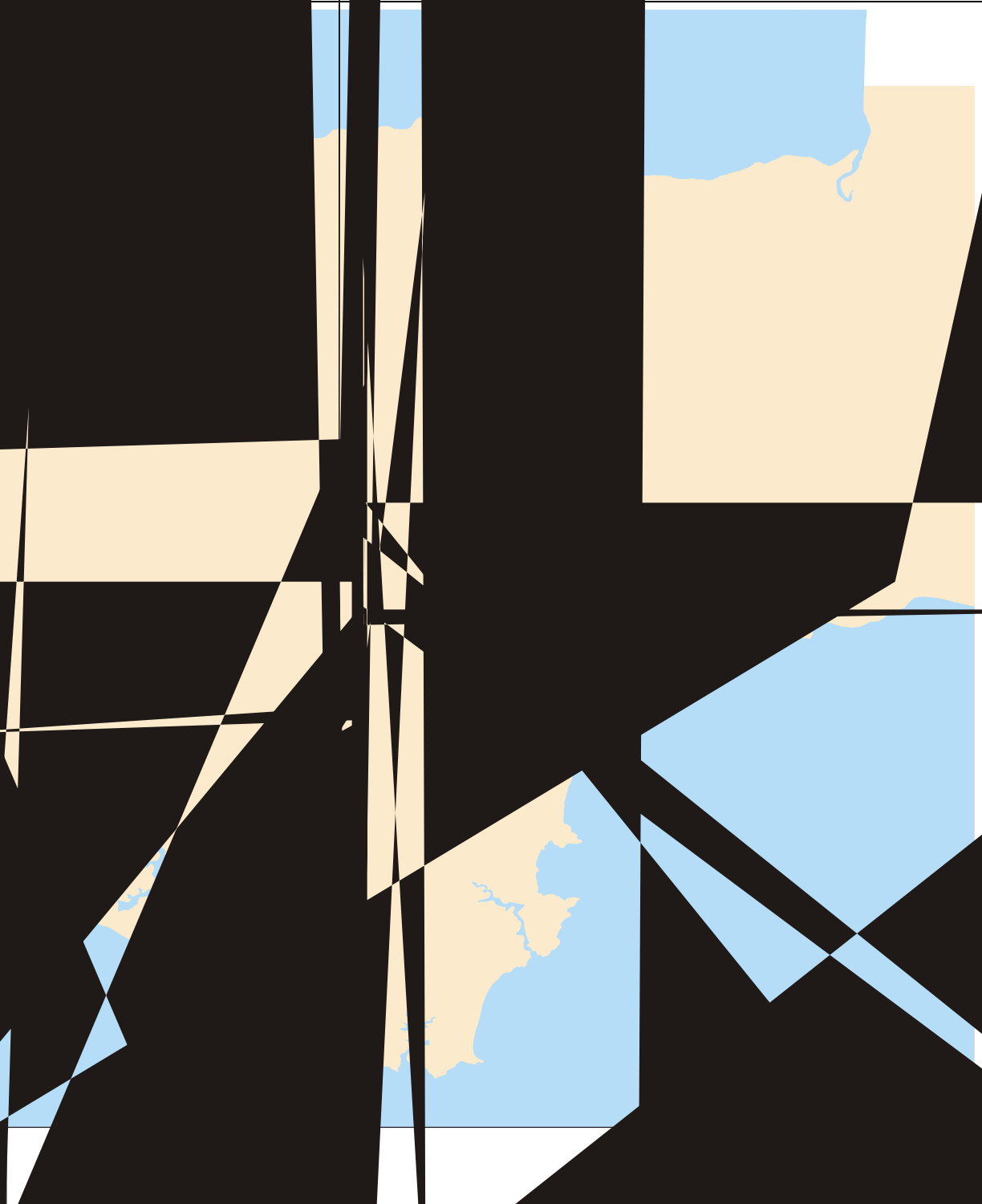
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County Planning (All Purposes)

Devon County Council (Structure Plans and Local Plans)

District Planning (All Purposes)

National Planning (All Purposes)

1. INTRODUCTION

This **Monitoring Report** relates to the Devon Structure Plan First Review 1995 to 2011 (adopted February 1999). This Report has been jointly prepared by Devon County Council, Plymouth Council, Torbay Council, and Dartmoor National Park Authority. The Report illustrates the main findings that have emerged from monitoring the Plan and will help to raise awareness of the patterns of change occurring in Devon.

The main elements of the report will also be available on the **Internet** with links to the relevant data sources where available. Devon County Council's Structure Plan Website is: <http://www.devon.gov.uk/structur/homepage.html>

The Report **takes account of the Government's** requirements to keep under review those matters that may be expected to affect the development and planning of Devon and has regard to the 'plan, monitor and manage' approach to housing development.

On this occasion it has **only been possible to monitor specific aspects** of the Plan such as dwelling completions and to comment in general terms on the effectiveness of the Structure Plan Policies. There are a number of areas where there is at present inadequate data to monitor certain aspects of the Plan, but the Structure Plan Authorities are working closely with the District Councils and other organisations to obtain the appropriate data for consideration in subsequent Monitoring Reports.

Similarly, it has **not been possible to fully involve a number of organisations and bodies** who have expressed an interest in contributing to the monitoring process, but it is hoped that a closer involvement will be possible in future years.

The **main comments** as a result of monitoring the Plan are set out in ***bold Italics***.

Comment:

- ***The Structure Plan Authorities recognise that additional research needs to be undertaken to monitor those aspects identified in the Structure Plan with other organisations and agencies as appropriate.***

2. MAIN FINDINGS

2.1 Local Plans and Other Initiatives

Local Plans

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 Initial Deposit Plans for consultation will be published by the Autumn 2001, slightly later than most of the original programmes suggested. The current programme for the initial deposit, revised deposit and Inquiry of Local Plans is set out in Figure 2. All Local Plan Reviews to 2011 are now expected to be adopted during 2004 and 2005.

Local Transport Plans

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 Plans to 2011	Initial Deposit	Revised Deposit	Inquiry
Devon Minerals LP	Jan 2000	March 2001	Winter 2001
Devon Waste LP	Autumn/Winter 2001	Spring 2002	-
Dartmoor National Park LP	Sep 2001	-	-
East Devon LP: First Review	Sep 2001	-	-
Exeter LP: First Review	Jan 2001	Oct 2001	July 2002
Mid Devon LP: First Alteration	Sep/Oct 2001	Sep/Oct 2002	Apr/Jun 2003
North Devon LP:	Sep/Oct 2001	-	-
City of Plymouth LP (First Alteration)	Winter 2001	-	-
South Hams LP: First Review	Jan 2002	Spring 2002	Dec 2002
Teignbridge LP: First Review	Autumn 2001	-	-
Torbay LP	July 1999	Oct 2000	Nov 2001
Torrige LP	Oct 1999	Jan 2001	Jan 2002
West Devon LP: First Review	Sep 2000	Jan 2002	-

Local Transport Plans	Published
Devon Local Transport Plan	July 2000
Plymouth Local Transport Plan	July 2000
Torbay Local Transport Plan	July 2000

Figure 2: Programme for the preparation of Local Plans and Transport Plan (shading shows progress at Sept 2001)

Comment:

- *The preparation of Local Plans needs to be progressed, particularly in those parts of the Devon where the supply of development sites is limited, for example in the Areas of Economic Activity, to accommodate the development needs in those areas.*

2.2 Overall Indicators of Change

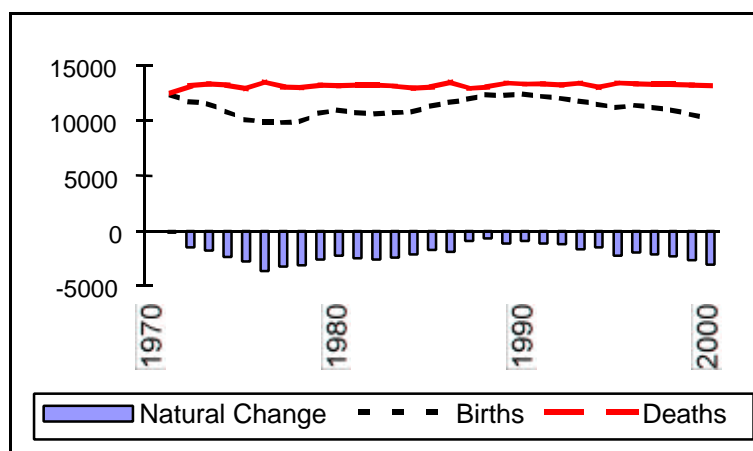
Population

The population of the area covered by the Devon Structure Plan at 2000 totalled 1,087,300 people - an increase of 12,300 over the previous year and of more than 28,500 since the base date of the Plan in 1995. In overall terms, this represents a rate of change slightly above that forecast at the time when the Structure Plan was adopted. The relative population change in each District over the 1995 to 2000 period indicates that only Plymouth population fell. In all the other Districts there was an increase in population with the greatest gains occurring in Teignbridge and Exeter.

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

Births and Deaths

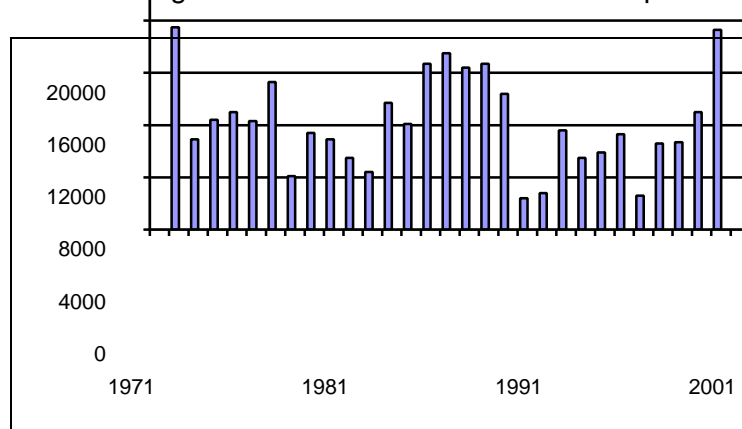
The number of births and deaths in Devon continues to result in a natural population decrease in the County of approximately 2,000 a year (i.e. more deaths than births).



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

Migration

This is the main factor affecting population growth in Devon and over the period from 1995 to 2000 annual net inward migration has ranged from 2,600 (1995/96) to 15,300 (1990/2000). The overall average annual net migration for the 1995 to 2000 period was 8,040. This is slightly above the 7,100 estimate used for assessing the Structure Plan First Review requirement.



Housing

Between 1995 and 2000 about 21,100 dwellings were built in Devon. **Figure 3** illustrates that over these first five years of the Plan the number of houses built in Devon was slightly below the implied

provision made in the Structure Plan. Dwelling completions over the period averaged 4,220 dwellings per year compared with an annual average Structure Plan provision of about 4,730 dwellings.

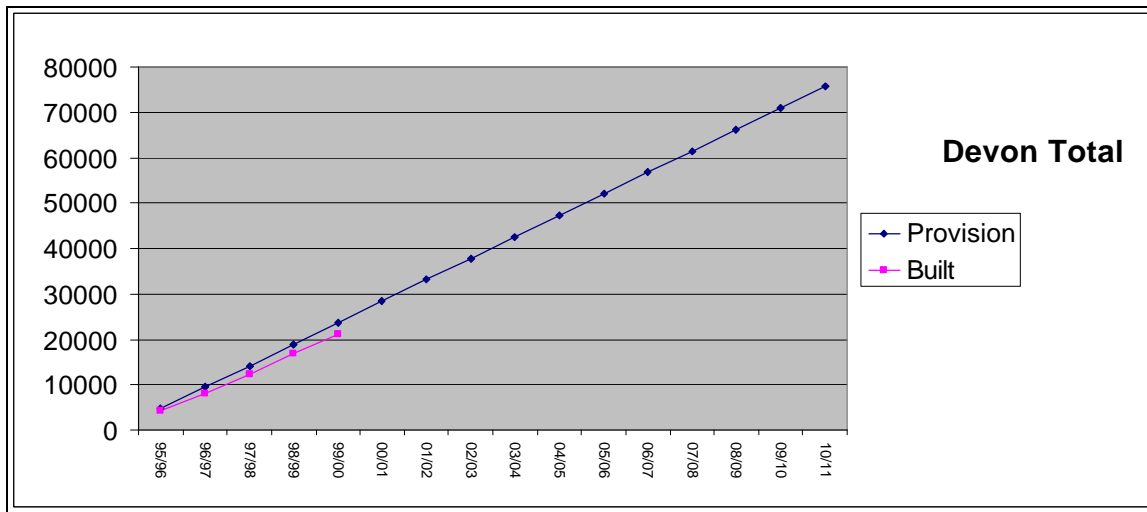
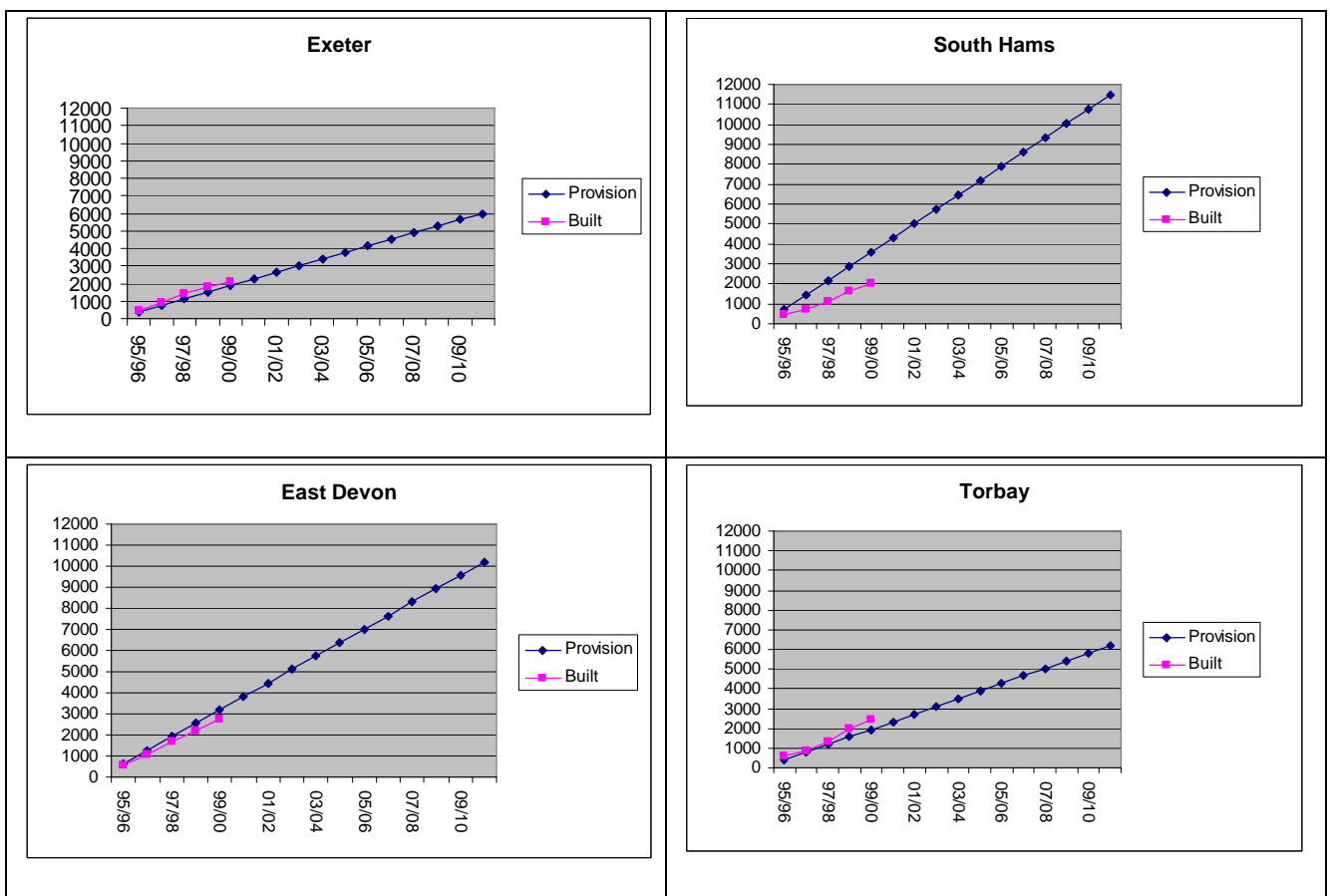
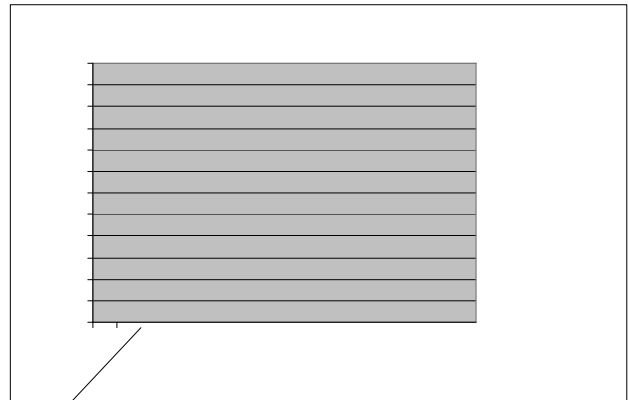
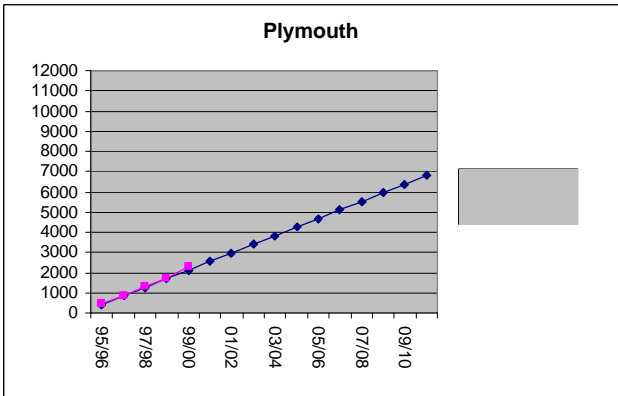
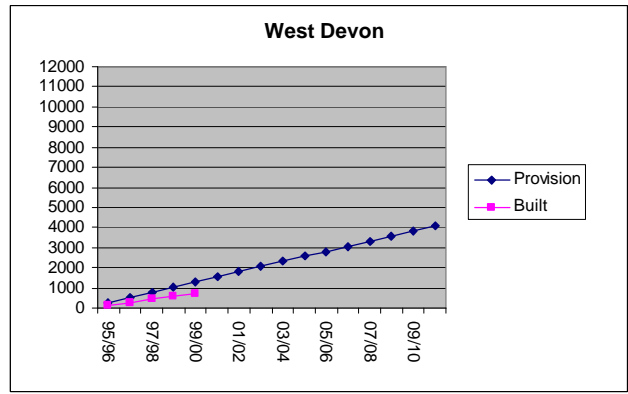
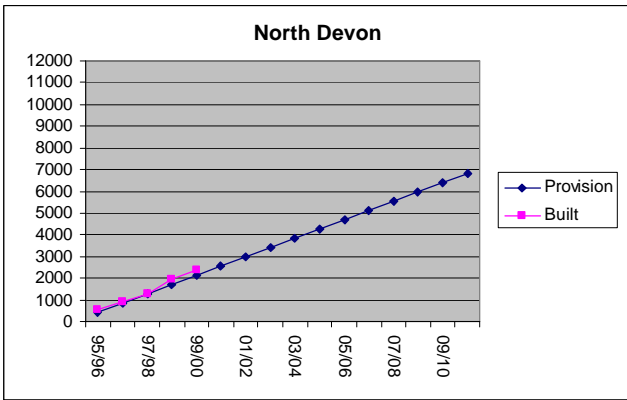
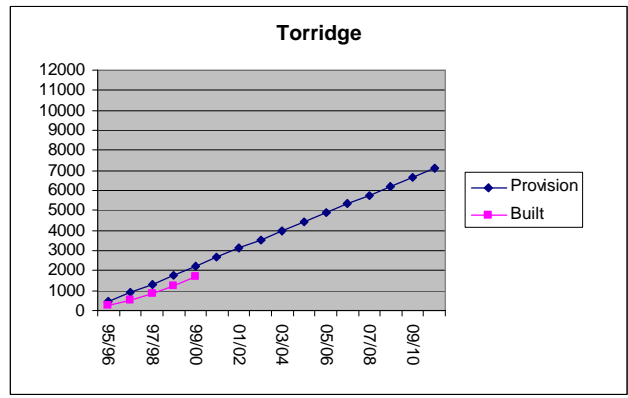
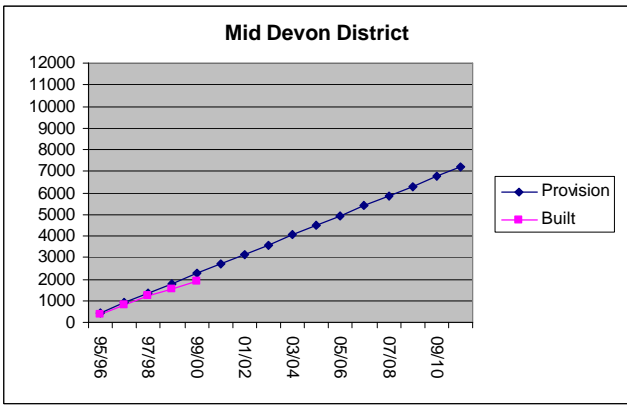


Figure 3: Dwellings built 1995 - 2000 compared with provision in the Structure Plan First Review for Devon

This overall pattern of change has not been reflected evenly across the Local Planning Authorities in Devon. **Figure 4** illustrates that in Exeter City, North Devon, and Torbay the annual rate of development has been slightly higher than that anticipated in the Structure Plan, were similar to expectations in Teignbridge, Plymouth and Dartmoor National Park, but were below expectations in East Devon, Mid Devon, Torrridge, 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.





Assessment of existing housing commitments

An assessment of existing housing commitments at March 2000 as compared to the Structure Plan provision is illustrated in **Figure 5**. This indicates that the overall level of commitments remaining in Local Plans at 2000 is only adequate to accommodate housing demand to about 2004/05. This leaves shortfall of about 28,500 dwellings still to be identified in the Reviews of Local Plans now being undertaken in Devon.

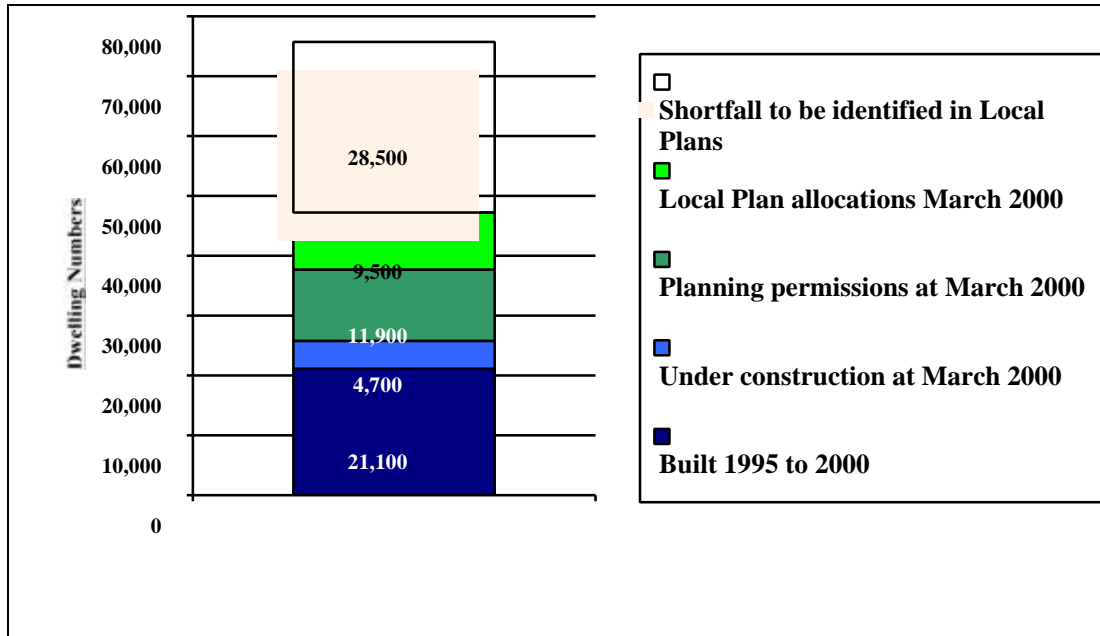


Figure 5: Dwelling built 1995 - 2000, committed at 2000 and shortfall to be identified in Local Plans

Employment Land

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 of what has been built and committed, illustrated in **Figure 6**, indicates that about 160 ha still need to be defined in Local Plans for employment purposes.

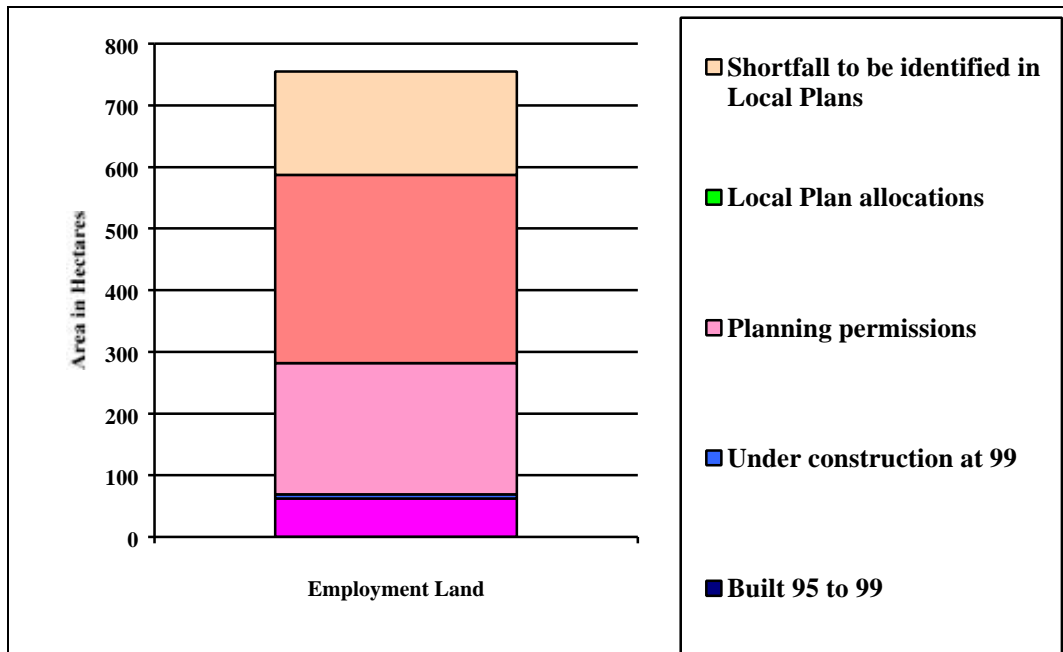


Figure 6: Employment land developed 1995 to 1999, committed at 1999, and still to be provided in Local Plans

The need for additional provision reflects the strategic importance of ensuring that a range of employment sites is available at all times 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. An element of additional provision was specifically included in Plan to allow for site choice, flexibility and scope to accommodate differing requirements over the period of the Plan.

Not all economic development requires the take-up of employment land, however economic changes within Devon have resulted in a fall in unemployment rates as described in Section 3.8 below.

Comment:

- ***There is no evidence that the assumptions underlying the First Review are significantly at variance from actual patterns of population change and movement.***
- ***The number of houses built between 1995 and 2000 slightly exceeded Structure Plan expectations in Exeter City, North Devon District, and Torbay; were similar to the expectations in Teignbridge, Plymouth and Dartmoor National Park; but were below anticipated rates of change in East Devon, Mid Devon, South Hams and West Devon Districts.***
- ***District Councils and Unitary Authorities need to identify adequate housing and employment land provision to accommodate the strategic housing and employment land needs and secure a 5-year supply.***

2.3 The Development Strategy: Housing Provision

Broad Strategic

The Development Strategy as set out in the adopted Structure Plan identifies three broad strategic areas within Devon – the Areas of Economic Activity focused on Plymouth, Exeter, Barnstaple and Torbay/Newton Abbot; more rural areas of development constraint; and more rural areas requiring economic diversification.

The Plan indicated 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. In the Rural Areas of Development Constraint the Plan proposed a reduced rate of growth, while in the Rural Areas Requiring Economic Diversification it proposed that past rates of development should be maintained.

A comparison of the actual level of housing development in these areas over the period (a) 1995 to 2000 (b) that anticipated in the adopted Structure Plan and (c) actually experienced in the period 1981 to 1995, and is set out in **Figure 7**. This shows that the proportion of actual development taking place over the period 1995 to 2000 within the AEAs is less than Plan expectations, while development in the Rural Areas requiring diversification and Rural Areas of Constraint has been greater than that anticipated over the Plan period as a whole. However the overall rate of housing development per annum since 1995, has been significantly lower than the per annum number of completions experienced in the period 1981 to 1995.

Strategic Area	(a)		(b)		(c)	
	Actual Completions 1995 to 2000	%	Structure Plan Assumption for 1995 to 2011	%	Actual Completions 1981 to 1995	%
Areas of Economic Activity	9,000	43	42,000	55	39,700	52
Rural Areas requiring diversification	4,800	23	12,800	17	8,600	11
Rural Areas of constraint	7,300	34	20,900	28	27,900	37
TOTAL	21,100		75,700		76,200	

Figure 7: Actual Housing Completions 1995 – 2000 compared with Structure Plan Housing provision 1995 to 2011 and completions 1981 – 95.

Settlement Hierarchy

The Development Strategy also proposes that the distribution of new development should also reflect the settlement hierarchy – particularly being focused on the Regional and Sub Regional Centres and on certain identified Area Centres.

The level of development experienced within these settlements over the period 1995 to 2000, together with those other Area Centres provisionally identified within the Structure Plan, is illustrated in **Figure 8**. This shows that about 60% of all new housing development was located within the main urban areas and selected Area Centres as set out in Policy S1c of the adopted Plan, with more than 70% located within the Regional, Sub Regional and Area Centres as a whole.

Settlement Category	Dwelling Completions 1995 to 2000	% of Total Dwelling Completions compared with Structure Plan provision	
Regional Centres	4,400	21%	57%
Sub Regional Centres *	4,100	20%	
Selected Area Centres *	3,400	16%	
Other Area Centres	3,200	15%	15%
TOTAL	15,100	72%	72%

* NB: All of Torbay, including Paignton, has been included within the Sub Regional Centre total.

Figure 8: Settlement Hierarchy - Dwelling completions 1995 - 2000 compared with Structure Plan provision

Comment:

- ***The distribution of housing completions is generally in accordance with the strategy advocated in the Structure Plan.***

2.4 Conservation

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

National Parks, Areas of Outstanding Natural Beauty (AONBs), Areas of Great Landscape Value (AGLV) and Coastal Preservation Areas 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.

Local Plans have progressively considered the detailed boundaries of the Areas of Great Landscape Value since 1995 and specific changes were contained in the Local Plans for South Hams and Teignbridge. The other major change affecting AGLVs related to the designation of an existing AGLV as an AONB in the Tamar Valley (1995).

Urban Environment

The identity, distinctive character and townscape features of existing settlements and urban areas are being conserved and enhanced through urban regeneration and conservation, townscape enhancement, traffic management and the retention of public open space. Progress on these initiatives and processes will be set out in future Monitoring Reports. There is a continuing need to conserve and enhance the quality of Devon's Historic environment and more detailed policies are being developed in the preparation of Local Plans. The quality of Devon's historic environment is recognised through the identification of about 300 Conservation Areas and more than 20,000 Listed Buildings and Historic Parks and Gardens and over 60,000 sites of archaeological interest.

Nature Conservation

The Structure Plan indicates that the biodiversity and earth science resource of Devon's natural environment should be enhanced. The Draft Regional Planning Guidance lists a number of wildlife habitats and the population of key wildlife species as indicators for which data should be collected. Conservation of Important Sites and Features is one of the longest established and best-understood of the nature conservation policies and is well addressed through Local Plans. Its overall effectiveness is demonstrated by the low number of applications for development likely to

have a significant adverse effect on such sites. Conservation of Important Sites and Features has seen improvement in the way this issue is addressed through Local Plans, with greater weight now given to the protection of non-statutory sites.

Conservation of Natural Resources

The Structure Plan requires that management of waste should be considered in accordance with the principle of the 'best practical environmental options' and also to the hierarchy of 1) Reduction, 2) Re-Use, 3) Composting and Material Recycling 4) Energy Recovery and 5) Final Disposal. The Devon Waste Local Plan is currently in the process of preparation and the initial Deposit is likely to be published in Spring 2001.

There are significant concerns about the amount of household waste being produced in Devon - more than 540,000 tons of household waste was produced in Devon (including Plymouth and Torbay) in 1999/2000 and this represents an increase of 14 % since 1995/1996. The average tonnage in Devon is about half a tonne per head population and about 1.19 tonnes per household. Devon's performance of 23.4% recycling/composting rate is exemplary compared with the national average of 9%. The Government has now set a requirement to increase recycling / composting to 33% by 2003.

Energy Recovery

Since the publication of the structure plan in 1995 two waste landfill sites in the county have introduced gas to energy plants. Another plant has recently opened, which has resulted in this output being more than doubled. Devon is promoting the use of several other processing methods which make use of renewable energy resources:- Hydro (water power), Biomass – energy produced by combustion gasification of organic material, Biogas - gained from the treatment of human and animal waste (sewage).

Quality of rivers

The quality of rivers in Devon continues to remain high and results for 1998 indicated the chemical quality of water in the region was 8% better than in 1990. 88% of all the watercourses in Devon were reached A and B standard.

Further information can be found at: <http://www.devon.gov.uk/sustain/pollution/pi49/pi49devin.html>

Air quality and traffic pollution

This is monitored by 3 automatic sensors in Devon. All districts are working towards their obligations under the Environment Act that require reductions of pollution levels for 7 pollutants by 2004/05 in line with EU requirements. Currently no District Councils anticipate problems in meeting the objectives by the date required.

Comment:

- ***Future Monitoring Reports will identify recent levels of development within the landscape policy areas identified in the Structure Plan.***
- ***The increased level of waste production within Devon is a major cause for concern – despite significant progress in recycling/composting capacity.***

2.5 Transport

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.

Movement of People and Goods

Personal travel and freight are dominated by the reliance on the road network as the principal mode of travel. 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.

The average distance travelled by people in the South West is about 7,200 miles per year. This is illustrated in **Figure 9**. 89% is by car, 7% by public transport, 3% by walking and 1% by pedal cycle. In total about 97% of travel is road based. An equivalent breakdown for people in Devon is not available.

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.

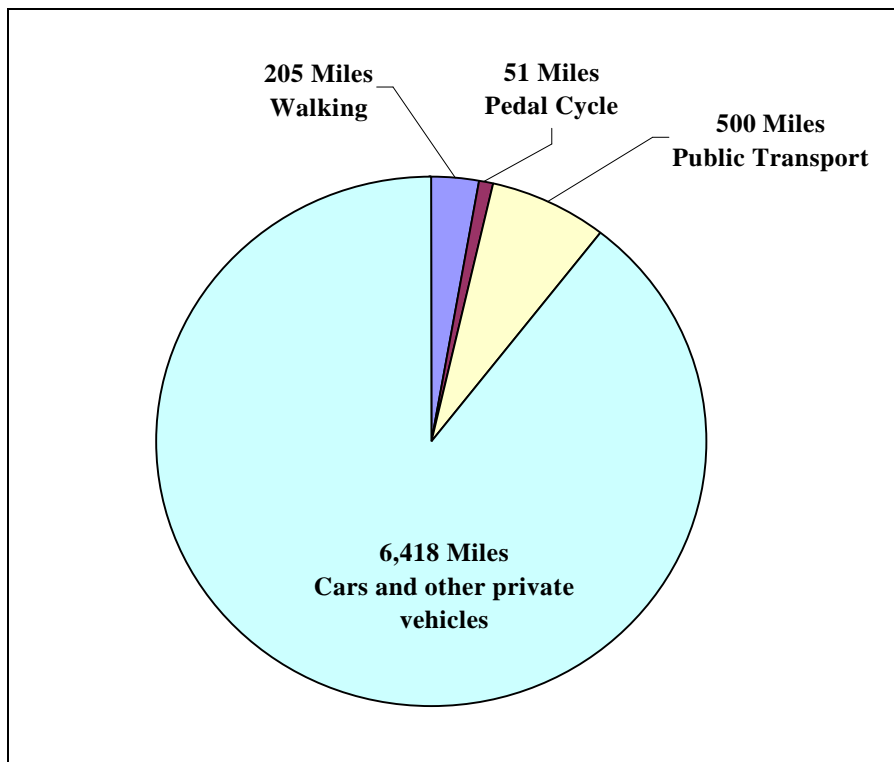


Figure 9 : Miles Travelled per person by mode of Transport in 1994 (South West)
(Source: National Travel Survey DETR)

Buses

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.

Change in level of bus travel - Nationally travel by bus has been declining, in the early '50'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 10** and 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.

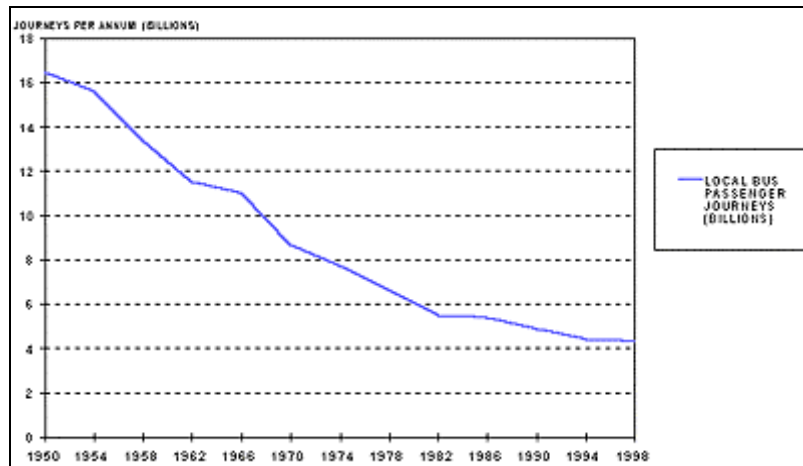


Figure 10: Local Bus Passenger Journeys 1950 to 1998

Rail

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 11**.



Figure 11: Devon Rail Network

The rail industry has changed significantly since privatisation in 1990's. Railtrack 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.

The 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), Railtrack 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.

Traffic Volumes

Traffic volumes in Devon since 1989 (based on the East Devon Screenline) have increased by nearly 24%, this increase is illustrated in **Figure 12**.

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

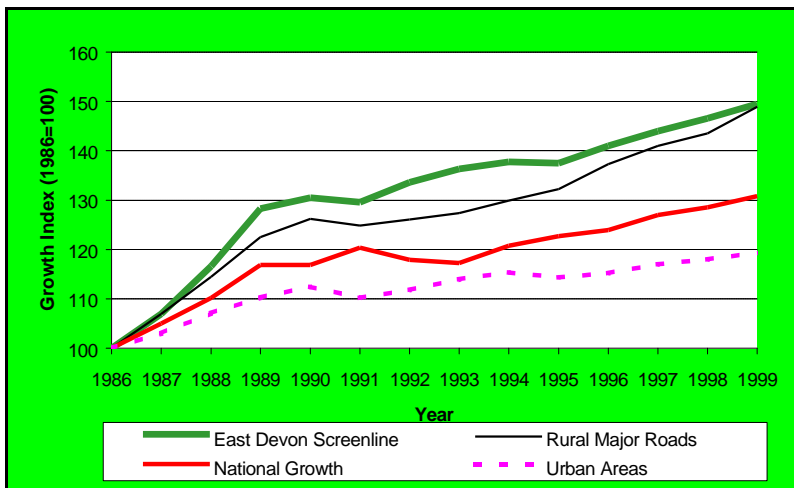


Figure 12: Traffic Growth in Devon and comparisons with National Trend

The distribution of the changes between 1996 and 1999 are illustrated **Figure 13** and annual average daily traffic flows in 1999 are illustrated in **Figure 14**. 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.

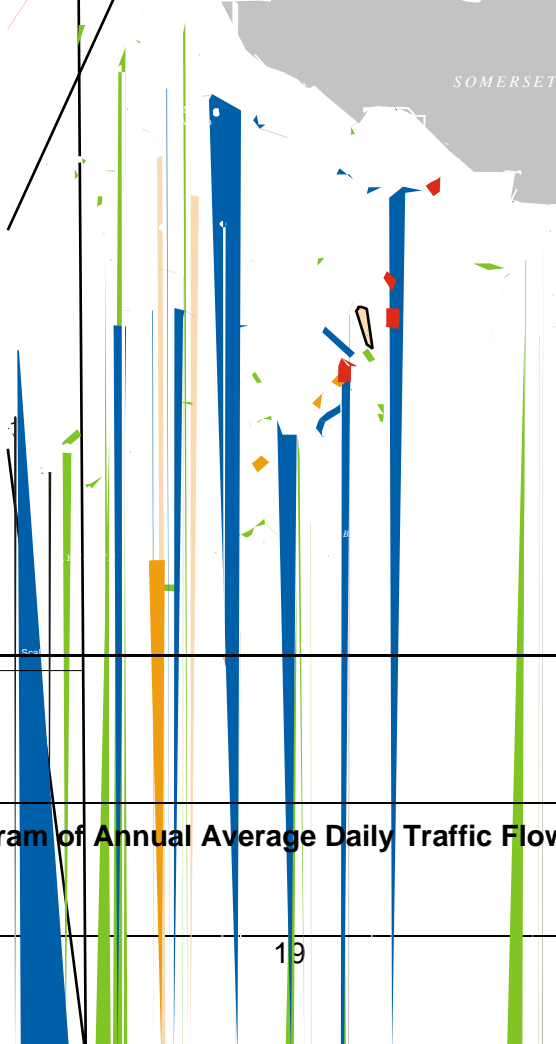
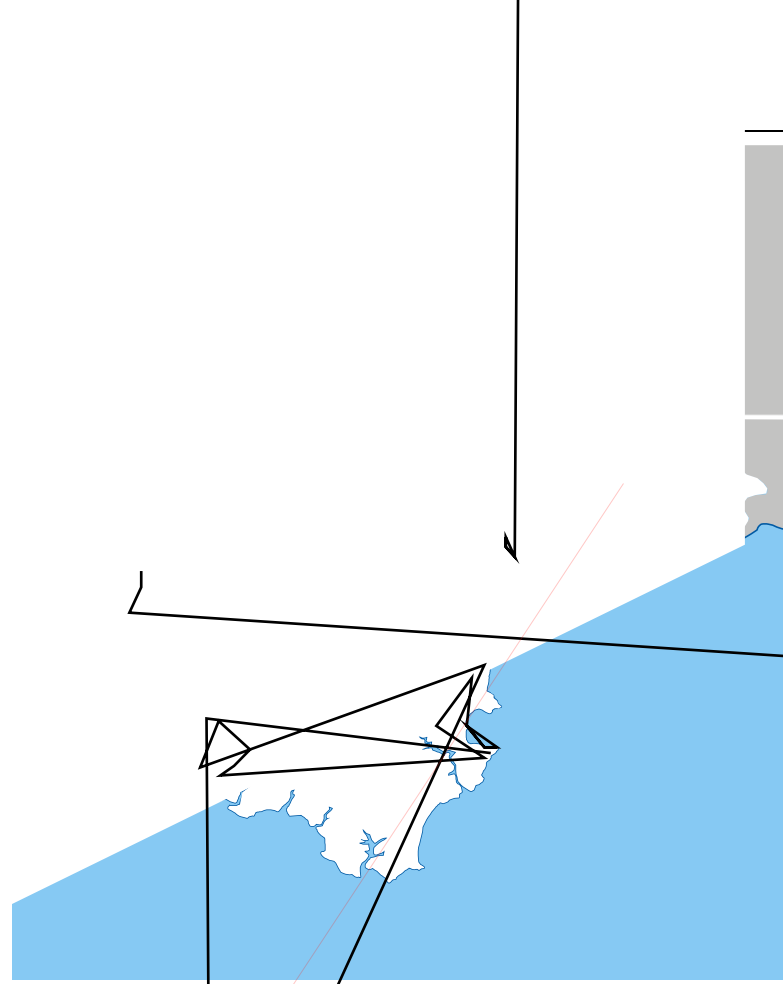


Figure 14: Illustrative Diagram of Annual Average Daily Traffic Flows 2000

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 to reduce and/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 will be set out in more detail in the final report.

Management of Travel Demand

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.

Following the submission of Local Transport Plans (covering the period 2001 -2006) for Devon, for Plymouth and for 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 as a major scheme for the construction of the Barnstaple Western Bypass at an estimated cost of £30.4m.

Comment:

- ***The implementation of the transportation strategy and proposals are an ongoing process and much of the move towards more sustainable means of transport is within the hands of the Government, and other organisations and agencies. The principles and objectives have been set in the Structure Plans and Local Transport Plans. These need to be developed and implemented through a phased programme of work in conjunction with others.***
- ***In future monitoring reports it is intended to monitor traffic volumes, modal choice, public transport service provision (bus, rail etc), car ownership and use, road freight, air port use, and the effect of transportation on the Environment and Society, and the implications of implementing transportation policy.***

2.6 Housing

Housing

The overall level of completions and their distribution are discussed in Sections 3.2 and 3.3 above.

Use of previously developed land

Structure Plan Policy S3 recognises the need to minimise the loss of greenfield sites to built development and proposes that priority should be given to the development of land within existing built up areas, particularly land available for redevelopment.

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 (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 provides advice on determining the potential capacity of previously developed and other land.

Current data available from eight Districts for the period 1995 to 1999, illustrated in **Figure 15**, 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 15** 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.

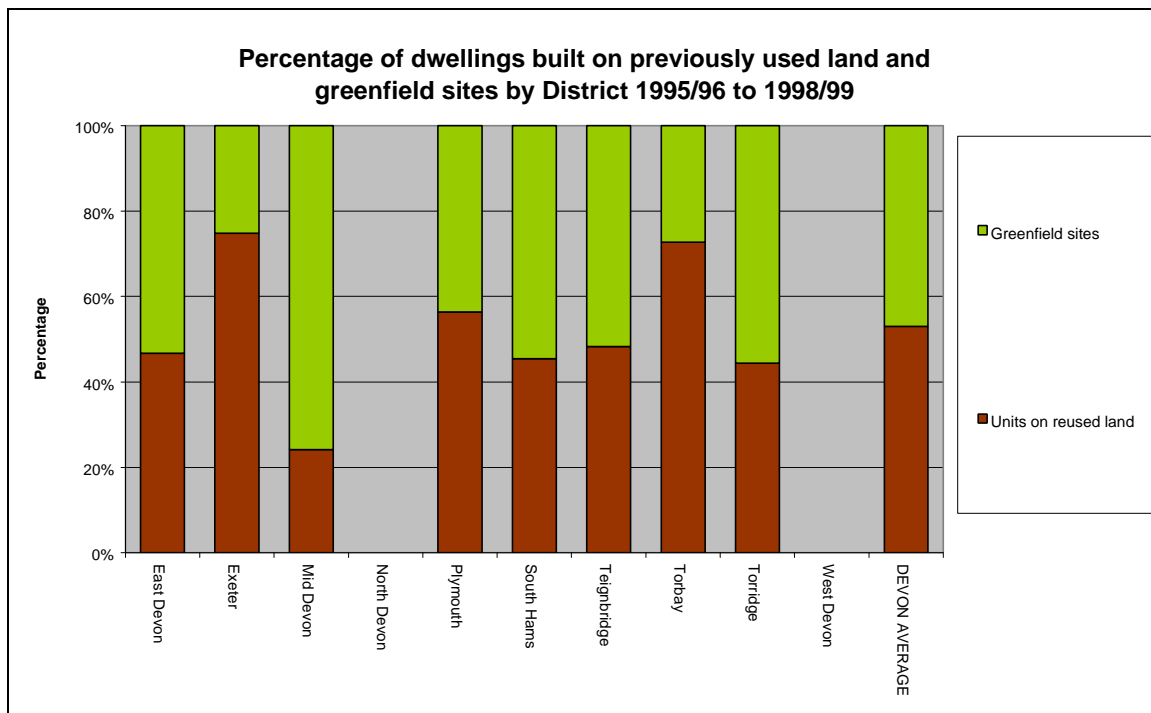


Figure 15: Percentage of dwelling built on previously built land and green field sites by District 1995/96 to 1998/99

In terms of the change in the proportion of dwellings resulting from conversions and the development of brownfield sites, **Figure 16** 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.

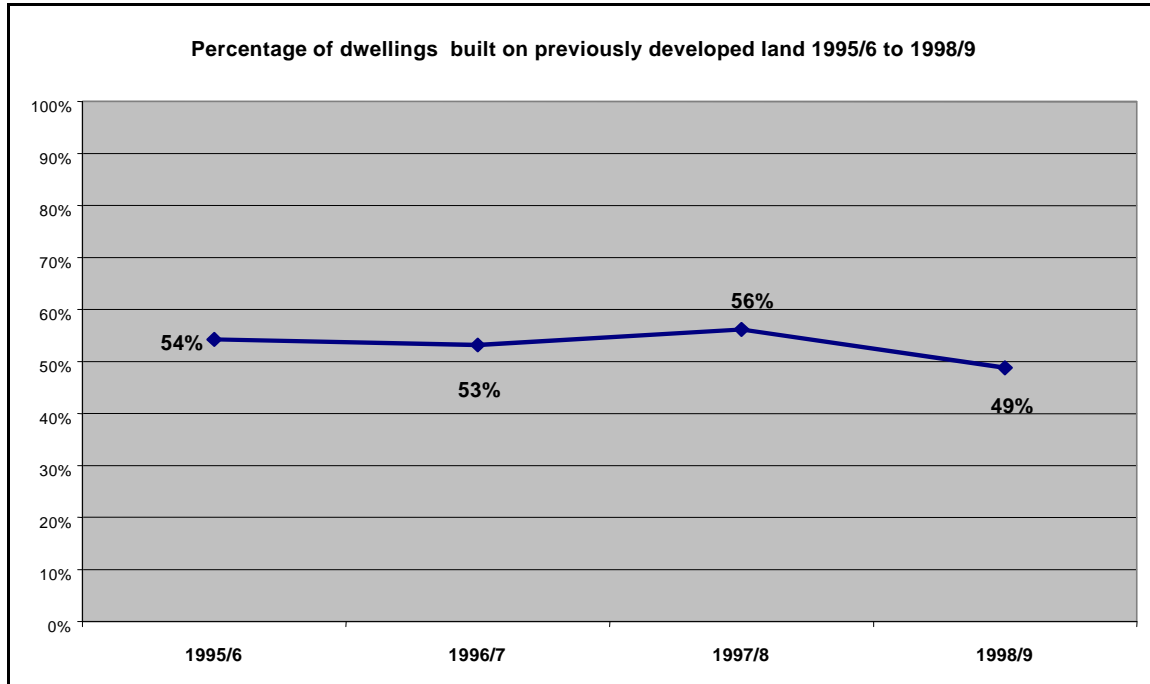


Figure 16: Percentage of dwelling built on previously built land in Devon 1995/6 to 1998/99

House prices

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 2000. This change is illustrated in **Figure 17**, it also illustrates for example that prices of detached houses have increase more rapidly than other types of houses.

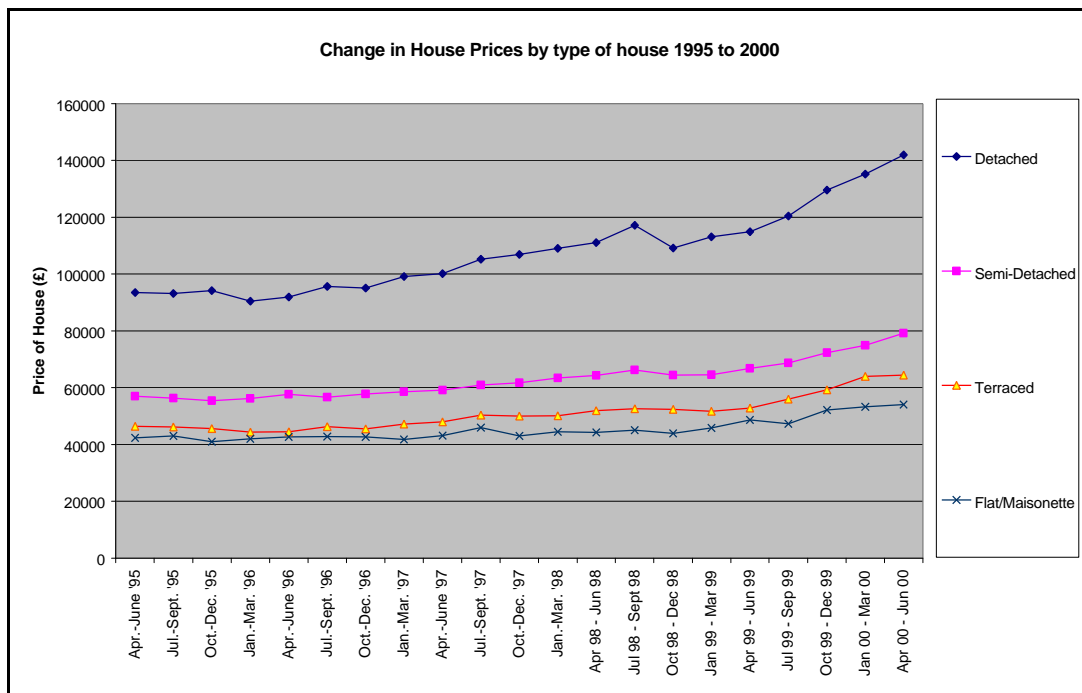


Figure 17: Change in house prices by type of house 1995 to 2000

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

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 18** indicates this differential - for example average house prices in South Hams District are about 25% above the average for the County whereas the average house price in Plymouth is about 30% below the average for Devon.

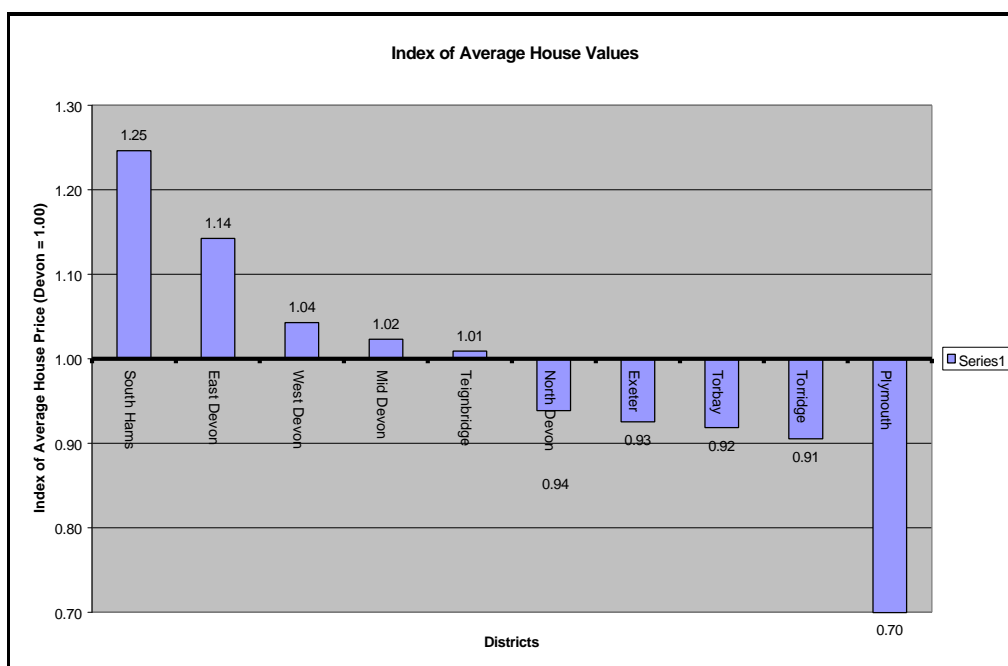


Figure 18: Index of average house values by District for 1995 to 2000 period

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

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.

Comment:

- ***The Department of the Environment, Transport and the Regions (DETR) has recently published a good practice guide on monitoring 'Monitoring Provision for Housing through the Planning System – Towards Better Practice' to help planning authorities to implement the Governments new approach to 'plan, monitor, manage' housing development. The guide is directed primarily at district and unitary authorities, as the main source and collectors of information. It is proposed that future monitoring reports will be better able to address trends as more detailed data is collected.***

New Communities

Structure Plan proposals make provision for a new community of at least 2,500 dwellings within South Hams and a new community of about 2,000 dwellings within East Devon in the period to 2011. 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 their initial Deposit Plans for consultation in the Autumn/Winter of 2001/2.

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.

Comment:

- ***In Devon the new community provisions were identified as the most sustainable solution for accommodating housing needs close to Exeter and Plymouth. East Devon and South Hams District Councils are progressing the preparation of their Local Plans.***

2.7 Economy***Employment Land***

The overall level of employment land development in the County is discussed in Sections 3.2 above.

General Economic Situation

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 the specific economic assets of the County.

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. 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.

Further information can be found at: <http://www.devon.gov.uk/dris/economic/grapr001.html>

Gross Domestic Product (GDP) figures

Devon continues to lag behind the UK and SW Region in 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

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

Since 1995 unemployment rates in Devon have fallen from over 8% to less than 3%. This reflects the general trend in the South West and Great Britain illustrated in **Figure 19**. Current unemployment rates in Devon are slightly higher than those for the South West but lower than Great Britain rates.

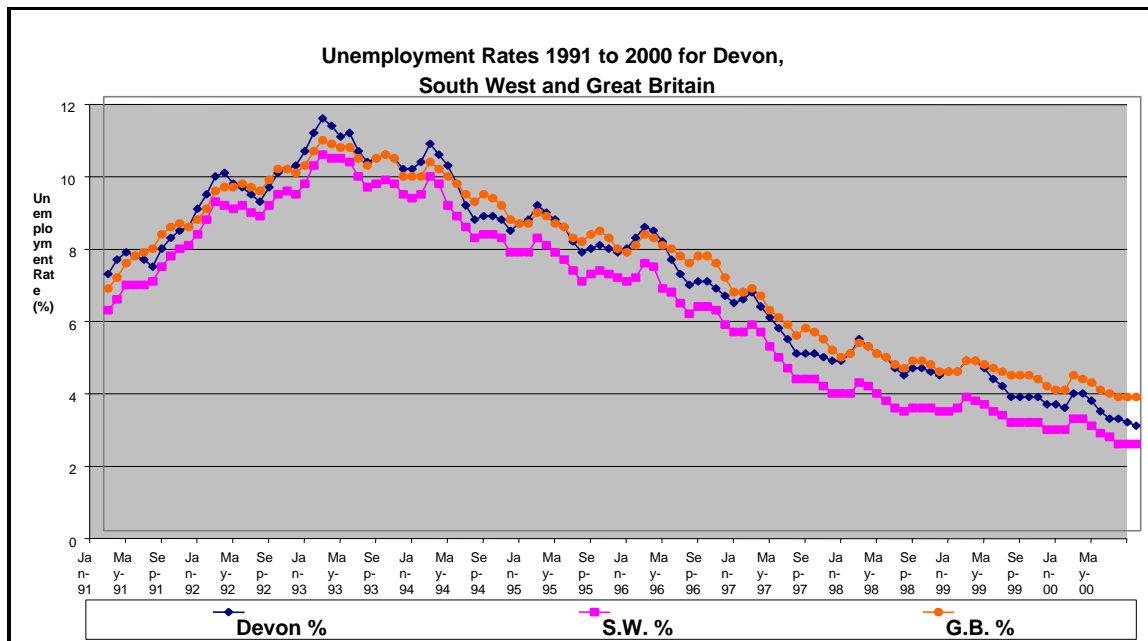


Figure 19: Unemployment Rate (%) 1991 to 2000 in Devon, SW and GB

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

Unemployment levels (based on the claimant count) in Devon in February 2000 stood at 19,308 a reduction of 4,217 on the same period in 1999 as illustrated in Figure 20.

	No. Unemployed			Percentage		
	Males	Females	Total	Devon	S.W	G.B
Feb 2000	14,180	5,128	19,308	3.8	3.1	4.2
Feb 1999	17,418	6,107	23,525	4.7	3.6	4.7

Source: ONS

Figure 20: Unemployment in Devon 1999 and 2000

Inland Revenue information on VAT business registrations (start ups) by District (1995/98) shows reductions in overall registrations particularly in agriculture, hotels and retailing but increases in financial services were recorded throughout Devon.

Tourism

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. Figures for tourist visitors both home and overseas and their spend are regularly monitored.

The bulk of visitors stayed between March and October with a peak in July and August (1999 and 2000). The estimated income from tourism (tourism spending in 2000) was £380 million.

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. Torbay is the most popular destination attracting nearly one third of the total, although its share of tourists has declined from 39% in 1975 to 24% in 2000.

The capacity of Devon's tourist accommodation is measured in bedspaces for all types of accommodation including caravan and tents. Currently about 215,000 bed spaces (2000) are available throughout the County. In 1995 a figure of 31.5 million tourist nights were recorded, this increased to 34 million in 1997 but declined to 32.1 million in 2000, as illustrated in **Figure 21**.

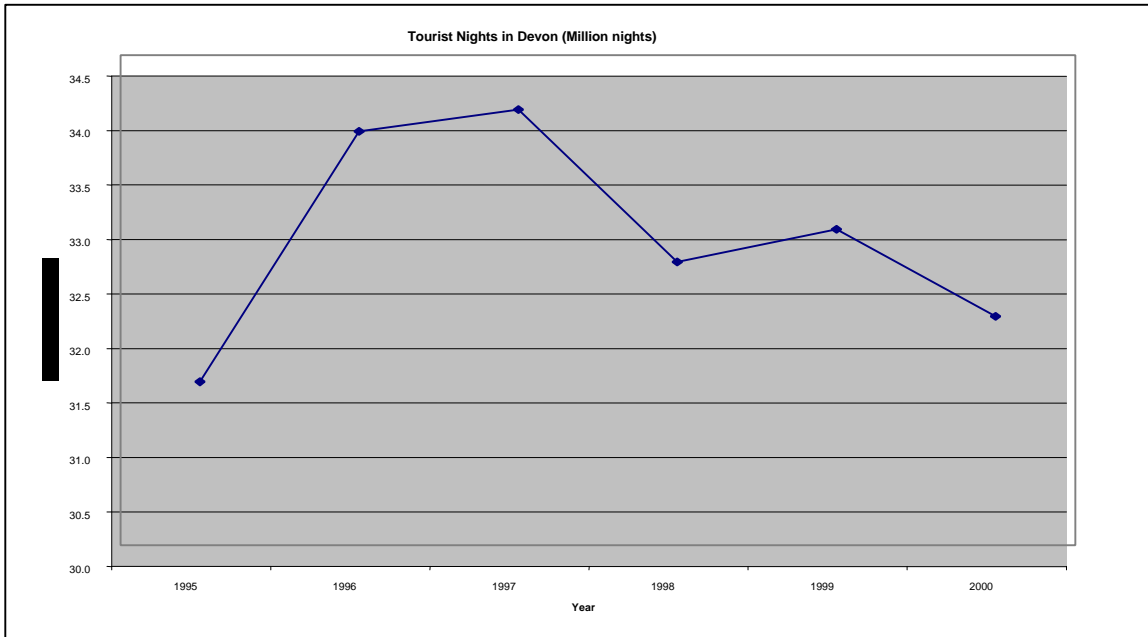


Figure 21: Tourist Nights in Devon 1995 to 2000

The distribution of tourist nights by type of accommodation illustrated in **Figure 22** indicates that over the past 4 years that touring pitched use has fallen more significantly than other types of accommodation.

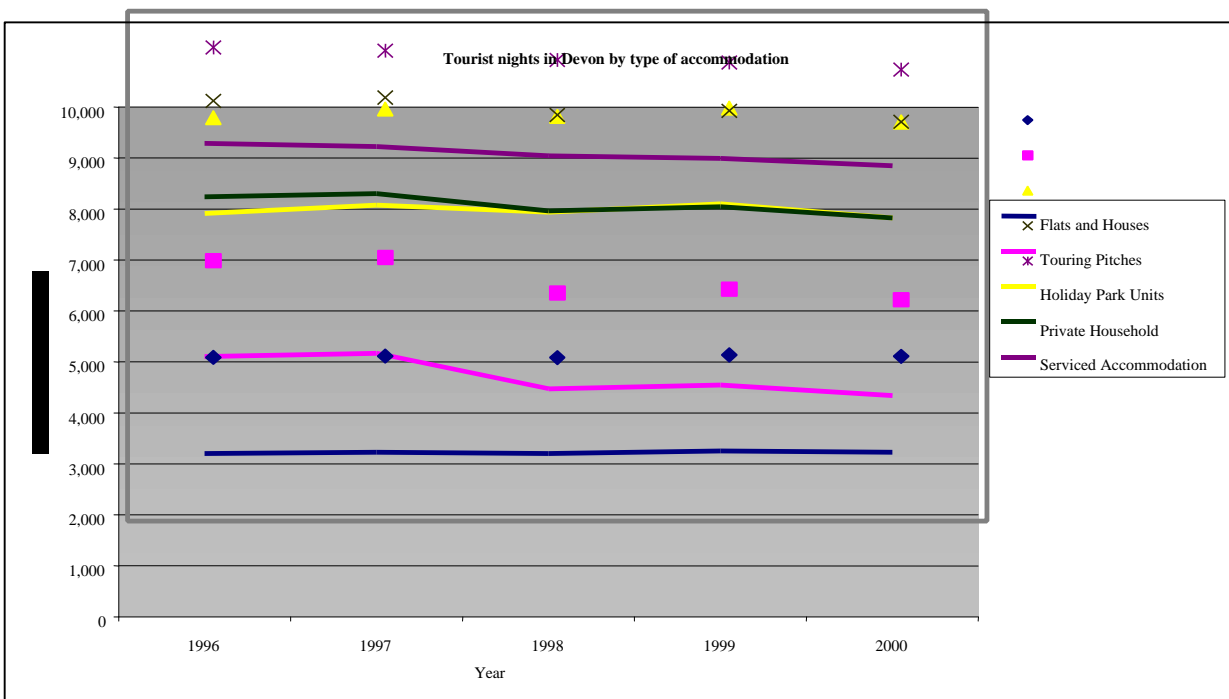


Figure 22: Tourist Nights in Devon by type of accommodation 1995 to 2000

The length of the holiday season has increased slightly through an increase in weekend and off-peak breaks, structural improvements to tourist accommodation, new attractions and increased accessibility.

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

Minerals

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

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

Comment:

- ***Unemployment levels in Devon have fallen significantly since 1995 but there are potential difficulties facing some local industries, including agriculture and tourism.***
- ***Despite reduced unemployment levels, Devon's relative economic prosperity compared with other parts of the Region and the UK – as reflected in average wages, GDP per head and European indicators – remains a matter of concern.***
- ***Future monitoring reports will consider the detailed variations on economic prosperity within different parts of Devon.***

3. OVERALL CONCLUSIONS

The **Summary Report** illustrates the main findings that have emerged from the monitoring of the Plan. The overall conclusions are that:

- the scale and pattern of development, schemes and initiatives implemented and other changes generally reflect the intention of the adopted Structure Plan.
- there are no issues which suggest a need for the Plan to be altered or revised in advance of the normal Plan review process.
- the indicators of change such as population, births and deaths, migration, house completions and employment land take-up indicate that there is no evidence that the overall assumptions underlying the Plan are at significantly at variance from the actual patterns of change and movement.
- Local Plans needs to be progressed, particularly in those parts of the Devon where the supply of development sites is limited, for example in the Areas of Economic Activity to accommodate the development needs in those areas.
- there are concerns about the amount of waste being produced in the Devon,
- additional monitoring and research needs to be undertaken to ensure that all aspects of the Structure Plan can be effectively considered in future years.

4. LOCAL PLANNING AUTHORITY ADDRESSES

Structure/Unitary Planning Authority

Devon County Council

Environment Directorate
Lucombe House
County Hall
EXETER
EX2 4QW
Tel: 01392 382275
Fax: 01392 382135
email: structureplan@devon.gov.uk
Website: <http://www.devon.gov.uk>

Plymouth City Council

Department for Regeneration
Civic Centre
PLYMOUTH
PL1 2EW
Tel: 01752 304360
Fax: 01752 304231
email: structure.plan@plymouth.gov.uk
Website: <http://www.plymouth.gov.uk>

Torbay Council

Strategic Services Directorate
Town Hall
Castle Circus
TORQUAY
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Tel: 01803 208888
Fax: 01803 208882
email: strategic@torbay.gov.uk
Website: <http://www.torbay.gov.uk>

Dartmoor National Park Authority

Parke
Haytor Road
Bovey Tracey
NEWTON ABBOT
TQ13 9JQ
Tel: 01626 832093
Fax 01626 834684
email: hq@dartmoor-npa.gov.uk
Website: <http://www.dartmoor-npa.gov.uk>

Exmoor National Park Authority

Exmoor House
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Somerset
TA22 9HL
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Fax 01398 323150
Email: plan@exmoor-nationalpark.gov.uk
Website: <http://www.exmoor-nationalpark.gov.uk>

District Planning Authority

East Devon District Council

Planning and Technical Services
Council Offices
Knowle
SIDMOUTH
EX10 8HL
Tel: 01395 516551
Fax: 01395 517509
email: jmaidment@eastdevon.gov.uk
Website: <http://www.east-devon.gov.uk>

Exeter City Council

Economy and Dev't Directorate
Forward Planning Section
Civic Centre
EXETER
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Fax: 01392 265165
email: local.plan@exeter.gov.uk
Website: <http://www.exeter.gov.uk>

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Planning and Technical Services
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Website: <http://www.middevon.gov.uk>

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Civic Centre
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Fax: 01271 323638
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South Hams District Council

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Fax: 01803 861166
email: Local.Plan@south-hams-dc.gov.uk
Website: <http://www.south-hams-dc.gov.uk>

Teignbridge District Council

Directorate of Planning and Environment
Forde House, Brunel Road
NEWTON ABBOT
TQ12 4XX
Tel: 01626 361101
Fax: 01626 215760
Email: planning@teignbridge.gov.uk
Website: <http://www.teignbridge.gov.uk>

Torridge District Council

Planning and Technical Services
Riverbank House
BIDEFORD
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Website: <http://www.torridge.gov.uk>

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Fax: 01822 813635
Email: localplan@westdevon.gov.uk
Website: <http://www.wdbc.gov.uk>