Data from local authorities and other third parties is reported in this Annual Monitoring Report 2005. No responsibility is assumed by the Assembly for the quality or accuracy of this data.

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- The local authorities of the South West and the contributions by individual Members and officers
- The Environment Agency
- The Regional Development Agency
- Government Office for the South West
- South West Tourism
- South West Observatory Core Unit and Thematic Modules
  - SLIM
  - BEM
  - PHO
- The specialist officer support groups convened by the Regional Assembly including members of:
  - Strategic Information Providers (SIP)
  - County led sub – SIP groups
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1. INTRODUCTION

1.1 Purpose of the Monitoring Report

Regional Planning Bodies are required to monitor the implementation of Regional Planning Guidance, through development and local transport plans and other means, and on their effects on the “real world” outside. In this way a check can be kept on whether the strategy is working and if any changes in implementation, or indeed in the planning policies themselves, are likely to be necessary. At the same time, links with the objectives and implementation programmes of other region-wide strategies can be identified together with situations where a joint approach with other organisations responsible for working on or through these strategies would be advantageous. These strategies, including Regional Planning Guidance (RPG10) for the South West and the forthcoming Regional Spatial Strategy (RSS), are currently being drawn together under the “umbrella” of an Integrated Regional Strategy (IRS) which is being co-ordinated by the South West Regional Assembly, working with key partner organisations.

The IRS was launched in November 2004 and more information on the may be found at the following web address:


or by contacting the South West Regional Assembly at:

South West Regional Assembly
Dennett House
11 Middle Street
Taunton
Somerset TA1 1SH
Tel: 01823 270101
E-mail: hannah.hickman@southwest-ra.gov.uk

1.2 Monitoring principles

The planning system should be dynamic, capable of managing and responding to changes in the development environment. This is emphasised by the emergence of the plan, monitor and manage approach. Policies should anticipate, and as far as possible accommodate, changes revealed by monitoring.

Regional Planning Guidance for the South West (RPG10) was published by the Secretary of State in September 2001. It emphasised the importance of monitoring and indicated both in a concluding chapter and throughout the document examples of potential targets and indicators.

The aims of monitoring RPG10 are fourfold:

- to assess the extent to which RPG is being implemented through the development plan system;
- to evaluate whether RPG is effective;
- to see whether the RPG’s broad vision and spatial strategy is being adopted; and
- to identify those external factors that are outside the scope of RPG but which may have a bearing on its successful implementation.

---

1 The South West Regional Assembly website is to undergo changes in early 2006. The new web links were not available at the time of printing. However the web links given should automatically redirect you to the relevant pages. If this is not the case please contact the SWRA on 01823 270101.
The fundamental approach adopted conforms to ODPM guidance published in *Monitoring Regional Planning Guidance: Good Practice Guidance on Targets and Indicators*.

This is the fourth Annual Monitoring Report (AMR) of RPG10. The purpose of this report is, to present evidence on what actions have been taken to implement RPG10 or what outputs have been achieved; and to comment on what, if anything, needs to be done as a result.

The South West Regional Assembly’s approach to monitoring is based on the principle of co-operative working with partner organisations throughout the South West. A region-wide Strategic Information Providers Group (SIP) agrees the monitoring approach and content. The Group works closely with Regional Assembly officers and the SW Regional Observatory team to design and implement an Internet based data entry system to allow local authorities to enter data on-line direct from their offices. SIP Group members provided further co-ordination and support at the local level through the organisation of seven local SIP groups.

The 2005 and subsequent Monitoring Reports will form important inputs to work on the development of the Regional Spatial Strategy (RSS) for the South West which is currently underway with the draft document to be published in March 2006. Further information on the scope, draft content and programme for the RSS and the Regional Transport Strategy (RTS), which forms a key component of the RSS, may be found at:


and;

http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_index.shtml

or by contacting the South West Regional Assembly at the above address, or by sending an email to:

Regional Spatial Strategy: keith.woodhead@southwest-ra.gov.uk

Regional Transport Strategy: chris.mitchell@southwest-ra.gov.uk

Implementation and Monitoring: stuart.todd@southwest-ra.gov.uk

1.3 Improving the monitoring systems

The South West Regional Assembly’s approach to monitoring has attempted to be as inclusive as possible. Liaison with stakeholders has taken place over several years. Local authorities were identified as the main data providers, but other organisations also played important roles. A multi-organisation working party was set up in 1999 to consider the issue of monitoring. A preliminary monitoring manual, including a draft list of indicators, was produced by the working party and circulated for comment in 2001 when a series of RPG monitoring seminars were held throughout the region.

A Regional Monitoring Manual was then published in May 2002, and is revised annually to take into account the refining of the monitoring process. These set out the Assembly’s approach to monitoring and present a detailed list of indicators. As part of its commitment to making information freely and publicly available, the Assembly set up a regional Planning Module of the South West Observatory and an associated website (www.swrpm.org.uk). Key data found within these Monitoring Manuals and AMRs is also supplied to the South West Intelligence Database (SWID, http://www.southwestid.org.uk).

The most recent copy of the Monitoring Manual, published in July 2005, (and also copies of all past Monitoring Manuals AMRs and ODPM planning guidance) can be found via the link to the Planning Module document archive: http://www.swrpm.org.uk/documents/

---

2 The Observatory is a research and intelligence resource for the region. It has a modular structure. Please refer to www.swo.org.uk for more information
An annual online questionnaire tailored for the use of each local authority (including the National Parks, and Joint Strategic Planning and Transportation Unit in the former Avon area) has been developed by the SWRA in collaboration with partners, in a password-protected area of the Planning Module website. The purpose is to enable the main data providers to submit their RPG monitoring data as straightforwardly and efficiently as possible. In order to maximise the response rate, missing data is chased up by telephone, email and letter, and through the Assembly’s officer groups. The online questionnaire is hosted by the Planning Module, and is currently being re-designed to allow local authority officers to access data submitted in previous years.

It is in the interests of local authorities to set up appropriate monitoring systems. The Assembly has encouraged authorities to do this to assist with RPG monitoring, and also because this will help them respond to national government requests for data and to meet their own requirements for local monitoring to manage and improve their own land use planning.

The RPG monitoring system is now completing its fourth year of operation, and the process of setting up, testing and refining procedures relating to components of RPG is continuing. There are, however, still a number of areas that have only an initial, and sometimes only partial, set of data available.

Work continued in 2005 to develop the effectiveness and coverage of the innovative data collection systems, based on direct supply of data by the South West’s local authorities over the Internet. During 2005, a refined set of indicators was introduced and a more streamlined, and robust, online data collection questionnaire used. Further measures were also taken to continue to build on the co-ordination of the RPB’s data collection with that of the ODPM Statistics Division at the national level. This has resulted in:

- a reduced workload for the local authorities concerned;
- more consistent data on housing construction and housing stock change;
- support for the ODPM in their attempt to improve the, currently incomplete, picture of national housing stock change;

Whilst local authorities are no longer required to submit a Housing Flows Reconciliation (HFR) return, in order to ensure completeness of data for RPG Monitoring, they were requested to continue inputting the relevant data via the online questionnaire. The response rate to this request was slightly disappointing. While 96% of south west local authorities responded to this request for housing data, only 70% did so within the prescribed time period and only 63% provided complete data (compared to a response rate of 95% in 2004 and a consistently improving response rate in the years before that).

A further review of monitoring methods and indicators is planned for early 2006. This will take into account the emerging requirements for monitoring and implementing the Regional Spatial Strategy, now in preparation. Similarly it will also take into account the implications of the published Integrated Regional Strategy and the need for closer working with other regional partners, including the SW Regional Development Agency (Regional Economic Strategy, now in the process of review), the Regional Housing Body (Regional Housing Strategy), Government Office South West, and the various environmental bodies, in order better to coordinate monitoring and analysis of any policy implications.

1.4 LOCAL DEVELOPMENT FRAMEWORK MONITORING

Requirements are placed upon local authorities to undertake the development of a Local Development Framework (LDF) and subsequent documents, and also require the LAs to submit an annual monitoring report (AMR) to the SWRA as RPB by the end of each calendar year. The findings and policy interpretation presented by the LAs will be an important element in the process of analysis of the RSS policies.

The RPB has been charged with leading on the development of an integrated approach to monitoring with the local authorities. This presents a good opportunity to avoid duplication of
data requests and a streamlined approach to interpretation and analysis. The RPB undertook a series of consultation workshops across the region in early 2005 as part of this process.

The review of monitoring methods planned in early 2006 will also take into account this requirement for local authorities to monitoring LDF. Local authorities submitted their LDF AMRs for the first time in 2005 with a 100% submission rate to Government Office South West. It is recognised that the timetable for submission of these sub-regional AMRs came in to conflict with the data submissions with the online questionnaire, and this may go some way to explaining the low participation rates for RPG monitoring. The RPB is working closely with the local authorities to improve coordination of the data requirements for both LDF and RPG monitoring.

The South West Regional Assembly gratefully acknowledges the contributions made by the participating authorities and the work of Members and officers in achieving these results. The RPB is working with local authorities to facilitate the monitoring process both for their regional return and in terms of monitoring the LDF work. It is vital that the process of plan, monitor and manage is built upon robust and timely data.

A full list of the individual web links to the 2005 South West local authority LDF AMRs can be found on the Planning Module website: http://www.swrpm.org.uk/LDF/index.asp

1.5 MONITORING IN THE CONTEXT OF PLANNING REFORMS

Following the publication of the Planning and Compulsory Purchase Act 2004 additional draft guidance has been issued by ODPM with regard to the monitoring process. This guidance builds on the processes for monitoring already in place in most Regional Assemblies.

The main changes being brought forward are:

- Major planning reforms set out in the Planning and Compulsory Purchase Act (PCPA) 2004, supporting regulations, and planning policy statements and guidance.

- Statutory Regional Spatial Strategies (RSS) have replaced RPG. Local Development Documents (LDDs) have replaced local development plans. RSS’s have extra weight and an enhanced role, with a wider spatial remit, and they take over the functions of structure plans, these having been abolished.

- The PCPA requires the production of Annual Monitoring Reports (AMRs) to report on the implementation of the RSS and LDDs. Regulations made under the Act specify the submission date, and functions of the AMRs.


- The core output indicators published for consultation in Annex F of draft PPS11, have been revised and will be set out in the RSS guidance on monitoring.

- New guidance is being published by ODPM on monitoring LDDs. This reflects the principles and processes set out in the guidance.

- Sustainability Appraisal (SA) is now required under the Planning Act for RSS and LDD, as is Strategic Environmental Assessment (SEA) under the EU Directive. Both need to be monitored. ODPM has published draft guidance on undertaking an SA. It incorporates ODPM guidance on SEA published in October 2003. This includes advice on monitoring, SA.
PPS 11 – MONITORING

With the publication of Planning Policy Statement 11 (PPS 11), there were significant implications for the process of monitoring at the Regional level. Read in the context of the draft guidance on monitoring RSS, PPS 11 stipulates the requirement for an implementation plan to be developed along with a fully integrated monitoring system. An extract of key paragraphs can be seen below focusing on the elements that will set out the way forward to monitoring in the foreseeable future.

FIGURE I1 EXTRACT FROM PPS 11 – IMPLICATIONS FOR MONITORING

3.4 In order to help focus on the key actions that are necessary to deliver the strategy, wherever practicable and sensible to do so, policies should be quantified and output targets and indicators set. Output targets should be set to specify a scale of change in a specified time period. The selection of indicators, which should be kept to a minimum, should follow after objectives, policies and targets have been defined. It is important that progress against the output targets is monitored as the key element of the annual monitoring report. For further explanation of the purposes of these targets and indicators see the monitoring guide referred to below.

3.5 Contextual indicators should also be monitored. These are indicators that measure changes in the wider socio-economic and environmental regional context against which the RSS is being implemented. These indicators may reveal changes which have been caused in part by the RSS.

3.6 RPBs also need, in time, to monitor the significant effects of implementation of the RSSs, although it may be several years before the RPBs can be certain about these effects. Directive 2001/42/EC requires formal SEA of certain plans and programmes which are likely to have significant effects on the environment. Analysing the significant effects of RSS implementation is part of this. As part of the wider SA (see paragraphs 2.36 to 2.40) the significant effects of the RSS on society and the economy, as well as on the environment, need to be assessed and monitored. Advice on this is provided in the monitoring sections of the consultation paper ‘Sustainability Appraisal of Regional Spatial Strategies and Local Development Frameworks’, published by OPDM in September 2004.

3.7 In line with the above, Regulation 5 requires an annual monitoring report to be submitted by the RPB to the Secretary of State on the 28th of February of the following year to which it applies. Naturally, if the report is available before that date it should be submitted as soon as it is available. RPBs should ensure that as much as possible of the data provided in the report covers the year 1 April to 31 March, as required under this regulation. However, the report should not be limited to the inclusion of one year’s data as analysis of longer time periods may be needed to ensure that any discerned trend is established and not a temporary phenomenon.

3.8 Where the RSS contains a policy specifying the annual number of dwellings to be built, or any other period specified, for any part of the region, the annual monitoring report must state the number of net additional dwellings provided. It should also state the gross data needed to define this net figure. These gross data are the total of new dwellings created (new build and conversions) and losses (demolitions and changes of use). This information should be both for the year covered by the annual monitoring report and from the start date of the policy in question.

3.9 The Act makes clear that the main purpose of the annual monitoring report is to consider whether implementation of the RSS is being achieved in line with the purposes of the RSS. If it is not, then Regulation 5 requires the RPB to set out the reasons why it thinks the policy is not being implemented and what it intends to do about it. This will include whether the RPB intends to prepare a draft revision of the RSS to amend the policy. The report should be made publicly available, including on the RPB’s website.

3.10 The RPB should provide the Secretary of State with details of the proposed monitoring arrangements where they are not set out in the draft revision to the RSS. The Secretary of State will need to be satisfied that the RPB has established a monitoring and review mechanism, with member local authorities and other bodies as appropriate, that can respond sufficiently quickly to any adverse impact of the strategy. It is essential that there are clear arrangements to ensure close linkages between the production of the regional and local annual monitoring reports. The Regulations give the RPBs two more months, compared to LPAs, to submit their annual monitoring reports so that local monitoring information can feed into these regional reports. ODPM has published a set of core output indicators for RSSs and LDDs which are complementary and designed to achieve a cost-effective approach to data collection by the RPBs and local authorities for their respective reports.

The Regional Planning Body will produce an implementation plan as part of the development of the RSS. This will in be in accordance with the requirements as set out in PPS 11.
2. SPATIAL STRATEGY

2.1 REVIEW OF RPG10

Publication of Planning Policy Statement 11 (PPS 11) had significant implications for spatial planning and the process of monitoring at the Regional level. The main principles of the new regional planning arrangements are summarised below and will now instigate a review of the approach to monitoring at the regional level to accommodate the changes required.

“1.1 The main principles of the new arrangements are to deliver policy better at the regional level and contribute to the culture change necessary to deliver the Government’s Sustainable Communities Plan, by:

– giving more weight to what is currently Regional Planning Guidance (RPG) by replacing it with a statutory Regional Spatial Strategy (RSS), with which the new Local Development Documents (LDDs) have to be in general conformity, and by making it part of the development plan;

– ensuring that future changes to the RSS are produced on an inclusive basis of partnership working and community involvement;

– making the RSS more regionally and sub-regionally specific with a focus on implementation, and subject to a statutory annual monitoring report which has to identify any necessary remedial action;

– better integration of the RSS with other regional strategies; and

– assisting in delivering the Government’s statutory purpose for plan making by requiring the regional planning body (RPB) to ensure that any draft RSS revision is prepared with the objective of contributing to the achievement of sustainable development. (Source – PPS 11)”

Further implications of PPS 11 have been discussed in the introduction to this monitoring report. The development of a Regional Spatial Strategy that effectively replaces the current RPG10 also involves the development of the relevant strategies to provide a focused approach to integrated planning in the regions. Whereas RPG10 has spatial policies relating to most areas outside of land use planning, these will be broadened and deepened by the development of additional strategies such as the Environment Strategy, Waste Strategy, and Housing Strategy etc. All of these strategies will have elements that will provide focused policies that will feed directly into the RSS.

Each of the individual complementary strategies will have its own monitoring regime developed specifically to assess the policy implementation and output of the strategy. An overarching element of the strategies is the incorporation of the aspects relevant to the Integrated Regional Strategy (IRS). This has been explored in more detail in the introductory chapter to this report.

The Regional Planning Body (RPB) will be working closely with partners and stakeholders to ensure an integrated approach to the monitoring of the spatial aspects of the developing strategies. This will encourage the crosschecking of available information to avoid undue duplication of data collection and analysis. This presents an excellent opportunity to demonstrate continued ‘joined-up’ working and cooperation amongst partnering organisations in the South West.
2.2 REGIONAL PLANNING GUIDANCE (RPG10) CORE STRATEGY

Regional Planning Guidance for the South West (RPG10) was published in September 2001 and provides a broad strategic planning context for the Structure and Local Plans covering the region. The essence of the plan’s central strategy is to:

- Direct most development towards the 11 principal urban areas (PUAs) where need is greatest and sustainable development can best be achieved (brown field land, higher densities, better access to facilities), plus a modest number of other towns designated as centres for growth (ODCG). Elsewhere development is focussed on meeting local need only.

- Encourage supply of sufficient housing, with a mix of types and densities, to meet both needs and reasonable market demand.

- Relate transport priorities to urgent needs of PUAs.

- Conserve resources and protecting the natural and built environment

- Make provision for employment and cultural uses where they can best serve people’s needs, utilise available skills and cause least environmental damage

On commencement of the Planning and Compulsory Purchase Act, RPG10 became the Regional Spatial Strategy. In order to update the RPG and ensure it meets the requirements of (RSS), a ‘Fit for Purpose’ revision was carried out in 2004. This was concerned mainly with ensuring that the Plan meets the new requirements of the new legislation and that the key assumptions underlying RPG10 were tested in the light of changing circumstances and the results of monitoring the application of existing policies. The ‘Fit for Purpose Review’ by Baker Associates can be viewed and downloaded from the SWRA website via the link below: [http://www.southwest-ra.gov.uk/swra/downloads/ourwork/RSS/FFP_Final_Report.pdf](http://www.southwest-ra.gov.uk/swra/downloads/ourwork/RSS/FFP_Final_Report.pdf)

Bearing in mind that RPG10 was published in late 2001, the time period elapsed to date still makes it difficult to measure effectively the effects the planning guidance is having on the ground. Whilst some Structure Plans have incorporated its key elements, the change in the planning process has not enabled the full compliance with RPG10 across the region in the way that it was originally anticipated. The core of the strategy, briefly summarised above, is likely to remain substantially intact in the emerging RSS, but with some changes in emphasis, and the annual monitoring exercise will be a key element in testing its implementation and effectiveness.

2.3 URBAN CONCENTRATION POLICY

Section 3 of RPG10 articulates the Plan’s spatial strategy and is based on the principle of urban concentration. In summary this describes how the diversity of the region is recognised in the identification of four sub-regions: Northern, South East, Central and Western (policy SS1). Most development is to be concentrated at eleven principal urban areas (PUAs, policy SS2) and based on studies of urban capacity and urban extension potential (policy SS5). While recognizing the need for development in other designated sub-regional centres, growth in the larger towns within easy commuting distance of PUAs should be avoided, particularly in respect of housing proceeding out of step with employment (policy SS6). Other towns might accommodate small-scale development to meet local needs and the service requirements of the surrounding rural area only (policy SS7). Finally, the role of designated Green Belts in preventing coalescence of settlements should be maintained, but the need for boundary alteration should be reviewed when local authorities prepare their development plans (policy SS4).

---

3 Policy references throughout this report such as SS1 refer to the relevant policy in RPG10.
2.4 LOCATION OF NEW HOUSING DEVELOPMENT

This section considers the impact of housing growth on the spatial strategy outlined in RPG10. Unfortunately there is still the element of incomplete data being provided from some local authorities within the region. As a result the data collected provides the baseline information for future monitoring as opposed to providing a complete picture of the impact of RPG10 policies. The RPB is currently commissioning research to provide a more consistent appraisal of housing development and capacity within the region. Some of this work is discussed briefly within this chapter.

Research commissioned includes:

- ‘Functional Analysis of Settlements in the South West’ by Roger Tym and Partners. April 2005

- ‘Market Facing Assessment of the Demand and Supply of Employment Land’ by King Sturge LLP. September 2005


  [http://www.southwesthousingbody.org.uk/publications.html](http://www.southwesthousingbody.org.uk/publications.html)

The figures represented below in tables S1 and S2 give an indication of the specific numbers for dwelling completions both within PUAs and within individual local authorities. Figure S1 shows the general distribution of development across the South West between the 1991 and 2001 Censuses in order to give an indication of the location of new housing development at district level.

**FIGURE S1  % CHANGE IN NUMBER OF DWELLINGS SOUTH WEST 1991-2001**

[Image of the map showing the change in number of dwellings]

Source SWRA, 2003
Figure S1 shows, that in percentage terms, generally, the most rapid rates of development occurred in the most rural Districts of the region. This is the situation that the core strategy of RPG10 is intended to change. This trend has been occurring for many years and was a major driver for the development of policies within the spatial strategy that would focus development in the PUAs.

Figure S2 below reflects how in 2005 the policies in RPG10 may be having an impact on the ground. It suggests that recent new build is concentrated within specific areas such as Bristol and Swindon, and that more recent development is concentrated within designated area of growth. However the illustration also shows that 32 of the districts and PUAs (72%) have a net completions rate up to and over 30% above the regional completions average of approximately 4000 completions pa.

FIGURE S2 DISTRICT NET COMPLETIONS COMPARED TO REGIONAL AVERAGE NET COMPLETIONS 2005

Source: SWRA 2005

The policy objective identified in Policy SS2 is to ‘concentrate most development at the PUAs’. However, as Table S1 demonstrates, in the period 2002/03 only 44% of the dwellings provided were located at the PUAs, a figure in line with the PUAs’ regional population share of approx 45%. At the same time approximately 39% were built in other towns of over 10,000 population and a further (approximately) 20% in settlements of fewer than 10,000 population. However, for the period 2004/05 there has been a further rise of 3.03% in the development being situated in the PUAs’ across the region. This rise to 47% would indicate that RPG is having the desired impact and is producing a positive outcome with regard to the delivery of housing numbers.
### TABLE S1 NEW DWELLINGS COMPLETED AT THE PRINCIPAL URBAN AREAS

<table>
<thead>
<tr>
<th>Authority</th>
<th>PUA area</th>
<th>New dwellings completed at the PUAs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2002/03</td>
</tr>
<tr>
<td>Bath &amp; NE Somerset UA</td>
<td>Bath</td>
<td>332</td>
</tr>
<tr>
<td>Bournemouth UA</td>
<td>Bournemouth part of PUA</td>
<td>932</td>
</tr>
<tr>
<td>Bristol CC UA</td>
<td>Bristol</td>
<td>1189</td>
</tr>
<tr>
<td>Cheltenham BC</td>
<td>Cheltenham - PUA (Part in Cheltenham)</td>
<td>424</td>
</tr>
<tr>
<td>Exeter CC</td>
<td>Exeter/Topsham</td>
<td>444</td>
</tr>
<tr>
<td>Gloucester CC</td>
<td>Gloucester</td>
<td>417</td>
</tr>
<tr>
<td>N. Somerset UA</td>
<td>Weston-super-mare</td>
<td>1206</td>
</tr>
<tr>
<td>Plymouth CC UA</td>
<td>Plymouth PUA</td>
<td>446</td>
</tr>
<tr>
<td>Poole UA</td>
<td>Poole</td>
<td>313</td>
</tr>
<tr>
<td>South Glousc. UA</td>
<td>South Glousc. part of Bristol PUA</td>
<td>942</td>
</tr>
<tr>
<td>Swindon BC</td>
<td>Swindon</td>
<td>857</td>
</tr>
<tr>
<td>Taunton Deane BC</td>
<td>Taunton</td>
<td>479</td>
</tr>
<tr>
<td>Torbay UA</td>
<td>Torbay</td>
<td>481</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>8462</strong></td>
</tr>
<tr>
<td><strong>Total net additional dwellings for SW</strong></td>
<td></td>
<td><strong>19171</strong></td>
</tr>
<tr>
<td><strong>% of net dwellings located within the PUAs</strong></td>
<td></td>
<td><strong>44.14%</strong></td>
</tr>
</tbody>
</table>

Source: SWRA 2005

Table S2 confirms the net additions to dwelling stock in the South West since 1996, and is the result of work conducted in 2006 between ODPM, SWRA and local authorities to confirm a standard set of figures. ‘Spikes’ in the data may be a result of the delivery of a particularly large development and not a general increase in housing development.

### TABLE S2 NET ADDITIONS TO DWELLING STOCK SOUTH WEST COUNTIES 1996 - 2005

<table>
<thead>
<tr>
<th></th>
<th>96/97</th>
<th>97/98</th>
<th>98/99</th>
<th>99/01</th>
<th>00/01</th>
<th>01/02</th>
<th>02/03</th>
<th>03/04</th>
<th>04/05</th>
<th>1996-2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornwall</td>
<td>1741</td>
<td>1899</td>
<td>2373</td>
<td>2067</td>
<td>2279</td>
<td>2484</td>
<td>2626</td>
<td>2211</td>
<td>2491</td>
<td><strong>20171</strong></td>
</tr>
<tr>
<td>Devon</td>
<td>3620</td>
<td>4405</td>
<td>4631</td>
<td>4191</td>
<td>4039</td>
<td>3750</td>
<td>3872</td>
<td>3630</td>
<td>4619</td>
<td><strong>36757</strong></td>
</tr>
<tr>
<td>Dorset</td>
<td>2790</td>
<td>3121</td>
<td>2813</td>
<td>2677</td>
<td>2639</td>
<td>3289</td>
<td>2942</td>
<td>3733</td>
<td>3237</td>
<td><strong>27241</strong></td>
</tr>
<tr>
<td>Former Avon</td>
<td>3146</td>
<td>3620</td>
<td>3870</td>
<td>3358</td>
<td>2887</td>
<td>3299</td>
<td>3669</td>
<td>4671</td>
<td>3901</td>
<td><strong>32421</strong></td>
</tr>
<tr>
<td>Glousc.</td>
<td>2105</td>
<td>2315</td>
<td>2373</td>
<td>2071</td>
<td>1880</td>
<td>1873</td>
<td>1811</td>
<td>2541</td>
<td>2259</td>
<td><strong>19228</strong></td>
</tr>
<tr>
<td>Somerset</td>
<td>1965</td>
<td>2155</td>
<td>2422</td>
<td>2845</td>
<td>2568</td>
<td>1896</td>
<td>1864</td>
<td>2416</td>
<td>1963</td>
<td><strong>20094</strong></td>
</tr>
<tr>
<td>Wiltshire</td>
<td>2861</td>
<td>3567</td>
<td>2274</td>
<td>2305</td>
<td>2589</td>
<td>3038</td>
<td>2387</td>
<td>3601</td>
<td>3687</td>
<td><strong>26309</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>18228</strong></td>
<td><strong>21082</strong></td>
<td><strong>20756</strong></td>
<td><strong>19514</strong></td>
<td><strong>18881</strong></td>
<td><strong>19629</strong></td>
<td><strong>19171</strong></td>
<td><strong>22803</strong></td>
<td><strong>22157</strong></td>
<td><strong>182221</strong></td>
</tr>
</tbody>
</table>

Source: ODPM & SWRA 2006

4 Whilst the current format of urban area housing data from the relevant PUA authorities is not an ideal substitute for PUA development data, at this stage it is the most suitable alternative.
2.5 GEOGRAPHICAL DISTRIBUTION OF NEW HOUSING: LEVELS OF HOUSING DEVELOPMENT 1996 - 2016

Table S3 outlines the annual net completions figure required of each county in order to fulfill RPG10. It compares this to the number of dwellings provided in the period 2002/05 and illustrates what percentage of the RPG requirement has been satisfied on an annual basis. Gloucestershire and Somerset are the only structure plan areas not to have satisfied the required annual RPG10 targets in 2004/05. Overall in the South West, the net completions target for 2004/05 has been exceeded by 9.7%. Cumulative net completions for the south West over the entire plan period so far have also exceeded the required amounts for the first time (by 0.2% which amounts to 360 net completions)5

TABLE S3  RPG10 ANNUAL HOUSING TARGETS AND DWELLINGS PROVIDED (2002 - 2005)

<table>
<thead>
<tr>
<th>County</th>
<th>RPG10 annual requirement</th>
<th>Dwellings provided in period</th>
<th>% of planned annual target achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2002/03</td>
<td>2003/04</td>
</tr>
<tr>
<td>Former Avon</td>
<td>3700</td>
<td>3669</td>
<td>4671</td>
</tr>
<tr>
<td>Cornwall</td>
<td>2050</td>
<td>2572</td>
<td>2626</td>
</tr>
<tr>
<td>Devon</td>
<td>4300</td>
<td>3872</td>
<td>3630</td>
</tr>
<tr>
<td>Dorset</td>
<td>2650</td>
<td>2942</td>
<td>3733</td>
</tr>
<tr>
<td>Glouc.</td>
<td>2400</td>
<td>1811</td>
<td>2541</td>
</tr>
<tr>
<td>Somerset</td>
<td>2100</td>
<td>1864</td>
<td>2416</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>3000</td>
<td>2387</td>
<td>3601</td>
</tr>
<tr>
<td>SOUTH WEST</td>
<td>20,200</td>
<td>19,171</td>
<td>22,803</td>
</tr>
</tbody>
</table>

Source: RPG10 and SWRA 2005

Overall approximately 221,800 net completions are left to be built in the remaining plan period 2006-2016. Currently Devon and Gloucestershire are falling short of the required provision of housing in terms of RPG10 requirement. Former Avon and Wiltshire are also falling slightly below their plan period housing requirement. Somerset is just providing enough housing for meet its requirements, while Dorset and Cornwall have exceeded their targets (See Housing Chapter).

2.6 DEVELOPING THE RSS – JOINT STUDY AREA WORK

The Assembly has commissioned a number of sub-regional studies (referred to as Joint Study Areas) to inform the developing RSS. This work seeks to ensure that any ‘strategic policy deficits’, which might arise as Structure Plans are removed from the development plan system, are addressed in the RSS.

The Joint Study Area work is focusing on the larger urban areas in the South West, where strategic planning of these areas may cut across a number of local authority boundaries. This work will help identify the necessary sub-regional policies to be incorporated in the RSS and RTS and will provide policy guidance to the Local Development Frameworks prepared by the respective local authorities.

In all cases, the strategic authorities have been asked by the Assembly to take the lead in the technical work, in administering the process, in policy development and in consultation. The Joint Study Area technical work was completed in mid 2005 and covers the following areas:

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5 Topic discussed further in the Housing Chapter
- **Central Cornwall Towns** (Truro, Falmouth, Newquay, St Austell, Camborne/Pool/Redruth).
- Exeter
- Gloucester/Cheltenham
- Plymouth and SE Cornwall
- SE Dorset conurbation (including Bournemouth and Poole)
- Swindon
- Taunton
- **West of England area** (including Bristol/Bath/Weston-super-Mare)

An important aspect of this work is to produce a clear ‘vision’ for the Joint Study Area in terms of its likely future role and function. Suitable monitoring indicators will need to be developed following completion of this work to assess the implementation of any RSS policies which are developed from this work. Further information is available via the SWRA website: [http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_Developing_JSAs.shtml](http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_Developing_JSAs.shtml)

### 2.7 RESEARCH INITIATIVES

#### 2.7.1 URBAN HOUSING CAPACITY

In 2003, the RPB carried out a review of the state of Urban Housing Capacity Potential (UHCP) studies in the South West. This found that all parts of the region were covered by recent studies, most being in reasonable conformity with the protocol. Nevertheless, many gaps and inconsistencies were apparent and a coherent regional picture could not easily be derived – for example, some of the studies then in use had pre-dated the production of the protocol. Since that time, a number of LPAs have updated their earlier studies and more are known to be in the process of re-survey.

Further work was commissioned in 2004 to:
- Assist in the allocation of District and housing market housing numbers in the RSS - particularly for non PUA named towns.
- Provide an independent assessment of UHCP figures put forward in the JSA studies to assist in the examination of those studies.
- Provide an updated monitoring assessment of the UHCP position compared with the 1999 study carried out for the SW Planning Conference by Baker Associates, to build on that original information base and experience and to incorporate the results of the broad assessment of conformity of the local studies with agreed regional standards that was carried out by the Assembly in 2003/4.
  
  This will also provide a basis for application and monitoring of brownfield development potential by District in the RSS more closely reflecting the local situation (i.e. instead of the RPG10 one size fits all approach to brownfield targets).
- To review the content of the 2001 Regional guidance note on Urban Capacity studies issued in 2001 by the old Transport Officers Group, which has formed the basis for studies ever since, and provide guidance to Districts and UAs in carrying out future studies (there is a widely held view that, whilst the guidance is competent, it is unnecessarily complex and therefore expensive to apply).
- To provide guidance for the Districts and UAs in projecting forward "windfall" development potential on small sites as part of their District housing trajectories (as required in PPS12).

The resulting study ‘Review of Urban Housing Capacity and Potential Studies in the South West’ by Baker Associates July 2005’ also:
- establishes the broad baseline position for urban housing capacity in the region, taking into account the review of capacity studies in the region carried out in 2003;
- produces broad estimated regional UHCP for the three spatial units (PUAs, other strategically significantly towns and Districts) for the period 2006-11, 2011-16, 2021;
- produces broad estimated regional UHCP for PUAs and the four statistical sub regions only for 2021-26.
2.7.2 ANALYSIS OF SUB-REGIONAL HOUSING MARKET IN THE SOUTH WEST - 2005

The South West Housing Body commissioned DTZ in May 2004 to undertake a study intended to ‘begin to analyse the sub-regional housing markets in the South West. The specific objectives of resulting study ‘Analysis of Sub-Regional Housing Market in the South West’ were:

- identify the number and extent of sub-regional housing markets in the South West
- recommend a common methodology, identifying key data sets that should be utilised, or to be created, to undertake a comprehensive sub-regional Housing Market Assessment
- advise the SWHB on how best to generate the greatest understanding of the nature and dynamics of the sub-regional housing markets in the South West. This should take into account the range of housing studies already undertaken or planned at local or sub-regional level.

The South West can be divided up into 12 sub-regional housing markets (see Figure S3). The 12 identified sub-regional housing markets are associated with the Principal Urban Areas of the South West, and the other larger settlements in the region. Unsurprisingly the larger the urban settlement, and its associated employment base, the more extensive is its sub-regional housing market. These housing markets reflect the boundaries of the ‘city’ region – comprising the urban area and its hinterland. This report is assisting in the Joint Study Area work.

FIGURE S3 SUB REGIONAL HOUSING MARKETS FOR THE SOUTH WEST 2004

Source – DTZ Pieda 2004
Full details of the analysis of sub-regional housing markets can be found on the South West Housing Body website via the link below:
http://www.southwesthousingbody.org.uk/publications.html

2.7.3 FUNCTIONAL ANALYSIS OF SETTLEMENTS - 2005

This study was prepared by Roger Tym and Partners, with the explicit goal of assisting in the review of the Regional Spatial Strategy (RSS) by the RPB and it also informed the review of the Regional Economic Strategy

“In doing this the RPB is looking for a more creative approach to settlement strategy than has commonly been the case in the development of regional strategy in the UK.”

A detailed set of issues were specified, where a key requirement involved a functional analysis of settlements at all levels, particularly below the main urban centres (i.e. the Principal Urban Areas that are named in RPG10). The analysis also provided guidance on settlement functionality at the local level for use in Local Development Frameworks (LDFs)).

The main study objectives were as follows:

- Developing a methodology (with associated datasets) to identify current functions and functional relationships of settlements and their potential future roles.
- Apply the methodology to identify settlements which are or could be "regionally significant" or "may have a significant part to play" in delivering regional objectives/RSS/RES or "have a strong sub-regional effect".
- Provide guidance on how to deal with settlements - settlement functionality and potential allocations for "local requirement" at the local level.
- Production of dataset for future reference and analysis.

The project identified a number of key conclusions of functionality from Travel To Work data as follows:

- Identified a number of strong employment centres for their own population and also strong net importers of workers. Towns which show either strong self-containment, importation of employment, or both, can fairly be said to be strategically significant for employment.
- Identified a number of strong net importers of employment, but only employ a little over half of their resident population. Towns where there is strong out-commuting this presents a picture of weakened strategic significance; these places are more dormitories.
- The position and importance of each settlement is strongly influenced by local geography, which involves the nature of the settlements themselves, their relationships with other nearby settlements, and their relationships with major infrastructure and larger urban areas.

A copy of the full report can be obtained from the SWRA website via the link below:
http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_Developing_FA.shtml

2.7.4 MARKET FACING ASSESSMENT OF THE DEMAND FOR AND SUPPLY OF EMPLOYMENT LAND - 2005

A range of factors will impact upon the future demand for employment land over the period to 2026. These hinge around key market trends and how they manifest themselves in terms of economic potential and rates of growth at the regional, sub-regional and local levels.
The report considers how these factors impact upon the demand for employment land and premises over time. Specific considerations included a review of the findings of Sir Michael Lyons Independent Review of Public Sector Relocation and what that could mean for the South West Region. This included a case study of the Met Office relocation to Exeter.

The report assesses the supply of sites allocated for employment across the region, where the focus is regional rather than a detailed local analysis and should be seen as a framework to then be expanded upon in detail at a local level. It also provides guidance on the criteria that should be used in assessing the need for, and allocation of, employment land based on market realism and sustainability considerations, to include:

- The process of identification, allocation, monitoring and review of employment land, paying particular regard to market realism and sustainability as the two key considerations.
- The criteria which should be used in assessing the need for and allocation of employment land and the frequency at which these allocations are reviewed.

Further discussion of this work can be found in the Economy Chapter, within the Employment Land section. The full report is also available on the SWRA website via the following link: http://www.southwest-ra.gov.uk/swra/downloads/ourwork/RSS/King_Sturge_Report.pdf

2.8 SUMMARY AND CONCLUSIONS

The implementation of RPG10’s central strategy is showing further signs of starting to take effect. Momentum is expected to continue to increase with the production of the RSS now well underway and the first round of monitoring of the Local Development Frameworks complete. However, significant problems will still have to be addressed. The initiatives reported on in this monitoring report will assist in providing a clearer perspective with which to develop relevant policies.

Whilst there is now clear evidence that there is a trend for increased development within PUAs, the backlog of outstanding planning permission and local plan allocations will lead to a continued high build rate outside the PUAs for a number of years to come. Local Planning Authorities will be strongly encouraged to review allocations in these areas in line with the requirements of Government guidance PPG3 and PPS7.

The Joint Study Area work will greatly assist the production of the RSS with its focus on the larger urban areas especially where the concept of strategic planning cuts across the boundaries of local authorities. The sub-regional policies produced will have a direct bearing on the development of LDFs.
3. HOUSING

3.1 INTRODUCTION

The South West region’s population continues to increase rapidly (see society chapter). Along with demographic characteristics and social change (increase in life expectancy, smaller household sizes), this has resulted in demand for housing continuing to increase faster than the national trend.

Consequently there is also significant demand on the region to provide housing. Over the period 1991-2005 the South West recorded the fastest growth in the numbers of dwellings of any region. In 2003/04 the number of additional dwellings completed exceeded South West Regional Planning Guidance (RPG10) targets for the first time as the South West experienced a 19% increase in additions to housing stock (compared to 2002/03 figures).

Regional population characteristics and the delivery of adequate type, size and location of housing to meet subsequent demand continues to create a challenge for the South West. The RSS aims to play a central role in successful achievement of sustainable housing delivery and draws on PPS1 ‘Delivering Sustainable Development’ and its aim to create prosperous, sustainable communities. While the RSS nears completion, RPG10 continues to guide monitoring of dwelling provision and the implications of housing growth within the South West.

3.2 STRATEGIC POLICY CONTEXT

The aims and objectives of RPG10 housing policies can be summarised as:

- A ‘decent home for everyone’.
- 20,200 additional dwellings (net of losses) should on average be added to the region’s housing stock annually 1996-2016 (Policy HO1).
- Plan, monitor and manage: the adequacy of housing provision and distribution, outlined in Policy HO1, should be regularly monitored and reviewed where necessary (Policy HO2).
- Local authorities and relevant housing agencies should seek to provide sufficient affordable housing to meet both urban and rural social housing needs (Policy HO3).
- Limited additional housing in rural areas should be provided where it meets the needs of rural communities and would support local services and economic development (Policy HO4).
- At least 50% of new housing development in the region as a whole should be on previously developed land. Vacancy rates should be reduced to an average of 3% (Policy HO5).
- The need for a wide mix of housing types and tenure options that reflect local conditions and increase densities (Policy HO6).

3.3 MONITORING

In order to assess the extent to which the aims and objectives of RPG10 housing policies have been achieved the following regional information is gathered:

- The spatial distribution of new housing development
- The type of new dwellings provided including affordable housing
- The density of new housing development
- The proportion of new housing development provided on previously developed land
- The proportion of vacant dwellings
This data is gathered with the help of South West Local Authorities via use of an online questionnaire. In 2005 96% of all South West Local Authorities responded to the RPB request for RPG analysis data. However, only 70% did so within the time limit prescribed and only 63% provided complete data (i.e. answered all questions). Of the total data submitted to the RPB, only 91% was provided in a useable format (i.e. numerical figures as opposed to hash marks, asterisks and question marks), resulting in the RPB manually querying the data.

The RPB is currently working with the LAs to improve the quantity and quality of data submitted. The online questionnaire is undergoing improvements to provide more user support and to allow LAs to access data inputted for previous years. It is envisaged that these changes will be complete in readiness for the 2006 RPG data submission period.

3.4 FAST FACTS

- There are 2.4 million dwellings in the South West (2005) and over the period 1991 to 2005 the region recorded the fastest growth in the number of dwellings of any region in England.

- A total of 182,160 dwellings have been built during the plan period so far (1996-2005). This equates to an average of approximately 20,240 new dwellings per annum as opposed to the required 20,200 per annum outlined in RPG10. The achieved average figure is therefore within the target for the first time over the plan period.

- Since 1996, an average of 3,900 affordable dwellings per annum, have been funded through public sector funding. Whilst the figures up to 2004 do not include affordable units provided through other means, e.g. S106 agreements, this figure is still significantly below the required target of 6,000 to 10,000 affordable units per annum. (See Society Chapter).

- In 2004 there was a higher percentage of owner occupations in the South West (74%) compared to England generally (71%).

- The number of larger (4 bedroom) properties being built has decreased in recent years. In 2004 smaller dwellings (one and two bedroom houses and flats) accounted for 40% of total new build in the South West.

- Vacant dwelling stock (excluding holiday and second homes) in the South West decreased from 2.8% (March 2004) to 1.5% (March 2005).

- Average housing densities on previously developed land (2000-2004) have increased by nearly 13% when compared with the average figures for 1999-2003. The average density of all dwellings in the South West is in line with the average for England at 39 dwellings per hectare (2004).

- In 2004/05, 54% of new development had been built on previously developed land compared with the average of 59% in 2003/04.
3.5 GENERAL HOUSING PROVISION (RES09)

HOUSING COMPLETIONS

Table H1 shows the number of dwellings completed in the South West from 1996 onwards. The difference between the ODPM housing completion figures and those provided by the local authorities reflect the different approaches in the collection of housing data. The ODPM published figures are gross completions based on P2M returns made by district and unitary authority building inspectors and relate to new dwellings only. The annual Housing Flows Reconciliation (HFR) return developed by ODPM and sent to local authorities, sought to resolve this issue.

This year Local Authorities were not required to complete and submit an HFR form. However, in order to ensure completeness of data ODPM requested that local authorities submit the majority of data required by the HFR to the Regional Planning Body. The HFR data forms the basis of the net dwelling completion figures in the SWRA’s annual monitoring analysis. Where HFR data was not available or incomplete, County Council monitoring representatives were requested to verify the data. In the event that neither HFR nor SWRA local authority data was submitted the P2M (now replaced as P2Q) return data was utilised. The P2M data only records new dwellings and does not include conversions.6

<table>
<thead>
<tr>
<th>Year</th>
<th>ODPM</th>
<th>SWRA</th>
<th>% difference between SWRA and ODPM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996/97</td>
<td>16,642</td>
<td>18,228</td>
<td>9.5%</td>
</tr>
<tr>
<td>1997/98</td>
<td>19,003</td>
<td>21,082</td>
<td>10.2%</td>
</tr>
<tr>
<td>1998/99</td>
<td>15,929</td>
<td>20,756</td>
<td>30.3%</td>
</tr>
<tr>
<td>1999/00</td>
<td>15,901</td>
<td>19,514</td>
<td>22.7%</td>
</tr>
<tr>
<td>2000/01</td>
<td>14,972</td>
<td>18,881</td>
<td>26.1%</td>
</tr>
<tr>
<td>2001/02</td>
<td>15,598</td>
<td>19,629</td>
<td>25.8%</td>
</tr>
<tr>
<td>2002/03</td>
<td>15,732</td>
<td>19,171</td>
<td>21.9%</td>
</tr>
<tr>
<td>2003/04</td>
<td>15,982</td>
<td>22,763</td>
<td>42.4%</td>
</tr>
<tr>
<td>2004/05</td>
<td>16,265</td>
<td>22,136</td>
<td>26.1%</td>
</tr>
<tr>
<td>Total</td>
<td>146,024</td>
<td>182,160</td>
<td>24.7%</td>
</tr>
</tbody>
</table>

Source ODPM and SWRA 2005

If the region as a whole is assessed, the South West has exceeded RPG10 housing provision requirements for the total plan period for the first time in 2004/05 (by 0.2% as illustrated in Tables H1 and H2). Using data outlined in Table H1 and H2, and taking into account inevitable losses of dwellings due to conversions, demolition or redevelopment, it is estimated that a net addition of 182,160 dwellings were made to the total housing stock over the period 1996-2005. This equates to an average of approximately 20,240 new dwellings net per annum.

When the average net completions are compared with the RPG10 requirement of 20,200 dwellings per annum (181,800 from 1996 to 2005), the total regional housing provision over the plan period is exceeded by 360.

ODPM data (sourced from Table 232, ODPM Website) would seem to suggest a significant under provision, and (as shown in Table H1 above) the percentage difference between ODPM and SWRA data has remained consistently high over the plan period.

---

6 HFR data is not published on the ODPM website. More information on the P2M (now known as P2Q) return data can be accessed via the following link: [http://www.odpm.gov.uk/index.asp?id=1156721](http://www.odpm.gov.uk/index.asp?id=1156721)
ODPM data makes use of housing completions data sourced from local authority P2M returns submitted by council building control sections, and from returns by the National House Building Council (NHBC). If based solely on the ODPM data, this AMR would conclude that completions rates are falling behind RPG requirements and that if continued this would result in a sizeable short fall over the entire plan period. If this illustration based on ODPM data of completions is accepted, this will result in a considerable overestimation of the number of dwellings required to be built in the future. Consequently, it is imperative that local authorities continue to deliver consistent data specifically collected for the purpose of RPG monitoring.

**FIGURE H1 HOUSING COMPLETIONS FOR SOUTH WEST 1996-2005**

![Graph showing housing completions for South West 1996-2005](source image)

Figure H1 compares the housing provision over the period 1996-2005 with the required annual housing target in RPG10. The annual trend illustrated within this chart suggests a heavy fluctuation in dwelling completion figures for the region as a whole. For this reason it is still necessary to monitor net housing completion rates to assess the average provision over the plan period, and to ascertain whether the spatial strategy requirements of RPG10 are being met (Policy HO2).

While Figure H1 does confirm that this isn’t the first time that the South West has reached the RPG annual target, it is the first time that the SW has reached the overall target for the entire plan period so far. The regional housing completion figures highlight a significant improvement on the position in 2002/2003 where an approximate shortfall of 4000 dwellings over the period from 1996-2003 was recorded.

While housing provision rates for the region appear to be within RPG10 requirements, this masks the varying completion figures between the Counties. Table H2 outlines the position regarding the number of housing completions within the structure plan authorities compared to the RPG10 requirement (Policy HO1). For the period 1996/97-2004/05 Cornwall, Dorset and Somerset have exceeded their requirements. The remaining areas have not satisfied the housing requirements outlined in RPG10, whilst in Gloucestershire the housing completions are significantly lower than the RPG requirement (Policy HO1). The inclusion of student accommodation units within the completion figures (following advice in the HFR return to the ODPM) have served to increase the overall completion figures for the Former Avon area over the period 1996-2004.
## TABLE H2 NET HOUSING COMPLETIONS BY COUNTY 1996-2005

<table>
<thead>
<tr>
<th>Year</th>
<th>Former Avon #</th>
<th>Cornwall</th>
<th>Devon</th>
<th>Dorset</th>
<th>Gloucecs.</th>
<th>Somerset*</th>
<th>Wiltshire</th>
<th>South West</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Annual RPG requirement</td>
<td>3,700</td>
<td>2050</td>
<td>4300</td>
<td>2650</td>
<td>2400</td>
<td>2100</td>
<td>3000</td>
</tr>
<tr>
<td>1996/97</td>
<td>3146</td>
<td>1741</td>
<td>3620</td>
<td>2790</td>
<td>2105</td>
<td>1965</td>
<td>2861</td>
<td>18228</td>
</tr>
<tr>
<td>1997/98</td>
<td>3620</td>
<td>1899</td>
<td>4405</td>
<td>3121</td>
<td>2315</td>
<td>2155</td>
<td>3567</td>
<td>21082</td>
</tr>
<tr>
<td>1998/99</td>
<td>3870</td>
<td>2373</td>
<td>4631</td>
<td>2813</td>
<td>2373</td>
<td>2422</td>
<td>2274</td>
<td>20756</td>
</tr>
<tr>
<td>1999/00</td>
<td>3358</td>
<td>2067</td>
<td>4191</td>
<td>2677</td>
<td>2071</td>
<td>2845</td>
<td>2305</td>
<td>19514</td>
</tr>
<tr>
<td>2000/01</td>
<td>2887</td>
<td>2279</td>
<td>4039</td>
<td>2639</td>
<td>1880</td>
<td>2568</td>
<td>2589</td>
<td>18881</td>
</tr>
<tr>
<td>2001/02</td>
<td>3299</td>
<td>2484</td>
<td>3750</td>
<td>3289</td>
<td>1873</td>
<td>1896</td>
<td>3038</td>
<td>19629</td>
</tr>
<tr>
<td>2002/03</td>
<td>3669</td>
<td>2626</td>
<td>3872</td>
<td>2942</td>
<td>1811</td>
<td>1864</td>
<td>2387</td>
<td>19171</td>
</tr>
<tr>
<td>2003/04</td>
<td>4671</td>
<td>2211</td>
<td>3630</td>
<td>3733</td>
<td>2541</td>
<td>2416</td>
<td>3601</td>
<td>22803</td>
</tr>
<tr>
<td>2004/05</td>
<td>3901</td>
<td>2491</td>
<td>4619</td>
<td>3237</td>
<td>2259</td>
<td>1963</td>
<td>3687</td>
<td>22157</td>
</tr>
<tr>
<td>1996-2005</td>
<td>32421</td>
<td>20171</td>
<td>36757</td>
<td>27241</td>
<td>19228</td>
<td>20094</td>
<td>26309</td>
<td>182221</td>
</tr>
</tbody>
</table>

| % of RPG10 requirement achieved | 97.4 | 109.3 | 95 | 114.2 | 89.1 | 106.3 | 97.4 | 100.2 |

Source: HFR data and SWRA 2005 verified with the SW Structure Plan Authorities’ monitoring data.
* - The Somerset 2001/02 figure is calculated using the HFR and P2M returns.
# - Former Avon total has increased by 427 in the plan period 1996-2004 due to the inclusion of cluster flats as per the requirements of the HFR.

### 3.6 HOUSING TENURE CHANGE (SOC16)

There are more than 2.4 million dwellings within the South West Region (State of the South West 2005). The changes in tenure outlined in Figure H2, reveal a higher percentage of owner occupation is present in the South West compared to England generally. In comparison the proportion of social housing in the South West (Registered Social Landlords and local authority housing) continues to be lower than in England generally.

**FIGURE H2 HOUSING TENURE IN ENGLAND AND THE SOUTH WEST 1991 - 2004**

Source: ODPM 2005

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\[ More recently the ODPM has estimated that as of 31/03/05 there were 2,822,285 (net completed) dwellings in the South West. \]
In order to compare the South West housing tenure change against the other regions in England it is necessary to use the ODPM statistics on changes in regional housing stocks. According to ODPM data, the region’s dwelling stock growth has been higher than any other region in the period 1996-2004. At the time of writing the position for 2005 could not be updated as ODPM data was not available.

FIGURE H3 CHANGES IN DWELLING STOCK IN ENGLAND AND THE REGIONS 1991-2004

Source: ODPM 2005

* Index 1991 = 100: The number of dwellings in England in 1991 was estimated at 19,671,000. Hence the values shown represent relative increases. For example, the number of houses in England rose to an estimated 21,813,000 in 2004, representing an increase on the index of 9.87 (shown as 109.87 on the graph).

3.7 EMPTY HOMES

Policy HO5 includes a target for a reduction in average vacancy rates in the region to 3%. In order to establish whether the RPG policies are reflected in lower tier plans, local authorities were asked whether they had an empty homes strategy (EHS).

The response (Table H3) identified that 52% of local authorities within the region have an empty homes strategy. This represents a reduction since 2003 when 66% of local authorities within the region confirmed they had an EHS. At first glance it would appear to indicate that local authorities are dropping their EHS, and that the perceived need for an EHS is decreasing.

However, these figures may be somewhat distorted since the ODPM has recently stated that there is no longer a need for local authorities to produce a ‘stand alone’ Empty Homes Strategy. Consequently many local authority’s EHS are set out as statements incorporated within their Development Plan Documents. For example, Taunton Deane Borough Council’s Empty Homes Strategy is a paragraph within their Housing Strategy Plan and is also listed in their Housing Action Plan.
Many authorities without an EHS do recognise the need for one, but have insufficient resources to maintain or review such strategies. Many LAs do bring empty homes back into use but do not recognise this as part of a specific strategy.

In areas previously without an EHS, the perceived need (both politically and within the community) for an affordable housing strategy is such that any initiatives to increase the availability of housing will be given priority. For example Christchurch Borough Council, who only recently introduced their EHS, has cited the need to demonstrate to the community that they are seeking to address housing needs in the area, by making the best use of the existing private housing stock, even if the proportion of empty homes is relatively small.

In 1991 the regional vacancy rate, excluding second homes and holiday homes was 4.7%. Table H4 highlights the current number of empty dwellings in the region. In 2005 the South West had 42,182 (1.5%) empty dwellings, representing a significant decrease from the figure in 2004 (2.8% of dwelling stock were vacant in March 2004). The 3% RPG target has therefore been achieved.

<table>
<thead>
<tr>
<th>TABLE H3 AUTHORITIES WITH AN EMPTY HOMES STRATEGY AS AT 31 MARCH 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;NE Somerset UA</td>
</tr>
<tr>
<td>Bournemouth UA</td>
</tr>
<tr>
<td>Bristol CC UA</td>
</tr>
<tr>
<td>Caradon DC</td>
</tr>
<tr>
<td>Carrick DC</td>
</tr>
<tr>
<td>Cheltenham BC</td>
</tr>
<tr>
<td>Christchurch BC</td>
</tr>
<tr>
<td>Cotswold DC</td>
</tr>
<tr>
<td>Dartmoor NP</td>
</tr>
<tr>
<td>East Devon DC</td>
</tr>
<tr>
<td>East Dorset DC</td>
</tr>
<tr>
<td>Exeter City Council</td>
</tr>
<tr>
<td>Exmoor NP</td>
</tr>
<tr>
<td>Forest of Dean DC</td>
</tr>
<tr>
<td>Gloucester CC UA</td>
</tr>
<tr>
<td>Kennett DC</td>
</tr>
<tr>
<td>Kerrier DC</td>
</tr>
<tr>
<td>Mendip DC</td>
</tr>
<tr>
<td>North Cornwall DC</td>
</tr>
<tr>
<td>North Devon DC</td>
</tr>
<tr>
<td>North Dorset DC</td>
</tr>
<tr>
<td>North Somerset UA</td>
</tr>
</tbody>
</table>

Source: SWRA 2005

# Those authorities that had an Empty Homes Strategy as at March 2003 and now do not (as at Nov 05)
× Those authorities that did not have an Empty Homes Strategy as at March 2003, and now do (Nov 05)
- Five local authorities did not respond to this monitoring question.
<table>
<thead>
<tr>
<th>Total dwelling stock as at 31/03/05</th>
<th>Total number of empty homes</th>
<th>Proportion of vacant dwellings from total dwelling stock</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,822,285</td>
<td>42,182</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

Source SWRA 2005

**N.B.** The dwelling stock and vacant stock figures were calculated from the HFR Monitoring Questions within the RPB Monitoring Questionnaire. Any missing figures were obtained from the 2005 HIP/HSSA returns. This may have distorted the vacancy rates.

### 3.8 SECOND HOMES

The 2001 Census revealed and the Survey of English Housing (2005) supported figures which show that the South West has the highest number and percentage of second homes in England. ODPM Survey of English Housing (2005) suggests that between 2001/02 – 2003/04 there were 253,000 households in England with a second home (1.2% of total housing stock). 24% (60,000) of these were located in the South West, representing 2.7% of the total South West housing stock.

Within the 2005 Local Development Framework (LDF) Annual Monitoring Report (AMR), many local authorities commented that the high percentage of second homes continues to have implications for the affordability and availability of housing in some areas of the South West. Penwith District Council reported that approximately 7.1% of all dwellings were second homes. Purbeck District Council reported that the level of second homes continues at nearly 8 times the national average. South Hams District Council reported that 40-50% of the housing stock in coastal areas receive a second homes council tax discount. South Somerset District Council reported a 0.32% increase in the percentage of second homes since 2001.

### 3.9 HOUSING TYPES (RES14)

Policy HO6 aims to promote strong and stable communities through encouraging local authorities, social housing providers, developers and other agencies to provide a wide range of housing types and tenure options reflecting local conditions. In addition PPG3 also requires that local authorities should:

> ‘..secure an appropriate mix of dwelling size, type and affordability in both new developments and conversions to meet the changing composition of households in their area in the light of the likely assessed need.’

Figure H4 highlights the changes in dwellings by number of bedrooms. The proportion of larger properties being built has experienced a sharp decline in recent years. The number of new homes built with four or more bedrooms peak at 34% in 2001/02, and has since dropped to 24% in 2004/05. More recently in 2004/05 the trend shows that smaller dwellings account for approximately 40% of the total new build. Whilst the proportion of two bed properties was in decline during the period 1991-2001, in recent years this has started to increase again and now accounts for 33% of all new build. Three bedroom dwellings increased more moderately from 29% of the total to 36% of dwellings being provided in the period 1991-2005.

The proportion of flats gradually declined during the period from 1991-2000 from 21% of the total in 1991/2 to 10% by 1999/2000. However in recent years there has been a dramatic increase to 26% in 2003/2004 and 22% in 2004/05.

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8 Note: 2004/05 Housing Type data is based on only 71% response rate to RPB online questionnaire.

9 PPG3 para .11
In 2001/2002 only 54% of the districts and unitary authorities were able to submit data in respect of the dwelling types by number of bedrooms. Despite an improvement to 82% in 2003/2004, this has since dropped again with the South West achieving only a 71% response rate in 2005 regarding monitoring the type of dwellings provided. Of the 14 district and unitary authorities who did not respond to this issue in 2004/05, five of them (Bristol City, Caradon, East Devon, Cheltenham and Tewkesbury) have areas that fall within the PUAs. Given that a large proportion of future housing growth is to be focused within the PUAs (Policy SS2) and is required to meet housing need in these areas determined through housing need assessments (Policy HO6), it is essential that the SWRA continue to work with the authorities concerned to encourage more comprehensive regional coverage of housing type data on an annual basis.

The only local authorities that have not submitted dwelling type data in either 2003/2004 or 2004/05 are Bristol City Council, Caradon and Tewkesbury Borough Council. The SWRA needs to liaise with these specific authorities to ensure that dwelling type data is collected in the future. This data needs to be comprehensively collected in order to gauge the extent to which Policy HO6 and the requirements of PPG3 are being successfully implemented across the region. Whilst monitoring the number of bedrooms in completed dwellings is a time consuming task for local authorities, particularly when carried out retrospectively, local planning authorities and structure plan authorities should seek to monitor the number of bedrooms as a matter of on-going routine throughout the year.
3.10 HOUSING DENSITY (RES01)

National guidance (PPG3) has highlighted that the historically high level of land take can no longer be sustained, as it results in inefficient use of land and similarly such development is less likely to sustain local services or public transport, ultimately adding to social exclusion. PPG3 stipulates that future housing developments should:

- encourage housing development which makes more efficient use of land (between 30 and 50 dwellings per hectare net); and
- seek greater intensity of development at places with good public transport accessibility such as city, town, district and local centres or around major nodes along good quality public transport corridors.

FIGURE H5 DENSITY OF DWELLINGS BUILT BY PREVIOUS USE: GOVERNMENT OFFICE REGIONS 2000-2004 AVERAGE

These requirements are reflected in RPG10 Policy HO6 which seeks to increase densities in the region to between 30-50 dwellings per hectare, with potentially higher densities where possible on urban sites, especially those close to town-centres and transport nodes.

Figure H5 highlights that in the South West average net densities on previously developed land (pdl) and non-previously developed land (non-pdl) for the period 2000-2004, were 35 and 26 dwellings per hectare respectively. This represents an increase of 12.9% in the housing density of newly built homes on pdl when compared with the average for 1999-2003. An increase of approximately 4% is demonstrated in the average housing density of new homes on non-pdl when 2000-2004 figures are compared against those for 1999-2003.

Figure H6 compares the density of dwellings built in the South West region with the English average. According to the ODPM’s Land Use Change statistics, in 2004 the density of dwellings built in the South West region was 39 dwellings per hectare. This is in line with the English average which in 2004 was also 39 dwellings per hectare. Dwelling densities for both the South West and England have increased dramatically since 2001, with approximately a 16% increase in dwelling densities for both.
Figure H7 outlines the dwellings per hectare by local authority. This map has utilised the data from the ODPM’s Land Use Change statistics 2003. Information gathered through the RPB’s monitoring exercise on average dwelling densities was incomplete and the RPB intends to work more closely with the local authorities to ensure that more accurate and complete data is collected in the future in order to record the density of new housing development. However, the incomplete data is displayed in Figure H7b so as to allow a partial illustration of dwelling densities within the SW in 2004/05.

**FIGURE H7 AVERAGE DENSITY OF DWELLINGS PER HECTARE IN SOUTH WEST 2000-2003**

Source ODPM Land Use Change Statistics May 2005
**FIGURE H7b AVERAGE DWELLING DENSITY BY SW LOCAL AUTHORITY 2004/05**

* District with even spread of densities from 30 dwellings per hectare upwards.

Note - Comparison of Figure H7 and H7b is not directly possible due to different scale classes used for dwelling densities and due to incomplete dataset for Figure H7b.

**FIGURE H8 NET HOUSING DENSITY FOR THE SW LOCAL AUTHORITIES 2004/05**

Source SWRA 2005
- Not all local authorities responded to this monitoring question.
NET HOUSING DENSITY BY LOCAL AUTHORITY (NCOI 2c)

Figures received from local authorities are presented above with regard to the reported development and the net density of dwellings built. This is only the second year that these figures have been requested from local authorities and so only provides a ‘snap shot’ of the current position.

3.11 NEW HOUSING ON PREVIOUSLY DEVELOPED LAND (RES02, RES03)

Policy HO5 seeks to achieve at least 50% of new housing development on previously developed land (PDL) based on the completion of local urban capacity studies. This figure is lower than that identified for England as a whole by PPG3, which aims to reach a national target of more than 60% of all new dwellings on PDL by 2008. The potential for ‘brownfield’ development in a largely rural area such as the South West is clearly less than in more urban or former industrial areas.

Figure H9 shows that in 2004 the South West, the percentage of development on PDL achieved a rate higher than the 50% required by policy HO5. Whilst this is the second time that the 50% land recycling rate has been achieved during the RPG10 plan period, it represents a 2% decrease on 2003 figures. SWRA data (14% incomplete) suggests that 59% of land was recycled for development in 2004/05.

FIGURE H9 PERCENTAGE OF DWELLINGS BUILT ON PREVIOUSLY DEVELOPED LAND IN THE SOUTH WEST 1994-2004

Source ODPM Land Use Change Statistics 2005

Figure H10 shows the percentage of development on previously developed land by district in the South West during the period 2000-2003. This map has utilised the data from the ODPM’s Land Use Change Statistics. Whilst SWRA monitoring data for this issue was incomplete, the data collected is illustrated in Figure H10b. However no comparison is possible with ODPM data due to differences in the density band in which data is submitted.

As might be expected, the actual levels of land recycling achieved at a more local level across the region are far more variable than the regional average, and this is shown in Figure H10.
Only 51% of the district and unitary authorities within the region achieved a recycling rate above the RPG 50% target during the period 2000-2003. This does however continue to illustrate a gradual improvement on the figures recorded in previous years (31% in 1998-2001 and 43% in 1999-2002). The data provided by the ODPM (Figure H10) does not include conversions and therefore the individual local authority percentages are likely to be higher.

Note - Comparison of Figure H9 and H9b is not directly possible due to different measurements used for dwelling densities and due to incomplete dataset for Figure H9b.
Figure H10b partially illustrates the data obtained through the RPB’s monitoring process and shows the proportion of development on previously developed land by local authority during 2004-2005. The data collected from the local authorities that did respond (86%) to this issue revealed that 80% achieved a recycling rate above the RPG10 target of 50%.

Figure H11 outlines the percentage of new housing on previously developed land in all the English regions and how the proportion has increased since 1995. The average recycling rate in the South West, during the period 2000-2004 was 51%. According to the ODPM’s Land Use Change Statistics, in 2004 the recycling rate (new housing development being located on previously developed land) was 54%.


![Graph showing percentage of new dwellings built on previously developed land in different regions for 1995-99 and 2000-2004.]

Source ODPM Land Use Change Statistics 2005

3.12 SUMMARY

In order to fully assess the implementation of the spatial strategy outlined in RPG10, improvements in the data collection process are required. This includes more complete data in terms of the extent to which new housing development is being located in the PUAs and also the type of dwellings (by number of bedrooms) which are being provided. The extent to which RPG10 policies are being adhered to will be progressed as more local authorities’ plans are reviewed and tailored towards RPG10 policy requirements. Local authorities are now also monitoring many of the strategies within RPG for their LDF AMRs. It is expected that returns for the RPB monitoring questionnaire will improve as a result of coordination of the data collection and submission timetable for both the LDF AMRs and the regional AMR.

House building during the past nine years of the RPG10 plan period (1996/97 - 2004/05) is for the first time slightly above the levels envisaged in policy HO1. As a result of the gradual increase in the number of dwellings completed the numbers required in RPG10 have been achieved by a marginal amount. During the plan period thus far, an average of approximately 20,240 new dwellings per annum have been built. However the reasons for the continued significant under provision of housing in areas such as Gloucestershire and Wiltshire do need to be explored and addressed if delivery of the strategy is to be maintained. If there are fundamental problems in these areas, the premises of the strategy may themselves need to be reviewed as part of the revision of the RSS.
Changes in building densities continue to be implemented rather more rapidly according to the evidence gathered by the ODPM’s Land Use Change Statistics. South West dwelling densities (per hectare) have increased by 16% since 2001. The data collected through the RPB’s monitoring process was incomplete and this needs to be addressed with the local authorities concerned to ensure that density of new development is monitored more effectively across the region. The mix of housing types provided does appear to be improving and the supply of smaller dwellings is revealing an upward trend. However the issue of poor housing affordability (see society chapter) and the limited availability of social housing remains an acute issue for the region and the RPB will continue to work with the Regional Housing Body and associated partners to address this issue effectively through the Regional Housing Strategy and the RSS.

In addition there have been improvements in the recycling rate in the South West in recent years. According to the ODPM’s Land Use Change statistics the average recycling rate during the period 2000-2004, was 51%. In 2004 the recycling rate had decreased slightly from 56% to 54% (new housing development being located on previously developed land). This is the second time that the 50% land recycling rate was achieved during the RPG10 plan period. Furthermore the RPB’s monitoring process identified a further improvement on land recycling rates during the period 01/04/03-31/03/04, where despite only a 86% response rate the data indicated that overall 80% of new development had been built on previously developed land.
4. ECONOMIC PROSPERITY

4.1 STRATEGIC POLICY CONTEXT

A central aim of RPG10 is to maintain and improve quality of life for the current and future population of the South West, and economic prosperity is one indicator of quality of life. In an economic context, RPG10 aims to complement the strategic approach set out in the Regional Development Agency’s Regional Economic Strategy (RES), specifically by directly development towards areas where it can support and be supported by economic development. The RES is being reviewed alongside the review of RPG10, and both have been submitted to the Secretary of State in 2005.

4.2 MONITORING

Indicators that monitor the economic context and impact of the RSS economic policies fall into the categories of:

- General economic context
- Employment and development
- Tourism sector

4.3 FAST FACTS

- The South West economy grew faster than the UK as a whole in per capita terms between 2000 and 2003. This faster growth has narrowed the gap in GVA per head between the South West and the UK, although at £15,038 in 2003, economic output per head was still lower than (95 per cent of) the UK average.

- Among South West Counties and Unitary Authorities (UAs), weekly and hourly earnings grew most rapidly in North Somerset (up 8.9% and 8.3 percent respectively between 2002 and 2004). Wage differentials across areas of the South West narrowed over the period.

- The South West has the lowest International Labour Organisation (ILO) rate of unemployment all the UK regions at 3.6% in the year to September 2005. This compares to 4.7% for England as a whole. The total number of unemployed people in the region fell by 8% between March 2001 and September 2005 compared with 4% for England as a whole.

- The South West region remains the most popular destination for domestic visitors, accounting for 20% of England’s domestic tourist trips, 25% of nights and 22% of spending in 2004.

- The South West has a total resident labour force of 2.5 million and has the lowest International Labour Organisation (ILO) unemployment rate of all the UK regions at 3.6% (in the year to September 2005), compared to 4.7% for England as a whole.

4.4 GENERAL ECONOMIC CONTEXT

Estimates of Gross Value Added\(^{10}\) (GVA) for the UK region value the South West economy at £75.2 billion, ranking the South West as the sixth largest economy of the English regions in 2003. Since 2000, South West GVA per head has steadily increased (Table E1). Revisions to official estimates of total output and productivity in the South West show the region to be substantially more productive than previously believed. This represents a faster annual rate of growth over the period 2000-3 (5.3%) than for the rest of England (4.9%) or the UK as a whole.

\(^{10}\) Gross Value Added (GVA) is the preferred measure of regional income and replaces Gross Domestic Product (GDP). GVA measures the total income generated by production of goods and services within the region and, unlike GDP, is based upon an index which includes industrial output and prices.
GVA at current basic prices, increased in all regions during 1989 to 2003. The rate of increase varied between the regions. The biggest growth in 2003, (compared with 2002), was 6.3 per cent in East Midlands; followed by 6.0 per cent in Northern Ireland and Wales. The lowest growth rate was 2.6% in London.

The average GVA per head of population for the UK as a whole was £15,980 in 2003. London had the highest regional GVA per head of population at £20,990; followed by the South East with £18,411. With £17,452, the East of England was the only other region to have a GVA per head of population higher than the national average. Wales has the lowest GVA per head of population at £12,629.

### TABLE E1 REGIONAL GVA PER HEAD

<table>
<thead>
<tr>
<th>Year</th>
<th>GVA Per Head (£)</th>
<th>% Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>12,902</td>
<td>-</td>
</tr>
<tr>
<td>2001</td>
<td>13,609</td>
<td>5.5</td>
</tr>
<tr>
<td>2002</td>
<td>14,286</td>
<td>5.0</td>
</tr>
<tr>
<td>2003</td>
<td>15,038</td>
<td>5.3</td>
</tr>
</tbody>
</table>

Source: ONS 2005

GVA per head in the South West is around 94% of the UK level (Figure E1). GVA per head varies significantly across the region, and in 2002, GVA per head varied from £9,525 in Cornwall (62% UK average) to £24,113 in Swindon (158% UK average). Low levels of GVA in some areas, such as Devon and Cornwall, may be partly explained by the relatively large numbers of retired people in these areas as income arising from pensions and investments are not recorded in local GVA.

### FIGURE E1 REGIONAL GROSS VALUE ADDED 2003

Source: ONS 2005

### HOUSEHOLD INCOME

Note that GVA per head can be misleading at a sub-regional level as it does not account for the effects of commuter income flows and differences in industrial structure and particularly capital intensity.
Gross Domestic Household Income (GDHI) for the South West as a whole was around £63.5 billion in 2003. The implied GDHI per person, at around £12,704, is 98% of the English level and 104% of that for England excluding London and the South East. Around 45% of the South west's GDHI accrued to households in the Bristol area (NUTS2 region of Gloucestershire, Wiltshire and North Somerset). GDHI per head in Cornwall and the Isle of Scilly was only 91% of the South West level at this time. Cornwall has enjoyed relatively rapid growth of GDHI and GDHI per head over recent years, by 6.0% and 5.1% respectively between 1995 and 2003.

AVERAGE EARNINGS

In 2004, the average weekly wage of employees in the South West was £397.8, 93% of the English average. The average hourly wage was £9.78 which is 92% of the English mean. The difference between the hourly and weekly wage reflects that South West employees work on average slightly fewer hours per week than England as a whole. However between 2003 and 2004, weekly wages grew at a faster rate by 3.6% in the South West compared with 3.5% for England.

Among South West Counties and Unitary Authorities (UAs), weekly earnings grew most rapidly in North Somerset (up 8.9% between 2002 and 2004), Torbay (7.5%) and Wiltshire (6.2%) (Figure E2). The slowest increases occurred in Bath and North East Somerset (0.8%), Poole (1 percent) and Bournemouth which actually experienced a decline of 2.9%. Hourly earnings grew fastest in North Somerset (8.3%), Cornwall and the Isles of Scilly (6.9%) and Torbay (6.1%). The result of these sub-regional trends has been a narrowing in wage differentials across areas of the South West.

FIGURE E2 PERCENTAGE CHANGE OF AVERAGE EARNINGS 2002 - 2004

ECONOMIC PERFORMANCE

The overall size structure of businesses in the region is highly similar to that for England as a whole (Figure E3). As is the case nationally, the majority of South West business sites are small with around 76% employing fewer than 5 people (ONS 2005), and around 89% of businesses employing 10 people or fewer. Larger businesses in employment terms tend to be concentrated in a few industry sectors, particularly in energy and water, manufacturing, public
administration, education and health, with larger concentrations of small firms in agriculture & fishing, distribution, hotels & restaurants, and business services.

Sector contribution to GVA and employment, as calculated by the Regional Accounts\textsuperscript{12} highlight the key contribution of four key areas: business services, manufacturing, distribution and retail and the public sector (public admin and defence, health and education) which accounts for over 70% of GVA and over 65% of employment. Other sectors with over 5% of output and employment are construction, hotels and catering, transport and communication and other services.

\textbf{FIGURE E3 VAT REGISTERED BUSINESSES BY TURNOVER SIZE BAND 2005}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure_e3.png}
\caption{VAT registered businesses by turnover size band 2005}
\end{figure}

\textit{Source Inter-Department Business Register, ONS 2005}

\section*{4.5 EMPLOYMENT AND DEVELOPMENT}

\subsection*{UNEMPLOYMENT}

The South West has a total resident labour force of 2.5 million and has the lowest International Labour Organisation (ILO) unemployment rate of all the UK regions at 3.6\% in (the year to September 2005), compared to 4.7\% for England as a whole. Total ILO unemployment fell by 8\% in the South West between March 2001 and September 2005 compared to an average of 4\% for England. Unemployment has fallen for both men and women in the region, although the unemployment rate for men is higher and the rate is highest amongst young people (age between 16 and 24).

The claimant count, a narrower definition of unemployment, shows that around 41,383 South West residents were claiming unemployment-related benefits in December 2005; almost three-quarters of whom were men. This represents an unemployment rate of 1.6\% comfortably below the rate for England as a whole (2.7\%). The unemployment rate varies considerably across the region’s Local Authority areas, from less than 0.5\% in Purbeck and the Isles of Scilly to 2.2\% in Plymouth and Gloucestershire. All the South West’s local authority areas have claimant unemployment rates below the average for England.

\textsuperscript{12} Regional Accounts are available from the Business and Economy Module of the South West Regional Observatory by visiting \url{www.swbem.org.uk}
EMPLOYMENT LAND

A key part of the spatial strategy and planning system is to ensure that an adequate supply of employment land is provided in the most suitable and sustainable locations so as to meet the varying demands for different types of economic activity in the region. The proportion of employment land that is allocated on previously developed ('brownfield') and previously undeveloped ('greenfield') land is monitored to ensure that authorities are meeting targets for brownfield land use and also to monitor growth rates in employment land development throughout the region.

The figure below (Figure E5) reports on the amount of employment land development that has taken place on previously development (pdl) and previously un-developed (non-pdl) in 2004/05. This is only a snap-shot of the complete image and there are issues of inconsistencies and gaps in historic data.

Reporting on certain categories of employment (termed ‘Use Class Orders’ or UCOs) was not possible this year as many local authorities were unable to report separate figures for all UCOs as requested by the RPB. A number of local authorities have also failed to make a return to the Assembly on the total amount of employment land developed. In all only 75% of LPAs submitted data for this topic, and this has had the effect that this year the Assembly is unable to report accurately, the amount of land developed. However there has been at least 112 hectares of employment land developed in the South West in the 2004/05 financial year. This is an increase of 16% on the figures for the previous year. The Assembly will encourage local authorities to improve their collection of this data through 2005/06. Many authorities are working hard to improve data submission to the South West Regional Assembly. Kerrier District Council for example is undertaking a comprehensive county wide survey on Employment Land to ensure that data is available for their 2006 LDF AMR. Many others are similarly endeavouring to ensure that they can contribute successfully to the regional AMR.

FIGURE E5 EMPLOYMENT LAND DEVELOPMENT ON PDL AND NON-PDL 2004 - 2005
Policy EC4 in RPG10 states that major strategic sites should be identified by the RPB, to meet the needs of major business users or groups of users. Work was commissioned by the SWRA and SW Regional Development Agency (RDA) in March 2005 to:

a. Provide a market facing assessment of the demand for and supply of employment land over the timeframe of the RSS.

b. Provide an assessment of the supply of employment from non-industrial sources (outside of the B use classes).

c. Guidance on the criteria that should be used in assessing the need for and allocation of employment land based on market realism and sustainability considerations. To include;

- Use classes
- Size
- Location
- Accessibility
- Spatial distribution and priorities
- Regeneration needs
- Economic potential
- Environmental protection
- Types of sectors
- Firm size/function
- Market availability
- Relationship with housing supply/self containment
- Sustainability

The output of this work by King Sturge has provided a much clearer understanding of the type and distribution of employment land and its development across the region. Analysis of strategic sites identified shows that there is a good distributed site throughout the south wests region, with clustering around the major urban areas, and the largest number of sites being in the North East Triangle (Bristol and surrounding area). The South West as a whole has in the order of 1,834.3 hectares of employment land (93 strategic employment sites) (Table E2) identified by King Sturge Consultants in 2005. 76 of those sites identified have either planning permission granted or are allocated in local plans for employment.
Table E2 shows a summary of conclusions regarding an analysis of site availability by functional zone:

<table>
<thead>
<tr>
<th>Zone</th>
<th>Number of sites</th>
<th>Total area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>North East Triangle</td>
<td>38</td>
<td>945.5</td>
</tr>
<tr>
<td>South East Coastal</td>
<td>17</td>
<td>198.1</td>
</tr>
<tr>
<td>M5 Corridor</td>
<td>13</td>
<td>298.6</td>
</tr>
<tr>
<td>South Central</td>
<td>16</td>
<td>352.4</td>
</tr>
<tr>
<td>Western Peninsular</td>
<td>7</td>
<td>59.5</td>
</tr>
<tr>
<td>A303 Corridor</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td>North Peninsular</td>
<td>1</td>
<td>8.1</td>
</tr>
<tr>
<td>Total</td>
<td>93</td>
<td>1864.3</td>
</tr>
</tbody>
</table>

Source King Sturge, 2005

Table E3 shows an analysis of available employment land broken down by its market significance in terms of whether it serves local, regional or national requirements. A significant majority (67.5%) are of regional market significance.

Table E3 EMPLOYMENT SITES IN THE SOUTH WEST REGION BY MARKET SIGNIFICANCE:

<table>
<thead>
<tr>
<th>Market Significance</th>
<th>Size (ha)</th>
<th>No of sites</th>
<th>% of land by area</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>357.5</td>
<td>11</td>
<td>19.2</td>
</tr>
<tr>
<td>Regional</td>
<td>1247.8</td>
<td>62</td>
<td>66.9</td>
</tr>
<tr>
<td>Local</td>
<td>259.0</td>
<td>20</td>
<td>13.9</td>
</tr>
<tr>
<td>Total</td>
<td>1864.3</td>
<td>93</td>
<td>100</td>
</tr>
</tbody>
</table>

Source King Sturge 2005

Generally all sites (of national, regional and local significance) are spread between an even weighting of greenfield and brownfield locations. Of the strategic sites identified their availability is spread fairly broadly. 34 sites are available immediately, 22 within one year and 37 in the long term, although their spread across the functional zones varies.

It was recommended by King Sturge that the SWRA and SWRDA should maintain a region wide database of the key employment sites. LAs will play a key role in this in tracking change sand new additions in employment sites. This work will be supplemented by the Annual Monitoring Reports completed as part of each authority’s Local Development Framework.

The full report is available on the SWRA website via the following links:
http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_Developing.shtml
4.6 TOURISM

The South West region remains the most popular destination for domestic visitors, accounting for 20% of England’s domestic tourist trips, 25% of nights and 22% of spending in 2004.

A key feature of tourism is seasonal variation, and while the region is committed to extending the season outside peak periods, data suggests that seasonal variations persist with average bed and room occupancy rates for 1997-2004 rising from 30% in winter to 70% in summer. For example, 8% of domestic trips to the South West were taken in October 2004 compared to 15% in August. Customer Satisfaction research indicates that the quality of all-weather tourism attractions could be improved in the region as visitors commented that the range in the region are below average. (South West Tourism, 2004).

RPG10 policies seek to promote and encourage sustainable tourism in the region, to improve the quality and range of tourist attractions and to provide for new major flagship attractions in sustainable locations. Between 2003 and 2004, the number visitors to the region’s top ten flagship attractions decreased for 4 of the attractions and increased in 6. In terms of sustainability, the tourism sector continues to impact heavily on the region in terms of additional traffic congestion as overwhelmingly, car and van are the main modes of transport used for day visits to the South West. Between March 2003 and March 2004, 86% of day visits to the region and 82% of trips (involving an overnight stay) were made by car (United Kingdom Tourism Survey, 2004).

VISITOR TRENDS AND PATTERNS

GENERAL PATTERNS IN ROOM AND BED SPACE OCCUPANCY

Regional variations in room occupancy are from 53% in January, to 66% in July, falling again to 55% in November. Variations continue to be particularly marked in Devon and Cornwall and least in the UAs, and especially Wiltshire which has the least.

DOMESTIC VISITORS

Domestic visitors make up 90-95% of tourists during winter months and around 80% in the summer. There are however, significant regional variations with fewer UK visitors to the UAs and higher rates in Cornwall. Greatest variation from summer to winter is in Wiltshire and least variation over the same time period is in Dorset.

OVERSEAS VISITORS

Overseas visitors account for 5-10% of tourists during winter and 15-20% during the summer. In contrast to the regional variation of the domestic visitors there are higher than average levels of overseas visitors reported in the UAs and in Wiltshire especially.

DOMESTIC / OVERSEAS VISITOR TRENDS

- Lower rates of UK visitors in Summer months and higher rates of overseas visitors during the same period suggests that room and bed space left by UK visitors in the Summer months tends to be filled by visitors from overseas.
- However, very few businesses achieve consistently achieve 100% occupancy even during Summer months providing scope to increase the numbers of overseas and domestic visitors staying in the region.

13 Tourism is a difficult sector to define; it includes Hotels & Restaurants, Travel Services, and Recreational and Sporting services. It is useful to distinguish between these ‘tourism-related’ and leisure industries and the economic contribution of tourism, per se. This is because some activities in tourism-related industries are heavily supported by local purchases as well as demand by tourist visitors.
• Significant regional variations point to the need for tailored delivery of a regional overseas marketing strategy
• Scope to build visitor levels in the ‘shoulder’ months of May/June and October

**FIGURE E3 NUMBER OF VISITORS TO FLAGSHIP ATTRACTIONS**

![Figure E3: Number of Visitors to Flagship Attractions](image)

Source South West Tourism- Visits to Attractions Survey 2004

### 4.7 SUMMARY

The South West economy grew faster than the UK as a whole in per capita terms between 2000 and 2003. This faster growth has narrowed the gap in GVA per head between the South West and the UK, although at £15,038 in 2003, economic output per head was still lower than (95%) of the UK average.

There are issues of disparity across the region with low levels of GVA per head in some areas, most notably Cornwall and Devon. These may partly be explained by the relatively large numbers of retired people living in these areas whose pensions and investments are not recorded in the GVA estimates.

At 3.6% the South West had the lowest International Labour Organisation (ILO) unemployment rate of all the UK regions for the year to September 2005 (the England average was 4.7%). The number of unemployed people in the region fell by 8% between March 2001 and September 2005 twice the fall recorded in England as whole.

The amount of employment land developed within the South West appears to be steadily rising, with at least 122ha developed in 2004/05.

The South West region remains the most popular destination for domestic visitors, accounting for 20% of England’s domestic tourist trips, 25% of nights and 22% of spending in 2004.

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14 Attractions receiving more than 350,000 visitors per year
5. SOCIETY

5.1 STRATEGIC POLICY CONTEXT

RPG10 seeks to achieve progress in meeting society’s needs and aspirations. This requires addressing the needs for decent housing and accessible services in order to promote social inclusiveness and reduce inequalities. One of the South West’s greatest assets is the environment, making the region an attractive place to live, work and visit. In a recent public opinion poll conducted on behalf of the SWRA in June 2004, residents were asked about the thing they most valued about the South West. When residents were asked about the importance of issues, 67% identified good schools as very important, followed by high quality environment (61%) and good health services (54%). In 2004/05, the South West had the second lowest rate of recorded crime in the England regions and Wales (Crime in England and Wales, Home Office 2004/05). This is compared to the third lowest rate in 2002/03.

5.2 MONITORING

This chapter monitors the social aspect surrounding issues such as:

- Affordable housing
- Homelessness
- Population change and migration
- Deprivation
- Health

5.3 FAST FACTS

- Along with London, access to affordable housing is more difficult in the South West than any of the other regions. Affordability issues continue to worsen relative to London and the South East, due to the continuing disproportion between house price rises and average incomes. (Joseph Rowntree Foundation 2005)
- Sixteen of the top 37 ‘least’ affordable areas in England were in the South West region. (Joseph Rowntree Foundation 2005)
- A total of 3,315 Social Housing Grant funded affordable dwellings were completed in 2004/05.
- Since 1996, an average of 3,900 affordable dwellings per annum, have been funded through public sector funding (ODPM 2005). Whilst the figures up to 2004 do not include affordable units provided through other means, eg.S106 agreements, this figure is still significantly below the required target of 6,000 to 10,000 affordable units per annum.
- At the end of 2004, the average property price in the South West was £160,221, with a resulting house price to income ratio of 4.74 to 1. This represents an average price house increase of £9,074 and a ratio increase of 0.08 since 2003.
- In the South West, there were 9,680 homeless households in priority need in 2004/05. This represents a fall of 1550 (14%) since 2003/04.
- The South West’s population increased by 5% between 1996 and 2004. This is equivalent to 30,600 residents per year. Only London experienced a faster rate of growth over this period. The region’s population increased mainly due to net migration and gains particularly from migrations flows from the South East and London.
- Of the 3,226 Super Output Areas\(^\text{15}\) in the South West, 8.6% (278) are in the most deprived 20 per cent of SOA in England, 20.8% of SOAs in the South West (623) are in the least deprived SOAs in England.
- The South West had the highest life expectancy at birth for men (77.8 years) and women (82.0 years) of all the England regions during 2002-2004.

\(^{15}\) Super Output Areas (SOAs) are a new geography designed to improve the reporting of small area statistics. They have been introduced initially for use on the Neighbourhood Statistics (NeSS) website, but it is intended that they will eventually become the standard across National Statistics. There are also different levels of SOA, the IMD data uses the Lower Layers which can be abbreviated to SOALLSs.
5.4 HOUSING

RPG contains policies for housing, namely HO3 and HO4, which relate to provision of affordable homes and housing in rural areas. Information on other housing issues such as dwelling prices, homelessness and local authority waiting lists provide contextual data for these policies. RPG10 intends making the best use of existing housing stock and reducing the number of vacant properties in the region which should, in turn, lower the need for construction of new dwellings and the demands made on Greenfield sites.

RPG10 seeks to ensure that everyone has the opportunity of a decent home. Housing conditions are monitored every five years by the English House Condition Survey, which classifies a ‘decent home’ as one that satisfies all of the following four criteria:

- it meets the current statutory minimum standard for housing. At present this is the fitness standard
- it is in a reasonable state of repair
- it has reasonably modern facilities and services
- it provides a reasonable degree of thermal comfort.

The proportion of both private sector and social housing dwellings that did not meet the ‘decent home’ standard in the South West in 2004 was 33% and 41% respectively, compared to 32% and 38% in England (ODPM, 2004). The Housing Corporation reports that in the South West approximately 94,191 homes were unfit\textsuperscript{16} for accommodation in 2005.

**HOUSING AFFORDABILITY**

The issue of affordability is a serious problem in the South West region. A recent report identified that, along with London, access to affordable housing is more difficult in the South West region than in any of the other regions. Affordability issues in the South West continues to worsen relative to London and the South East, due to greater house price rises. Sixteen out of the top thirty-seven ‘least’ affordable areas\textsuperscript{17} in England were in the South West region in 2004 (compared to eighteen in 2003 and sixteen in 2002) (Joseph Rowntree Foundation, 2005). Of these sixteen, Bournemouth, Kerrier and Christchurch had house price to income ratios in excess of 6 to 1. In terms of completions of affordable housing, Figure S1 shows how the number of dwellings completed has changed over the last ten years.

**FIGURE S1 SOCIAL HOUSING GRANT – HOUSING COMPLETIONS 1996 - 2005**

\[\text{Source Housing Corporation 2005}\]

\textsuperscript{16} ‘Unfit’ defined as total number of properties likely to be certified as unfit under relevant legislation (HIP returns)

\textsuperscript{17} ‘Least affordable’ defined as where the ratio of average house prices to income of younger working households exceeds 5.5 to 1)
A total of 3,315 Social Housing grant funded dwellings have been completed in 2004/05 (Housing Corporation). ODPM figures (2005) indicate that since 1996, an average of 3,900 affordable dwellings per annum, have been funded through public sector funding. Whilst the figures up to 2004 do not include affordable units provided through other means, eg. S106 agreements, this figure is still significantly below the required target of 6,000 to 10,000 affordable units per annum.

Further information has been gathered this year as part of the inclusion of the National Core Output Indicators (NCOI) as required by the draft RSS monitoring guidance (summarised in Section 9). NCOI indicator 2d request the number and funding stream of affordable housing at the local authority level. From those local authorities that responded to the RPB monitoring questionnaire regarding affordable housing completions (88%), it is estimated that 1,172 affordable housing units provided through S106 agreements have been built in the South West in 2004/05.

According to those LAs that did respond, only 2929 affordable housing units were provided in total in 2004/05. The district breakdown is shown in Figure S2. The discrepancy between SWRA data and Housing Corporation data can be accounted for by the 12% of authorities that did not respond. This serves to highlight the importance of the RPB working closely with local authorises in order to obtain more comprehensive data sets in the future.

FIGURE S2 NUMBER AND FUNDING TYPE OF AFFORDABLE DWELLINGS IN SOUTH WEST 2004/05

- Those LAs that responded to the request for data and had no affordable dwellings to report on for the period 2004/05: Christchurch BC, Exmoor NPA, West Somerset DC, Purbeck DC.
Table S1 compares the house price to income ratio across each region. At the end of 2004, the average property price in the South West region was £160,221, while the average household income was £33,826, resulting in the house price to average income ratio being 4.74 to 1 (Joseph Rowntree Foundation, 2005).

This represents a house (average sized) price increase of £9,074, an average income increase of £1,382 and a ratio increase of 0.08 since 2003 in the South West. English mean house prices rose by an amount similar to the South West since 2003 (£9,751), as did the average income (higher generally than that within the South West) which rose by £1,557. The house price to income ratio for England rose by 0.09 since 2003.

TABLE S1 HOUSE PRICES AND AFFORDABILITY - QUARTER 4 – 2004

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of working households</th>
<th>Household earned income (£)</th>
<th>Mean house prices (£)</th>
<th>House price to income ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>830,123</td>
<td>52,656</td>
<td>257,687</td>
<td>4.89</td>
</tr>
<tr>
<td>South West</td>
<td>480,683</td>
<td>33,826</td>
<td>160,221</td>
<td>4.74</td>
</tr>
<tr>
<td>South East</td>
<td>817,183</td>
<td>41,426</td>
<td>188,543</td>
<td>4.55</td>
</tr>
<tr>
<td>East of England</td>
<td>567,025</td>
<td>38,943</td>
<td>165,798</td>
<td>4.26</td>
</tr>
<tr>
<td>West Midlands</td>
<td>496,358</td>
<td>32,203</td>
<td>124,767</td>
<td>3.87</td>
</tr>
<tr>
<td>Yorkshire and Humber</td>
<td>507,109</td>
<td>30,189</td>
<td>109,311</td>
<td>3.59</td>
</tr>
<tr>
<td>East Midlands</td>
<td>416,238</td>
<td>34,429</td>
<td>119,724</td>
<td>3.48</td>
</tr>
<tr>
<td>North West</td>
<td>657,619</td>
<td>31,917</td>
<td>109,626</td>
<td>3.43</td>
</tr>
<tr>
<td>North East</td>
<td>232,420</td>
<td>29,428</td>
<td>985,28</td>
<td>3.35</td>
</tr>
<tr>
<td>England</td>
<td>5,004,758</td>
<td>38,106</td>
<td>159,986</td>
<td>4.20</td>
</tr>
</tbody>
</table>

Source Joseph Rowntree Foundation 2005; Affordability differences by area for working households buying their homes 2004 update.
- based on average household incomes of working households aged 20-19 and average house prices for 2/3 bedroom dwellings.

Table S2 compares the percentage of local authority housing sold in England and the South West region. Figures for All Sales include transfers to registered social landlords along with other small scale transfers. Over a third of stock has been sold through Right to Buy compared to under a third nationally. In the South West region, there have been a higher percentage of local authority housing sales in the South West region (63.7%) in the period 01/04/79-31/03/2004 compared with England (54.1%) generally.
### TABLE S2  COUNCIL HOUSE SALES 1996 – 2004

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td><strong>South West</strong></td>
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<td></td>
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<tr>
<td>Right to buy</td>
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<td>5145</td>
<td>5962</td>
<td>26587</td>
<td>10173</td>
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<td>25</td>
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<tr>
<td>All sales</td>
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<td>Right to buy</td>
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<td>41329</td>
<td>40272</td>
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<td>51968</td>
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<tr>
<td>Other sales</td>
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<td>77358</td>
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<td>36178</td>
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<td>185467</td>
<td>88146</td>
<td>230130</td>
<td>109209</td>
</tr>
</tbody>
</table>

Source ODPM 2005

Policy HO3 seeks to address the affordable housing problem in the South West. This policy seeks to achieve a provisional target of 6,000-10,000 affordable units (gross) per annum in the whole region. Data from the Housing Corporation indicates that there has been a decline in total housing association completions since 1996/97. This was particularly significant after 1997/98. Since 2001, there has been a slight increase, but the number of affordable dwellings being provided annually is still below 4,000. However, this does not include privately funded dwellings. Between 1996/97 and 2003/04, 31,800 public sector funded affordable units have been provided, which equates to an average of 3,975 dwellings per annum. Whilst this figure does not include affordable units provided through other means, for example, S106 agreements, this is significantly below the required target of 6,000 to 10,000 affordable units per annum.

The ODPM collates information on additional affordable dwellings (Housing Strategy Statistical Appendix), but this also includes private sector provision. However, the data provided by local authorities to monitor the social housing stock is clearly incomplete. It suggests that apart from a significantly higher number provided in 1997/8, total public/private provision was lower in 1998/99, 1999/00, and 2002/03 than housing association completions (ODPM, 2004). This issue of being unable to access complete data on total affordable housing completions needs to be addressed.

### 5.5 HOMELESSNESS (SOC 15)

Data from the ODPM shows that in the South West, there were 9,680 homeless households in priority need in 2004/05 (provisional data). This represents a fall of 1,550 (14%) since 2003/04 and 3,110 (24%) since 2002/03. Figure S2 outlines the change in number of homeless households between 2000/01 and 2004/05, by region. Only the North East and East Midlands experienced a lower proportion of statutory homelessness than the South West in 2004/05 (7,940 and 9,120 respectively). Yorkshire and the Humber experienced the highest decline in number of homeless households overall. (A drop of 17% on figures for 2003/04).
5.6 POPULATION AND MIGRATION (PRO09 AND ENV05)

Population and migration data aids the formulation of housing and spatial strategy policies. Assessing the change in settlement population figures in the region also indicates the extent to which population growth has been successfully focused in urban areas as part of the urban renaissance policy.

Whilst the majority of the South West’s 5 million residents live in an urban area, most of the region’s population growth between 1996 and 2004 occurred in local authority areas classified as rural or significantly rural (Table S3). The South West has a higher proportion of rural dwellers than any other Government Office region in England.

TABLE S3 RESIDENT POPULATION BY URBAN/RURAL CLASSIFICATION OF LOCAL AUTHORITY DISTRICTS FOR THE SOUTH WEST, MID-1996 AND MID-2004

<table>
<thead>
<tr>
<th>Area classification</th>
<th>Mid-1996</th>
<th>Mid-2004</th>
<th>Change mid-1996 to 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000s</td>
<td>000s</td>
<td>%</td>
</tr>
<tr>
<td>Major urban</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Large urban</td>
<td>962.2</td>
<td>987.0</td>
<td>24.8</td>
</tr>
<tr>
<td>Other urban</td>
<td>929.0</td>
<td>960.4</td>
<td>31.4</td>
</tr>
<tr>
<td>Significantly rural</td>
<td>261.7</td>
<td>278.2</td>
<td>16.5</td>
</tr>
<tr>
<td>Rural-50</td>
<td>1333.4</td>
<td>1412.5</td>
<td>79.1</td>
</tr>
<tr>
<td>Rural-80</td>
<td>1306.9</td>
<td>1400.2</td>
<td>93.3</td>
</tr>
<tr>
<td>All districts</td>
<td>4793.2</td>
<td>5038.3</td>
<td>245.1</td>
</tr>
</tbody>
</table>

Source: Mid-year population estimates, ONS and DEFRA 2005
The South West’s population has increased by over ¼ million residents since the beginning of the regional planning period – a figure broadly comparable to the population of Plymouth. In percentage terms, only London had a faster growing population than the South West between 1996 and 2004.

The South West's population is growing solely due to rising levels of net inward migration (Figure S4); simply fewer births are recorded in the region than deaths and more people move into the region than move out.

**FIGURE S4 COMPONENTS OF POPULATION CHANGE IN THE SOUTH WEST, MID-1994 TO MID-2004**

![Graph showing population change](image)

Source ONS 2005

**MIGRATION AND OTHER CHANGES**

Understanding why the region’s population is changing is important because migration tends to be socially selective; migrants typically have a different age and socio-economic profile than the existing population and this will influence the nature of public and private goods and services demanded.

Most people who move to or from the South West region move from or to other parts of the UK. During 2004, around 143,000 people moved into the South West from other parts of the UK and almost 109,000 people moved out. This created a net gain of around 34,000 people from migration flows with other parts of the UK a larger net gain than any other region in the UK. Most of the South West’s net gain from internal migration is from the South East and London (Figure S5).

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19 These estimates are derived from the National Health Service Central Register.
FIGURE S5 NET GAINS TO THE SOUTH WEST FROM MIGRATION FLOWS WITHIN THE UK MID-1994 TO MID-2004

Source ONS 2005

Most adults who move to or from the region are aged 16 to 44 (Figure S6) although the largest net gains occurred in the 25 to 64 year age group. People aged over 65 accounted for less than 10% of the region’s net gain from internal migration flows during the year to June 2004.

FIGURE S6 INTERNAL MIGRATION BY BROAD AGE GROUP SOUTH WEST MID 2004

Source ONS 2005

International migration in contrast, represents a relatively small share of total migration. During 2003, just over 39,000 people moved into the region from abroad and almost 37,000 South West residents moved overseas. As these estimates are based on a survey of
passengers at ports, airports and the Channel Tunnel they tend to be highly variable at the regional level and subject to relatively large error margins.

5.7 DEPRIVATION (SOC12, SOCu)

INDEX OF MULTIPLE DEPRIVATION

The Index of Multiple deprivation is an area-based measure of deprivation\(^20\). It uses 37 indicators to describe separate ‘domains’ of deprivation and then ranks census-based ‘Super Output Areas’ (SOAs) according to their scores for the individual domains as well as bringing all the domains together to produce a single, composite index of multiple deprivation for the SOA. The seven domains of deprivation are: income; employment; health and disability, education, skills and training, barriers to housing and services, living environment and crime.

The South West has 278 SOAs that fall within the most deprived 20% in England. This represents less than one in ten (8.6%) of all SOAs in the region, far lower than half the national ‘average’ of 20%. In contrast, just over one-fifth (21%) of SOAs in the South West are amongst the least deprived 20% SOAs in England. Only the South East and East have a lower percentage of SOAs in the most deprived SOAs nationally and a higher percentage amongst the least deprived.

The overall pattern of deprivation within the South West shows a concentration in the inner urban areas – especially Bristol and other large centres – and the sparsely populated upland rural areas of Cornwall, West and North Devon, and West Somerset (Figure S7).

FIGURE S7 INDEX OF MULTIPLE DEPRIVATION 2004 BY SUPER OUTPUT AREA, NATIONAL QUARTILES

\(^20\) The Indices of Multiple Deprivation – formerly the Index of Local Conditions (1991) and Index of Local Deprivation (1998) – have become generally established as standard measures of neighbourhood well-being, and widely used to allocate funds. The Index of Multiple Deprivation 2004 seeks to give the best snapshot of conditions using the most recent data. Despite keeping the same name, the IMD 2004 is not directly comparable to earlier versions. It cannot therefore be used to track changes over time. Significant changes since 2000 are to the geographical units used and the ‘domains’ of deprivation included; additionally the population estimates for small areas have been updated on the basis of the 2001 census and some aspects of the methodology changed.
Of the seven domains of multiple deprivation, barriers to housing and services affects the largest number of SOAs in the South West; almost 15% of the region’s SOA ranked amongst the most deprived 10% nationally on this measure (Table S5). Moreover, seven of the country’s ten most housing and services deprived SOAs are in the South West.

**TABLE S5 MOST DEPRIVED SOUTH WEST SOAS BY IMD CATEGORY**

<table>
<thead>
<tr>
<th>Domain</th>
<th>Number of South West SOAs in most deprived 10% in England</th>
<th>South West local authority areas with highest number of SOAs in most deprived 10% in England. (Number of SOAs in brackets)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barriers to housing and services</td>
<td>465</td>
<td>North Cornwall (36), Restormel (25), Salisbury (20), Mid-Devon (19)</td>
</tr>
<tr>
<td>Living environment</td>
<td>210</td>
<td>Plymouth (38), Exeter (29), Torbay (19), Bristol (18)</td>
</tr>
<tr>
<td>Crime</td>
<td>189</td>
<td>Bristol (105), Plymouth (29), Bournemouth (6)</td>
</tr>
<tr>
<td>Education, skills and training</td>
<td>172</td>
<td>Bristol (62), Swindon (20), Plymouth (19), Sedgemoor (8)</td>
</tr>
<tr>
<td>Income</td>
<td>87</td>
<td>Bristol (32), Plymouth (14), Torbay (6)</td>
</tr>
<tr>
<td>Health and disability</td>
<td>73</td>
<td>Plymouth (27), Bristol (15), Bournemouth (7), North Somerset (7),</td>
</tr>
</tbody>
</table>

Source: Index of Multiple Deprivation 2004, ODPM

The barriers to housing and services domain can be split into two sub-domains: geographical barriers to services and broader barriers to housing and services. Almost 1,000 of the region’s 3,226 SOAs rank amongst the 20% most deprived nationally for geographical barriers to services. This is unsurprising given the region’s rural population distribution, and as would be expected almost all rural SOAs in the region show high levels of deprivation in this sub-domain. Geographical distance from services is not only important as a measure of deprivation, but reflects the costs in providing such services to a dispersed population (South West Observatory, 2004).

The Commission for Rural Communities (formerly the Countryside Agency) offers a further perspective on access deprivation. The Rural Services Series measures access deprivation in terms of the number of rural households within fixed distances from key services such as schools, banks and libraries. The data shows that rural households in the South West were less likely to be within an accessible distance of most rural services than the England average in 2005. Accessibility — so defined — has deteriorated in the South West for most service since 2000 but most notably for banks and libraries (see chart). In contrast, the proportion of rural households within an accessible distance of cash points, and to a lesser extent, primary schools, has increased. Whilst useful, this source is restricted to rural households and is solely concerned with geographical distance to services — it does not take into account peoples’ physical mobility (which will influence whether an individual can walk to a bus stop or easily get onto a bus) or access to private transport.
5.8 HEALTH

LIFE EXPECTANCY (SOCx)

Life expectancy at birth (LE) is a convenient summary measure of general health. Life expectancy has increased considerably over recent years in almost all areas, and almost all sectors of society. In the South West LE has increased over the last 10 years by 2.5 years for men and 1.5 years for women.

In the period 2002/04 the South West has the highest LE of any English Region, at 77.8 yrs for men and 82 years for women. However, this masks considerable variation between Local Authority Districts within the region, with a difference of 5.1 years in men and 3.6 years in women between the Districts with the highest and lowest life expectancy.

In 2002/04 men in Gloucester, Bristol and Plymouth, and women in Swindon had life expectancy statistically significantly below that of England (Fig S9). In 33 Districts for men and 37 Districts for women (out of 44 – no data for Isles of Scilly) life expectancy is significantly higher than England.

The inequalities target set by the Department of Health is to reduce by 10% the difference in life expectancy between the fifth of Districts with lowest scores across many health indicators (the Spearhead Group) and the mean by 10%. Preliminary indications are that inequalities are increasing, but this predates many of the initiatives aimed at reducing inequalities.
In 2002/04 the infant mortality rate for the South West was 4.7 deaths per thousand live births, while in England the rate was 5.2 (Fig S10). The difference is real (statistically significant).

Infant mortality is known to vary with deprivation, and the Inequalities Target is to reduce the gap between births to people in routine and manual groups and the mean by 10% by 2010. Early indications suggest that inequalities are currently widening, but like the life expectancy target, many initiatives take time to show effect.

Source ONS 2005
5.9 SUMMARY

Affordability issues within the South West continue to worsen, with sixteen of England’s least affordable districts being located in the South West in 2004. Completions of affordable housing continue to decline with approximately a 36% drop in completions since 1996. House prices have risen annually by an average of £9,000 across the region since 2003.

The South West’s population increased by 5% between 1996 and 2004. This is equivalent to 30,600 residents per year. Only London experienced a faster rate of growth over this five year period. The region’s population increased solely due to net migration and gains particularly from migrations flows from the South East and London.

The South West has 278 SOAs that fall within the most deprived 20% in England. This represents less than one in ten (8.6%) of all SOAs in the region, far lower than half the national ‘average’ of 20%. The overall pattern of deprivation within the South West shows a concentration in the inner urban areas – especially Bristol and other large centres – and the sparsely populated upland rural areas of Cornwall, west and north Devon, and West Somerset.

The region has a lower percentage of rural households within an accessible distance of a range of key services than the England average. Furthermore, the accessibility of most services has deteriorated since 2000 – particularly for banks. A greater proportion of rural households, however, are now within 4km of a cash machine.

The South West had the highest life expectancy at birth for men (77.8 years) and women (82.0 years) of all the England regions during 2002-2004.
6. Transport

6.1 INTRODUCTION

The South West covers 18% of England’s land area, making it the largest English region geographically, but with an average of 207 people per sq km it only accounts for 10% of England’s population. Just over 41% of the region’s population live in Principal Urban Areas (PUAs) and 48% live outside these areas. This has lead to a pattern of scattered and dispersed settlements, most of which are relatively small. Implications for transport provision are heavily influenced by the basic geography of the region.

The South West is affected by peripherality both from the economic core of Britain and the rest of Europe. The efficient movement of people and goods, both inter and intra-regionally, is therefore essential if the region is to compete on a national, European and global scale. Reliable connections to UK, European and international markets to assist economic investment and reduce regional disparities are a key objective of the Spatial Strategy contained within RPG 10 and the emerging RSS.

The dispersed pattern of settlements in the region results in reduced accessibility to key services and employment opportunities for the majority of the population. There has been a general tendency towards the centralisation of service provision, retail and employment opportunities towards the PUAs.

The problem of providing adequate public transport services to such a dispersed population has been a long standing issue in the South West. The increasing concentration of many services into the region’s larger settlements have meant that many have little choice but to rely on the private car as their main means of transport. As a result the region has one of the highest levels of car ownership in England. The challenge, therefore, is to try and influence travel behaviour and encourage a modal shift from private car to more sustainable forms of transport. This, in the long-term, has the potential to positively influence environmental quality, reduce social exclusion, tackle congestion and encourage economic growth.

The efficiency of the region’s transport systems has a major influence on its ability to compete economically. Social exclusion, especially in more rural parts of the South West, and safeguarding the region’s valuable environmental assets are also key issues which need to be addressed. Transport has the potential to make a major contribution to tackling these issues in the future.

Map 1 shows the major elements of the transport infrastructure in the South West, including the region’s trunk road network, rail routes, airports and ports.
6.2 FAST FACTS

- Travel is the single largest expenditure category for households in the region, as it is nationally. According to the family spending report 2004, households in the South west spend approximately £57.80 per week on travel and transport (2001-2004) (approximately 15% of total weekly expenditure) This is slightly lower than the English average of £60.80.

- South West residents travelled an average of 7,957 miles in 2002-2003, which is slightly more than the national average.

- Just over 2/3 of journeys made in the period 2002-2003 were by car. South West residents are more likely to make their journeys by car and less likely to travel by public transport than the average for England.

- People in the South West have some of the least accessible bus services in England with only 81% living within a 13 minute walk of an hourly service in 2003/04. However this has not stopped many people making journeys by bus: 177.6 million journeys were made in 2003/04.

- Over 20 million rail journeys were taken by South West residents during 2002/03, 58% of these were within the region. In 2004/05 these numbers of rail journeys had increased by a factor of 42.

- Airports in the region carried 5.1 million passengers in 2003. This only represents approximately 2.9% of the nation’s air passenger traffic.

- In 2003, there were approx 24,122 casualties resulting from traffic accidents of which approximately 12% (2918) involved death or serious injury (a slight decrease on figures for 2002)
Some 174 million tonnes of freight were carried by road, 19,314 thousand tonnes by sea (accounting for approximately 5% of national sea borne freight), and 5,900 tonnes by air in the region (0.3% of English total volumes) in 2003. Freight carried by air continues to decrease.

6.3 POLICY CONTEXT

The role of the Regional Transport Strategy (RTS) is to support the spatial strategy functions of RPG10, to provide a strategic transport framework for the region’s Local Transport Plans (LTPs) and to provide a framework for the investment and operational plans of relevant transport operators / agencies. It was approved as part of RPG10, by the Secretary of State in September 2001.

In September 2004, the Assembly published Developing the Regional Transport Strategy: Investment Priorities for the South West (DRTS). The DRTS was prepared in advance of a full review of the RTS, which is currently underway as part of preparing the Regional Spatial Strategy (RSS) for the region. The DRTS developed and updated the RTS and identified key issues that are relevant to the region. It also stated what interventions / investments were required to deliver the region’s priorities and longer term objectives. The Strategy aims to provide an important context for investment programmes of the Highways Agency and relevant rail authorities (note that the Strategic Rail Authority’s responsibilities transferred to the Department for Transport (DfT) under the name DfT Rail in August 2005). The DRTS does not amend or replace the policies set out in RPG10, it simply updates the priorities.

The DRTS took into account some key pieces of national policy. The five key documents are The European Commission’s ‘European Transport Policy for 2010: Time to Decide’, The Transport White Paper ‘A New Deal for Transport: Better for Everyone’, The Ten Year Transport Plan, the Regions White Paper ‘Your Region, Your Choice’ and the South West Regional Assembly’s Integrated Regional Strategy (IRS). DfT has recently reviewed the Ten Year Plan and published ‘The Future of Transport: A network for 2030’. This will influence the formal review of the RTS.

6.4 RECENT TRANSPORT STUDIES

Table 1 highlights a number of recent studies that have been completed and form part of the evidence base which will be used to help explain the policies emerging in the revised RSS. Most of the issues highlighted are relevant to RPG 10 but a number of the studies have been commissioned specifically to help with the development of the draft RSS which is to be submitted to Government in March 2006.

A portfolio of technical information, demonstrating clear links with emerging regional transport policy, is being developed in anticipation of the RSS Examination in Public (EiP) and will be available, as a working draft, from the Assembly during 2006.

TABLE T1 RELEVANT STUDIES

<table>
<thead>
<tr>
<th>STUDY</th>
<th>CONTENT/AIMS</th>
<th>CONCLUSIONS/OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>The South Wales and South West Multi Modal Study (<a href="http://www.swarmms.org.uk">www.swarmms.org.uk</a>)</td>
<td>Made recommendations for a long term strategy to address passenger and freight movement needs on key transport corridors.</td>
<td>A series of measures were set out under the title, ‘The Preferred Strategy’. They centred on reducing travelling time, public transport and integration, traffic restraint, new road and rail infrastructure, better use of existing roads, local road measures and tourism measures.</td>
</tr>
<tr>
<td>STUDY</td>
<td>CONTENT/AIMS</td>
<td>CONCLUSIONS/OUTPUT</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The Bristol And Bath to South Coast Study (BB2SC)</td>
<td>The study examined how existing transport facilities, both road and rail, can best meet the strategic demand in the Bristol and Bath to South Coast Corridor.</td>
<td>Two reports were produced: Bath and the Strategic Corridor for the SW. Many measures were put forward including de-trunking of the A36/A46 and the establishment of a route management strategy, better rail services between Bristol/Bath and Southampton and more reliable and frequent bus services.</td>
</tr>
<tr>
<td>A30/A53/A31 Route Management Study</td>
<td>Provides a 10 year framework for managing the A30/A35/A31 trunk road, from Exeter to Southampton.</td>
<td>The objectives of the framework were in line with NATA objectives (protecting the environment, improving safety, contributing to an efficient economy, promoting accessibility, and integrating transport). Recommendations were put forward for managing the route with regard to each of these objectives.</td>
</tr>
<tr>
<td>'The Mainline they Shouldn’t Ignore: South Coast to Bristol and South Wales'</td>
<td>The Rail Passengers’ Committees from Southern England, Western England and Wales set up a joint Task Force in the summer of 2003 to look at the issues concerning the future development of the route.</td>
<td>The recommended service improvements would build on the considerable commitment from existing passengers/stakeholders and increase the opportunities for commercial growth as part of an integrated transport system.</td>
</tr>
<tr>
<td>The Greater Bristol Strategic Transport Study</td>
<td>Examines current and future transport needs within the Greater Bristol area.</td>
<td>A series of measures would need to be put into place to address the issues raised. Some of these are medium or long term (improving existing facilities, implementing rapid transit routes or construction of new roads).</td>
</tr>
<tr>
<td>Great Western Mainline Route Utilisation Strategy</td>
<td>Looked at opportunities to develop and better manage capacity on the main rail lines from London to the South West, South Wales and the Cotswolds.</td>
<td>Although final recommendations have not been agreed, the strategy primarily aims to improve local and regional services across the wider Bristol, Cardiff and South West Area.</td>
</tr>
<tr>
<td>Demand Management Policy Review Study</td>
<td>The Demand Management Working Group of the SWRA commissioned Mott MacDonald to undertake a review of existing policy and practice. The report sets out the draft demand management policies to be considered for inclusion in the revised RSS.</td>
<td>The outcome is a revised and strengthened demand management strategy for inclusion in the new RSS aimed at enabling growth and addressing regional transport issues.</td>
</tr>
<tr>
<td>Significance of Availability and Cost of Limiting Access to Jobs and Training</td>
<td>The study has assisted in identifying and removing barriers to accessibility and mobility, and thereby constraints to accessing jobs and training.</td>
<td>Concluded that transport was a major factor influencing accessibility. The study set out a framework which examined accessibility on different scales and suggested which factor had the most influence. Transport was singled out as the main influence in rural areas and the report recommended a community based approach as a basis for finding solutions.</td>
</tr>
<tr>
<td>Developing Public Transport Policies of the Regional Transport Strategy- A Public Transport Strategy for the South West Principal Urban Areas</td>
<td>Provided input to the work of the Assembly’s Bus &amp; Coach Working Group in developing the public transport policies of the RTS. This was motivated by recognition in the region that comprehensive public transport strategies in the PUAs would be needed in order to deliver the RSS.</td>
<td>The study set out a framework for delivering bus services in urban areas. Solutions proposed would have the potential to deliver a step change in the provision of quality bus services.</td>
</tr>
</tbody>
</table>
6.5 THE RSS PROCESS

The emerging Regional Spatial Strategy (RSS) will cover the period 2006 to 2026 and will be finalised in 2007/08. Two of the most important aspects of this, from a transport perspective, are the Regional Funding Allocation (RFA) and Prioritisation Framework processes. The RFA process essentially equips regions with the power to take decisions on major investment in key areas away from central government control. The RFA process should reflect the region’s view on what is required, in terms of transport, economic development and housing investment, to deliver the outcomes which are deemed to be most important in the region.

All major transport schemes are being assessed against agreed criteria to assess their contribution to regional strategic transport objectives as part of the transport Prioritisation Framework. Schemes will be short listed based on that assessment. Schemes that are considered not to make a significant contribution will be sifted out and not considered further for inclusion in the RFA programme.

In terms of transport the regional funding allocation only covers major capital projects over £5 million. The region needs to ensure that wider requirements such as improvements to heavy rail and investment in the national strategically important road network are met through the full range of funding sources available.

Local transport plan funding can and should contribute to helping implement the Spatial Strategy contained in RPG 10/RSS. For 2006/07 a total of £56.939 million in capital borrowing approvals have been allocated by Government for integrated transport spending, and a further £116.804 million for highway structural maintenance and bridge assessment and strengthening. It is important for local transport authorities to demonstrate, through their LTP Annual Progress Reports, published in July of each year, to demonstrate how they are using this funding to help implement the Spatial Strategy.

Future AMRs will provide a more detailed analysis of how these processes are working and what contribution they are making to meeting regional objectives.

6.6 MONITORING

This section reports on the monitoring of the established RPG10 performance indicators relating to the RTS and should help to show the extent to which its objectives and policies are being met, whether it is having an effect on travel patterns and to examine the general transport trends in the South West.

The RPG indicators are designed to give an overview of the region’s changing transport situation and to monitor the effects of specific policies in the RTS. The Assembly is continually working with stakeholders and strategic authorities on the development of indicators and their analysis to ensure that monitoring the RSS can be made to be more robust.

Data from various sources have been used in this AMR. These sources include Department for Transport (DfT) and data from the Joint Strategic Planning and Transport Unit.

Areas that are covered in respect to monitoring RPG10’s transport policies are:

- Bus Accessibility (Soc 10) and public transport patronage
- Congestion (Soc 22) and road safety
- Distance Travelled and Mode (Soc 24)
- Freight Transport (Soc 26)
- Parking (Soc 28)
- Air Transport (r)
6.7 BUS ACCESSIBILITY AND PUBLIC TRANSPORT PATRONAGE (SOC 10)

Buses form the backbone of the South West’s public transport network, with a level of flexibility and coverage unobtainable by rail. Buses also have the highest proportion of patronage of all the public transport modes. Not only do buses assist in reducing congestion and pollution levels, they can also help to improve accessibility for those without access to a car. They provide access to employment, leisure and a range of other services, thus reducing social exclusion. The Government places major emphasis on improving bus services and this is reflected in its requirement for all local transport plans to include a bus patronage target. Rail patronage is also examined under this indicator.

The 2004 AMR reported that the region has experienced a decrease in bus journeys: around 180 million journeys were taken in 2000/01, which decreased to 173 million in 2003/04 according to DfT statistics. Ever increasing car ownership levels are likely to be a contributing factor to this. Other factors could be increasing bus fares and a poor quality of service in some areas.

**FIGURE T1 INDIVIDUAL BUS JOURNEYS IN THE SOUTH WEST 2004/05**

![Bus Journeys Graph](source)

Source DfT Regional Transport Statistics 2005

Figure T1 shows a further decrease in bus journeys taken in 2004/05. Local transport plan statistics, compiled by county and unitary authorities in the region, show that 178.368 million bus boardings were made in 2002/03, a figure that had reduced to 177.566 by 2004/05. LTP ‘trajectory’ data suggests that, assuming the bus improvement measures set out in the next round of LTPs (2006-11) are implemented on schedule, there is a real possibility of growth back to 2000/01 levels by 2010/11.

The number of people who are within a 10 minute walk of an hourly or better bus service has risen in the region from 65% in 1992/1994 to 79% in 2002/03. This had further increased to around 81% in 2003/04. The small increase suggests that circumstances surrounding bus availability have not greatly changed recently and that a wider range of measures may be required to help meet bus patronage targets. In the future it is likely that this level will remain fairly static as more local authorities adopt demand responsive transport solutions in rural areas.

**FIGURE T2 BUS ACCESSIBILITY – SOUTH WEST & GREAT BRITAIN**
The Assembly commissioned two studies to examine the issue of bus availability: ‘Significance of Availability and Cost of Limiting Access to Jobs and Training’ and ‘Developing Public Transport Policies of the Regional Transport Strategy- A Public Transport Strategy for the South West Principal Urban Areas’. Details can be found in Table 1. Findings from both reports have enabled solutions to progress in addressing bus availability.

FIGURE T3 RAIL PATRONAGE INDEX – SOUTH WEST, ENGLAND & GREAT BRITAIN

Rail patronage, in contrast to that of buses, has increased rapidly over the past decade. Figure T3, indexed to 1996 levels, shows that passenger numbers are up in 2004/05 by 42 points. This might be due to a number of factors. Research by the Rail Passenger Council (RPC), *State of the Railways 2005*, found that people were now more favourable towards the rail industry. Around 44% of the people polled believed train punctuality was getting better and 51% said that rail was the most convenient and easiest form of public transport to use. Transport
Authorities, in improving local station facilities and access to the railways, coupled with land use and other transport policies may have played a significant part in raising levels of rail use.

Levels in the future are likely to continue to gradually climb but more must be done to improve capacity, both within and beyond the South West, if future demand for rail services is to be accommodated in an acceptable way.

6.8 CONGESTION (SOC 22)

The growth of regional road traffic, resulting from a combination of increases in population, tourist numbers, economic activity and rising car ownership, has lead to a rise in levels of congestion. A number of urban areas such as Bristol, Plymouth and Bournemouth/Poole are already suffering from peak hour traffic congestion. Medium sized and smaller towns are also beginning to experience the negative impacts of higher levels of traffic. This was one of the key findings of the SWARMMS study (see South Wales and South West Multi Modal Study, Table 1), which identified severe congestion ‘hotspots’ within the region.

There is no clear nationally agreed definition of what constitutes congestion and this has led to inconsistency in data collection and interpretation. Programmes for measuring congestion are still being developed both regionally and nationally. RPG10 policies TRAN2 and TRAN3 are the key policies for reducing congestion by encouraging more sustainable travel and focusing efforts on inter urban and inter regional transport links.

The 2004 AMR demonstrated that the traffic level on ‘A’ roads and motorways continues to increase, with the most serious congestion confined to PUAs. Between 1993 and 2003 the South West experienced the second highest rise in traffic on ‘A’ roads and motorways of all English regions, with an increase of 25%. Figure T4 shows that all regions have experienced traffic growth with the South West having experienced a 23% traffic increase in a decade.

FIGURE T4 TRAFFIC INCREASE BY REGION 1994-2004

One of the most important contributing factors to this growth has been ever increasing levels of car ownership in the South West. In many rural areas the private car remains the only
viable mode of transport for most households to gain access to jobs and services. As figure T5 shows over a third of households in the region have two or more cars and 47% have at least one car. A practical target for most transport authorities will be to try and slow the rate of traffic growth over the next 20 years, rather than to reverse it.

**FIGURE T5 HOUSEHOLD CAR OWNERSHIP - 2003**

<table>
<thead>
<tr>
<th></th>
<th>Great Britain</th>
<th>England</th>
<th>South West</th>
</tr>
</thead>
<tbody>
<tr>
<td>No car</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One Car</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Two or more cars</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source DfT Regional Transport Statistics 2005

RPG10, the DRTS and the Local Government Association’s Transport Shared Priority with central Government have a reduction in road casualties high on their respective agendas. Road safety is an important issue to consider in the context of congestion and increasing traffic levels.

**FIGURE T6 REGIONAL KSI CASUALTY RATE 2003 - 2004**

Source DfT Road Casualties English Local Authority Tables 2004

The analysis of the number of people killed or seriously injured (KSI) is the key national indicator of road safety and it reflects the overall safety record of all roads in a highway authority’s area (including trunk roads and motorways). Comparisons between 2003 and 2004
calendar years show that KSI values have decreased in the region, giving the impression that roads in the region are getting safer. This can be attributed to a large degree to the Government’s sustained drive to reduce the number of KSIs resulting from road traffic crashes, particularly those involving children. This policy is being taken forward through Local Transport Plans and the implementation of an increased number of casualty reduction measures using LTP funding.

Assuming the Government maintains or increases current levels of funding targeted at reducing the number of KSIs on Britain’s roads there is the likelihood that the numbers will decrease still further in the coming years.

**FIGURE T7 KSI CASUALTY RATE BY SW COUNTY/UA 2003-2004**

![Figure T7 KSI Casualty Rate by SW County/UA 2003-2004](source)

Figure T7 compares 2003 and 2004 KSI figures between authorities within the South West. The majority of counties or UAs have shown decreasing numbers of KSIs, apart from the City of Bristol. One of the factors contributing to this could be increasing traffic volumes; a characteristic of the region’s main urban areas, but could equally be a statistical blip.

**6.9 DISTANCE TRAVELLED AND MODE (SOC 24)**

Examining distance travelled and mode used can shed light onto regional travel patterns and behaviour, which can be used to help develop regional transport policies. RPG10 Policy TRAN 1, for example, aims to reduce the need to travel and shorten distances needed for journeys by encouraging the development of existing centres and focussing growth on urban centres.

Figures from the National Travel Survey show that South West residents travelled an average 7957 miles in 2004/05. The majority of journeys made were intra-regional. This figure can be broken down by modes of transport. Most journeys in the region are made by car. The mode with the lowest average miles travelled was walking, as most journeys by foot are relatively short.

The rural nature of the region, with many services, jobs and opportunities requiring increased travel, contributes to the continued dominance of the private car as the mode of choice for the majority of households. The coverage of public transport and issues of accessibility also help to explain why the private car is such a popular mode of transport. Walking does however represent a relatively high proportion of overall trips in the region and exhibits a higher level than any other region. This could be due to the nature of the region’s smaller towns and urban areas where walking may be a more attractive option than in some other regions due to the relatively shorter distances involved.
Increased wealth and car ownership, marital and family breakdown and the tendency to work later in life may all be factors which will cause the distance travelled by private car to increase further in future.

FIGURE T8 AVERAGE DISTANCE TRAVELLED BY MODE OF TRANSPORT 2004

![Chart showing average distance travelled by mode of transport in 2004 for South West, England, and Great Britain.]

Source DfT Regional Transport Statistics 2005

FIGURE T9 TRIPS BY MODE OF TRAVEL 2003/04

![Chart showing trips per person per year by mode of travel in 2003/04 for South West, England, and Great Britain.]

Source DfT Regional Transport Statistics 2005

6.10 FREIGHT TRANSPORT (S0C 26)

The efficient movement and distribution of freight is fundamental to the economy. It is accepted that, within current regional planning time horizons, the majority of freight will...
continue to be transported by road. As part of the review of the RTS the Assembly, working with industry and strategic planning organisations, have commissioned consultants to establish an accurate picture of freight flows and road capacity in the region. A ‘Regional Freight Map’ was produced as part of the DRTS, which firstly seeks to establish the existing situation and co-ordinates existing county and unitary freight maps, and secondly provides an input into how freight could be transported in the region in the future.

TABLE T2 FREIGHT TRANSPORT IN THE SOUTH WEST

<table>
<thead>
<tr>
<th>MODE</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>61</td>
<td>62</td>
</tr>
<tr>
<td>Rail</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Coastal</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Seagoing</td>
<td>27</td>
<td>26</td>
</tr>
<tr>
<td>Air</td>
<td>0.01</td>
<td>0.01</td>
</tr>
<tr>
<td>Pipeline</td>
<td>0.44</td>
<td>0.51</td>
</tr>
<tr>
<td>TOTAL (Million tonnes kms)</td>
<td>19,641</td>
<td>19,436</td>
</tr>
</tbody>
</table>

Source Joint Strategic Planning and Transport Unit

FIGURE T10 SOUTH WEST MODAL SHARE OF FREIGHT TRANSPORT 2004

Between 2003 and 2004, there was a fall in tonnage by sea, owing to a lower level of traffic at Bristol together with cessation of mail traffic by rail. There was an increase in air freight, which is explained by the expansion of the freight handling capacity at a number of key regional airports including Exeter. Road transportation will continue to be the main mode for freight transportation as shown in Figure T10. Overall the amount of freight carried in the region has slightly decreased between 2003 and 2004.

Road haulage has increased in the last decade, making it the primary transportation mode for freight in the SW. Freight moved by air has remained relatively constant over the last decade. Freight moved by sea, in contrast to other regions, remained low in 2004.

Time will tell whether the RTS objective to increase the share of freight carried by non-road modes will increase in the South West in the coming years. It may be that the amount of freight moved overall will decrease relative to other regions but policy in the future should continue to advocate a range of modes to meet the demand for freight distribution.
FIGURE T11 FREIGHT TRANSPORTED BY ROAD - GOODS LIFTED BY ORIGIN OF GOOD 1993 - 2004

Source DfT Regional Transport Statistics 2005

FIGURE T12 FREIGHT LIFTED BY AIR AT GB AIRPORTS BY REGION 1993 - 2004

Source DfT Regional Transport Statistics 2005
6.11 PARKING PROVISION IN NEW DEVELOPMENTS (SOC 28)

Parking provision forms a core transport indicator in OPDM guidance, and RPG 10 Policy TRAN 5 sets out the maximum parking standards for development depending on use class. The 2003 AMR found that most authorities do comply with RPG 10 although many were in fact stricter for all or some types of use.

However the usefulness of the policy and the capacity to effectively monitor it has been questioned during work carried out as part of a full review of RTS. The effectiveness of this policy on car use and ownership levels may not be as direct as often assumed and past work carried out by consultants for the Assembly has brought this approach into question. The relationship between car use and ownership is a complex one: some European countries have higher car ownership levels but also have higher levels of rail and bus use.

Parking provision however still needs to be considered: areas where car parking policies fail and result in ‘car clutter’ can have adverse effects on the visual and functional quality of any development. In addition the provision of car parking opportunities in urban centres can have a major bearing on public transport take-up.

The level of parking provision at new developments is likely to decrease slightly in future, as a proportion of the total amount of land / dwellings / floorspace developed. In addition demand management measures, which are due to be implemented in many parts of the region, should help to reduce, or stem the growth of parking provision in urban centres.

6.12 AIR TRANSPORT

Demand for air travel has been increasing rapidly and around 189 million people passed through UK airports in 2002, of which 4.4 million were in the South West (DfT, 2003).

The region has five notable airports in terms of passenger movements; Bristol, Plymouth, Bournemouth, Exeter and Newquay - although Bristol is by far the most significant. Gloucester and Filton Airports also play a role in maintaining business links whilst Penzance Heliport, Tresco Heliport and St Mary’s Airport serve mainly tourism traffic. Overall growth in air passengers in the region stands at 13% pa with Bristol experiencing the highest growth at
Air travel can make a substantial contribution to the economy in providing opportunities for rapid travel for business, personal and leisure purposes. Around 10,000 people in the region are employed either indirectly or directly in the aviation industry.

The Government's White Paper for Air Transport stated that passenger numbers in the region would increase significantly over the coming decades and outlined proposals for expansion at all five of the region’s main airports. The South West Regional Development Agency has identified the expansion of air services as a key element in its economic development strategy. However the growth of air travel can have adverse implications such as environmental impacts, noise and air pollution, surface access issues, global warming and noise impact on local residents.

**FIGURE T14 TERMINAL AIR PASSENGERS 1993 - 2004**

Figure T14 shows that air travel in all regions has increased with the exception of 2001. Passenger numbers in the South West stood at around 5 million in 2004. The RTS policies will look to meet more of the demand for air services from within the region and reduce ‘leakage’ to the South East and congestion on major road routes serving airports.

6.13 **SUMMARY**

Regional public transport has decreased in terms of bus journeys yet rail patronage has seen an increase. This could be due to a combination of high car ownership, dispersed settlement patterns and services not meeting people’s needs. Recent research by the Rail Passengers Council (RPC) has highlighted that the public are now more positive towards the rail industry and rail travel, which may be a further reason for the increase.

Due to the growing number of cars in the region, increased wealth and personal mobility, traffic levels in the South West have increased by 23% in the last decade. Some of the consequences of this are increased congestion, noise and air pollution, environmental implications and increasingly dangerous roads in some areas. However regional KSI figures from 2003-2004 show that, across the region as a whole, roads are getting safer. The reasons for this are likely to include improved vehicle technology, driver awareness and highway condition (skidding resistance).
Journeys made by car were the highest of any mode in the region, and this is sure to remain the case for the foreseeable future. Accessibility issues and public transport coverage contribute significantly to this status quo. Even so, walking represented a good proportion of overall trips in the region due to the nature of smaller urban centres where walking can be an attractive alternative. The majority of trips made by all modes were intra-regional.

In common with other regions the majority (62%) of freight is transported by road, with the least tonnage transported by pipeline (0.55%).

Demand for air transport has increased in the region: 5.1 million flew from the region’s airports in 2003. This is set to increase with the Air Transport White Paper setting out proposals for expansion at Bristol, Bournemouth and Exeter airports.

Despite many positive factors, the region will face some difficult transport challenges in the future. The region’s transport infrastructure must support the economy if it is to overcome the problems arising from peripherality and compete successfully in national, European and global markets. As the European Union expands eastwards, the region is at increasing risk from becoming peripheral in European terms, therefore urgent action is required.

The peninsula and rural nature of the region means only one strategic rail and road route into the region currently exists and public transport coverage is limited for large numbers of the population. This has the potential to hinder economic growth and contributes to social exclusion. The region suffers from high levels of traffic in some urban areas and many smaller settlements are beginning to feel the negative effects of this, especially during the summer months, due to seasonal traffic. This in turn has environmental implications affecting everybody in the region.
7. ENVIRONMENT

7.1 Strategic policy context

RPG10 identifies the environment as a ‘key strength’ in the South West, and is cited as being a central reason for people to move into and stay in the region. The environment is also recognised as a key economic driver in the Regional Economic Strategy.

RPG10 includes policies that ‘address how best to accommodate development that meets the social and economic objectives of a successful region, while ensuring that the South West’s stock of environmental assets is maintained and expanded’.

7.2 Monitoring

The indicators reported on below intend to monitor the environment as a context in which RPG10 sits as well as outcomes of the specifically environment and resource-use policies in the strategy. The monitoring falls into the following broad areas;

- Landscape and biodiversity
- Historic environment
- Water quality
- Air quality
- Flood risk
- Waste
- Minerals
- Renewable energy

7.3 FAST FACTS

- Farmland and woodland bird numbers in the South West have continued to fall between 1994 and 2003.
- The South West continues to have a high percentage of river lengths of good or fair chemical and biological quality, and 99.5% of the region’s bathing waters passed the Imperative Standards in 2005.
- Whilst the numbers of applications to develop on areas of historic importance have been increasing steadily for the past 10 years, 2005 experienced a 6.4% drop in the total figure (a decrease of 6000).
- There have been fewer flood warnings issued in the period 2003/04, a total of 280.
- The figures also show that there have been 896 applications where an objection to development was made by the Environment Agency on the grounds of flood risk.
- The number of planning permissions granted contrary to Environment Agency advice of flood risk increased from 79 to 85 in 2004/05.
- 24 Air Quality Management Areas have been established by local authorities in the region to monitor air pollution.
- Currently the South West has approximately 109.4MW of installed capacity comprising 102 projects. This capacity falls far short of the target to produce 11-15% (or 560-660MW) of energy from renewable sources by 2010.
7.4 LANDSCAPE AND BIODIVERSITY

The region is rich in landscape and biodiversity and almost 37% of the region is classified by the international Union for Conservation of Nature as protected landscape. These include 12 complete and 2 partial Areas of Outstanding Natural Beauty (AONBs), 2 complete and 1 partial national parks (Exmoor and Dartmoor and parts of the New Forest). There are also 46 National Nature Reserves and 79 Local Nature Reserves and 166,500ha designated as Sites of Special Scientific Interest. (In terms of biodiversity, the South West supports some 25 species of global importance, over 700 species of national conservations concern and 34 species endemic to the UK, 11 of which are only found in the South West.)

Policy EN1 in RPG10 urges local authorities and other agencies to protect and enhance the internally and nationally important landscapes and habitats and specifically to have regard for the targets set out in RPG10 for the protection and restoration of key habitats in the region.

POPULATION OF SELECTED WILD BIRDS (ENV04)

The population of selected wild birds is one of the government’s 15 headline indicators of sustainable development and is considered to be a good indicator of the broad state of wildlife and countryside because birds are wide-ranging in habitat distribution and tend to be at or near the top of the food chain.

ALL NATIVE BIRDS

The population of all native birds, including farmland and woodland species, in the South West showed no significant change, with the index decreasing by 5% between 1994 and 2003. This differed from the national trend, which had seen a slight increase. Table EN1 shows the population trends for specific species found in the South West.

TABLE EN1 SOUTHWEST BIRD POPULATION TRENDS 1994 – 2003

<table>
<thead>
<tr>
<th>Species</th>
<th>1994 Index</th>
<th>2003 Index</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raven</td>
<td>+245%</td>
<td>+245%</td>
<td>0%</td>
</tr>
<tr>
<td>Stonechat</td>
<td>+156%</td>
<td>+156%</td>
<td>0%</td>
</tr>
<tr>
<td>Little Grebe</td>
<td>+85%</td>
<td>+85%</td>
<td>0%</td>
</tr>
<tr>
<td>Wheatear</td>
<td>+78%</td>
<td>+78%</td>
<td>0%</td>
</tr>
<tr>
<td>Sedge Warbler</td>
<td>+68%</td>
<td>+68%</td>
<td>0%</td>
</tr>
<tr>
<td>Coot</td>
<td>+68%</td>
<td>+68%</td>
<td>0%</td>
</tr>
<tr>
<td>Sand Martin</td>
<td>-79%</td>
<td>-79%</td>
<td>0%</td>
</tr>
<tr>
<td>Curlew</td>
<td>-73%</td>
<td>-73%</td>
<td>0%</td>
</tr>
<tr>
<td>Wood Warbler</td>
<td>-66%</td>
<td>-66%</td>
<td>0%</td>
</tr>
<tr>
<td>Lapwing</td>
<td>-64%</td>
<td>-64%</td>
<td>0%</td>
</tr>
<tr>
<td>Cuckoo</td>
<td>-62%</td>
<td>-62%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: DEFRA, Royal Society for protection of Birds, & British Trust for Ornithology (2005)

*BBS - British Bird Survey

21 Comparisons between regions, and between regions and the overall national position, need to be interpreted with caution because geographical variations in the numbers of species recorded in the Breeding Bird Survey mean that each regional indicator covers a different subset of the species covered by the UK or England indicator.
WOODLAND BIRDS

Figure EN1 illustrates that the population of woodland birds in the South West showed a moderate fall, with the index decreasing by 10% between 1994 and 2003, similar to the national trend. However, Figure EN1 does not illustrate the fact that the indicator appears to have stabilised since 2000.

The indices for nine of the 29 individual woodland bird species included in the index decreased by 10% or more. However, most of the species showing large declines are scarce species in the region, so trend data is only available from adjacent regions or England as a whole.

TABLE EN2  WOODLAND BIRD SPECIES TRENDS 1994 - 2003

<table>
<thead>
<tr>
<th>Woodland species increasing &gt;20% 1994 - 2003</th>
<th>Woodland species declining &gt;50% 1994 - 2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Spotted Woodpecker (+44%)</td>
<td>Wood Warbler (-66%)</td>
</tr>
<tr>
<td>Nuthatch (+25%)</td>
<td>Willow Tit (-59%)</td>
</tr>
<tr>
<td>Chiffchaff (+21%)</td>
<td>Willow Warbler (-56%)</td>
</tr>
<tr>
<td>Goldcrest (+21%)</td>
<td>Tree Pipit (-55%)</td>
</tr>
</tbody>
</table>

Source: DEFRA, Royal Society for protection of Birds, & British Trust for Ornithology (2005)

FARMLAND BIRDS

The index of farmland birds decreased by 6% between 1994 and 2003, similar to the national trend, with a particularly steep decline from a high point in 2000. The indices for six of the 16 individual farmland bird species included in the index showed a decrease of 10% or more.

22 The basis of these indicators has been revised compared to previous versions and caution must be applied when comparing the figures reported here, covering a period from 1994 to 2003, with earlier indicators covering 1970 to 2000.
TABLE EN3    FARMLAND BIRD SPECIES TRENDS 1994 - 2003

<table>
<thead>
<tr>
<th>Farmland species increasing &gt;20% 1994 - 2003</th>
<th>Farmland species declining &gt;20% 1994 - 2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reed Bunting (+33%)</td>
<td>Lapwing (-64%)</td>
</tr>
<tr>
<td>Jackdaw (+28%)</td>
<td>Starling (-41%)</td>
</tr>
<tr>
<td>Woodpigeon (+20%)</td>
<td>Skylark (-20%)</td>
</tr>
</tbody>
</table>

Source: DEFRA, Royal Society for protection of Birds, & British Trust for Ornithology (2005)

NUMBER AND AREA OF SELECTED KEY HABITATS (ENV03)

The protected habitat targets in RPG10 have now been incorporated into the South West Biodiversity Implementation Plan which was launched in 200423. The South West Regional Biodiversity Partnership is currently developing a scheme that will monitor progress towards these targets, utilising the expert advice from partners including the Local Record Centres.

The South West Biodiversity Implementation Plan also included the recently developed Regional Nature Map24 which identifies the larger areas of the South West that have a high value for biodiversity and potential habitat restoration (based on Biodiversity Action Plan priority habitat mapping). A refinement process was undertaken using Local BP Partnerships and consultation on the draft updated version of the Nature Map was undertaken in Autumn 2005 (for more info, and to download the draft trial version see the web link below http://www.swenvo.org.uk/nature_map/nature_map.asp#refined_map). With respect to RPG10, the Nature Map illustrates where some of the major biodiversity concentrations are found and where BAP targets for maintenance, restoration and re-creation might be met. This will inform the consideration of more sustainable choices for development.

With regard to the current state of SSSIs in the South West, 52.82% were in favourable condition in January 2006, showing very little change from 2003 (52.87%) but a significant increase on 2002 (44%).

FIGURE EN2    SOUTH WEST NATURE MAP

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23 Biodiversity Implementation Plan, South West Regional Biodiversity Partnership, 2004
24 The original of which was published in July 2004
LANDSCAPE

The South West is made up of 41 Countryside Character Areas that have distinguishably different features defining their landscape. The Countryside Agency launched the Countryside Quality Counts (CQC) indicator in 2004 which is an aggregated indicator and monitors change to the distinguishable landscape features of the character areas. The indicator combines information on changes such as woodland pattern, agriculture, boundary features and settlement and the built environment. The CQC indicator therefore monitors progress towards an objective to protect and enhance the region’s landscapes and townscapes.

The State of the Countryside 2004 report presented the initial results of the CQC project. The indicator showed that for the period 1990-1998, about 42% of our landscapes were either stable or showed changes that were consistent with existing character area descriptions. For 26% of our landscapes the changes were marked and inconsistent with these descriptions. In the remaining 32% of our landscapes the changes were inconsistent with existing descriptions, but they were of less significance in terms of their impact on overall character (Figure EN2).

The Countryside Agency notes that in examining these figures it is important to emphasise that marked change inconsistent with countryside character can still be positive change, for example, it can reflect environmental regeneration or major tree planting projects. It can, however, also reflect major developments such as road schemes.

The geographical distribution of these changes indicates that marked and inconsistent change between 1990 and 1998 was concentrated in ‘middle’ England – in the areas around the major conurbations of Manchester, Birmingham and Bristol and across central England (See Figure EN2).

The project is currently undergoing a second phase of development and consultation, involving updating and further refinement of CQC data for the period 1998 to 2003. Consultation was undertaken online between September and December 2005, and will be undertaken again between April and June 2006, providing an important opportunity for the landscape community to collaborate in developing a national indicator of landscape change. The results of the next round of consultation, including an updated indicator of change for the period 1998 to 2003, will be made available towards the end of 2006, and will be reported on in the next AMR. More information can be found via the following link: http://www.cqc.org.uk/index.html
The Countryside Quality Counts indicator shows that between 1990 and 1998, 32% of the South West’s Landscapes underwent “marked change inconsistent with their character” (red areas) and 26% underwent “Some change inconsistent with their character” (amber areas). The remaining 42% of the landscapes in the region underwent “some change consistent with their character or no change at all” (green areas).

LISTED BUILDINGS (ENV07)

Policy EN3, RPG10 urges local authorities to protect, preserve and enhance the historic environment through such means as rescuing buildings at risk, encouraging restoration of historic building and taking account of the context and setting of buildings and settlements.

The numbers of protected sites – listed building, scheduled monuments, conservation areas and registered landscapes – tends to increase year on year, reflecting commitment to protect sites of regional, national and international importance. But at the same time, pressure on the historic environment continues to grow and applications for change to these sites are also rising.
In 2004/5 there were 87,300 planning applications across the South West, a decrease of around 6,000 over 2003/4 and representing a 6.4% drop and a cessation of the upward trend over the past ten years – in 1993/4 there were only 58,542 such applications. Applications for listed building consent numbered 8,145, an increase of 269 over the previous year.

There are currently 88,980 listed buildings in the South West (2005), 24% of the total for England and an increase of 48% in 2004. 90% of listed buildings within the South west are located in predominantly rural areas, reflecting the many listed churches and farm buildings.

Numbers of grade I and II* Buildings at Risk (including structural scheduled monuments) have decreased from 170 to 163 since 2004. Of these, 145 are grades I and II listed buildings (2% of total listed buildings in the SW region) and 18 ancient monuments. The decrease to 163 represents the fact that during the past year, 19 entries (11%) have been removed from the register and 12 entries have been added to it (English Heritage 2005).

There is currently no consistent data on the condition of scheduled monuments (other than those few eligible for inclusion on the Buildings at Risk Register), and English Heritage has begun a new survey of Monuments at Risk in order to begin to quantify the problem. Since 2004 the number of scheduled monument sites has increased from 6,944 to 7,018, accounting for 35% of the national total (English Heritage 2005).

It is recognised that at present there is too little reliable statistical data available for the historic environment, which hampers efforts to measure success of policies in this area. English Heritage is leading work to develop a reliable set of performance indicators and build good baseline data which can be used to identify trends and monitor performance. This suite of measures and indicators forms the basis for the annual State of the Historic Environment Report (published as Heritage Counts 2005 http://www.english-heritage.org.uk/heritagecounts/). Whilst there are still clearly gaps in the data, the annual collation of comparative data for inclusion in Heritage Counts will allow good baseline measures to be established and performance to be monitored more accurately.

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* The 2004 figure (170) masks the fact that a number of buildings were removed from the register following repair, as equal numbers were added to the register for the first time.
7.5 WATER QUALITY

RIVER WATER QUALITY (RES23)

River Water Quality is one of the government's 15 headline indicators of Sustainable Development. Regional river water quality has improved significantly in recent years and is generally excellent, consistently exceeding national benchmarks. In the last Environment Agency annual survey of river water quality (2004), England continued to have a high proportion of 'very good' quality rivers (71% - an increase of 1% on 2004 figures). In 2003 almost all of the region’s rivers were of very good or good chemical and biological quality (80% and 87% respectively).

In 2004, almost all of the Region's rivers were of good or fair quality - 97% being of good or fair chemical quality and almost 99% being of good or fair biological quality.

The chemical quality of rivers in the South West has been consistently good and is steadily improving. The number of rivers of good and fair quality has improved by almost 4% (3.7%) (from 93% in 1990 to 96.7% in 2004) (Figure EN3).

The biological quality of rivers in the South West has significantly improved since 1990, with an increase of 2% (1.81%) in the number of rivers of good and fair quality (from 97% in 1990 to 98.81% in 2004) (Figure EN4).

FIGURE EN4 CHEMICAL QUALITY OF SOUTH WEST RIVERS 2004

Figures for those rivers of bad biological quality have increased slightly on 2003 figures. (0.199 in 2003 and 0.44 in 2004). There has also been a marked increase in those rivers of only fair quality (1.88 in 29003 and 11.07 in 2004), when compared with the higher levels of good quality in 2003.
BATHING WATER QUALITY (RES24)

There are 191 designated bathing waters in the South West, which is nearly 40% of the total for England and Wales (414 bathing water in England as a whole). The coastline and bathing waters are vital to the prosperity of the region’s economy and wildlife.

Overall the 2004 Bathing Water season recorded similar results to previous years with Mandatory compliance decreasing slightly and Guideline compliance improving. South West bathing waters consistently achieve excellent compliance results and have improved between 1991 and 2002.

In the summer of 2004 98.4% of the region’s bathing waters passed the Imperative Standards and 81.1% passed the more stringent Guideline Standards. Just three beaches failed to meet the Imperative Standards in 2004, these being Combe Martin (Devon), Ilfracombe (Hele) Beach (Devon) and Lyme Regis (Church) Beach (Devon).

The long term trend in improving bathing water quality is largely the result of improvements in coastal sewage systems. These large scale improvements have revealed smaller, more localised and variable pollution sources, particularly run-off from agricultural land. These sources can now be more readily detected and investigated.

Bathing water quality in the South West consistently achieves excellent compliance results and has significantly improved between 1990 and 2005. Those bathing waters meeting the mandatory Imperative Standards in 2005 have increased by almost 11% (to 99.5%) since 1990 (compared to the national average of 30%) whilst those meeting the tighter Guideline standards have increased by over 38% (to 87.4%) (compared to the national average of almost 53%) (Figure EN5).
In 2004 Dartmouth and Sugary Cove (Devon) was the only bathing water out of 190 monitored in South West Region that failed to comply with the mandatory standards. However the beach has been closed since 2000 due to accessibility problems. The number of single exceedences against the mandatory standards also decreased by 5 from 13 in 2004 to only 8 in 2005.

Bathing waters making the Imperative standards have tended to reach a plateau at 98-99% compliance since 2001. However, there was a slight decline in those meeting Guideline standards between 2004 and 2005, with 6 more failures (24 in comparison to 18 in 2004) although there were 18 fewer exceedences (101 in comparison to 119 in 2004).

7.6 AIR QUALITY (RES20)

Air quality - days when air pollution was moderate or higher: 1987 to 2003 is one of the Government's 15 Headline Indicators of Sustainable Development. There is a wide range of air pollutants, with a variety of health and environmental impacts, for example respiratory stress, acid rain and climate change.

Government air quality statistics show that air quality in the South West is generally good with low levels of sulphur, nitrogen dioxides and particulates in comparison to the rest of England. However, pockets of poor air quality exist in the region, especially within large urban industrial areas such as Bristol.

It is not possible to provide regional averages, such as can be seen in the graph above, because there are too few sites in some regions. Instead, representative urban and rural sites are chosen to indicate, as can be seen in the table below:
Table EN5 shows that nationally, in 2004 there was an average of 22 days with moderate or higher pollution in urban areas, and 42 days in rural areas. The South West had a below average number of poor air quality days in all of its representative urban sites but an above average record Yarner Wood, one of the representative rural sites.

The number of days of moderate or higher air pollution in the South West ranged from 16 days in Bristol Centre to 53 days in Yarner Wood (Devon) during 2004 (Figure EN6). Air quality has generally improved since 1993, largely due to a reduction in particles and sulphur dioxide. The weather also influences air pollution. Hot and dry summers, such as in 2003, encourage the production of air pollutants, ground level ozone and fine particles.

Source - DEFRA 2005

![Number of pollution days at chosen South West sites 2004](source: Environment Agency and DEFRA 2005)
24 air quality management areas have been established in 12 local authorities in the region, up from 8 in 2003. These are primarily in urban areas, to monitor and reduce air pollution mainly from traffic.

More information on the location and function of these areas can be found within the SWENVO (South West Environment) Module of the South West Observatory website. (See link http://www.swenvo.org.uk/)

7.7 FLOODING (RES25)

Flooding causes damage to properties, infrastructure and the natural environment. The risk of flooding is predicted to increase in the South West as a result of climate change causing wetter winters. There are large areas in the region that are at risk of flooding, including the Somerset Levels & Moors and major built up areas such as Bristol, Taunton, Bridgwater, Exeter, Blandford Forum and Bodmin. Around 100,000 properties in the region are at risk from the most serious floods, and many of our urban areas are at risk. Many smaller settlements and coastal communities are also at risk. Flooding also causes disruption to major transport infrastructure. Railways along the coast – such as near Dawlish in Devon – remain vulnerable to storm surges, high tides and cliff instability while tunnels are vulnerable to flooding.

The period April 2004 to March 2005 was characterised by a small number of high profile events within an otherwise dry year. A turbulent summer brought several very high intensity events in Devon and Cornwall, the most notable being the North Cornwall flooding in August. The autumn period was relatively free from fluvial flooding, but the South West once again hit the national headlines when severe tidal flooding occurred on the region’s south coast in October.

Rainfall was below the long term (1961-90) average for all except two months in the period. August was notably wet – the rainfall event in North Cornwall on 16 August 2004 saw 3 times the monthly average for Cornwall fall in one afternoon (Figure EN7)

FIGURE EN8 PRECIPITATION RATES (MM) APRIL 2003 – MARCH 2004

![Graph showing precipitation rates from April 2003 to March 2004.](source: Environment Agency 2005)

26 100 year fluvial flood; 200 year tidal flood
Although extreme, river floods were very localised. The number of flood warnings issued was one of the lowest in the period since 1993. Just 269 warnings were issued, compared with a typical figure of around 600. The number of properties affected across the region from river and tidal flooding as a whole for the year was around average at 441 properties. 287 of these during the tidal event in October. The tidal floods were calculated as having between 25% and 2% chance of occurring in any one year.

**FIGURE EN9  SOUTH WEST FLOOD WARNINGS 1994 - 2004**

Source: Environment Agency 2005

**Flood Risk and Planning Applications**

During the period 2004/05 the Environment Agency objected to 896 planning applications on flood risk grounds. This is a considerable drop from the previous (1,354 in 2003/04) and is due mainly to the introduction of ‘Standing Advice’ on flood risk provided by the Environment Agency to local authorities.

The majority of Environment Agency objections are resolved either by modifying proposals with the agreement of the local planning authority and the developer, or by securing conditions on the planning approval that deal with Environment Agency concerns. 85 planning applications were approved contrary to the advice of the Environment Agency during 2004/05, around the same as in 2003/04. The majority of these were minor developments (83), only 2 were major developments – one light industrial/office development in Melksham (Wiltshire) and one recreation scheme at Mevagissey (Cornwall). No major residential developments were approved contrary to Environment Agency advice.
### TABLE EN7  PLANNING APPLICATION AND FLOOD RISK 2004/05

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Planning applications on which the Agency responded by obj ecting on flood risk grounds</td>
<td>896</td>
</tr>
<tr>
<td>Total number of LPA Decision notices received by Agency for objections on flood risk</td>
<td>782</td>
</tr>
<tr>
<td>Number of decisions where application was approved by LPAs contrary to Agency advice</td>
<td>79</td>
</tr>
<tr>
<td>Number of decisions where application was approved by LPAs but contain planning conditions that partially mitigate Agency concerns</td>
<td>6</td>
</tr>
<tr>
<td>Number of major residential developments approved by LPAs contrary to Agency Advice</td>
<td>0</td>
</tr>
<tr>
<td>Number of minor residential developments approved by LPAs contrary to Agency Advice</td>
<td>38</td>
</tr>
<tr>
<td>Number of other major developments approved by LPAs contrary to Agency Advice</td>
<td>2</td>
</tr>
<tr>
<td>Number of other minor developments approved by LPAs contrary to Agency Advice</td>
<td>45</td>
</tr>
</tbody>
</table>

Source: Environment Agency 2005

### 7.8 WASTE

RPG10 promotes the use of the Best Practicable Environmental Options (BPEO) and the adoption of the waste hierarchy (to reduce, re-use, recover, and then dispose). RPG10 also encourages local authorities to manage waste as close as possible to the place of production (proximity principle) and to work towards regional self-sufficiency. There is also the re-iteration of targets set in the National Waste Strategy to recover value (through recycling, composting and incineration) from 40% of municipal waste by 2005, 25% by 2010 and 67% by 2015. The developing RSS is likely to adopt the higher targets set in the Regional Waste Strategy which sets a higher target of more than 45% of all waste to be recycled or reused and less than 20% of waste produced to go to landfill by 2020.

Regional monitoring by the RTAB has now accumulated figures from waste disposal and collection authorities for 2000/01 to 2004/05. In previous years the RPB has used the information collected by the Regional Technical Advisory Body (RTAB) to assess the situation in relation to the monitoring indicators for waste, as identified within Regional Planning Guidance. However, the data for 2004/05 was not provided to the RPB within sufficient time for thorough analysis to be undertaken. SWRA will work with RTAB and the Environment Agency to ensure that future waste figures are provided within a sufficient timescale to allow analysis to be completed for future AMRs.

The data presented below on municipal waste to landfill has been extracted from the Municipal Waste Survey 2004/5\(^{27}\) and the Commercial and Industrial Waste Arisings Survey (periodic) undertaken by the Environment Agency.

All other data analysis on municipal and commercial waste was provided by the South West Observatory ‘State of the South West 2005 Report’ available via the following link: [http://www.swo.org.uk/State_of_the_South_West/index.asp](http://www.swo.org.uk/State_of_the_South_West/index.asp) Much of this data was primarily sourced from DEFRA and the EA and is for the period 2003/04.

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\(^{27}\) The Municipal Waste Survey was taken forward by the Regional Technical Advisory Body (RTAB). This survey reports on trends of Municipal Solid Waste (MSW) (includes all household waste, street litter, waste delivered to council recycling points, municipal parks and garden wastes, council office waste, civic amenity site waste, and some commercial waste from shops and smaller trading estates where local authority waste collection agreements are in place) and Household Waste (including waste from household collection rounds, bulky waste collection, hazardous household waste collection and separate garden waste collection, plus waste from services such as street sweeping, litter and civic amenity sites and schools).
A more detailed analysis of the 2003/04 data and the trend analysis for the previous two years is available in the 2004 Regional AMR. This can be accessed from the Planning Module document archive via the link [http://www.swrpm.org.uk/documents/](http://www.swrpm.org.uk/documents/).

### 7.8.1 MUNICIPAL WASTE

Over 2.8 million tonnes of municipal waste (all waste collected by or on behalf of the local authorities) was produced in the South West in 2003/04. Accounting for 57% the largest proportion of this waste came from regular household collections (1.6 million tonnes), followed by household recycling with 548,000 tonnes and civic amenity sites with 322,000 tonnes.

Total municipal waste has increased by 26% since 1996/97, from around 2.3 million tonnes to over 2.8 million tonnes in 2003/04. However, this also represents the first reduction seen in 2003/04, of 36,000 tonnes or just over 1% on 2002/03.

### 7.8.2 COMMERCIAL WASTE

In 2003/04, 12% of total waste production in the region came from the commercial sector and 14% from industry. This amounts to 5.2 million tonnes of industrial and commercial waste being produced per year (45% of which came from commerce and 55% from industry).

Management of most industrial waste was balanced between landfill and recycling or reuse with over 40% to each. Around 52% of commercial waste was disposed to land whilst 22% was recycled or reused.

### 7.8.3 RECYCLING OF MUNICIPAL WASTE

Just over 21% of household waste was recycled in 2003/04, with each household recycling over 256 kg per year. The Municipal Waste Survey for 2003/04 revealed that the region had the 3rd highest recycling rate in England, behind the East and South East (both 23%). Household recycling has been steadily increasing in the region, by almost 42% since 1996/97.

**FIGURE EN10 MUNICIPAL SOLID WASTE DISPOSED TO LANDFILL 2004/05 IN SW**

![Bar chart showing municipal solid waste disposed to landfill 2004/05 in SW]

Source: Environment Agency & RTAB 2005

- No data available for Bristol, Torbay and Bournemouth.
7.8.4 WASTE DISPOSAL - LANDFILLING OF MUNICIPAL WASTE (RES16)

According to Defra, 76% (almost 2.2 million tonnes) of waste in the South West was sent to landfill in 2003/04, compared to 72% in England and the third highest rate of the English regions, behind the North East and Yorkshire and the Humber. At the current rate of production, the South West Regional Assembly predicts that most landfill sites could be filled in between 4 and 18 years’ time. However, there has been a continued decrease in the proportion of municipal waste disposed of at landfill in England from 78% in 2001/02 to 72% in 2003/04. This has been mirrored in the South West, with a 6% reduction between 2001/02 and 2003/04.

The RTAB survey reveals that the tonnage of Municipal Solid Waste (MSW) disposed of to landfill in 2004/05 was a regional total of 2,488,845 tonnes (Figure EN9). The continued high overall reliance on landfill across the South West Region suggests that much still needs to be done to reduce both disposal of MSW in general and to reduce the disposal of the biodegradable proportion of MSW, to accord with the requirements of the Landfill Directive and the Landfill Allowance Trading Scheme.

7.9 RENEWABLE ENERGY (RES26)

Currently the South West has approximately 109.4MW of installed renewable energy capacity comprising 102 projects powering the equivalent of 130,875 homes (Figure EN10). This capacity falls far short of the target to produce 11-15% (or 560-660MW) of energy from renewable sources by 2010, as proposed in the ‘Renewable Energy Assessment and Targets’ (REAT) study (commissioned by GOSW, 2001) and as outlined in the Regional Renewable Energy Strategy. The feasibility of this target has been confirmed in the 2004 publication of the REAT study Revision 2010 which included sub-regional targets. At present, the region is working on developing 2020 renewable electricity targets and also targets for reusable heat energy for 2010 and 2020. It is intended that these will be included in the revision of the RSS:

‘Achieving the commitments set nationally within the 2003 Energy White Paper will require at least 40% of electricity to be generated from renewable sources by 2050. In the shorter term the Government is committed to the achievement of 10% renewable electricity by 2010 and is aiming for 20% by 2020. Although the South West has made a good start and has a range of renewable energy installations using wind, hydro, solar and biomass resources, in 2005 only about 3% of the region’s electricity demand is met by these methods28.

Existing renewable energy schemes in the South West are capable of producing nearly 52 MW of electricity - more than enough to power the whole of North Cornwall, Exeter, Gloucester or Taunton.

By developing this capacity and new schemes, the Region could produce between 259- 597 MW (Terence O’Rourke PLC & ETSU 2001). This is enough to supply Dorset, Somerset and Gloucestershire, and would be up to 15 % of the South West's energy generation capacity. Still, this will only provide between 3.7 and 7.8 % of the Government's 10 % target - the third lowest of all British regions (Oxera Environmental and Arup Economics & Planning, 2002 - for DTI).

At present, wind energy makes the most significant contribution to renewable electricity generation, and is set to be the main contributor to the 2010 renewable energy target. Beyond 2010, wave and tidal energy technologies are expected to be taken forward and become the major contributors to fulfilling the 2020 targets. Major opportunities to develop wave and tidal energy have been identified off the South West coast (which has one of the highest capacities in Europe) and a wave hub has been positioned off the Cornwall coast to test offshore wave energy technologies.

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28 Copies of the draft RSS renewable energy text (section 7) can be accessed via the SWRA website.  
‘A survey conducted by Regen South West in 2004 found that approximately 3% of South West electricity consumption comes from the 109 MW of installed renewable energy capacity. It is estimated that this is already preventing the creation of 313,000 tonnes of carbon dioxide annually. There are 32 landfill and sewage gas schemes in the region making up 51% of the installed capacity, nine wind projects make up 39%, 39 hydro schemes providing 8%, two schemes using advanced waste treatments making up 1.5% and 17 solar PV installations making up 0.2% of installed capacity. There has been considerable concern about the location of some renewable energy schemes, particularly from conservation bodies and local opposition groups, but support for renewables remains very high, with a MORI opinion poll in 2003 showing 89% support for renewable energy in the South West and another MORI poll showing that 71% of rural residents support the use of wind power in Devon.’

State of the South West 2005 – South West Observatory 2005

7.10 MINERALS (RES27/28)

The South West is rich with mineral resources, such as aggregates (crushed rock and sand), coal and hydrocarbons (oil and gas), china and ball clay and building stone. The region is the second largest producer of crushed rock and the fourth largest user of sand and gravel. Although these resources make a significant contribution to the local economy, the industry has significant environmental impacts. Mineral exploitation is recognised as generating approximately 6000 directly employed jobs and almost £350 million to the regional economy (0.5% of GVA in the South West).

Despite significant closures in recent years, mining and quarrying remains an important primary industry in the region, particularly in Devon and Cornwall. The region contains all of the UK production of ball clay, over three-quarters of which is exported to generate £30 million in export sales each year. In Devon and Cornwall the China Clay industry contributes more than £150 million a year to the local economy (DEFRA, 2002). At MPA level, Somerset and Avon quarries continue to be the principal providers of crushed rock whilst quarries in Dorset and Wiltshire are the main providers of sand and gravel. Data in the region can be divided into categories of production and reserves.
The government’s subsequent review of the apportionment guidelines to take them forward over the period 2002-2016, has resulted in a reduction in the overall amount of aggregate required from the region for all types of primary aggregates, but an increase in alternative aggregates (secondary and recycled). Following the SWRA’s consideration of the 2001-2016 guideline figures, the sub-regional apportionment has been adopted by the RPG, and incorporated within the draft RSS.

### TABLE EN6   LAND WON AGGREGATES – APPORTIONMENT AND PRODUCTION
2002 - 2003

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Avon</td>
<td>5.93</td>
<td>4.76</td>
<td>4.57</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Somerset</td>
<td>14.14</td>
<td>11.34</td>
<td>11.67</td>
<td>Included with Devon</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Cornwall</td>
<td>1.82</td>
<td>1.6</td>
<td>1.4</td>
<td>0</td>
<td>0.94</td>
<td>0.95</td>
</tr>
<tr>
<td>Devon</td>
<td>3.5</td>
<td>2.83</td>
<td>2.7</td>
<td>1.36</td>
<td>Included with Cornwall</td>
<td>Included with Cornwall</td>
</tr>
<tr>
<td>Dorset</td>
<td>0.48</td>
<td>0.38</td>
<td>0.31</td>
<td>2.27</td>
<td>1.56</td>
<td>1.7</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>Included with Dorset</td>
<td>Included with Dorset</td>
<td>Included with Dorset</td>
<td>1.85</td>
<td>1.35</td>
<td>1.57</td>
</tr>
<tr>
<td>Gloucs.</td>
<td>2.5</td>
<td>2.04</td>
<td>1.75</td>
<td>1.14</td>
<td>0.94</td>
<td>0.7</td>
</tr>
<tr>
<td>TOTAL</td>
<td>28.37</td>
<td>22.95</td>
<td>22.4</td>
<td>6.62</td>
<td>4.79</td>
<td>4.92</td>
</tr>
</tbody>
</table>

Source: SWRAWP 2005

The revised regional guidelines figures for primary land won aggregates were revised in 2005 and are shown in Table EN7; this also shows that actual production in 2003 was less than the annualised sub regional apportionments for both crushed rock and sand and gravel. However, landings of marine dredged sand and gravel in 2003 were 0.59mt, most of which were landed at Avonmouth in Bristol (0.37mt) and Appledore in Devon (0.08mt) and dredged from licensed areas in the Bristol Channel. This amounts to an increase in landings of approximately 7% on 2002 figures.

Somerset has consistently been the main producer of crushed rock over the period 1992-2003, averaging 12.85mt per year. Former Avon has averaged 5.4mt per year and Devon has averaged at 3.2mt per year. For sand and gravel Dorset has been the main producer with an average production of 1.61mt over the 12 year period. Devon and Wiltshire have each averaged just over 1mt per year and Gloucester 0.79 per year.
7.11 SUMMARY

Numerous environmental monitoring initiatives continue to be supported and expanded upon throughout 2005, including Countryside Quality Counts indicators and the Nature Map of areas of strategic importance for maintenance, restoration and re-creation. English Heritage and the South West Biodiversity Partnership are also continuing to develop monitoring schemes for the region.

The above data shows that the South West has a high environmental quality to protect; a large number of natural and historic environmental assets and generally high quality rivers, bathing waters and air. However, monitoring also reveals that there are increasing development pressures that threaten these assets, such as an increasing number of applications to develop on areas of historic importance and an increasing number of planning permissions granted contrary to Environment Agency advice of flood risk.

In terms of natural resources, regional targets have been set for the generation and re-use of waste and for renewable energy generation, but the region currently falls far short of these targets.

There have been fewer flood warnings issued in the period 2003/04, a total of 280. The figures also show that there have been 896 applications where an objection to development was made by the Environment Agency on the grounds of flood risk.
8. SUMMARY OF ACTION POINTS FROM 2005 & PROPOSED ACTIONS FOR 2006

The Annual Monitoring Report from 2004 produced an output of action points relating to the findings from each of the thematic chapters. The following section will detail how these action points have been addressed by the South West Regional Assembly. The action points are set out as bullet points below with the response to the action in boxes.

8.1 PROGRESS ON ACTION POINTS FROM 2004 AMR

SPATIAL STRATEGY

• The Assembly will work with local authorities to complete the Joint Study Area work that is a key component to the development of the RSS.

\[
\text{The Assembly has commissioned the strategic authorities to take the lead in a number of sub-regional studies (referred to as Joint Study Areas) to inform the developing RSS. The Joint Study Area work focused on the larger urban areas in the South West, where strategic planning of these areas cuts across a number of local authority boundaries. This work will continue to help identify the necessary sub-regional policies to be incorporated in the RSS and RTS and will provide policy guidance to the Local Development Frameworks prepared by the respective local authorities. Further information can be found in the Spatial Strategy Chapter.}
\]

• Further work will be undertaken with local authority partners and the Government Office to improve monitoring coverage relating to development at the PUAs. This will involve working with local authorities to develop and clarify the definitions of the PUA boundaries.

\[
\text{The Joint Study Area work addressed issues with monitoring coverage at the PUAs. More information can be found on the SWRA website via the following link: http://www.southwest-ra.gov.uk/swra/ourwork/RSS/RSS_Developing_JSAs.shtml}
\]

• The RPB will monitor Structure Plans, Local plans and Local Development Frameworks to ensure conformity of their development strategies with RPG10. The RPB will expect local planning authorities to review existing Local Plan housing allocations that are inconsistent with the urban concentration strategy set out in RPG10 as a key part of their preparatory work on Local Development Frameworks.

\[
\text{Due to the changes in the approach to planning introduced in 2004 the approach to monitoring conformity is now addressed in the RSS process. The district housing allocation process will also address the issues concerning the urban concentration of housing during 2005.}
\]

HOUSING

• The RPB will work with local authorities to ensure that residential density is more accurately recorded and complete data is obtained so that this can be measured against the Residential Density Direction Circular 01/2005.

\[
\text{The Assembly is continuing to liaise with local authorities through use of the LDF Monitoring Groups (Sub-SIP) and the Strategic information officers (SIP) Group, to ensure that complete datasets are provided for RPG monitoring. It is anticipated that once the LDF monitoring schedule becomes locally embedded, monitoring and collection of housing data will be facilitated.}
\]
• Work with areas such as Gloucestershire and Wiltshire to develop an understanding of why housing provision has been below the planned rate in certain areas within the South West.

**Work is continuing through the use of the LDF Monitoring groups to develop the monitoring system and we now have a better understanding of data flows and the processes that have affected the supply of housing. Many of the local authority AMRs describe efforts and methodologies to be undertaken to deal with the under provision of housing.**

• Work with the South West Housing Body and the local authorities to develop the required data sets for the housing market areas and accompanying housing market needs assessment.

**In January 2005 the SWRA commissioned a study analysing the sub-regional housing markets in the South West. The study aimed to create a better understanding of the nature and dynamics of the housing market areas, and also fed into the Joint Study Area work for the developing RSS.**

• The RPB will encourage local authorities to monitor the number of bedrooms provided in housing developments to enable an assessment of the mix of new dwellings to be carried out.

**The Assembly is continuing to liaise with local authorities through use of the LDF Monitoring groups (County-SIP) and the Strategic Information Providers (SIP) group, to ensure that complete datasets are provided for RPG monitoring. It is anticipated that once the LDF monitoring schedule becomes locally embedded, monitoring and collection of housing data will be facilitated.**

**ECONOMIC PROSPERITY**

• Encourage local authorities to collect and report on employment land development on previously developed and previously un-developed land for all relevant Use Class orders.

**The Assembly is continuing to liaise with local authorities through use of the LDF Monitoring Groups (County-SIP) and the Strategic Information Providers (SIP) group, to ensure that complete datasets are provided for RPG monitoring. It is anticipated that once the LDF monitoring schedule becomes locally embedded, monitoring and collection of housing data will be facilitated.**

• To work with the Regional Development Agency and tourism bodies to identify how to promote a higher quality of all-season tourist attractions and to promote use of public transport systems for visits to the South West.

**In working with the RDA and Culture South West to develop the RSS the SWRA, the importance of cultural activities and facilities to the Region and supporting sustainable patterns of tourism and visiting have been identified as important factors. A number of priorities and programmes of the cultural and allied agencies have also been identified. These priorities will form the basis of cultural promotional activity in the region over the next few years.**
• Working with the South West Housing Body and ODPM liaise with local authorities within the South West to see if there are any areas prepared to pilot the developing National Register of Social Housing (NROSH) because at present none of the pilot authorities are within the South West region.

Those local authorities that are currently piloting the NROSH are Swindon BC and Plymouth UA. Thos housing associations taking part in the south west there is the ‘Devon & Cornwall Housing Association’ amongst others. Further details can be found at http://www.odpm.gov.uk/nationalregisterofsocialhousing

• Working with the South West Housing Body and the Gypsy Liaison Officers work on developing indicators to monitor the provision of Gypsy and Traveller sites.

The Assembly is currently finalising a section on Gypsy and Travellers for inclusion in the draft RSS which will be submitted to Government in March. Local planning authorities will be required to monitor pitch numbers through their local development framework monitoring processes and these numbers will be collated and reported through the RSS Annual Monitoring Reports

• Working with the South West Housing Body and the Gypsy Liaison Officers work on collating data to inform the Local Housing Needs Assessments to aid in the development of policies relating to Gypsy and Traveller site provision.

The majority of 4/4 Authorities had not been able to undertake Local Housing Needs Assessments at the time of publication of the emerging RSS. As there was not sufficient information on which to establish district level pitch numbers, policies have been based on the transitional arrangements as set out in ODPM Circular 01/2006.

• Continue to undertake studies jointly with the Regional Housing Body, the house-building industry and related partner organisations to help identify appropriate strategies to improve housing affordability, reduce homelessness in both urban and rural areas and to reduce the proportion of properties falling below the decent homes standard.

The Regional Housing Body, of which the Assembly is a key and active partner, is undertaking work which seeks to ensure that the actions within the Regional Housing Strategy 2005-2016 are delivered. These actions include increasing the delivery of housing (in line with the Government’s response to the Barker review, to improve housing affordability), meeting the decent homes target, and a workstream on reducing homelessness and supporting vulnerable groups.

• Continue to work with its partners and in particular the Regional Housing Body, the house-builders, SWRDA, the local authorities and GOSW to investigate ways of increasing the construction of affordable housing across the region. Measures to be investigated will include a more co-ordinated approach to negotiating planning obligations on new housing development (Section 106 agreements) between different parts of the region. It is essential that the RPB has access to data which gives a composite picture of how affordable housing is being developed across the region.

The Regional Assembly remains a fully active and engaged partner in the work of the Regional Housing Body. An action within the Regional Housing Strategy relates to dissemination of s106 good practice. A recent government consultation on Planning Gain Supplement is likely to affect section 106 agreements in the future. Monitoring data in relation to affordable homes delivered as a result of s106 agreements, with and without public subsidy, remains essential.
• Continue to work with its partners in the RDA, the Countryside Agency, Government Office, the local authorities and other appropriate public, voluntary sector and private sector agencies to identify appropriate planning measures in the RSS review to support action to mitigate the effects of access and other deprivation. It is essential that as part of this review, the intra-regional differences are revealed and addressed.

The RSS incorporates work to look at the effects of access and deprivation. A key aspect of this is the Accessibility Study* that is informing the review of the Regional Transport Strategy. The Regional Economic Strategy will also examine issues of low wage during its review process (due for publication April 2006)

* ‘Significance of transport availability and cost in limiting access to jobs and training –Final Report’ September 2005. (Faber Maunsell - AECOM)

TRANSPORT

• The Regional Transport Strategy will be taken forward as a draft strategy and will be presented to a number of officer groups in March – May 2005 for comment. It will then be taken to the Regional Transport Forum for wider consultation in June 2005 and will be incorporated into the draft RSS towards the end of 2005.

The Regional Transport Strategy was produced as the Developing Regional Transport Strategy (DRTS) in March 2004. The Assembly is now working on a formal review of the Regional Transport Strategy which will be incorporated into the Regional Spatial Strategy.

A draft document ‘Developing the RTS’ was published for consultation in May 2005 and the Assembly held a Regional Transport Forum on the 24th of May to provide an opportunity for stakeholders to debate the question: "What should be the region’s priorities for investment and management of the transport network?" The consultation period ended on the 30th June 2005. The RSS along with the incorporated transport strategies is due for submission at the end of March 2006.

A transport background technical paper is being worked by the SWRA. The purpose of the Paper is to set out what the draft “Good Practice Guide on Regional Transport Strategies” requires in relation to the evidential base supporting the transport content of the RSS. The Paper will also look into the regions transport geography, issues and policy context.

ENVIRONMENT

• The Regional Waste Strategy was launched on the 19th October 2004 and the RPB is committed to working with key partners to further encourage the reduction of waste in the South West.

The Regional Waste Strategy was launched on the 19th October 2004 and is committed to working with key partners to further encourage the reduction of waste in the South West. In 2005 the SWRA, alongside the SWLGA and Environment Agency, sponsored the first regional “pioneers in Packaging” awards organised by Sustainability South West. The awards were given to organisations that reduced the environmental impact of packaging. SWRA has also included specific policies in the draft RSS that will lead to waste reduction, including requirements for site waste management plans and increased reuse of construction and demolition waste.
• The Regional Sustainable Energy Strategy (SES) is being developed and will address issues concerning renewable energy, energy efficiency and fuel poverty. Policies on renewable energy are currently being developed for the RSS as a first stage in developing the SES.

The Assembly and Government Office appointed consultants in January 2005 to advise on appropriate policies on renewable energy to be included in the Regional Spatial Strategy and to contribute to the developing Regional Sustainable Energy Strategy. This work was completed in June 2005 and the full “Revision 2020” report, the proposed RSS policies and proposed supplementary planning document are available from the SWRA website via the link below: http://www.southwest-ra.gov.uk/swra/ourwork/waste/energy_index.shtml

• The RPB through the Environment Strategy will continue to monitor the progress to improve water quality across the region. It will also monitor issues concerning biodiversity and environmentally sensitive areas in partnership with other regional stakeholders.

The Environment Strategy of the South West was launched in 2004 and contains policies and action plans to promote measures to improve the water quality of the region. The Regional Assembly will produce a short report annually which will assess delivery of outcomes in relation to the targets and indicators set out in the Strategy: and monitoring delivery of the actions identified in the implementation plan. This will be set within the context of the State of the Environment report produced by the environment module of the South West Observatory www.swenvo.org.uk. A formal review of the Strategy will be undertaken on a three-yearly basis. The first Progress Report on delivery of the Strategy has been published and is available via the SWRA website: http://www.southwest-ra.gov.uk/swra/ourwork/environment/Regional%20Environment%20Strategy.shtml

8.2 PROPOSED ACTIONS FOR 2006

During the coming year the Regional Planning Body will:

SPATIAL STRATEGY

• The RPB will be working closely with partners and stakeholders to ensure an integrated approach to the monitoring of the spatial aspects of the developing regional strategies. This will encourage the cross checking of available information to avoid undue duplication of data collection and analysis.

• The RPB will continue to work with LPAs to encourage them to continue to review local plan allocations in PUAs in line with the requirements of Government guidance PPG3 and PPS7.

ECONOMIC PROSPERITY

• Continue to work closely with local authorities to encourage them to collect and report on employment land development on previously developed land and previously undeveloped land for all relevant Use Class Orders.
• Work to develop a region wide database of key employment sites and work with Las who will play a key role in tracking site changes and new additions in employment sites. This work will be supplemented by the AMRs completed as part of each authority’s local development framework.

SOCIETY

• Continue to undertake studies jointly with the Regional Housing Body, the house-building industry and related partner organisations to help identify appropriate strategies to improve housing affordability, reduce homelessness in both urban and rural areas and to reduce the proportion of properties falling below the decent homes standard.

• Continue to work with its partners and in particular the Regional Housing Body, the house-builders, SWRDA, the local authorities and GOSW to investigate ways of increasing the construction of affordable housing across the region. Measures to be investigated will include a more co-ordinated approach to negotiating planning obligations on new housing development (Section 106 agreements) between different parts of the region. It is essential that the RPB has access to data which gives a composite picture of how affordable housing is being developed across the region.

• Continue to work with its partners in the RDA, the Countryside Agency, Government Office, the local authorities and other appropriate public, voluntary sector and private sector agencies to identify appropriate planning measures in the RSS review to support action to mitigate the effects of access and other deprivation. It is essential that as part of this review, the intra-regional differences are revealed and addressed.

HOUSING

• The RPB will continue to work with local authorities to ensure that the aims and objectives of the RGP housing policies are continually monitored. The RPB will work closely with local authorities to encourage more comprehensive regional coverage and the collection and accurate recording of complete data.

• Work with local authorities to encourage continued collection of data previously submitted within the HFR returns, so as to allow RPG monitoring to successfully progress into the adoption of RSS in 2007.

TRANSPORT

• In light of the emerging RSS, Regional Funding Allocations (reflecting the region's view on what is required, in terms of transport, economic development and housing investment) and Prioritisation Framework processes, work to provide a more detailed analysis of how these processes are working and what contribution they are making to meeting regional transport objectives.

ENVIRONMENT

• Work with RTAB and the EA to encourage efficient annual reporting on municipal waste by encouraging local authorities to provide information to DEFRA via the ‘WasteDataFlow’ online process.

• Work with SWRAWP to promote the provision of more accurate data on aggregates in the South West. To encourage the use of waste audits by developers in terms of providing accurate data on the use of construction and demolition waste at the point of its generation.
9. NATIONAL CORE OUTPUT INDICATORS (NCOIs)

9.1 BACKGROUND

Draft revised guidance on RPG/RSS monitoring indicates that there should be the incorporation of National Core Output Indicators (NCOIs) into the process of monitoring at the regional level. The draft guidance quotes:

‘A core set of standard national indicators should be used to allow for inter-regional comparisons. PPS11 states (3.10) that these also promote a cost-effective approach to the gathering of data between regions PPS11 states (3.11) that the core indicators set out below in table should be monitored by all RPBs. The list is not intended to be exhaustive. Additional indicators will need to be identified by the RPB to capture regional diversity and to reflect the particular requirements of each RSS.’

The RPB has incorporated the NCOI indicators into this years round of monitoring, although this is only the second year of inclusion of these indicators. Where the NCOI is already covered the relevant link to the RPG indicator is made below. ODPM published supplement guidance on the NCOIs in October 2005. ‘Local Development Framework Core Output Indicators Update 1/2005’ replaces Table 4.4 and Annex B of the ‘Local Development Framework Monitoring; A Good Practice Guide’ (March 2005) and updates the detailed description of the Core Output Indicators. A copy of this document can be found on the Planning Module web pages via the following link: http://www.swrpm.org.uk/LDF/index.asp

9.2 NATIONAL CORE OUTPUT INDICATORS (REGIONAL SET)

BUSINESS DEVELOPMENT (RES 32 a and b)

1a Amount of floorspace developed for employment by type.
1b Amount of floorspace developed for employment by type, which is in employment and/or regeneration areas.
1c Percentages of floorspace by employment type, which is on PDL.
1d Employment land available by type
1e Loses of employment land in (i) employment/regeneration areas and (ii) local authority area.
1f Amount of employment land lost to residential development.

HOUSING (RES 01, 02a and b, 03a and b, 04, 09, 10, 13, 14, 29; SOC 02, 14, 16, 20)

2a Housing trajectories showing:

(i) Net additional dwellings over the previous five year period or since the start of the relevant development plan document period, whichever is the longer;
(ii) Net additional dwellings for the current year;
(iii) projected net additional dwellings up to the end of the relevant development plan document period or over a ten year period from its adoption, whichever is the longer;
(iv) the annual net additional dwelling requirement; and
(v) annual average number of net additional dwellings needed to meet overall housing requirements; having regard to previous year’s performances.

2b Percentage of new and converted dwellings on previously developed land

2c Percentage of new dwellings completed at:
(i) less than 30 dwellings per hectare;
(ii) between 30 and 50 dwellings per hectare; and
(iii) above 50 dwellings per hectare

2d Affordable housing completions.
TRANSPORT (SOC 10, 22, 25, 26, 28, r)

3a Amount of completed non-residential development within UCOs A, B and D, complying with the car-parking standards set out in the local development framework.

3b Amount of new residential development within 30 minutes public transport time of: a GP; a hospital; a primary school; a secondary school; areas of employment; and a major retail centre(s).

LOCAL SERVICES

4a Amount of completed retail, office and leisure development.

4b Amount of completed retail, offices, and leisure development in town centres.

4c Amount of eligible open spaces managed to Green Flag Award standard.

MINERALS (RES 27 and 28) (FOR MINERALS PLANNING AUTHORITY ONLY)

5a Production of primary land won aggregates (tonnes).

5b Production of secondary/recycled aggregates (tonnes).

WASTE (RES 06, 15, 16, 17 and z) (FOR WASTE PLANNING AUTHORITY ONLY)

6a Capacity of new waste management facilities, by type.

6b Amount of municipal waste arising and managed by management type; and, the percentage each management type represents of the total waste managed.

FLOOD PROTECTION AND WATER QUALITY (RES 25)

7. Number of planning permissions, granted contrary to the advice of the Environment Agency on grounds of: flood defence; and water quality

BIODIVERSITY (ENV 02, 03, 04)

8 Change in areas of biodiversity importance, including:

(i) Change in priority habitats and species (by type); and

(ii) Change in areas designated for their intrinsic environmental value including sites of international, national, regional, sub-regional or local significance.

RENEWABLE ENERGY (RES 26)

9. Renewable energy capacity (MW) installed by type:

Types: defined as energy generated from:

(a) Bio fuels
(b) Onshore wind
(c) Water
(d) Solar energy
(e) Geothermal energy

Outputs should be in megawatts.