Greater Exeter Strategic Plan

Sustainability Appraisal and Strategic Environmental Assessment

Draft Scoping Report

Consultation Draft

November 2016

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1. Introduction

Production of a Greater Exeter Strategic Plan and the Sustainability Appraisal (SA) and Strategic Environmental Assessment (SEA)

1.1 This draft Scoping Report represents the first stage of work in undertaking Sustainability Appraisal (SA) and Strategic Environmental Assessment (SEA) for the proposed Greater Exeter Strategic Plan (hereafter referred to as GESP). The GESP will cover the local planning authority (LPAs) areas of:

- East Devon District Council;
- Exeter City Council;
- Mid Devon District Council; and
- Teignbridge District Council.

Devon County Council has been invited to be a partner in this joint planning work.

1.2 The GESP will set out strategic policies for development across the four local planning authority areas for the period covering 2019 through to 2040 in the context of a longer horizon to 2045. The individual authorities will produce more detailed local plans for their own areas that will sit under and be informed by the GESP.

1.3 It should be noted that around 30% of Dartmoor National Park falls in Teignbridge district and a very small part in Mid Devon. The National Park Authority is a planning authority in its own right; they have in the past, and will in the future, be producing their own Park wide plan. The GESP, and this scoping report, does not cover/address National Park areas, albeit with the caveat that some data sources quoted in this report may extend/cover areas that lie beyond the GESP area and there are also cross-boundary matters that are addressed in this report.

1.4 The principles of sustainable development are at the heart of the planning system. The SA process is intended to ensure that through plan-making LPAs have considered social, environmental and economic concerns when producing Development Plan Documents (DPD). The GESP will have the status of a DPD.

1.5 Under Section 39(2) of the Planning and Compulsory Purchase Act 2004 (as amended by the Planning Act 2008) the carrying out of SA is mandatory for any new or revised DPD. In addition to the SA requirement, LPAs are also required by law to conduct an environmental assessment, called a Strategic Environmental Assessment (SEA), in accordance with the requirements of European Directive 2001/42/EC. This Directive “on the assessment of the effects of certain plans and programmes on the environment or ‘SEA Directive’” is outlined in detail in the Environmental Assessment of Plans and Programmes Regulations 2004 (the SEA regulations).

1.6 In practice these two processes of SA and SEA are generally combined and they will be so for the GESP. The report highlights throughout where and how it fulfils

the SEA Directive's requirements. In this report the abbreviation SA should be read to also include/cover SEA requirements unless text explicitly advises otherwise.

The Role of the SA/SEA

1.7 The SA process allows for the possible impacts and implications of a plan to be tested against a range of Sustainability Objectives. Options and choices for policies and development proposals are appraised and refined through this process. The Sustainability Objectives, which are integral to the SA process, are justified and defined through this initial scoping report and may be refined through consultation; they form 'measures' of sustainable development. SA is an ongoing iterative process that sits alongside the plan making process and forms part of evidence and information used to refine and develop the plan. In this respect it is important to note that the SA does not establish what a plan should say, it does not define answers, but it is one part of the overall evidence that should inform the overall shape, form and content of the plan as it evolves through its various iterations.

1.8 This draft Scoping Report establishes the framework, specifically in the form of Sustainability Objectives, by which more detailed appraisal of emerging and final strategy, policies and allocations can be assessed.

Stages in SA/SEA

1.9 This draft scoping report sets out an evidence baseline and sustainability objectives for the GESP. This report and subsequent SAs will be prepared in accordance with the legal and planning framework, making use where available, of Government's guidance. This document takes into account and uses best practice and guidance as well as the specific Articles of the SEA Directive (2001/42/EC).

1.10 Stages A-E of the Sustainability Appraisal process are sub-divided into a number of tasks which should be completed in order to satisfy the SA and SEA requirements. These stages and the tasks associated with them are defined in more detail below, noting that **this Scoping Report is concerned with meeting the requirements of Stage A.**

Stage	Task	Purpose
Stage A: Setting the context and objectives, establishing the baseline and deciding on the scope **This is the current stage of work as addressed in this report.**	A1: Identifying other relevant plans, policies, programmes, and sustainability objectives.	To document and identify how the plan is affected by outside factors and suggest ideas for how any constraints can be addressed.
	A2: Collecting baseline information.	To provide an evidence base for sustainability issues, effects and monitoring.
	A3: Identifying sustainability issues.	To focus the SA and streamline subsequent stages
	A4: Developing the SA framework.	To develop a means by which sustainability of a plan can be appraised.
	A5: Consulting on the scope of the SA.	To consult with statutory bodies to ensure SA covers key sustainability issues.

Stage	Task	Purpose
Stage B: Developing and refining options and assessing effects	B1: Testing the Plan objectives against the SA framework.	To ensure that Plan objectives accord with sustainability principles and identify any conflicts between Plan objectives.
	B2: Developing the Plan options.	To identify a range of development options which can be assessed against the SA framework.
	B3: Predicting the effects of the DPD.	To predict the social, environmental and economic effects of the options being considered in the Plan Making process. Potential effects should be quantified where possible.
	B4: Evaluating the effects of the DPD.	To evaluate the significance of the likely effects of the Plan.
	B5: Considering ways of mitigating adverse effects and maximising beneficial effects.	To identify measures to prevent, reduce or offset significant adverse effects of implementing the DPD.
	B6: Proposing measures to monitor the significant effects of implementing the Plan.	To identify a means by which to monitor actual significant effects of implementation of Plan against those predicted by the SA.
Stage C: Preparing the Sustainability Appraisal Report	C1: Preparing the Sustainability Appraisal Report.	This Report on the proposed Plan is a key output in the SA process. It should clearly show how SEA directive requirements have been met.
Stage D: Consulting on proposed Plan and the Sustainability Appraisal Report	D1: Public participation on the preferred options of the Plan and the Sustainability Appraisal Report.	To provide the public with the opportunity to comment on not only the draft plan but also the SA and its findings.
	D2(i): Appraising significant changes.	To ensure any changes that are made between the draft Plan and it being submitted must be appraised in terms of their sustainability impact.
	D2(ii) Appraising significant changes resulting from representations.	To ensure that any changes made to the Plan following binding recommendations of an Inspector are appraised in terms of their sustainability impact.
	D3: Making decisions and providing information.	To ensure that an adopted Plan has taken into account the findings of the SA process in full.
Stage E: Monitoring the significant effects of implementing the Plan.	E1: Finalising aims and methods for monitoring.	To ensure that the monitoring information gathered is appropriate, up-to-date and reliable.
	E2: Responding to adverse effects.	To ensure that when a plan results in adverse effects the Local Planning Authority can take action.

Table 1: SA Stages

1.11 The subsequent chapters of this Scoping Report satisfy Tasks A1-A5 of the SA process requirements.

1.12 Stages B to F are later stages in appraisal that follow on after the scoping report is completed.

1.13 To set the SA work into context with the overall GESP preparation, Figure 1 shows how the two work streams will run in parallel. Any feedback on consultation on this draft Scoping Report and the proposed draft sustainability objectives in this report will inform any future refinement to ensure a final Scoping Report can be produced. Such feedback will ensure that the Stage A Scoping Report is completed.

1.14 This report will be made available to all relevant consultation bodies which include:

- the Environment Agency;
- Natural England;
- Historic England; and
- any other parties who, in the local authorities' opinion, are affected or likely to be affected by, or have an interest in, the decisions involved in the assessment and adoption or making of the GESP.

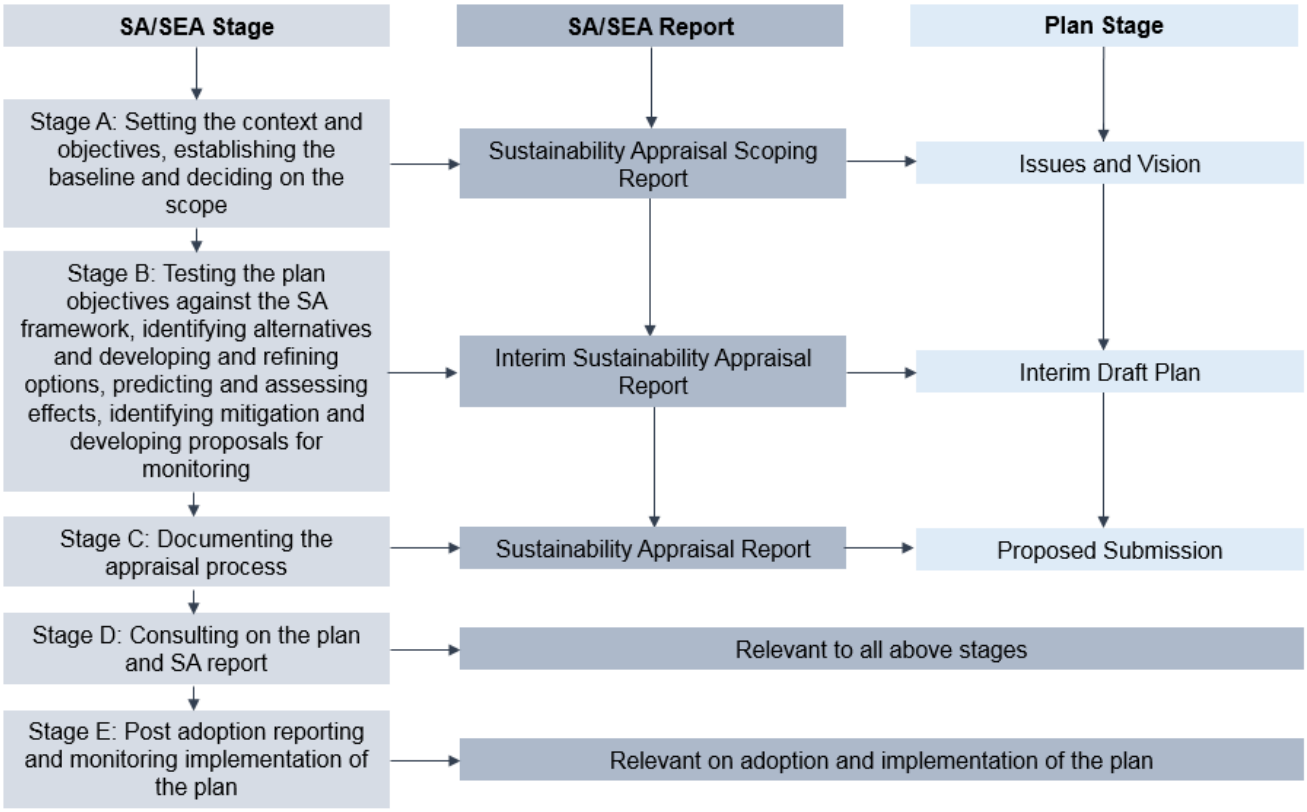

Figure 1: Relationship between SA/SEA report and Greater Exeter Strategic Plan

2. Policy Context

Task A1: Identifying other relevant plans, policies, programmes, and sustainability objectives

The Environmental Report* must include:

(a) "an outline of the contents, main objectives of the plan, and relationship with other relevant plans and programmes"

(e) "the environmental protection objectives, established at international, Community or national level, which are relevant to the plan and the way those objectives and any environmental considerations have been taken into account during its preparation"

SEA Directive Requirement (Annex 1)

** The Environmental Report refers to the Environmental Assessment of Plans and Programmes Regulations 2004 (i.e. the SEA regulations) which must be met in order to satisfy the requirements of the European Directive 2001/42/EC.*

2.1 Amongst other things, Stage A requires a review of the context in which the plan is being prepared to include an assessment of the policies, plans, programmes, strategies and initiatives (PPPSIs) which influence the content of the GESP and which may in turn be affected by the GESP. Many policies and plans set out objectives which relate to the environment and wider sustainability objectives more generally and those which are relevant to the GESP have been identified through this policy context review to satisfy the SEA Directive requirements as set out above as well as to meet the requirements for Sustainability Appraisal.

2.2 The GESP covers the geographical area of the four local planning authorities of East Devon District Council, Exeter City Council, Mid Devon District Council and Teignbridge District Council (excluding the area of Dartmoor National Park - see paragraph 1.3) as shown on Figure 2. This functional geography reflects the travel to work area and housing market area. The plan is limited in scope to cover strategic issues and strategic allocations within those areas with local issues to be considered through linked local plans prepared by each partner authority for their area. Councils are required to work together on strategic planning issues under the duty to co-operate that forms part of the National Planning Policy Framework, which must include consideration by those councils of preparing joint plans. In the case of the "Greater Exeter" area a joint plan covering strategy matters is considered to be a particularly appropriate way of ensuring a collaborative and co-ordinated approach to the delivery of the development needs of the Greater Exeter area.

Figure 2: Greater Exeter Strategic Plan Area

2.3 To reflect the strategic scope of the GESP, the SA has focused on identifying those plans, policies and projects which are most relevant to issues being faced at a strategic level and relating to areas most likely to be affected by the plan. Information relating to waste and minerals planning is not included within the scope of the plan (other than in the context of how such issues impact on specific elements of the GESP) as these are planned for separately through the Waste Plan and Minerals Plan prepared by Devon County Council.

2.4 The relationship between the GESP and other key PPPSIs is set out in Figure 3. This diagram shows those which most closely relate to the preparation of the plan but this is not an exhaustive list and details of other PPPSIs which are considered to affect the GESP is included in Appendix 2.

Figure 3: Key Plans and Policies Influencing the GESP

3. Sustainability Context

Task A2: Collecting baseline information

The Environmental Report must include:

(i) *"The relevant aspects of the current state of the environment and the likely evolution thereof without implementation of the plan"*

(j) *"The environmental characteristics of the areas likely to be significantly affected"*

SEA Directive Requirement (Annex 1)

3.1 The collection and interpretation of baseline information is a valuable way in which we can gain an understanding and strategic overview of what kind of place Greater Exeter is. It reflects on the current state of the environment and those characteristics which are most likely to be affected. This understanding allows us to not only consider the likely effects and impacts of the GESP but also how it can make a positive contribution towards the overall quality of human life and environmental wellbeing.

3.2 This Scoping Report presents a range of qualitative and quantitative information and data for across the plan area. Chapter 3 sets out the key baseline data relevant to the plan, with supplementary details provided in Appendix 2. In some cases, data has not been available and in such instances this has been documented. Further information will be provided as evidence for the GESP is assembled. It should be noted that the baseline data represents 'work in progress' and will be added to/amended if and when new data and sources of information become available. This will be updated, if necessary, in subsequent reports of the SA.

3.3 The baseline issues have been summarised against environmental, economic and social headings in the sub-sections in this chapter. Please note that some of the information recorded could comfortably sit under any or all of the three main strands of sustainability. The Scoping Report has sought to include the information under what is considered to be the most appropriate heading to avoid repetition but sustainable development, by its nature, is a holistic concept and therefore the various themes, by implication, interact and cross boundaries.

3.4 The review of the current state of the environment has been undertaken in the context of understanding strategic issues and information to reflect the nature and scope of the GESP. It is noticeable from the data collected that the overall picture of the GESP area can in some cases hide quite marked variations within individual authorities and localities. Such variations can be expected due to the varying geographies, economies and demographics across the plan area. Where these variations are most marked, these are referenced in the commentary. However, in order to focus on the strategic aspects of the plan, it

is necessary to understand the current state of Greater Exeter's environment **as a whole.** As such, in order to see the overall 'picture' in relation to the GESP area, a figure for Greater Exeter has been derived in many instances. This figure is a combined average of the figures collected for each district area.

3.5 In addition to the current state of the environment, the SA must include information about the likely future state of the area covered by the GESP without its implementation (see paragraphs 3.8-3.11).

3.6 The overall SA work will ultimately comment on:

a) What things are like now;
b) How they could be in the future in the absence of the plan;
c) How they should change by the interventions and policies proposed or set in the plan and the scale, timescales, cumulative and synergistic impacts of the plan; and
d) An assessment of reasonable alternatives to policies and plans.

Information relating to c) and d) will be dealt with in Stages B and C of the SA in subsequent reports prepared.

Environmental Baseline Data

Greater Exeter, for the most part, benefits from a very high quality environment with an exceptional landscape, great biodiversity resources and outstanding heritage assets. Commentary in this section provides an overview of the state of the Greater Exeter's natural, built and historic environment, highlighting the environmental qualities of the area as well as the concerns and challenges that exist. Supplementary information that has been used to inform this analysis of the environment is provided in Appendix 2.

Air quality

The quality of the air we breathe, and the pollutants it may contain, can have fundamental impacts on human health, wellbeing and also wider environmental impacts and implications. Local concentrations are typically highest within eight Air Quality Management Areas (AQMA's): East Devon (1), Exeter (1), Mid Devon (2) and Teignbridge (4) (as at October 2015). These are defined on account of poor air quality and they have associated action plans for improvements. The 8 AQMAs in Greater Exeter account for over half the amount in Devon. Although generally improving, air quality concerns still remains an issue, mainly as a result of road congestion in some urban areas.

Sources: Exeter/East Devon/Mid Devon & Teignbridge Air Quality Action Plans.

Soil Quality

Soil is a fundamentally important natural resource that has developed over the millennia. Due to the varied geology the plan area has a number of different soil types, including those summarised below.

- East Devon: Slightly acid and clayey soils with impeded drainage, particularly concentrated on Woodbury Common; the soil type is ideal for woodland type habitats
- Exeter: Comprised mainly of freely draining and slightly acid loamy soils, the most common across Devon.
- Mid Devon: Contains a mix of freely draining slightly acid loamy soils, slowly permeable seasonally wet acid loamy and clayey soils and freely draining acid loamy soils over rock.
- Teignbridge: Freely draining slightly acid sandy soils are present on the coast adjacent to the River Exe and some inland areas of Teignbridge.

The best and most versatile agricultural land is defined as Grades 1, 2 and 3a with Grades 3b, 4 and 5 representing poorer quality agricultural land. This grading system considers climate, gradient, flood risk and soil quality.

In broad terms, Grade 1 land is concentrated in or close to the Exe valley, with areas of Grade 2 land occurring in Teignbridge and in a belt across Mid Devon and in part of East Devon. Grade 4 land occurs around the fringes of Dartmoor and Exmoor.

The main threats to soil quality in Devon include erosion by flooding and surface water runoff, intensive cultivation, poor forestry practice and trampling by grazing animals. These are threats that wholly or largely fall outside of the control of the planning system through urbanisation which is clearly a planning matter as are developments in general can result in loss of or damage to soil.

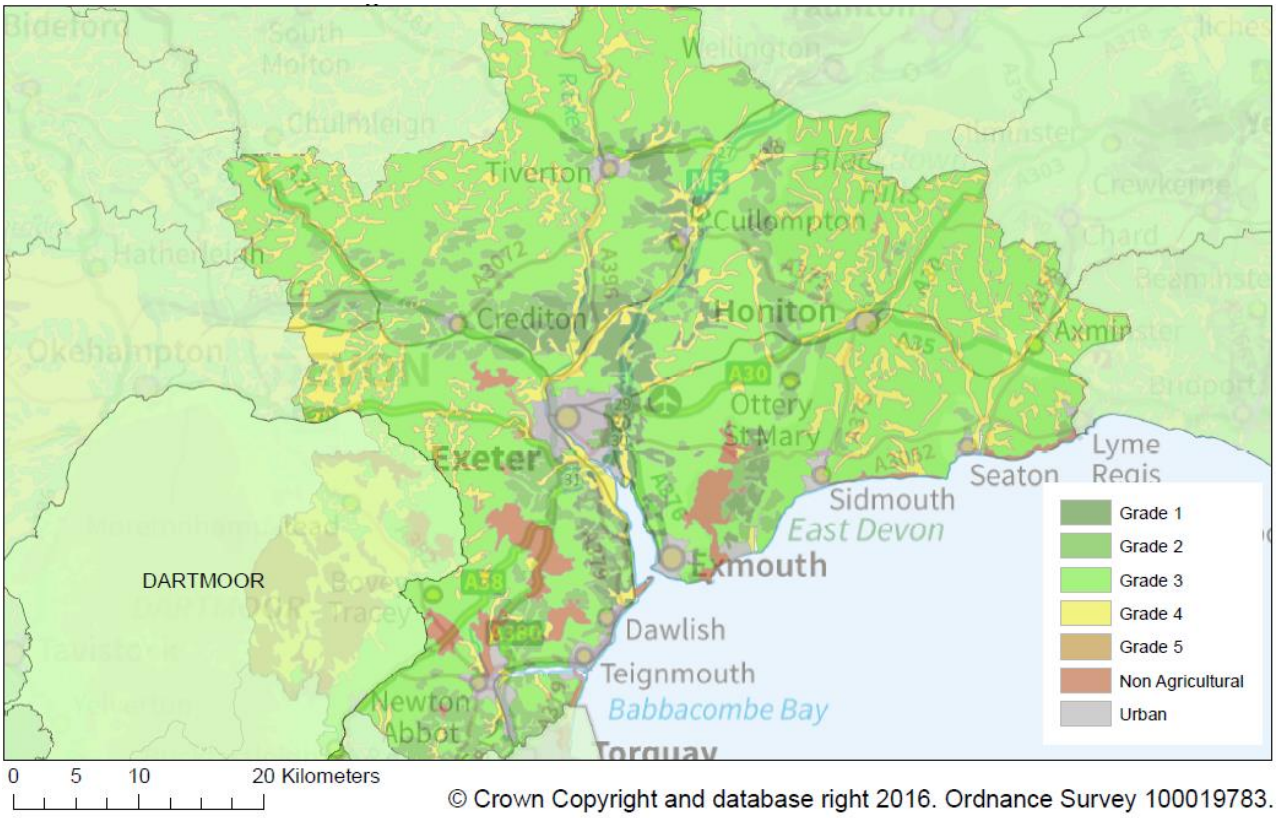

Figure 4: Agricultural Land Classification (DCC)

Source: Soil Descriptions by Area of Devon, Soilscapes National Soil Resources Institute (2013)

Water Quality

The Devon State of the Environment Report (2015) prepared by the Devon Local Nature Partnership provides up to date and relevant information relating to water quality in the Greater Exeter area which is summarised in the following section. Surface water includes rivers, lakes, estuaries and coastal waters. The rivers, floodplains and wooded banks are important for a number of key species such as otters, bats, Atlantic salmon, brown trout, dipper, white clawed crayfish, pearl mussels, mosses, ferns and rare invertebrates. A surface water's overall quality is assessed as a combination of its ecological and chemical quality.

The main rivers in the plan area are the Exe, Otter, Axe, Teign, Creedy and Culm. The largest is the River Exe, flowing 80km from Exmoor, through Tiverton and Exeter and reaching the sea at Exmouth. Adequate quantity, quality and timing of water flows is required to sustain ecosystems and the valuable clean water they provide.

The ecological status or potential for surface freshwaters, estuaries and coastal water bodies varies across Greater Exeter. In the most part, surface water quality is moderate to good across the plan area, with a small incidence of poor quality affecting the central and eastern part of the plan area and, most notably, parts of the Exe Estuary. Common reasons for less than good status include impacted fish and diatom communities; physical modification; high levels of copper and zinc, which can be linked to natural geology and historic mining activity, and phosphate, which can be linked to fertilisers used in farming.

A recent project initiative of South West Water (SWW) called 'Upstream Thinking' is an environmental improvement programme aimed at improving water quality in river catchments to reduce water treatment costs. The project targets land management practices to address the issue at source.

Groundwater quality varies across Devon. The majority of the county has poor chemical status with pockets of good status for instance around the Yarty and Axe in East Devon. Generally in the plan area groundwater sources such as springs, wells and boreholes are limited and account for only about 10% of water supplies. These are located mainly in East Devon. Surface water sources therefore provide the majority of the supply from reservoirs and river intakes. The most significant reservoirs for supply of drinking water are Wimbleball for Exeter and East Devon and Roadford for southern parts of the county. Drinking Water Safeguard Zones have been designated where the land use is causing pollution of the raw water. This affects the River Exe catchment between Exeter and Oakfordbridge which is at risk from pesticides. Groundwater bodies that fall into this category are near Kenton and between Ottery St Mary and Otterton (Environment Agency. Available at: http://maps.environmentagency.gov.uk/wiyby/wiybyController?topic=drinkingwater&layerGroups=default&lang=_e&ep=map&scale=5&x=292304.45833333314&y=102695.04166666593#x=257002&y=98693&lg=3,&scale=3). Human health is not at risk from these sources because SWW provide extra treatment.

Sources: Devon State of the Environment Report (DNLP, 2016); Drinking Water Safeguard Zones (Env Agency, 2012); Water Resources Management Plan (SW Water, 2014)

Biodiversity

Biodiversity is the term used to describe both wildlife species and their habitats. Greater Exeter is home to an abundance of rare species (including dormice, otters, reptiles, bats and birds) and home to important habitat types (including woodland, meadows, hedges, heaths, ponds as well as varied coastline comprising rock pools, beaches, sand dunes and estuaries). Many sites and land areas are protected by national and EU legislation. The exceptional wildlife and biodiversity of the Greater Exeter area is important in its own right but also it provides a highly appealing asset and attraction that enhances the quality of people's lives, and supports many jobs, for example in tourism and wildlife friendly land management. The area sits within four terrestrial Natural Areas as defined by Natural England, which are South Devon, Devon Redlands, The Culm and the Blackdowns.

Statutory designations - Habitats
There are six Special Areas of Conservation in the GESP area, including: Beer Quarry and Caves (rare bats), Dawlish Warren (dunes), East Devon Pebblebed

Heaths (lowland heathland), River Axe (supporting rare fish), Sidmouth to West Bay (sea cliffs) and South Hams (Greater Horseshoe Bats). Lyme Bay and Torbay (reefs and sea caves) is a currently a Site of Community Importance (but treated in planning as a Special Area of Conservation). There are also two Special Protection Areas, the Exe Estuary (also a Ramsar site and designated for waterbirds) and East Devon Pebblebeds (Dartford warbler and nightjar). There are a further eleven European Sites within 20kms of the area.

There are 71 Sites of Special Scientific Interest (SSSIs) which are sites designated for wildlife and/or geological interest within the Greater Exeter area; 63% of which are in favourable condition and 19% in unfavourable recovering condition. The Government has set (in Biodiversity 2020) national targets for 50% of SSSI to be in favourable condition and 95% to be in favourable or unfavourable recovering condition by 2020.

Other habitats
There are approximately 732 non-statutory County Wildlife Sites (CWS) in the GESP area as well as many other County Geological Sites and Local Nature Reserves. The area also supports Ancient Woodlands and a wealth of UK Priority habitats (such as grazing marsh, lowland meadow, lowland heathland, hedgerows and coastal habitats). It is important to note that many of these habitats are of CWS and SSSI standard but have no formal designation.

Species
European protected species found in this area include otter (widespread on rivers), dormice (widespread in woodlands, hedges and scrub), bats (widespread but it should be noted that the area supports Greater Horseshoes, Lesser Horseshoes, Barabastelle and Bechstein which are all Annex 1 species) and Great Crested Newts (the dispersed Devon population is concentrated in Teignbridge and East Devon).

Nationally protected species include water voles (distribution restricted to a number of watercourses in East Devon), reptiles (widespread), Schedule 1 birds (including cirl buntings which occur in Teignbridge and East Devon) and a number of other species.

The area also supports a large number of UK Priority / rare species including the only English location (Chudleigh Knighton Heath) of a rare ant (*Formica exsecta*).

Vulnerability issues
Vulnerability issues include:

- Direct loss of habitats
- Habitat fragmentation / isolation
- Urbanisation impacts (lighting, traffic collisions, fire, noise, cat predation, invasive species, polluation etc)
- Air and water quality / quantity impacts
- Recreational impacts

Opportunities
Rebuilding Devon's Nature Map identifies the priority areas (river corridors and Strategic Nature Areas) in Devon for expanding our wildlife habitats. However there

are also opportunities in and around development sites in all locations for wildlife enhancement.

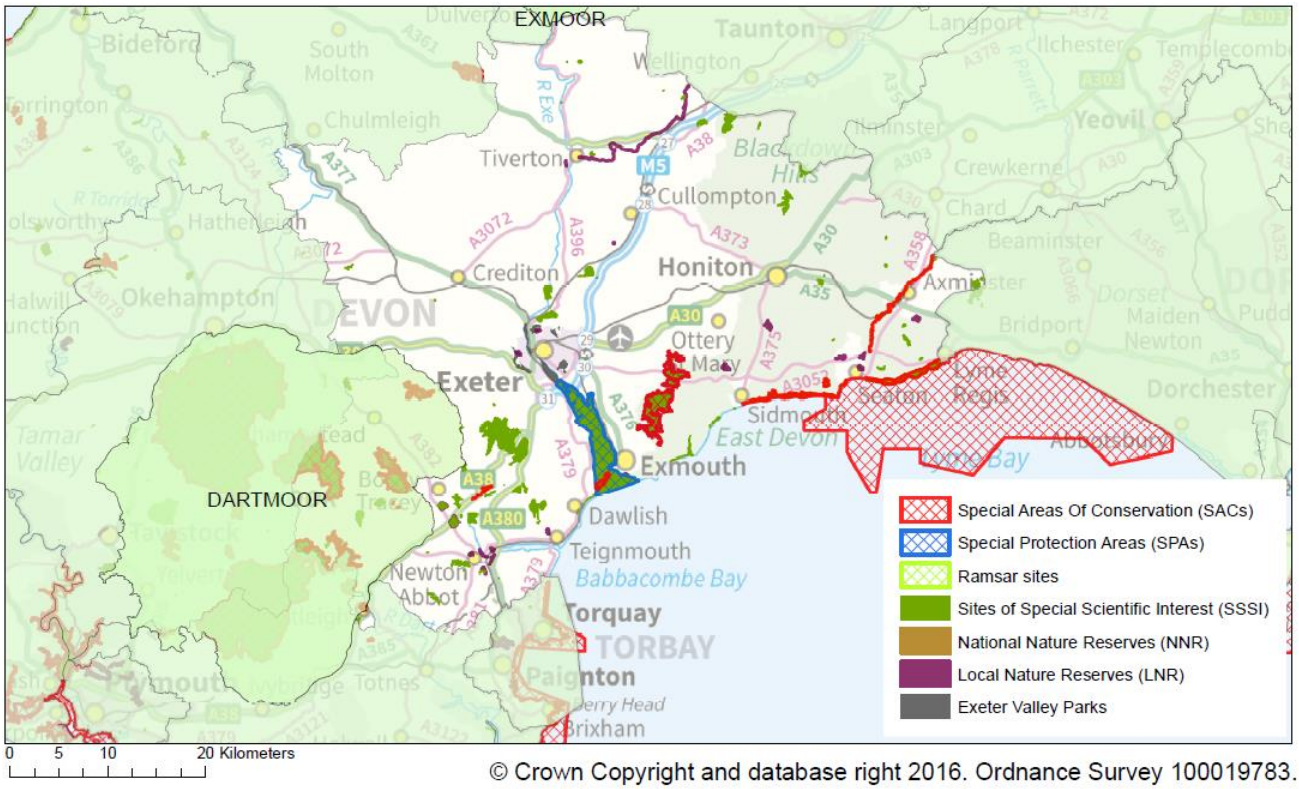

Figure 5: Biodiversity Sites in Greater Exeter (DCC)

Sources: Devon State of the Environment Report (DLNP 2015); Natural England (https://designatedsites.naturalengland.org.uk/)

Landscape

There are distinct variations in the character of the landscape across the four districts, as described in the Devon-wide landscape character assessments (LCA). Broad types of landscape include valleys, scarp slopes, estuaries, cliffs, rolling hills, plateaux and ridges. However, although varied, there are few areas of low lying flat land and the vast majority of the landscape is characterised in some form by undulating topography with considerable variation in ground levels. With reference to the Devon-wide LCA, Landscape Character Types offering farmland with the flattest topography and a low-lying position include Lowland Plains (3E), Sparsely Settled Farmed Valley Floors (3C), and some parts of Lower Rolling Farmed and Settled Valley Slopes (3B).

Away from the main city of Exeter, the study area is predominantly rural , characterised by a land cover of fields, hedges, copses and woodland with a settlement pattern of distinct smaller towns, villages, hamlets and isolated dwellings and farmsteads. Many settlements have distinct relationships with their landscape, located on intersections of historic routes, at water sources and crossings, away from wetlands or exposed areas and perhaps offering some prospect across the rural hinterland. Many have distinct identities and traditional vernacular character

reflecting a long history of human settlement and agricultural land use. The rural setting and identity of some settlements is valued and protected as evident from designations that seek to maintain their open, undeveloped character, such as ‘Green Wedge’ in East Devon, Strategic Open Break in Teignbridge and Landscape Setting Area in Exeter. The character of historic cores are also valued, evident from conservation area designation.

Major road and rail corridors and pylons dissect the landscape and there are distinct areas of modern and recent development including the Growth Areas around Exeter Airport and Cranbrook (new town) and numerous medium to large-scale solar farms. Away from these areas, the coast and countryside offers rural tranquillity that attracts tourists and supports the health and wellbeing of people living and working in the area.

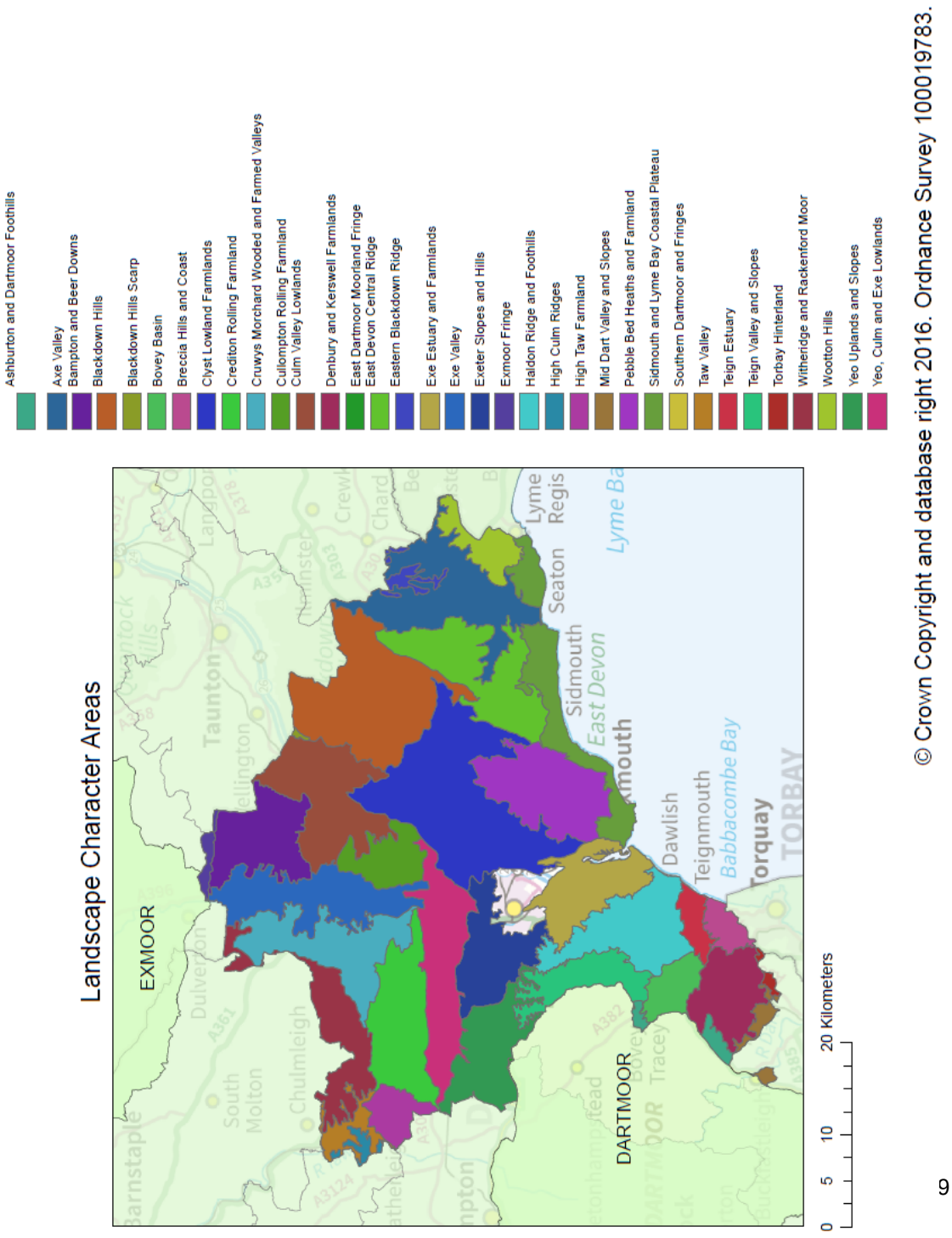

Figure 6: Landscape Character Areas (DCC)

Coast

An impressive coastline extends across the southern boundary of the Greater Exeter area. This dominant landscape feature is of fundamental importance to the history, economy and culture of Devon. The dramatic sea cliffs and slopes of East Devon are a widely appreciated natural asset in the area. The coastline provides residents and visitors with opportunities for work in tourism and maritime industries as well as recreational opportunities and an exceptionally attractive place to play and relax. The coast of the study area has varied and interesting geology and a diverse coastal topography has resulted from the erosive ability of wave energy and climatic conditions more generally. International recognition, on account of geological interest and importance, comes from inscription of the Dorset and East Devon Coast on the World Heritage Site list.

In addition to the underlying characteristics of the land an outstanding patchwork of flora and fauna exist along the coastline of East Devon and Teignbridge. Habitats include saltmarsh, dunes, cliffs and scree and intertidal estuaries. There is also a rich marine biodiversity beyond the coastline.

The coast is well used by local residents and visitors alike. The relatively high density of recreational and commercial activity (more so to the west than the east) means that this narrow strip of land is highly vulnerable to damage and degradation.

The coast is an asset that is widely used and enjoyed and requires a co-ordinated approach to its management and protection to ensure it retains its environmental value and visitor appeal and for it to remain vibrant and prosperous. The many players in coastal management within this area include national government, government agencies, the Crown, Duchy of Cornwall, commercial interests including ports, fishing (commercial and recreational) and tourism, large and small landowners, local authorities, influential charities such as the National Trust, RSPB and Devon Wildlife Trust, chambers of commerce, community based groups, research and academic institutions including schools and many more.

Historic Environment

Many millennia of human occupation in Greater Exeter have left a rich legacy of historic buildings, structures and spaces, historic landscapes and archaeological sites and monuments. Collectively these are referred to as heritage assets. This heritage forms a fundamental feature of the physical fabric and cultural identity of the Greater Exeter area. A significant proportion of historic buildings and areas of city, district and local centres are valued and protected as Listed Buildings, Conservation Areas, Registered Historic Parks and Gardens or Scheduled Monuments. However, the majority of the area's heritage assets are un-designated. Greater Exeter's heritage assets are listed in the following table.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter
Listed Building	3081	992	2569	1069	7711

Scheduled Monument	112	19	49	28	208
Registered Park/Garden	8	2	3	9	22
Conservation Area	41	21	51	40	153
Locally Listed Asset	0	0	169	0	169
Devon Gardens Register	24	23	18	22	87
Non-Designated Asset	15923	2307	8444	6813	33487
Designated Wreck	0	0	0	1	1

Table 2: Heritage Assets in Greater Exeter (Devon Historic Environment Record and National Heritage List for England)

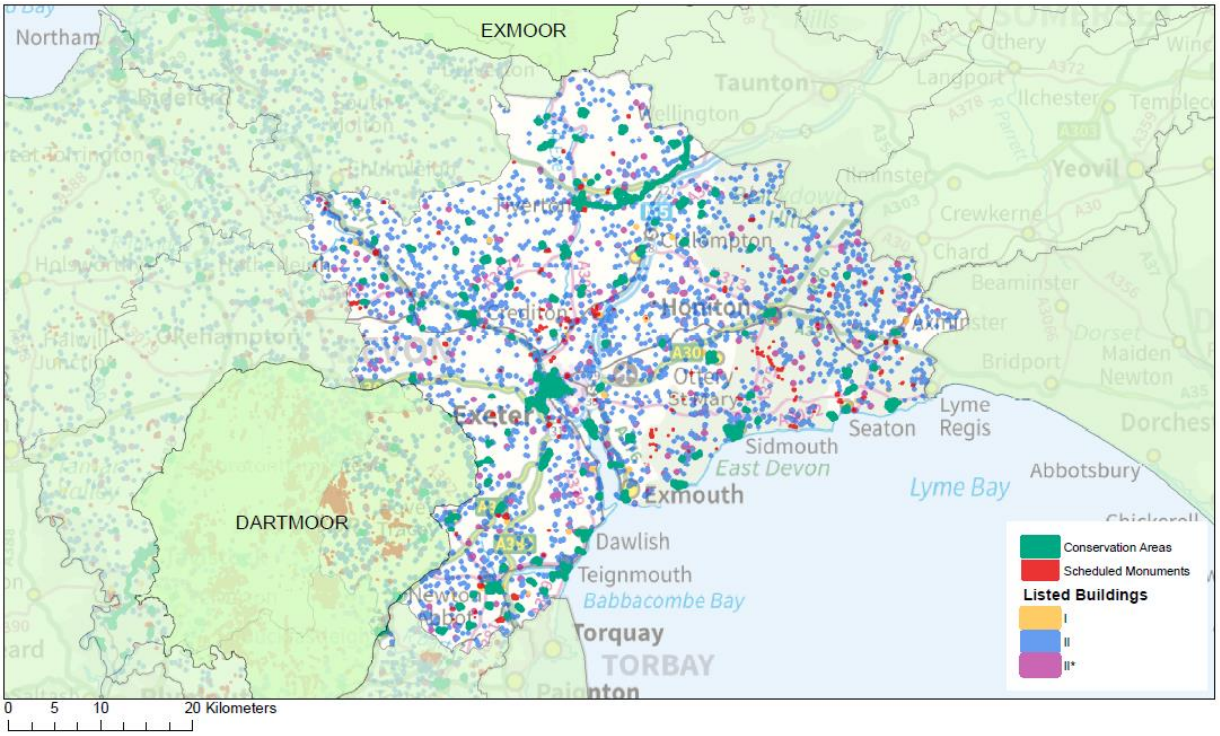

Figure 7: Designated Greater Exeter Heritage Assets

Source: Historic Environment Records (HER); Exeter Urban Database; Historic England's National Heritage List of Designated Assets

Design Quality

There are various measures which could be used to measure design quality such as Building for Life 12 accreditation or number of schemes that go through a Design Review Panel process but currently no authorities in the Greater Exeter area monitor these consistently and therefore there is no accurate baseline data to present at this time.

Land Contamination

Many areas of land become contaminated by residues left behind by activities such as mining, waste disposal and general industrial processes. Until the contamination is treated the land may be severely restricted in how it may be used in the future.

Since 2001, 1200 sites have been identified in Exeter City where there may be contamination sources, through strategic inspection. Known former land uses that have potential to cause contamination include: gasworks, slaughterhouses, brickworks, foundaries, railway land, landfill sites, tanneries, MOD land, sewage treatment plants, petrol filling stations and timber treatment yards.

During a ten year period from 2001, in East Devon, over 700 potentially contaminated sites were listed on the basis of their former uses. However over the same timescale no sites were determined as 'contaminated land', although several are subject to ongoing investigation and works by landowners. Two of the council's priorities are to encourage voluntary remediation and promote the re-use of brownfield land, using the Local Plan, planning process and regeneration proposals.

In Teignbridge, parts of the district are underlain by geology which may contain significant concentrations of naturally occurring contamination, such as arsenic and lead. There are no entries in the formal register of contaminated land but there are a number of sites that are probably polluted.

Data relating to contaminated land in Mid Devon is not currently available.

Statutory guidance is clear that normal levels of contaminants in soil should not be considered to cause land to qualify as contaminated land, unless there is a particular reason to consider otherwise.

Sources: Contaminated Land Strategy 2014 (ECC); Contaminated Land Strategy 2012 (EDDC);

Flood Risk

Some areas within Greater Exeter are at risk from both fluvial (river), pluvial (surface water) and tidal flooding. Development has the potential to exacerbate flooding.

The extent of the flood risk zones are shown in Figure 10. This shows all areas within flood zone 2 or flood zone 3.The Exe Estuary Strategy (prepared by the Environment Agency, enables policies within the Shoreline Management Plan to be delivered) concluded that it would be necessary to defend most of the developed coastline, although some of the defences might need to be moved or altered over time.

The greatest risk of fluvial flooding comes from the River Exe and its tributaries. However, other main rivers and ordinary watercourses across Greater Exeter also present a risk of flooding including the River Otter, River Sid, River Axe, River Creedy, River Culm, and River Teign.

Within the plan area, Exeter, Exmouth, Sidmouth and Teignmouth have the highest numbers of properties at risk from surface water flooding. Many other localised areas across the Districts are also at high risk, often associated with minor watercourses through urbanised areas.

The Exe Estuary Strategy (Managing flood and coastal erosion risk for the Exe Estuary, Environment Agency, 2014) concluded that it would be necessary to defend most of the developed coastline, although some of the defences might need to be moved or altered.

Flood risk is likely to become an increasingly important issue as the impacts of climate change are realised. It has been shown in recent climate change projections for Devon that peak river flows may increase by up to 30% by 2055 and an increase in winter rainfall totals of 15 to 20%.

Figure 8: Flood Zones 2 and 3

Sources: Flood Zone Maps (Environment Agency); Preliminary Flood Risk Assessment Report (DCC, 2011); Climate Change information for Local Flood Risk Management Strategies – South West River Basin District Map. (EA, DEFRA & Local Government Association, 2011); Managing flood and coastal erosion risk for the Exe Estuary (Environment Agency, May 2014); River Basin Management Plan (Env Agency, 2015); Devon Local Flood Risk Management Strategy – 2014-2020 (DCC, June 2014)

Brownfield Land

Brownfield land (also referred to as Previously Developed Land) is land that has previously been built-on or developed and which frequently will be in a despoiled

state. The supply of brownfield land assessed as being suitable for redevelopment is shown in the following table. The 83ha identified as being potentially suitable for redevelopment still makes up a relatively small proportion of overall potential land supply.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter Total
Number of Sites on Register	36	23	35	19	113
Total Area of Sites in Hectares	24.3	7.1	28.1	23.4	82.9

Table 3: Brownfield Land (LPA Pilot Registers 2016)

Source: Local Planning Authority Pilot Brownfield Registers

Minerals

There are a range of minerals worked across the Greater Exeter area which comprise Limestone, Ball Clay, Chalk, Igneous Rock and Sand and Gravel. The Mineral Safeguarding Areas relating to these deposits are shown on the following map. These safeguarding areas are concentrated around the Newton Abbot and the south of the Teignbridge District (The Bovey Basin) and lineally through the eastern part of East Devon stretching from Exmouth towards the county border with Somerset near Wellington.

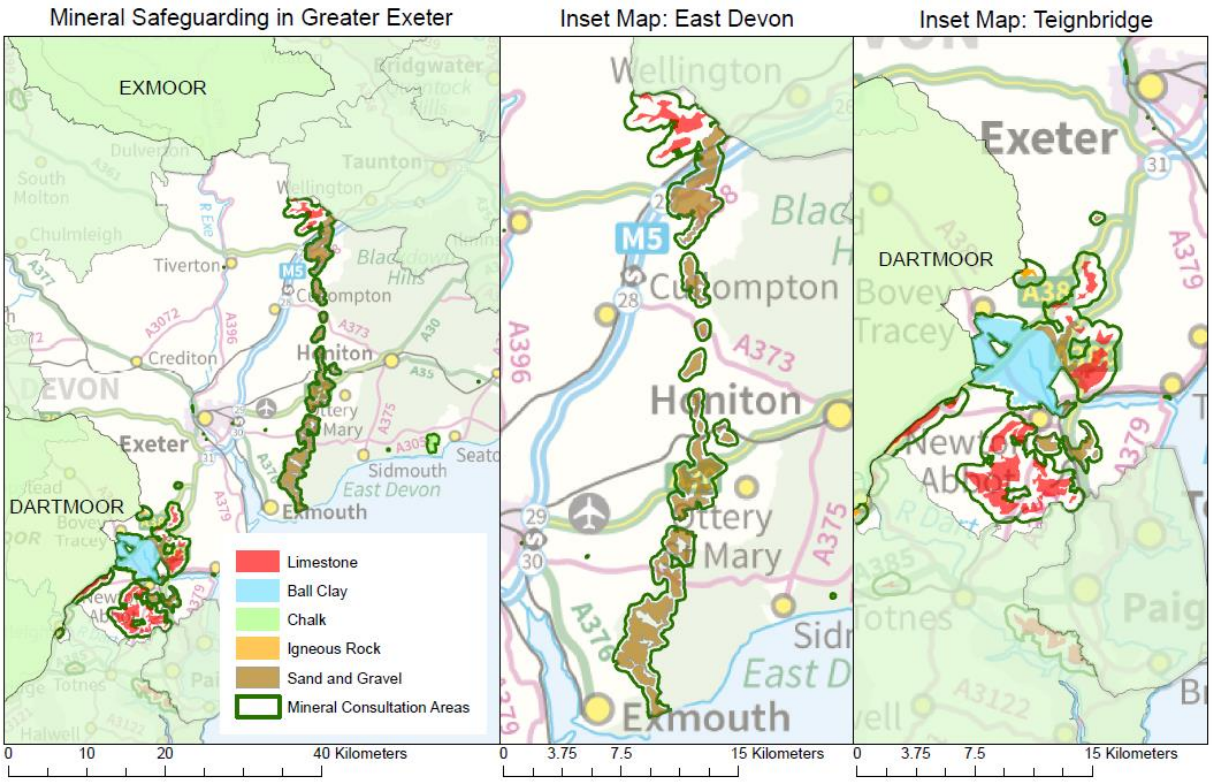

Figure 9: Mineral Safeguarding in Greater Exeter (DCC 2016)

Sources: Devon Minerals Plan 2016

Climate Change

Climate change is the effect of direct and indirect human activity "that alters the composition of the global atmosphere and which is in addition to natural climate variability observed over comparable time periods" *United Nations Framework Convention on Climate Change (UNFCCC) (Article 1:2, p.7).*

Reducing CO2 emissions in the atmosphere is a national target to reduce climatic impact. This is driven by the Climate Change Act (2008), which sets a legally binding target of at least a 34% reduction in UK emissions by 2020 and at least an 80% reduction by 2050, against a 1990 baseline. The table below shows per capita CO^2 emissions for the plan area by district covering the period from 2005 to 2014. Emissions for the Greater Exeter area have clearly reduced over the period from 2005 to 2014. However, individual districts are marginally higher than national and regional levels (at 2014) with the exception of Exeter, showing the largest reduction between 2005 and 2014 of 3.3 tonnes CO^2 per person.

In 2014 (the latest reporting period), per capita emissions for plan area (city/district average) stood at 6.2 tonnes CO2 per person compared to 6.0 tonnes nationally, 5.8 tonnes regionally and 6.3 tonnes at the county level.

Area	2005 per capita emissions (tCO^2)	2010 per capita emissions (tCO^2)	2014 per capita emissions (tCO^2)
East Devon	7.7	7.0	6.1
Exeter	7.6	5.4	4.3
Mid Devon	10.3	8.8	7.7
Teignbridge	8.2	7.5	6.6
Greater Exeter	8.5	7.2	6.2
Devon	8.5	7.4	6.3
South West	8.2	7.0	5.8
England	8.5	7.3	6.0
UK	8.8	7.5	6.3

Table 4: CO^2 Emissions Per Capita 2005-2014 (tonnes CO^2 per person) (DECC)

Sources: UK local authority and regional carbon dioxide emissions national statistics 2005-2014, DECC, June 2016

Waste

Devon's households (373,000 tonnes in 2012/13) and businesses (455,000 tonnes in 2009) generate broadly similar levels and types of waste, but their combined waste is exceeded by that from construction, demolition and excavation activity (1.2 million tonnes in 2010). There has been a strong shift away from land filling of this waste towards recycling and energy recovery, with households now recycling around 55% of their waste (2012/13).

Recycling rates of household waste in Devon have seen great improvement since 2004/5, including the Greater Exeter plan area, as shown in the table below. Slight reductions between 2011/12 and 2014/15 are attributed to reduced budgets for householder education and a significant reduction in paper waste as a consequence of digital media.

Area	2004/2005	2011/2012	2014/2015
East Devon	16.4	48.5	46.3
Exeter	20.7	36.2	33.8
Mid Devon	17.8	49.2	48.2
Teignbridge	26.9	57.3	53.7
Devon	32.7	55.3	55.4

Table 5: Historical Recycling Rates (%) in Plan Area/Devon - Devon County Council, (2013); Local Authority Collected Waste Statistics – Local Authority Data

Sources: Devon Waste Plan 2014 (DCC); Devon Waste & Resource Management Strategy Review & DEFRA (2015) Local Authority Collected Waste Statistics – Local Authority Data

Social Baseline Data

The only city within Greater Exeter is Exeter itself. The city acts as the region's main employment and economic centre and sees residents from all across the area commute in for work and leisure such as shopping. The largest towns in Greater Exeter include Exmouth, Newton Abbot and Tiverton. The Greater Exeter area is also host to a large number of villages. Exeter is connected to the major towns through road and rail, though due to the rural geography of Greater Exeter, the connectivity of many smaller villages and parishes is poor. Figure 3 shows the market town areas across Greater Exeter.

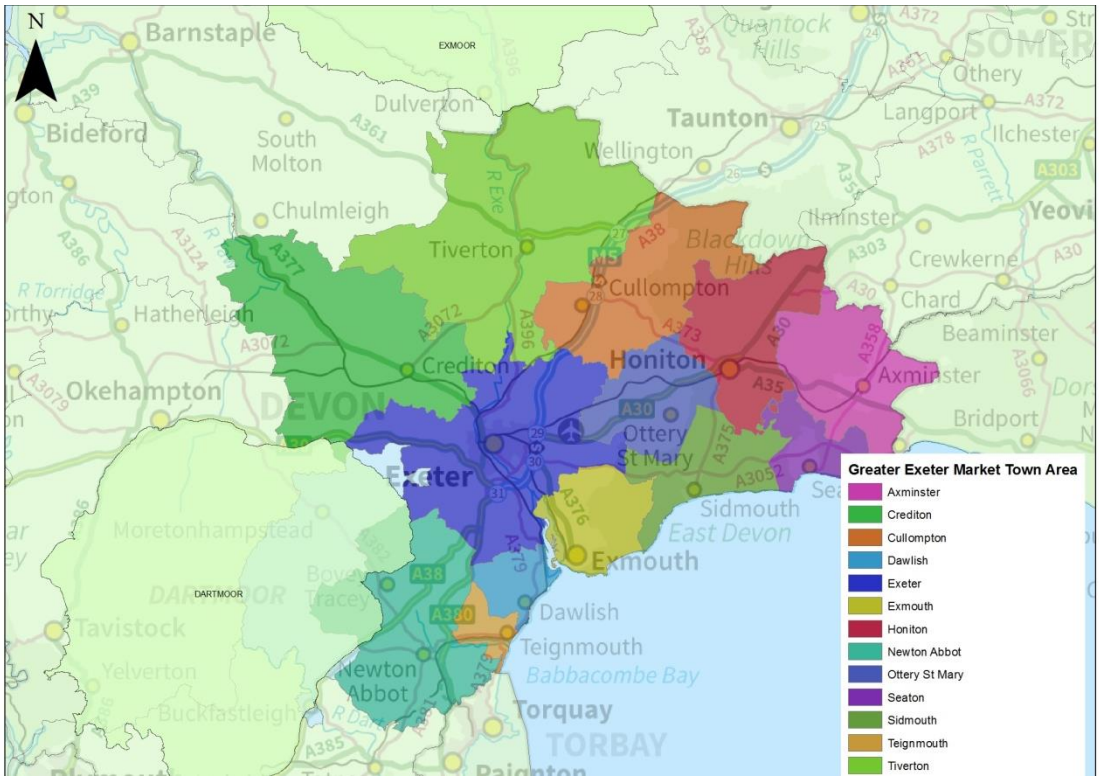

Figure 10: Greater Exeter Market Town Areas

This section covers issues relating to social aspects of the plan, including housing, demographics, education and skills and recreational access. Supplementary information that has been used to inform this analysis of the environment is provided in Appendix 3.

Housing

Growth

Adopted plans for all four districts make provision for 48,700 homes to be built in the Greater Exeter area. To support this growth around 360ha of employment land is allocated/proposed. This growth will occur over the next 15 and 20 years, with Adopted Plan end dates ranging between 2026 and 2033. Table 21 shows the planned growth and end dates for each district.

Growth	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter
Homes	17,100	12,000	7,200	12,400	48,700
Length of Plan Period (Years)	18	20	20	20	18-20
Plan Period	2013-2031	2006-2026	2013-2033	2013-2033	n/a

Table 6: Planned Growth by District (Local Plans)

The areas that will experience the most growth are locations that are already largely urban. This includes Tiverton and Cullompton for Mid Devon, South West Exeter and Newton Abbot for Teignbridge, and Monkerton/Hill Barton and Newcourt for Exeter. Another significant new development within the Greater Exeter area is Cranbrook, a new settlement located to the east of Exeter in East Devon.

Work is still being undertaken to assess housing need across the Greater Exeter area. It is accepted that the region will continue to grow, though more evidence is necessary to determine an exact figure in terms of planned future growth.

Delivery

Housing completions are monitored and reported by the local authorities in their annual monitoring reports. This information has been drawn together to identify the level of housing delivery across the Greater Exeter area over recent years. Completions across all districts have fluctuated over recent years (see Appendix 2 Table 23). Over 11,300 homes have been delivered in the area over the last five years (2011/12 – 2015/16).

The table below identifies whether the Greater Exeter authorities have been achieving the annual delivery target set out within their Local Plans. It should be noted that all Local Plans other than Mid Devon have been adopted.

Figures presented in green indicate a delivery rate which exceeds the annual delivery target. Figures presented in red indicate housing completions have not met the annual delivery target.

	Local Plan annual delivery target	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
East Devon	**950**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	824	1089	1027
Exeter	**600**	891	491	236	270	432	555	87	382	483	6188
Mid Devon	**380**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	320	316	288
Teignbridge	**640**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	819	632	622

Table 7: Local Plan housing delivery targets compared to housing completions (LPA AMRs)

Note: n/a shown where most up to date Local Plan not in place

Based on the information presented above, 12,300 homes have been built since the adoption/progression of the various local plans covering the area. This suggests that of the 48,700 planned homes identified in local plans, in the region of 36,400 remain to be delivered in the period to 2033.

Affordability

House prices across Greater Exeter and Devon vary considerably dependent upon location. This being said, Devon and Greater Exeter are both overall, very expensive places to live. The average house price in the Greater Exeter area is £246,787 whilst the average house price in Devon is a little higher at £259,787, both of which are considerably higher than the national average of £216,750. Whilst relatively high it should, however, be noted that they have remained fairly stable over the last five years indicating that local market factors have neither tightened nor loosened in that time. The most expensive area to live in Greater Exeter is East Devon with an average house price of £269,475, while the cheapest location is Mid Devon with an average cost of £226,434. This difference in cost of £43,000 is significant and highlights a clear disparity across the Greater Exeter area. Table 8 shows the average house price for districts, Greater Exeter and Devon.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
Price 2016 (£)	269,475	251,520	226,434	239,720	246,787	259,310	218,964

Table 8: House Price by District (Office for National Statistics, 2015)

With income levels across the Greater Exeter area being relatively low, and property prices being high, it makes it difficult for residents to afford their own home. Each district that makes up Greater Exeter has worse affordability than the national average. Average house prices in Greater Exeter are between 8 and 10 times the areas average income compared to the national average of around 7.

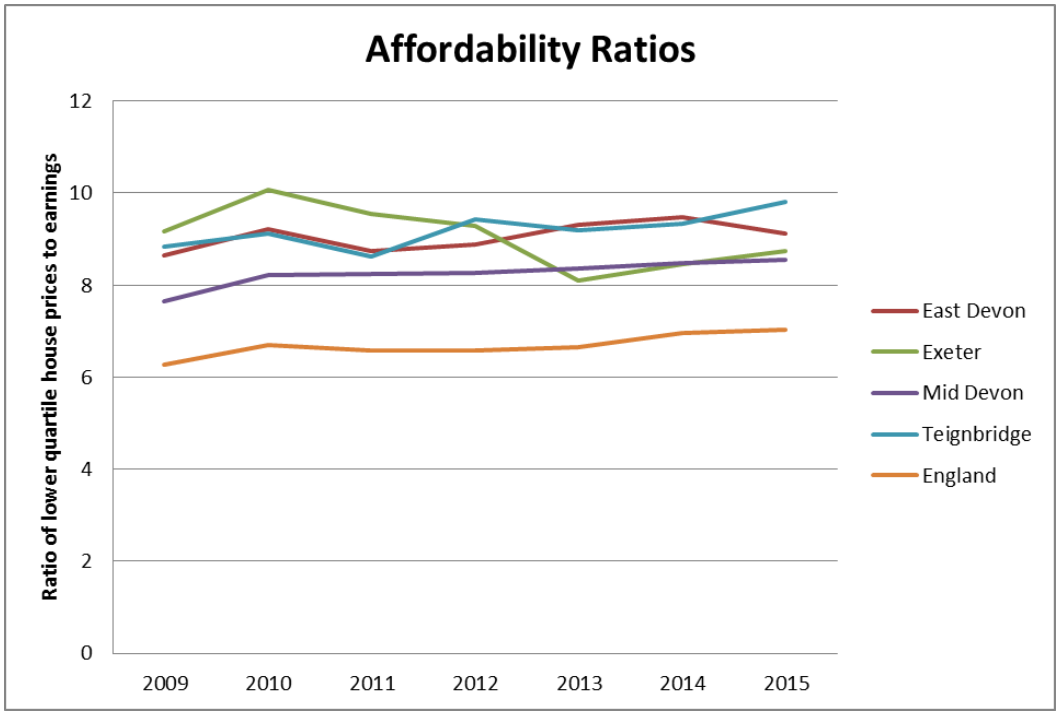

Figure 11: Affordability Ratios by District.

Source: Local Authority Monitoring Reports; Department for Communities and Local Government and Stats Wales

Demographics

The total population of Greater Exeter in 2011 was 452,600 and Devon's total population was 747,900. The demographic make up for Greater Exeter is listed below along with additional district figures in Appendix B, Table 20.

- 17% are under 16 (74,800 people) which is below the UK average of 18.9% but above the Devon average of 16.4%.
- 61% are aged between 16 and 64 (277,500 people).
- 23% are over 65 (104,900 people) which is similar to the rest of Devon but significantly higher than the national average of 16.9%.

Source: Devon Facts and Figures Mid-Year Estimates (DCC)

Health and Wellbeing

The Greater Exeter area, much like the rest of Devon, has relatively good health. It has a significantly higher proportion of the population in very good health when compared to the rest of England. The average for England for those in good health is above the Greater Exeter average; however Greater Exeter has fewer people in fair and bad health than nationally.

Generally good health across the Greater Exeter area is correlated with an above average life expectancy of 83.6 years for women and 79.7 for me, when compared with the national statistic of 82.8 for women and 79.1 for men. However, more deprived areas within Greater Exeter have life spans cut to more than 3 years shorter than the regions average.

Sources: Self-Assessment of Health by District (Office for National Statistics, 2015); Joint Strategic Needs Assessment Devon Overview (DCC and Public Health Devon 2010)

Deprivation

Overall, the Greater Exeter area would not be considered deprived. Deprivation however, does exist in the region. This deprivation is largely concentrated to small pockets within urban locations. This contrasts with the rest of Devon, where a majority of deprivation is evident in rural communities. Areas that experience some deprivation within the Greater Exeter area include Tiverton, Cullompton, Newton Abbot, Teignmouth and Dawlish, alongside some particularly deprived places such as the Withycombe Ward in Exmouth which falls within the 20% most deprived parts of the UK. The most deprived parts of Greater Exeter exist within Exeter itself (with 9 areas within the 20% most deprived parts of the UK), though overall, Greater Exeter is less deprived than the rest of Devon. Different types of deprivation affect rural and urban communities more severely; factors such as living environment (i.e. the quality of the local environment which is measured by factors such as air quality and road traffic accidents), have greater effect on rural communities whilst education, skills and training deprivation is more of a factor on urban communities.

Figure 12 displays the levels of deprivation across Greater Exeter. The most deprived is in red, followed by orange, yellow and light green, with dark green highlighting the least deprived.

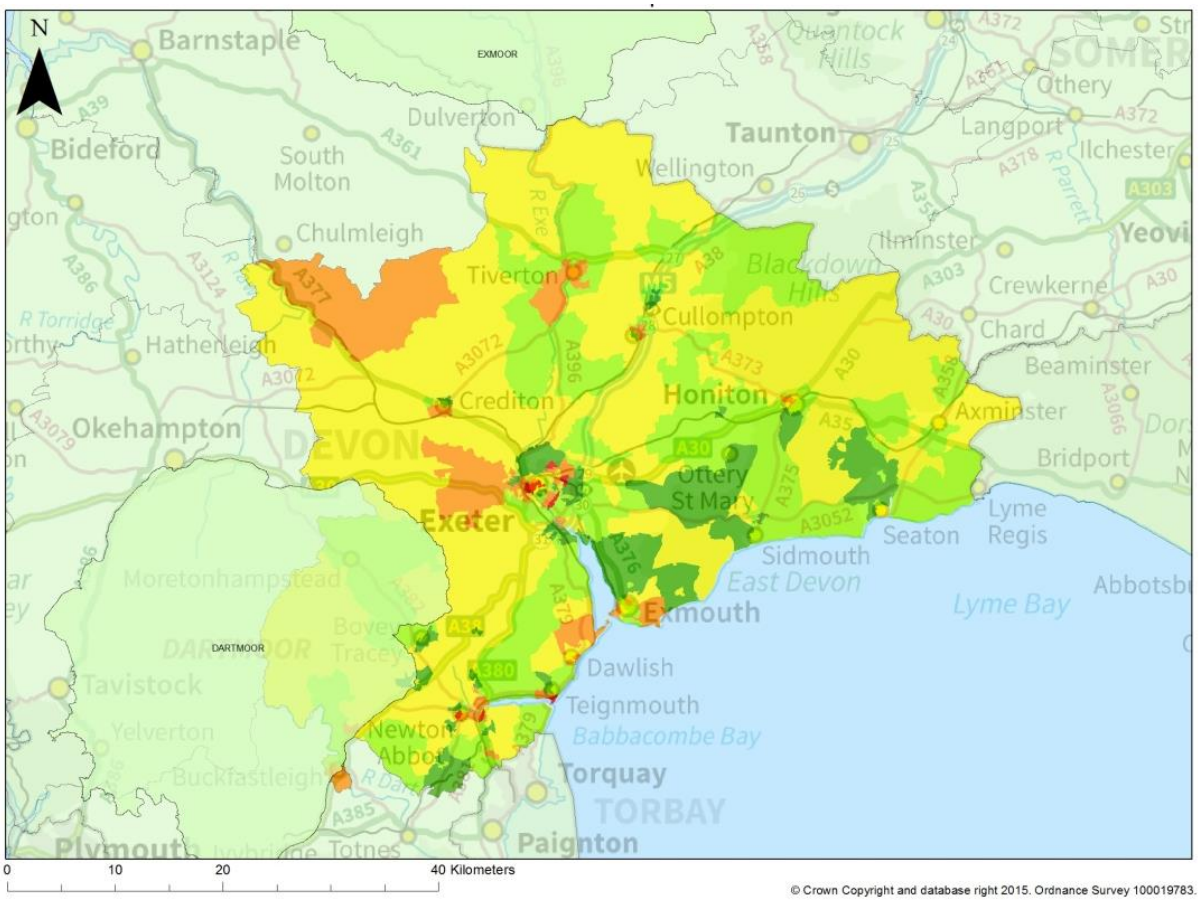

Figure 92: Indices of Deprivation 2010 (DCC)

Sources: Indices of Deprivation 2010 (DCC)

Crime and Community Safety

Crime in the Greater Exeter Area is relatively low. Overall, Devon has seen a decrease in crime of 8.1% in 2015 since the previous year. There are however hotspots of crime within the Greater Exeter area with 6 areas being highlighted as the most deprived in terms of crime; these are found within Barnstable, Exeter, Ilfracombe and Tiverton. These areas are highest in crime measured across four major crime areas including violence, burglaries, theft and criminal damage. Other areas with a relatively higher crime rate include Exmouth, Dawlish and Newton Abbot. Overall, the Greater Exeter area is not deprived in terms of crime. However, there is a noticeable correlation between urban areas that are more generally deprived and their subsequent crime rates.

Although crime rate is relatively low, fear of crime is commonly quite pronounced across the Greater Exeter Area. The type of fear varies across the county but noise, domestic violence, anti-social behaviour and drug and alcohol abuse are all prevalent topics for concern. This fear is not necessarily supported by actual figures and may correlate to differing views on acceptable behaviour.

Source: Joint Strategic Needs Assessment Devon Overview (DCC and Public Health Devon 2010)

Education and Skills

The population of Greater Exeter has an above average level of education when compared to both Devon and England. There is also a considerably lower percentage of those without qualifications in Greater Exeter than the rest of England. These figures are displayed in Table 19. In terms of education and skills deprivation, the most deprived areas are located in main urban centres and the least deprived to the south of Greater Exeter. East Devon has no areas that are least deprived in terms of education and skills.

The availability of an appropriately skilled labour force can be an important factor for attracting business investment and acts as useful evidence when persuading employers to locate their operation within the area. Therefore, the skill set of the local population can have an impact upon the make-up of Greater Exeter's economy. Overall, Exeter and East Devon perform better in terms of education and skills and there are some clear disparities in terms of those with no qualifications with Mid Devon having a significantly higher quantity of unqualified people compared to Exeter which is very low.

Qualifications	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	England
NVQ L1+ / GCSE D-G	92%	92%	85%	88%	89%	84%	82%
NVQ L2+ / GCSE A*-C	82%	79%	75%	72%	77%	71%	71%

NVQ L3+ / AS-A Level	59%	60%	54%	52%	56%	58%	55%
NVQ L4+ / Higher Education	32%	39%	32%	26%	34%	34%	33%
No Qualifications	6%	2%	10%	6%	6%	6%	9%

Table 9: Education by District (Annual Population Survey, 2012)

Source: Annual Population Survey, 2012

Access to Open Space

Greater Exeter has an abundance of diverse and valued green networks, wildlife and quality landscapes. However, access to open space and green infrastructure can vary for different people and for different parts of the plan area.

The population of Devon and Torbay is better connected to the natural environment (defined as the green open spaces in and around towns and cities, as well as the wider countryside and coastline) than the population of England as a whole (Devon State of the Environment Report 2015). However, whilst many areas benefit from good public access, there are areas which are deficient when compared to Natural England standards (Devon County Council's PRoW Team). The following map shows the distance between homes and accessible natural greenspaces of various sizes. In Greater Exeter, the area most deficient is Mid Devon.

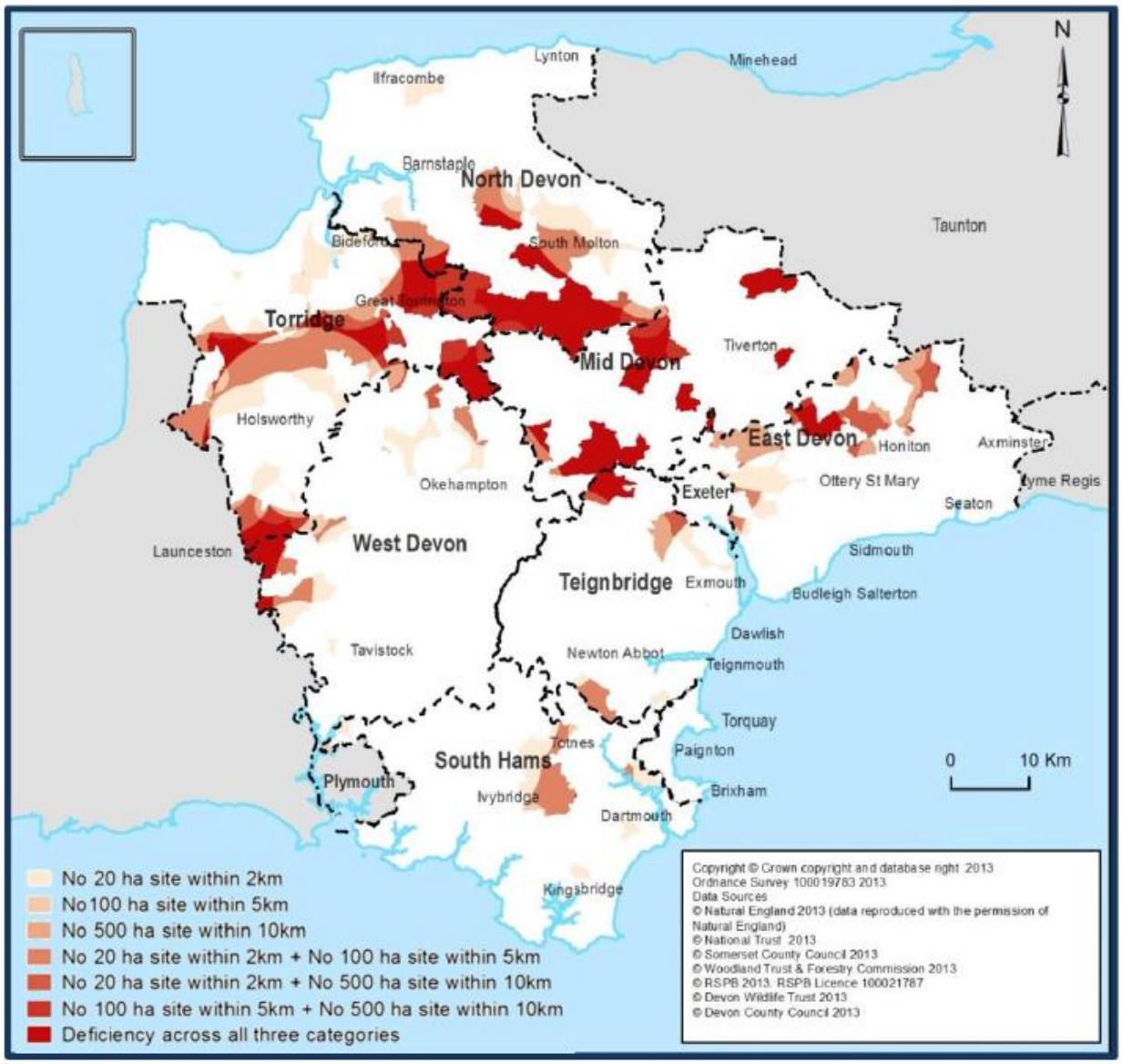

Figure 1310: Areas deficient in Public Rights of Way (lowest 20% by density) and do not meet Natural England Standards (Devon State of the Environment Report 2015)

There are a number of quality, quantity and accessibility deficits for different open space typologies across the Greater Exeter area, however the majority of these are relatively localised issues. To date, there has been no consistent assessments of open space across the four authorities who each measure it in different ways. Key strategic issues regarding open space tend to be focused around quality and quantity of sports pitches, protection of open spaces (in particular sports pitches) from loss to other uses and access to natural and semi-natural greenspaces.

The Public Right of Way (PRoW) network and areas of accessible land as shown on Figure 18 provides opportunities for walking and access to open space across most parts of the Greater Exeter area. Strategic cycle routes are concentrated around the larger settlements, namely Newton Abbot, Exeter, Tiverton, Cullompton and Honiton and also extend along the majority of the coastline in the south of the plan area.

Areas less accessible by Strategic Cycle Routes are mainly concentrated around the north west of the Greater Exeter area, around Crediton and lineally along the A377.

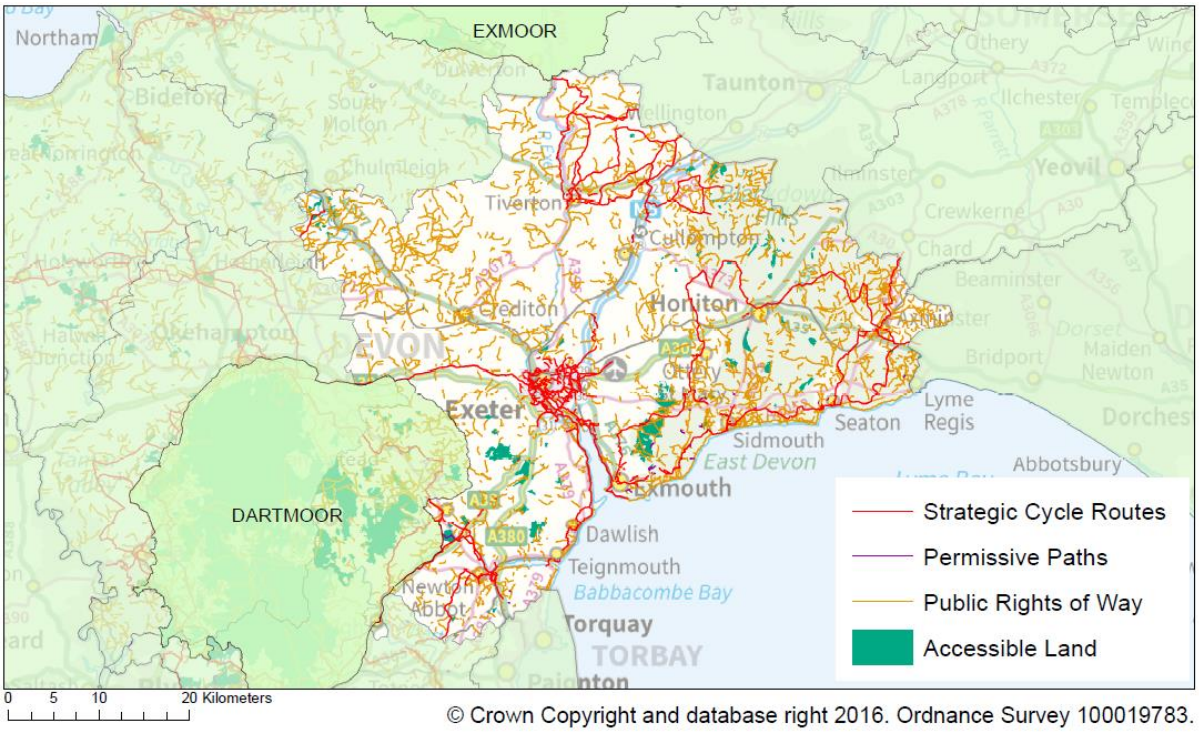

Figure 14: Recreation and Access Routes (DCC 2016)

Source: Devon State of the Environment Report (DNLP, 2016)

Economic Baseline Data

The Greater Exeter economy is formed around a strong city centre at its core and a surrounding strong rural economy. The area provides unique and competitive advantages through its environment and the quality of life it offers and is well suited to leading innovations in so called 'Nature-tech' industries. The Innovation Exeter Strategy (KPMG 2016) which covers the Greater Exeter area identifies the assets of the sub-region and aims to accelerate growth and safeguard the future of this growth through various measures. The key innovation assets which have been identified in the Innovation Exeter Strategy are:

- University of Exeter
- Exeter College
- Met Office
- North Wyke Farm (agricultural research centre)
- Royal Devon and Exeter NHS Foundation Trust
- Exeter 10,000 project (health research)
- The Innovation Centre
- Exeter Science Park
- Sky Park

These innovation assets and other businesses are heavily concentrated within the city of Exeter and the western end of East Devon. These areas perform far better in terms of workplace earnings, value added and proportion of skilled and professional job opportunities than East Devon, Mid Devon and Teignbridge.

There is much more potential to be realised which could help to develop a stronger and more resilient economy. In particular, there is potential to increase the retention of people aged between 25-39, the age group which is often considered to be the biggest driver of innovative growth. The retention of post-university students is a key part of this. As shown in the table below, the proportion of people aged 25-29 moving out of the Greater Exeter area is significantly higher than that of Bristol. This is indicative of a proportion of students leaving the area after university as well as residents going to university elsewhere in the country and not returning.

	Greater Exeter	Bristol
20-24	16,682	46,481
25-29	10,046	43,308
Net change	6,324	3,173
Percentage change	40%	7%

Table 10: Population by age band 2014 (ONS mid-year population estimates)

Workplace Earnings

Workplace wages in Exeter city are between 10% and 24% higher than other parts of the area. However, in comparison to national averages (taken as an average for full time workplace and resident wages), wages in Greater Exeter are 12% lower.

Residents of East Devon receive the highest wages (£397.00), but it is workplaces within Exeter that offer the highest weekly wages, outperforming the UK average.

There is a marked disparity between averages wages of workplaces across Greater Exeter. There is also a disparity between average wages for all residents (full time and part time workers) and for full time working residents, with part time workers' wages being on average only 83% of full time workers' wages across Greater Exeter.

The area offers better wages than neighbouring Torbay, where average weekly resident earnings are £323.70, average full time weekly resident earnings are £407.90 and where total average weekly workplace earnings are £317.80.

Sources: ONS Annual Survey of Hours and Earnings - Resident Analyses 2012 and 2013 and Workplace Analysis 2012

Productivity

Economic growth can be achieved either by:

- increasing the number of people who are in work or the number of hours each person works; **or**
- increasing the value of the goods or services that each person in work produces per day or per hour.

However, only the latter increases 'productivity'. Prior to the recent financial crisis, the Greater Exeter area saw a healthy growth in productivity but since then it has fallen behind the UK average and the gap is growing. The value added productivity of Greater Exeter is £31,125. This falls markedly short of the UK average of £36,600 but is comparable with the Devon average of £31,100. Although no district performs better than the UK average, which is weighted by the presence of London figures, Exeter leads locally with £33,500, followed by Mid Devon with £30,900, East Devon with £30,600 and finally Teignbridge with £29,500. This reflects the distribution of higher skilled jobs within the city.

Increasing productivity is a challenge and a priority for the Greater Exeter area.

Sources: Innovation Exeter Strategy (KPMG 2015); Cambridge Econometrics data / IER Estimates July 2010; Heart of the South West 2016.

Employment

Employment Rate is the number of people in employment expressed as a percentage of all people aged 16-64. Greater Exeter's employment rate has been consistently higher than the national average for the past 6 years, it has consistently increased over the past 6 years and, the rate of increase has been significantly higher than the national increase.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	UK
Jul10 – Jun11	71.1%	79.7%	77.5%	77.1%	76.4%	76.2%	78.4%	76.1%
Jul11 – Jun12	77.7%	76.1%	81.8%	79.8%	78.7%	79.6%	78.7%	76.4%
Jul12 – Jun13	80.8%	79.2%	73.7%	81.8%	78.9%	79.5%	79.0%	77.1%
Jul13 – Jun14	78.2%	82.4%	83.9%	79.1	80.9%	79.7%	79.3%	77.3%
Jul14 – Jun15	81.5%	78.3%	84.7%	83.9%	82.1%	79.9%	80.8%	77.5%
Jul15 – Jun16	85.6%	80.5%	87.0%	83.4%	84.1%	80.9%	80.6%	77.9%

Table 11: Employment Rate (ONS National Population Surveys 2010-2016)

Related to the employment rate indicator above, levels of unemployment across Greater Exeter are significantly below the average across Great Britain.

The highest levels of unemployment are in Exeter, with lowest levels in Mid Devon. The higher percentage of inactivity in Exeter is attributable to the high student population in the city but, overall, the trends around employment activity across Greater Exeter are encouraging.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	UK
Jul10 – Jun11	5.5%	6.0%	5.1%	5.7%	5.6%	5.6%	5.9%	7.8%
Jul11 – Jun12	4.8%	6.3%	5.4%	5.3%	5.5%	5.2%	6.2%	8.1%
Jul12 – Jun13	3.4%	5.5%	3.9%	4.3%	4.3%	3.3%	5.7%	7.8%
Jul13 – Jun14	3.6%	5.6%	4.3%	5.3%	4.7%	5.4%	5.5%	6.9%
Jul14 – Jun15	2.6%	4.2%	3.0%	3.0%	3.2%	2.9%	4.3%	5.7%
Jul15 – Jun16	3.1%	4.7%	2.4%	3.3%	3.4%	3.9%	4.0%	5.1%

Table 12: Unemployment Rate (ONS National Population Surveys 2010-2016)

Source: ONS National Population Surveys

Job Industry and Distribution

The Heart of the South West Local Enterprise Partnership provides an estimation of the different levels of GVA per full time equivalent (FTE) employee for different job industries. For example, financial and insurance activities generate the highest levels of GVA per FTE whilst agricultural, forestry and fishing generates the least. It is interesting to note that agriculture, forestry and fishing makes up the greatest proportion of industry type in the Greater Exeter area (15.8%) while financial and insurance activities account for a very small proportion (1.7%). These figures, however, mask variations within Greater Exeter itself, with East Devon, Mid Devon and Teignbridge having high levels of employment within the agricultural, forestry

and fishing sector (17%, 31.9% and 13.3% respectively) while Exeter has only a 0.9% share. Conversely, financial and insurance activities make up 3.4% of Exeter's employment figures whilst East Devon, Mid Devon and Teignbridge are less at 1.3%, 0.8% and 1.4% respectively.

The transport and storage sector is under-represented within the Greater Exeter area, which is likely to be because of the geographic location of the area. The information & communications sector is also significantly under-represented in Greater Exeter in comparison to UK levels, with the exception of Exeter, which falls only slightly behind. There are slightly higher levels of employment within public administration within the Greater Exeter area than the national average and health and education employment levels are above those of the UK, mainly due to levels within Exeter, where the hospital and university are located.

GVA per FTE (£, 2009 prices)		**% Change**
	2015	**2005-2015**
K : Financial and insurance activities	93,009.30	13%
J : Information and communication	58,110.20	20%
C : Manufacturing	52,856.70	28%
O : Public administration & defence	45,299.20	11%
F : Construction	42,193.80	14%
P : Education	41,439.70	-2%
H : Transportation and storage	40,550.50	-3%
M : Professional, scientific and technical activities	35,590.90	8%
Q : Human health and social work activities	34,677.60	16%
N : Administrative and support service activities	34,174.10	59%
G : Wholesale and retail trade	34,151.30	16%
R : Arts, entertainment and recreation	27,254.70	8%
I : Accommodation and food service activities	21,399.60	3%
A : Agriculture, forestry and fishing	18,674.30	-4%
Total	**43,542.60**	**13%**

Figure 15: GVA per FTE by Industry, HotSW, 2015 (est.)

	Teignbridge	Exeter	Mid Devon	East Devon	Greater Exeter	UK
Agriculture, forestry & fishing	13.3%	0.9%	31.9%	17%	15.8%	5.1%
Production/ manufacturing	6.1%	4.7%	6.3%	5.2%	5.6%	5.8%
Construction	13.6%	11.7%	11.4%	12.7%	12.4%	11.6%
Motor Trades	4.1%	3.7%	3.1%	3.3%	3.6%	2.9%
Wholesale	4.0%	3.9%	3.6%	3.2%	3.7%	4.3%
Retail	7.6%	8.6%	5.2%	8.7%	7.5%	7.8%
Transport & Storage	2.9%	2.3%	2.7%	2.5%	2.6%	3.4%
Accommodation and Food Services	7.6%	7.0%	4.3%	7.5%	6.6%	5.9%

Information & Communication	4.0%	6.4%	3.2%	4.2%	4.5%	8.2%
Finance & Insurance	1.4%	3.4%	0.8%	1.3%	1.7%	2.1%
Property	3.4%	5.2%	2.2%	3.7%	3.6%	3.7%
Professional, Scientific & Technical	12.0%	17.8%	9.3%	11.7%	12.7%	18.0%
Business Administration & Support	7.3%	7.4%	5.6%	6.9%	6.8%	8.2%
Public Administration & Defence	0.7%	0.1%	0.7%	0.6%	0.5%	0.3%
Education	1.5%	2.3%	1.0%	1.5%	1.6%	1.7%
Health	4.6%	6.4%	3.0%	3.8%	4.5%	4.3%
Arts, Entertainment & Recreation	6.0%	8.0%	5.7%	6.1%	6.5%	6.7%

Table 13: Split of employment sectors (ONS Business Register and Employment Survey 2014)

Employment Land Availability and Delivery

Across Greater Exeter, a total of around 360 hectares is allocated/proposed for employment development. This includes significant employment land proposals in East Devon's West End area (5ha at Cranbrook, 25ha at Science Park and 40ha at Skypark), within the city of Exeter (c. 20 hectares), and within Newton Abbot and Cullompton. An additional proposal to allocate land for commercial development at Junction 27 of the M5 is included in the submission version of the Mid Devon Local Plan Review (November 2016).

Since the adoption of each Councils' most recent plans, very little land which has been allocated/proposed for employment use has been completed within Greater Exeter. Where it has come forward, particularly in the cases of Skypark and Science Park, this has been as a result of significant public sector grant funding, which has invested in upgrading access at Junction 29 of the M5, remediation works, installation of all site infrastructure including roads, broadband and utilities and the actual delivery of some buildings. This is not out of keeping with the trends being experienced throughout the country, as we are coming out of a "double dip" economic recession and, it is likely that this has played a significant part in the lack of delivery.

The development of proposed employment land at Matford, Exeter has also been achieved but, in this case, non-traditional employment uses were allowed to enable delivery in the form of car showrooms.

Although almost 260 hectares of allocated/proposed employment land remains without permission for employment use, 100 hectares of the 360 hectares identified within Greater Exeter has been delivered/secured planning permission. This is over 25% and this growth has been supplemented by additional growth on unallocated sites.

The amount of employment land across Greater Exeter has continued to increase with completions on other sites totalling over 40 hectares since 2009. East Devon has seen the most completions on unallocated sites (c. 27.5ha) with Mid Devon and Teignbridge experiencing the lowest (4.5ha and 3.6ha respectively).
As is evident by the lack of employment land completions on allocated/proposed sites, the delivery of employment land is challenging. It is often reliant on the necessary infrastructure and services being in place in order to make its development of employment land viable. The four main factors in delivery are:

- Broadband connectivity: parts of the Greater Exeter area do not have superfast broadband and this has an impact on how effectively businesses can operate. There are plans in place to improve this through the "Connecting Devon and Somerset Programme". The entire programme is worth £94m and it will extend fibre optic broadband to 90% of premises across Devon and Somerset by the end of this year, and 100% of area will have super-fast broadband by 2020.
- Grid infrastructure: Western Power Distribution has simply not been investing in the network at the necessary pace. The renewable sector is now suffering as a result as there is limited capacity to export electricity to the grid. In addition, supply is also an issue. In order to connect strategic sites, it is necessary to get these identified in Western Power's delivery programme and, once identified, improvements can take a number of years. Often new sites are delayed or abandoned due to lack of potential to connect.
- Highways and access: this is often regarded as a delivery constraint and improvements can be very expensive.
- Remediation costs: previously developed sites can have significant remediation costs which add to development costs and reduce site viability. This usually means other elements of the development are compromised.
- Overall viability as a result of constraints

Further evidence on the state of the Greater Exeter economy is currently being gathered through the Economic Development Needs Assessment which will be used to inform the preparation of the Greater Exeter Strategic Plan. Information set out in this Scoping Report will be updated as more information is made available.

Travel to Work Areas (TTWAs)

The Exeter TTWA has grown rapidly since 2001. The 2011 Census shows the TTWA for Exeter to be very closely aligned with the boundaries of the Greater Exeter area, demonstrating the growing role of Exeter as the economic centre of the Greater Exeter sub-region.

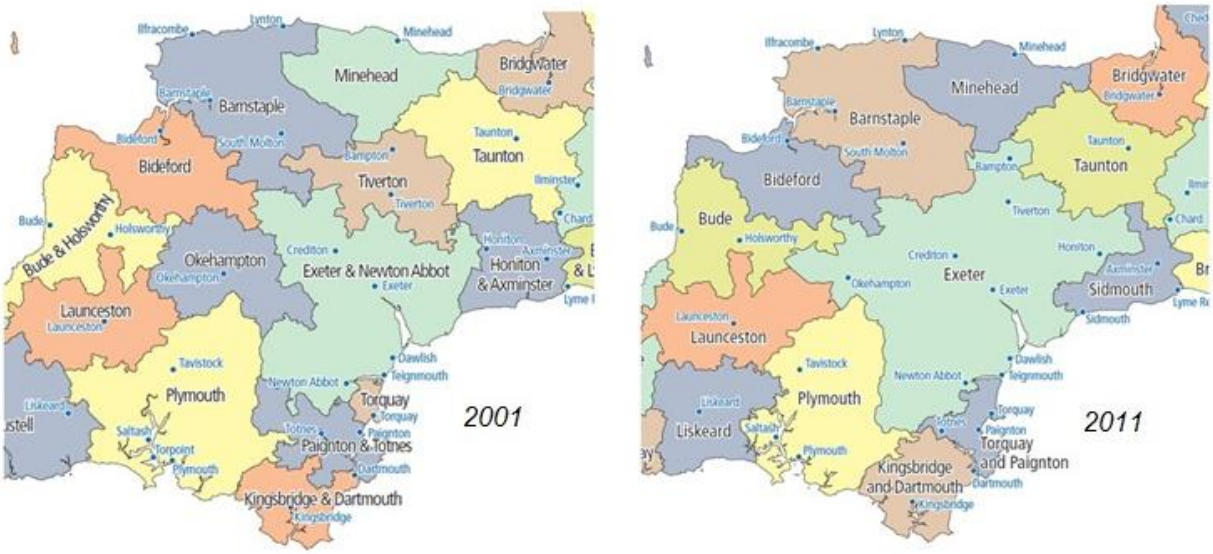

Figure 16: Exeter Travel to Work Area 2001 and 2010 (ONS)

Analysing the data more carefully shows some trends occurring in and around the Exeter TTWA:

- Strong outward flows of labour going from Mid Devon, East Devon and Teignbridge into Exeter.
- Teignbridge and Mid Devon have the highest levels of out-commuting, reflecting the more significant job opportunities within the city as well as around the boundary with East Devon where there are a number of large employers, notably the airport, which supports both airport and non-airport related sectors.
- Most of the labour flows occur within the Greater Exeter sub-region and the majority of residents within the plan area also work within the plan area. The most significant external relationship is between Teignbridge and Torbay.
- Exeter is the only authority to employ more of its residents within its boundaries than those who commute out of the city for work (NOMIS April 2015-March 2016).
- The Exeter TTWA is largest for those aged between 25-49, with those aged 35-49 travelling the greatest distances to work. 16-24 year olds tend to travel lesser distances to work.
- Full time females travel greater distances than full time males. As may be expected, part-time workers travel shorted distances than full time workers with travel focused more on smaller local centres such as Tiverton, Newton Abbot, Teignmouth, Budleigh Salterton and Axminster as well as on Exeter.
- The distances that people are likely to travel increases with their level of qualification, i.e. those with higher qualifications travel further to work than those with lower qualifications.

The TTWA reflects the growing role of Exeter as the economic centre within Greater Exeter, with an increasing concentration of professional services and highest skilled jobs (predominantly but not exhaustively associated with the university, financial and legal services). These types of job opportunities tend to be located within Southernhay, around the Meteorological Office and the university campus, as well as some of the outer lying industrial estates. Earnings by workplace (as opposed to

residents) are highest in Exeter. People are therefore increasingly attracted to working in the city (particularly between the ages of 25-49) for career opportunities and higher paid jobs. At the same time they are living in more rural and coastal locations and travel longer distances to get to work.

Source: Census 2001 and 2011

Tourism

Tourism is a big contributor to the Greater Exeter economy, with visitors drawn to the area for its coastal areas, outstanding environment, rich heritage and visitor and cultural attractions. Approximately a third of total visitor trips to Devon are made to Greater Exeter (31%), with slightly more of these coming from overseas trips (32.5%) than UK trips (31%). In relation to total nights spent within Devon, approximately a third of these are spent in Greater Exeter (32%), with a higher proportion of overseas nights (38%) than UK nights (31%).

With regard to spending by tourists, Greater Exeter received 28% of spending within Devon by UK visitors, but 36% of spending by overseas visitors.

Greater Exeter receives more than a third of Devon's day visitors (38%) and more than a third of their spend (37%).

Within the Greater Exeter area there is a great disparity between tourism within the different authority areas. Teignbridge and East Devon have higher numbers of UK trips, UK visitor nights and UK spend. Mid Devon and Exeter fall significantly behind. Exeter has the highest levels in relation to overseas trips and overseas nights and therefore, overseas spend. Mid Devon has significantly lower figures than other areas with regard to both UK and overseas tourism. With regard to tourism day trips, the trend is repeated.

Sources: South West Regional Tourist Board; Local Authority Databases 2014

Retail

Across Greater Exeter there are a number of key town centres which offer a range of shopping and leisure facilities. Alongside the city centre of Exeter there are: Honiton, Exmouth, Sidmouth, Seaton, Ottery St Mary and Axminster in East Devon; Tiverton, Cullompton and Crediton in Mid Devon; and Newton Abbot, Teignmouth, Dawlish, Ashburton, Bovey Tracey, Buckfastleigh and Chudleigh in Teignbridge.

Previous retail studies have been carried out for all four authorities but were commissioned at different points and therefore their relevance and usability varies. Teignbridge's evidence is now the oldest, having been published in 2010, East Devon published updates to their 2008 study in 2011 and Mid Devon published their study in 2012. A retail study covering Exeter and the west end of East Devon is currently being undertaken and is due to be published shortly.

There is a need to update and bring together the retail evidence for all four authorities in order for effective baseline data and future requirements to be

identified. This piece of work was commissioned in August 2016 and is currently being carried out on behalf of all four authorities. It will gather data and undertake a detailed assessment of such issues as town centre health, shopping patterns for convenience and comparison goods and assessments of the need for new retail floorspace in the main settlements in each of the four administrative areas. Further information will be included within the Scoping Report as part of any subsequent updates.

Transport

Although traditionally vehicle traffic has followed a fairly predictable growth path in recent years, both nationally and locally in the Greater Exeter area, the growth in vehicle traffic has slowed, and in some places is declining. The apparent historic coupling between economic activity and road traffic activity has also weakened, particularly coinciding with the rapid rise in internet access and usage.

	1991	2001	2011
East Devon	77.2	82.2	84.1
Exeter	67.4	72.4	72.9
Mid Devon	79.4	83.1	85.7
Teignbridge	77.2	81.9	83.9
Greater Exeter	75.3	79.9	81.7

Table 14: Percentage car ownership (Census 2011)

Based on data from the National Traffic Survey 2015, within the Greater Exeter area, the majority of travelling to work is done by the private car/van. There are differences within the area, with Exeter having significantly lower levels of travel to work by car/van and by far the highest percentage walking and cycling and using buses. This reflects the fact that the population is more concentrated within the city than in surrounding rural areas, with more opportunities in the city to walk or cycle to work.

Of all purposes, it is for shopping trips where travel trends have changed most rapidly. Not only has there been a consistent year on year decrease between 1995 and 2014, but it has been doing so at a faster rate (25%) than the general fall in trip rates. The overall fall per person of 63 trips per year corresponds to more than 1 trip a week, per person, that no longer takes place. This is most likely associated with the rise in shopping over the internet.

Year	1995	1998	2002	2004	2006	2008	2010	2012	2014	% fall
Shopping Trips	237	229	214	208	219	198	194	189	174	25%
All Trips	1086	1071	1047	1026	1037	992	963	954	921	15%

Table 15: Number of shopping trips (TRICS Research Report 14/1)

All Districts within the Greater Exeter area are served by rail connections and the use of the majority of stations across Greater Exeter has significantly increased since 2000. As an average figure calculated across Greater Exeter, the use of stations (and thus rail journeys) has increased by 262% (Office of Rail Regulation 2015).

Sources: Census 2011; National Traffic Survey 2015; TRICS Research Report 14/1; Office of Rail Regulation 2015

Broadband Connectivity

The Connecting Devon and Somerset project has been set up to deliver next generation broadband infrastructure to areas where the market has not invested. The programme is currently nearing the end of Phase with Phase 2 to follow. The extent of connection to high speed fibres is currently in the process of being monitored and mapped by Devon County Council. Data will be included within the baseline information when available.

Task A3: Identifying sustainability issues

Sustainability Issues

3.7 Undertaking tasks A1 and A2 has helped develop an initial understanding of what the key issues for the GESP are. These are summarised in Table 3.

Sustainability Issues	Supporting Evidence
Environmental	
Pressure on protected species' habitats	The 19 SACs, SPAs and Ramsar sites across Greater Exeter are sensitive to development pressures.
Flood risk	There are places within Greater Exeter which are particularly susceptible to groundwater, fluvial and tidal flooding. Most of the developed coastline associated with the Exe Estuary will require defending over the longer term and are vulnerable to climate change and sea level rise.
Loss of mineral resources	There are nationally important mineral resources within Greater Exeter that provide a constraint to development.
Degradation of water environment	The majority of the groundwater within Greater Exeter has poor chemical status.
Threat to soil quality	The best and most versatile agricultural land within Greater Exeter is at risk from erosion resulting from flooding and surface water run-off, which will increase as the climate changes.
Worsening of air quality	Air pollution in the Greater Exeter area has been predicted to result in at least 198 premature deaths per year.
Risk to coastline	The coastline areas of Greater Exeter are vulnerable to damage and degradation from development, tourism, leisure, sea level rises, and the increasing severity of storm surges.
Climate Change	Greater Exeter is generating low levels of renewable energy and there is a disparity across the area in the distribution of commercial renewable energy production schemes.
Social	
High house prices	Average house prices within Greater Exeter are high, particularly in relation to low wage levels, although they have remained fairly consistent over recent years.
Affordable houses	There is a shortage of affordable housing across Greater Exeter to meet the overall needs identified.
Deprivation	Social deprivation is an issue for parts of the Greater Exeter area, where poor housing conditions and crime hotspots occur.
Population	Due to a disproportionately high amount of people aged 65 and over, Greater Exeter has an increasing

	dependent population with resulting health and social care issues .
Economic	
Low average wages	Wages within Greater Exeter are 11% lower than UK average wages.
Low average productivity/GVA	There is low productivity/GVA across Greater Exeter, which falls significantly short of National GVA average.
Lack of high skilled Employment opportunities	Higher paid employment sectors are underrepresented within Greater Exeter (see paragraph 2.4 of this report).
Limited delivery of employment land	Very little employment land within Greater Exeter has been delivered other than sites which have been delivered with the assistance of significant grant funding.
Job types	The economy of the Greater Exeter area is heavily focussed on the Exeter city and its urban fringe, where the highest paid jobs and opportunities for skilled professionals are located.
Transport, accessibility and connectivity	High car dependency is an expensive burden on many households and it is causing congestion problems on parts of our road network.

Table 16: Sustainability Issues

Likely future trends under the 'Business as Usual' scenario

3.8 The baseline spreadsheet identifies, using the data available, the current state of the Greater Exeter area in terms of economic, environmental and social considerations. The baseline data includes, where possible, timeline data to enable trends and patterns or discrepancies to be extrapolated from the information. It also includes, where possible, comparisons with other regional or national information. This baseline information can provide clues as to the likely evolution of the Greater Exeter area in the absence of the GESP and the policies and proposals that it will include.

3.9 Predicting the nature of future trends is difficult at the best of times, being dependent on national and global economic climates. The decision taken at the referendum, held in June 2016, to leave the European Union, is likely to have some form of impact on the national economy.

3.10 Whilst there are certain trends that would appear likely to continue across Greater Exeter without implementation of a plan, it should be noted that existing Local Plans and/or Core Strategies are in place which, through their policies and proposals, would ensure that the area would not be left in a policy void without implementation of the GESP. These plans all have end dates of between 2026 and 2033. In this respect, the 'business as usual' scenario is that existing Local Plans prepared at the district level, and any made Neighbourhood Plans sitting beneath them, would provide the policy framework for future development. The GESP provides an opportunity for an additional layer of policy to be provided which addresses planning issues on a strategic and cross boundary level which would otherwise be dealt with

through Duty to Cooperate discussions involved in the preparation of individual Local Plan reviews.

Areas of particular environmental importance

The Environmental Report must include:

(k) "Any existing environmental problems which are relevant to the plan including, in particular, those relating to any areas of particular environmental importance, such as areas designated pursuant to Directives 74/409/EEC and 92/43/EEC"

SEA Directive Requirement (Annex 1)

3.11 There are 19 European Sites, designated for their core breeding, feeding and resting habitats for rare and threatened species whose boundaries fall wholly or partly within a 20km radius of the Greater Exeter plan boundary. These are detailed in Table 4 and shown on Figures 4 and 5. European sites are the 'top tier' of protected nature conservation sites, and subject to strict legal protection. These sites comprise Special Areas of Conservation (SACs), Special Protection Areas (SPAs) and Ramsar Sites. They are afforded the highest level of protection and any development proposals within or affecting these must satisfy the requirements of the EU Directive on the Conservation of Wild Birds (74/409/EEC) and the EU Directive on the Conservation of Natural Habitats (92/43/EEC).

Site Name/NGR	Features for which the site is designated (* - Priority habitat or species)
Beer Quarry and Caves SAC SY215892 West of Seaton on south coast of Devon	Annex I Habitats - Annex II Species Bechstein's bat *Myotis bechsteinii* greater horseshoe bat *Rhinolophus ferrumequinum* lesser horseshoe bat *Rhinolophus hipposideros*
Bracket's Coppice ST516071 North of Corscombe, Dorset, 14km east of Devon county boundary.	Annex I Habitats *Molinia* meadows on calcareous, peaty or clayey-siltladen soils (*Molinion caeruleae*) Annex II Species Bechstein's bat *(Myotis bechsteinii)*
Culm Grasslands SAC SS843214 East from South Molton, adjacent to the A361 near Rackenford Moor	Annex I Habitats Molinia meadows on calcareous, peaty or clayey-silt-laden soils (*Molinion caeruleae*); Northern Atlantic wet heaths with *Erica tetralix* Annex II Species Marsh fritillary butterfly *Euphydryas (Eurodryas, Hypodryas) aurinia*

Site Name/NGR	Features for which the site is designated (* - Priority habitat or species)
Dartmoor SAC SX590864 South of Okehampton, Devon	Annex I Habitats Northern Atlantic wet heaths with *Erica tetralix* European dry heaths Blanket bogs Old sessile oak woods with *Ilex* and *Blechnum* in the British Isles Annex II Species Southern damselfly *Coenagrion mercuriale* Atlantic salmon *Salmo salar* Otter *Lutra lutra*
Dawlish Warren SAC SX984792 At the mouth of the Exe estuary on the south coast of Devon	Annex I Habitats Humid dune slacks Shifting dunes along the shoreline with *Ammophila arenaria* (`white dunes`) Fixed dunes with herbaceous vegetation (`grey dunes`) Annex II Species Petalwort *Petalophyllum ralfsii*
East Devon Pebblebed Heaths SAC / SPA SY040868 East of Woodbury, Devon	Annex I Habitats Northern Atlantic wet heaths with *Erica tetralix* European dry heaths Annex II Species Southern damselfly *Coenagrion mercurial* Article 4.1 European nightjar *Caprimulgus europaeus* Dartford warbler *Sylvia undata* Article 4.2 -
Exe Estuary SPA SX981840	Article 4.1 *Slavonian grebe Podiceps auritus* Pied Avocet *Recurvirostra avosetta* Article 4.2 *Dark-bellied brent goose Branta bernicla bernicla* *Dunlin Calidris alpina alpine* *Eurasian oystercatcher Haematopus ostralegus* *Black-tailed godwit Limosa limosa islandica* *Grey plover Pluvialis squatarola* Over winter the area regularly supports:23811 waterfowl (5 year peak mean 01/04/1998)

Site Name/NGR	Features for which the site is designated (* - Priority habitat or species)
Exmoor and Quantock Oakwoods SAC SS894440 Southwest of Luccombe	Annex I Habitats Old sessile oak *Quercus Petraea* woods with *Ilex* and *Blechnum* in the British Isles Alluvial forests with *Alnus glutinosa* and *Fraxinus excelsior* (*Alno-Padion, Alnion incanae, Salicion albae*) Annex II Species Barbastelle *Barbastella barbastellus* Bechstein`s bat *Myotis bechsteinii* Otter *Lutra lutra*
Exmoor Heaths SAC SS864419 Exmoor, between Barnstaple, Devon and Bridgewater, Somerset	Annex I Habitats Northern Atlantic wet heaths with Erica tetralix European dry heaths Vegetated sea cliffs of the Atlantic and Baltic coasts *Blanket bogs Alkaline fens Old sessile oak woods with Ilex and Blechnum in the British Isles Annex II Species -
Hestercombe House SAC Taunton Deane, Somerset	Annex I Habitats - Annex II Species Lesser horsehoe bat maternity roost *Rhinolophus hipposideros*
Holme Moor and Clean Moor ST094260 Vale of Taunton, Somerset. 5.3km east of Devon county boundary (PH – 3.61km from Mid devon boundary – check)	Annex I Habitats Calcareous fens with *Cladium mariscus* and species of the *Caricion davallianae* *Molinia* meadows on calcareous, peaty or clayey-silt-laden soils (*Molinion caeruleae*)
Lyme Bay and Torbay SCI SY31583 Reefs offshore from Lyme Bay and the coastline + subtidal areas between Mackerel Cove and Dartmouth.	Annex I Habitats Reefs Submerged or partially submerged sea caves
Quants SAC ST186178 Vale of Taunton, 0.5km east of Devon county boundary. PH - 21.85kms from MDDC	Annex II Species Marsh fritillary butterfly (*Eurodryas aurinia*)
River Axe SAC SY267961 North of Whitford, near Axminster, Devon	Annex I Habitats Water courses of plain to montane levels with the *Ranunculion fluitantis* and *Callitricho-Batrachion* vegetation Annex II Species

Site Name/NGR	Features for which the site is designated (* - Priority habitat or species)
	Sea lamprey *Petromyzon marinus* Brook lamprey *Lampetra planeri* Bullhead *Cottus gobio*
Sidmouth to West Bay SAC SY326912 Adjacent to south west coast path, west of Lyme Regis	Annex I Habitats Vegetated sea cliffs of the Atlantic and Baltic coasts *Tilio-Acerion* forests of slopes, screes and ravines Annual vegetation of drift lines Annex II Species -
Somerset Levels and Moors SPA / Ramsar – PH = ~ 11kms from MDDC	Article 4.1 Wintering Bewick;'s Swan and Golden Plover Article 4.2 Wintering Shoveler, Teal, Wigeon + wetland assemblage of international importance.
South Dartmoor Woods SAC SX710701 South of New Bridge, nr Ashburton, Devon	Annex I Habitats Old sessile oak woods with Ilex and *Blechnum* in the British Isles European dry heaths Annex II Species -
South Hams SAC SX942565	Annex I Habitats European dry heaths Semi-natural dry grasslands and scrubland faces: on calcareous substrates (*Festuco-Brometalia*) Vegetated sea cliffs of the Atlantic and Baltic coasts Caves not open to the public *Tilio-Acerion forests of slopes, screes and ravines Annex II Species Greater horseshoe bat *Rhinolophus ferrumequinum*
West Dorset Alder Woods SAC SY538968 7km southeast of Somerset county border, northeast of Bridport PH - 12.57kms from EDDC	Annex I Habitats Alluvial forest with *Alnus glutinosa* and *Fraxinus excelsior*, Molinia meadows on calcareous, peaty or clay-silt-laden soils (*Molinion caeruleae*), old acidophilous oak woods with *Quercus robur* on sandy plains Annex II Species Marsh fritillary butterfly (*Euphydryas aurinia*) and great crested newt (*Triturus cristatus*)

Table 17: SPAs, SPAs and Ramsar Sites within 20km of GESP boundaries

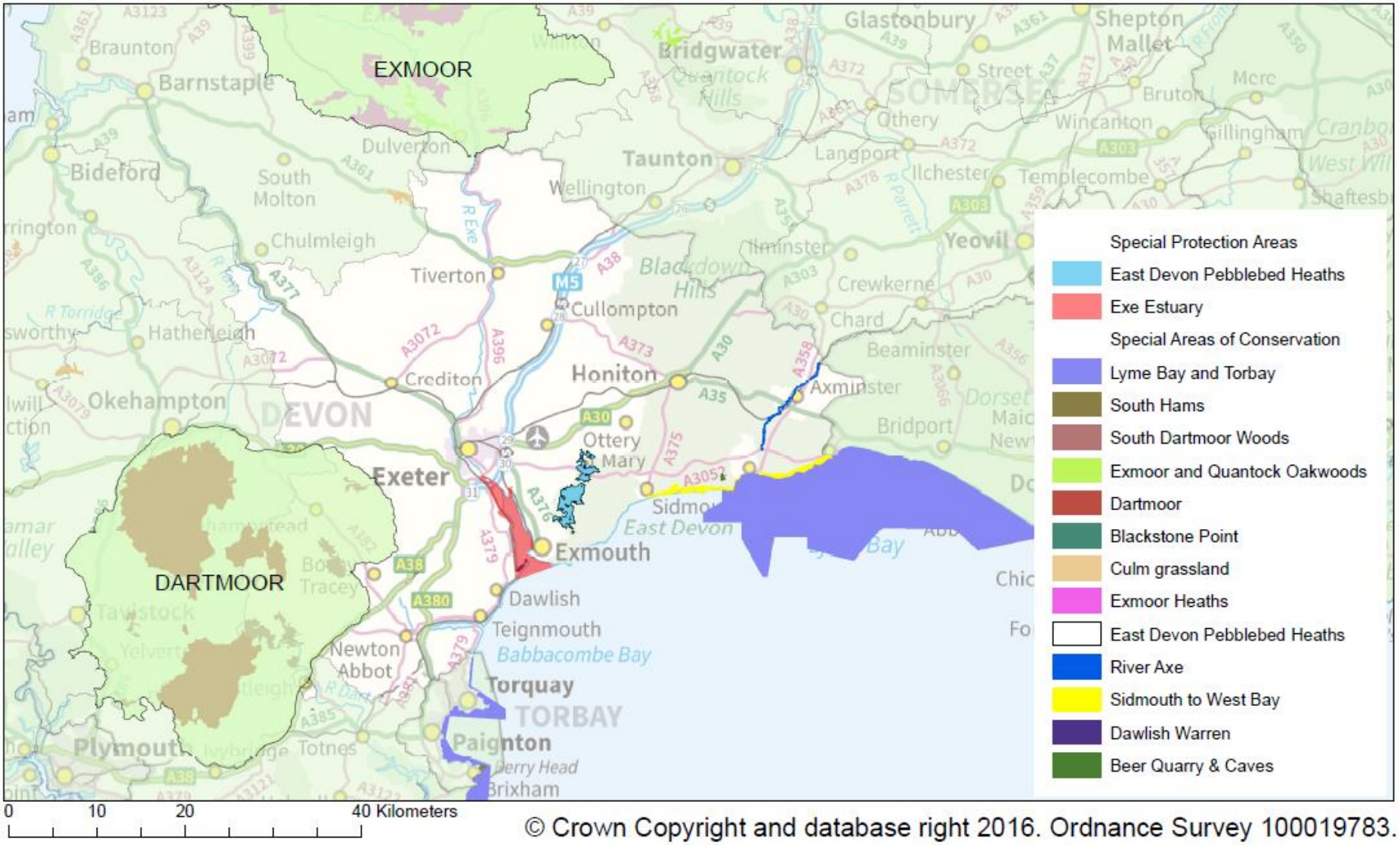

Figure 17: European Sites relating to the Greater Exeter area (NB: map does not show Bracket's Coppice, Hestercombe House SAC, Holme Moor and Clean Moor, Quants SAC, Somerset Levels and Moors SPA and West Dorset Alder Woods SAC due to absence of GIS data)

3.12 There are seven key impact pathways by which future development could pose risks to the relevant European Sites. These are:

- Fragmentation/isolation
- Loss of supporting habitat/functionally-linked land
- Recreation impacts (disturbance, trampling damage, fire etc.)
- Air quality (e.g. impacts of reductions in air quality linked to increased local traffic)
- Water quality issues
- Water availability issues (i.e. reductions in flow or wetland sites becoming drier)
- General urban effects (a range of issues linked to development in close proximity to sites, such as increased cat predation, light pollution etc.).

3.13 Despite considerable uncertainty, early recognition of possible issues and solutions for European Sites provides significant opportunity and is a positive approach. Such early consideration ensures that development options and policies are proposed based on a good understanding of the ability of each option to be legally compliant, with exploration of potential mechanisms for avoiding or mitigating potential effects to European sites. Such considerations are taking place as part of the early stages of preparing the GESP and the likely significant effect of the GESP on all affected European sites will be undertaken through a Habitats Regulation Assessment Screening and further Appropriate Assessment if required.

4. Sustainability Objectives

Task A4: Developing the Sustainability Appraisal Framework

4.1 By completing tasks A1 – A3 we have developed a key understanding of what the key environmental and sustainability issues for the GESP area are likely to be. The key policies, plans, programmes and sustainability issues identified through the collation of relevant baseline data have led to the identification of the following sustainability objectives:

Sustainability Objective	Factors
A. NATURAL ENVIRONMENT To conserve and enhance the habitat, wildlife and landscapes of our natural environment.	• Natural habitats and biodiversity; flora and fauna • Landscapes and landscape character • Recreational and leisure opportunities compatible with conservation • Coast • Air quality
B. HISTORIC AND BUILT ENVIRONMENT To conserve and enhance our built and historic assets and promote high quality architecture, design and accessibility in new build development.	• Conservation of heritage assets within their setting, including Listed Buildings, Conservation Areas, Archaeological sites and Scheduled Monuments • Cultural heritage • Local character • Design and build quality of new development
C. CLIMATE CHANGE AND RESOURCES To reduce greenhouse gas emissions, mitigate and adapt to the possible effects of climate change, utilise our resources efficiently and minimise their loss or degradation.	• Development that reduces the need to travel • Access to public transport, cycle and walking links to help reduce use of private car • Energy efficiency • Renewable and low carbon energy generation • Green infrastructure • Soil and water quality • Flood risk and the threat to people and property • Safeguard mineral resources • Reuse of previously developed land • Minimise waste (reuse, recycle, recover)
D. HOMES To provide and maintain a sufficient supply of good quality, financially accessible homes of mixed type and tenure, suitable to meet the needs of Greater Exeter.	• Supply of housing (accommodating population growth and changes in household composition) • Housing mix (type) • Housing mix (product e.g. affordable, open market, custom and self build) • Housing affordability • Access to services and facilities
E. HEALTH AND WELLBEING To support healthy and active communities where people can enjoy positive, safe and healthy lives with access to attractive	• Social deprivation • Cycle and walking networks • Open space and green infrastructure • Public recreational, play and leisure opportunities

environments and opportunities to enjoy and experience them.	• Air, noise and light pollution • Safe and secure environment with reduced fear of crime
F. ACCESS TO SERVICES To provide accessible and attractive services and community facilities for all ages and interests.	• Access to area wide services (nursery and pre-school, primary, secondary, further and higher education; healthcare; etc.) • Community facilities (local shops, meeting venues, public houses, places of worship) • Cultural buildings and facilities
G. JOBS AND LOCAL ECONOMY To foster a strong and entrepreneurial economy and increased access to high quality skills training to support improved job opportunities and greater productivity in Greater Exeter.	• Employment land supply • Mix of employment offer • Productivity of local economy and access to labour supply • Access to education and skills training • Tourism offer – commercial cultural and leisure provision
H. CITY AND TOWN CENTRES To safeguard and strengthen the vitality and viability of our city and town centres.	• Diverse city and town centre economy • Strengthen and safeguard the vitality and viability of centres • Relationship between new development and existing centres • Access to existing centres
I. CONNECTIVITY AND TRANSPORT To connect people and businesses digitally and physically through the provision of broadband, walking, cycling, public transport, road networks and other transport infrastructure both within the Greater Exeter area and beyond.	• Access to major road networks within and beyond Greater Exeter • Access to public transport, footpaths and cycle ways • Access to high speed broadband • Links between homes, services and businesses

Testing the inter-compatibility of SA objectives

4.2 The SA objectives have been chosen to reflect the remit of the GESP. The objectives seek to provide a broad and balanced overview of relevant considerations. To ensure that each of the objectives are genuinely needed and that none duplicate or overlap each other a simple framework has been set up to 'test' compatibility with one another.

4.3 It is important to test the internal compatibility of objectives against one another as this will reveal any incompatibilities or tensions between the individual objectives. There can sometime be, for example, a tension between the environmental and more economically driven objectives. For the purposes of SEA this highlights some of the impacts of development on the environment. For plan making

purposes it is equally important to consider social and economic factors as well as environmental ones.

4.4 It is considered that the achievement of economic objectives is just as critical to achieving sustainable development as the conservation and protection of environmental assets and as such the economic and environmental objectives will remain in the Sustainability Appraisal Framework. There will however be important decisions which need to be taken in plan making, informed by the findings of Sustainability Appraisal when in identifying economic priorities, particularly in respect of the more rural and sensitive parts of the plan area.

A. Natural Environment	✓								
B. Built Environment	✓	✓							
C. Climate Change and Resources	?	?	✓						
D. Homes	x	?	x	✓					
E. Health and Wellbeing	✓	✓	✓	✓	✓				
F. Access to Services	?	✓	✓	✓	✓	✓			
G. Jobs and Local Economy	x	?	x	✓	✓	✓	✓		
H. City and Town Centres	✓	?	✓	✓	✓	✓	✓	✓	
I. Connectivity and Transport	?	?	?	✓	✓	✓	✓	✓	✓
	A	B	C	D	E	F	G	H	I

Note: SA objectives shown on x and y axis

Key	
✓	Compatible
?	Neutral, variable or unknown with potential for both positive and negative relationships
x	Potential for conflict

Using the framework for assessment of plans, policies and programmes

4.5 In order to assess the sustainability of a plan, proposal or policy we need to establish an appropriate mechanism against which we can measure performance. By applying this methodology to the assessment it will be possible to provide a snapshot of the relative sustainability of a plan, proposal or policy and indeed compare them against one another.

4.6 Due to the interplay among factors in any given objective, and the unpredictability of detail in some outcomes, the assessment will provide summary comment on the factors affecting each objective.

4.7 It is proposed that for each objective, based on the likely net[1] performance of contributing factors, we will use the following to measure likely impacts:

The proposal is likely to…	
+3	have a major and overriding positive impact in contributing towards the achievement of the objective.
+2	have a significant net positive impact overall in contributing towards the achievement of the objective.
+1	have a minor net positive impact in contributing towards the achievement of the objective.
0	have no impact positive or negative in contributing towards the achievement of the objective **or** have some positive and some negative impacts thus the balance overall is neutral
-1	have a minor net negative impact in contributing towards the achievement of the objective.
-2	have a significant net negative impact overall in contributing towards the achievement of the objective.
-3	have a major and overriding negative impact in contributing towards the achievement of the objective.
?	It is not possible to predict the impact of the proposal on achievement of the objective.

4.8 It should be noted that the approach tabled above, and reference made here, is helping to set the scene for subsequent stages of appraisal, particularly Stage B. It is not proposed that individual policies and proposals appraised will be 'scored' by adding up the above measurements against each of the objectives. Rather, the approach set out aims to identify the specific impacts of each policy and proposal and represent these in a visual and easily identifiable format that will enable the identification of areas of likely significant affect and where options for mitigation or avoidance need to be explored.

Links to Plan Monitoring

The Environmental Report must include:

(i) *"a description of measures envisaged concerning monitoring in accordance with Article 10"*

SEA Directive Requirement (Annex 1)

4.9 The SEA regulations require that significant environmental effects of the plan or programme are measured. The following indicators are proposed as the

[1] Net performance recognises that in some factors there will be both positive and negative effects

basis for monitoring but may be updated as the GESP progresses to ensure effective links between SA monitoring and plan monitoring are made:

SA Objective Heading	Monitoring Indicators	Source
A. Natural environment	• Condition of European Sites • Condition of SSSIs • Air quality monitoring • Water quality chemical status	• Natural England • Natural England • LPAs • Environment Agency
B. Built environment	• Number of Building for Life accredited schemes • Number of schemes put through Design Review Panel process • Number of Listed Buildings at Risk	• LPA • LPA • Historic England
C. Climate change and resources	• Per capita carbon emissions • Planning permissions for non-domestic renewable energy installations • % dwellings built on previously developed land	• DECC • LPA • LPA
D. Homes	• Number of new homes built • Number of affordable homes built • Average house price	• LPA • LPA • Land Registry/ONS
E. Health and Wellbeing	• Levels of deprivation • Average male and female life expectancies • Crime levels	• DCLG • ONS • JSNA DCC
F. Access to services	• Access to open space • Qualifications at age 19 • Number of school places	• DCC • ONS • DCC
G. Jobs and local economy	• Areas of land developed for employment use • Weekly wages • Numbers employed in skilled/professional jobs • Area GVA	• LPA • ASHE • ONS • Cambridge Econometrics data / IER Estimates
H. City and town centres	• Net square metre increase in retail floorspace in city/town centres • Vacancy rates	• LPA • LPA
I. Connectivity and Transport	• Modal split of trips for work, shopping and leisure • % of premises with superfast broadband connections • Increase in rail patronage	• National Traffic Survey • DCC • Office of Rail and Regulation

Table 18: SA Monitoring Indicators

5. Consulting on the Sustainability Appraisal

Task A5: Consulting on the scope of the Sustainability Appraisal

5.1 In order to satisfy the requirements of the SEA Directive, we must seek the views of the statutory environmental consultation bodies designated in the SEA Regulations. These are the Environment Agency, Natural England and Historic England. We will, however, also consult more widely and encourage any interested organisation or individual to comment.

5.2 This Scoping Report will be made available for comment from 17 February to 31 March 2017. Consultees are requested to focus on the following questions:

- Are the PPPSIs reviewed appropriate?
- Are there any other baseline indicators which should be used to provide useful information?
- Are the sustainability issues identified considered appropriate?
- Do the SA objectives cover all necessary issues?

5.3 All comments received will be recorded, considered and made publically available. They will inform any subsequent redrafting of the Scoping Report if this is deemed necessary.

An integrated approach to Sustainability Appraisal

5.4 Sustainability Appraisal incorporating SEA is not the only form of assessment that the GESP will be subjected to. We will also consider the relationship of our Sustainability Appraisal process to the following assessments:

Habitats Regulations Assessment

5.5 Planning policy documents will need to be 'screened' under another important piece of European legislation: Article 6(3) and (4) of the Habitats Directive 92/43/EEC. The Habitats Directive helps us to assess whether there is likely to be a significant adverse effect on a wildlife site of European importance. There are several protected European sites within the Greater Exeter plan area as well as several outside which could be directly or indirectly affected by the proposals set out the plan as explained in Chapter 3.

Appendix 1: Satisfying the requirements of the SEA Directive

SEA Directive Requirement	Where covered
a) An outline of the contents, main objectives of the plan or programme, and relationship with other relevant plans or programmes;	Chapter 2
b) The relevant aspects of the current state of the environment and the likely evolution thereof without implementation of the plan or programme;	Chapter 3
c) The environmental characteristics of areas likely to be significantly affected;	Chapter 3
d) Any existing environmental problems which are relevant to the plan or programme including, in particular, those relating to any areas of a particular environmental importance, such as areas designated pursuant to Directives 79/409/EEC and 92/43/EEC;	Chapter 3
e) The environmental protection objectives, established at international, community or national level, which are relevant to the plan or programme and the way those objectives and the environmental considerations have been taken into account during its preparation;	Chapter 2
SEA Directive Requirements f) to j) will be covered in subsequent SA reports	
Consultation: · Authorities with environmental responsibility, when deciding on the scope and level of detail of the information which must be included in the environmental report (Art 5.4) · Authorities with environmental responsibility and the public shall be given an early and effective opportunity within appropriate time frames to express their opinion on the draft plan or programme and the accompanying environmental report before the adoption of the plan or programme (Art. 6.1, 6.2) · Other EU Member States, where the implementation of the plan or programme is likely to have significant affects on the environment of that country (Art. 7).	This draft Scoping Report is being consulted on with the statutory consultees of the Environment Agency, Natural England and Historic England. The report is also available for neighbouring authorities and other consultees.
Taking the environmental report and the results of the consultations into account in decision-making (Art. 8)	Detailed reports on the results of plan consultations, issues raised, and the changes arising will be provided.

SEA Directive Requirement	Where covered
Provision of information on the decision: When the plan or programme is adopted, the public and any countries consulted under Art. 7 must be informed and the following must be made available to those so informed: · The plan or programme as adopted · A statement summarising how environmental considerations have been integrated into the plan or programme and how the environmental report of Article 5, the opinions expressed pursuant to Article 6 and the results of consultations entered into pursuant to Art. 7 have been taken into account in-accordance with Art. 8, and the reasons for choosing the plan or programme as adopted, in the light of the other reasonable alternatives dealt with; and · The measures decided concerning monitoring (Art. 9)	This task cannot be completed at this stage.
Monitoring of the significant environmental effects of the plan's or programme's implementation (Art. 10)	This task cannot be completed at this stage.
Quality Assurance: environmental reports should be of a sufficient standard to meet the requirements of the SEA Directive.	This self-assessment satisfies this requirement.

Appendix 2: Relevant plans, policies & programmes

International

Relevant Plans/Guidance	Implications for Strategic Plan	Implications for SA
EU Directive 2001/42/EC (the SEA Directive)	A high level of environmental protection; To promote sustainable development by integrating environmental considerations into plan preparation and adoption; sets out detailed requirements of environmental assessment required for plans	The Directive has been translated into UK law and plan-making requirements and requires that a SA (incorporating SEA) is undertaken for all development plan documents.
EU Ambient Air Quality Directive (2008/50/EC) & Directive 2004/107/EC	Limits & targets for pollutants in outdoor air set by the Air Quality (standards) Regulations 2010.	The SA framework must minimise the adverse environmental, social and economic effects of air pollution through specific objectives.
EU Water Framework Directive (2000/60/EC)	It provides an opportunity to plan and deliver a better water environment, focusing on ecology. It provides an opportunity to plan and deliver a better water environment through river basin management planning.	The Directive highlights the need to protect ground and surface water from incidental, as well as accidental pollution.
EU Nitrates Directive	Aims to protect water quality across Europe by: □ preventing nitrates from agricultural sources polluting ground and surface waters; and □ promoting the use of good farming practices. The Directive states that Nitrate Vulnerable Zones must be designated where nitrate pollution is found or appears likely, and an Action Plan produced to ensure that these areas are protected.	Water pollution needs to be addressed through the SA Framework.
EU Directive (revised) on Bathing Water (2006/7/EC)	The overall objective is the protection of public health, but it also offers an opportunity to improve management practices at bathing waters.	Water pollution needs to be addressed through the SA Framework.
Drinking Water Directive (revision of technical annexes – II & III, (Oct 2015)	The amendments will provide an opportunity to monitor drinking water parameters at more appropriate frequencies. The new Annex II provides an option to perform the drinking water monitoring in around 100,000 water supply zones in Europe in a more flexible way, provided a risk assessment is performed ensuring full protection of public health. It follows the principle of 'hazard analysis and critical control point' (HACCP) used already in food legislation, and the water safety plan approach laid down in the WHO Guidelines for Drinking Water Quality. These amendments will allow a better and more problem-oriented monitoring of small water supplies.	SA Framework should consider water quality implications.
EU Directive on the Conservation of Wild Birds (Birds Directive – 2009/147/EC)	To protect all naturally occurring wild bird species and their habitats with particular protection of rare species.	SA Framework should consider objectives to protect and enhance biodiversity including wild birds.

EU Waste Framework Directive (2008/98/EC)	Sets the basic concepts and definitions related to waste management, such as definitions of waste, recycling, recovery.	The Framework requirements should be incorporated into the Sustainability Appraisal.
EU Directive on Landfill (1999/31/EC)	Focuses on waste minimisation and increasing levels of recycling and recovery.	Ensure the implications of this directive are met through the SA.
EU Environmental Noise Directive (2002/49/EC)	Concerns noise from the road, rail and air traffic and from industry; sets standards for noise emissions from specific sources.	Noise pollution needs to be addressed through the SA Framework.
EU Floods Directive (2007/60/EC)	Aims to reduce and manage risks that floods pose to human health, environment, cultural heritage & economic activity; requires assessment of all water courses for flood risk, map flood extent and assets & people at risk, and take adequate and co-ordinated measures to reduce flood risk.	The SA Framework will include objectives to ensure that flood risk/climate change has been taken account of.
EU Renewable Energy Directive (2009/28/EC)	Encourages energy efficiency consumption from renewable sources and improvement of energy supplies; places requirement on UK to source 15% energy needs from renewable sources by 2020.	The SA must contain an objective to promote renewable energy whenever this is possible.
EU Directive on Energy Performance of Buildings (2010)	The main objective of the Directive is to promote the improvement of the energy performance of buildings within the community, taking into account outdoor climatic and local conditions, as well as indoor climate requirements and cost effectiveness.	Energy matters need to be addressed through the SA Framework.
EU 7th Environment Action Programme (Jan 2014)	Will be guiding European environment policy until 2020 and sets out a vision beyond that to 2050. It identifies three key objectives: • to protect, conserve and enhance the Union's natural capital • to turn the Union into a resource-efficient, green, and competitive low-carbon economy • to safeguard the Union's citizens from environment-related pressures and risks to health and wellbeing	Priorities for Sustainable Development and priority areas for action are set out in the Environmental Action Plan.
Ramsar Convention on Wetland of International Importance (1971)	Wetlands of international importance are designated as Ramsar Sites. Ramsar sites in England are protected as European sites. The majority are also classified as SPAs and all terrestrial Ramsar sites in England are notified as SSSIs.	Consider inclusion of objectives which aim to promote conservation and wise use of wetland areas.

National

Relevant Plans/Guidance	Implications for Strategic Plan	Implications for SA
Air Quality Strategy for England, Scotland, Wales and Northern Ireland – Vol 2 (DEFRA, 2011)	The Air Quality Strategy points to certain pollutants where national objectives are in some cases being met, and others not. Pollutants described include: lead, benzene, 1,3-butadiene, carbon monoxide, particulate matter, nitrogen dioxide, ozone, sulphur dioxide and polycyclic aromatic hydrocarbons. Levels for many of these emissions are closely related to transport use, which planning	Potential impacts on air quality, noise and light pollution and congestion.

	policies will need to consider means to reduce those reaching unacceptable levels.	
Air Quality (Standards) Regulations 2010.	It sets air quality standards for key pollutants and requires the UK to demonstrate how the standards will be achieved and maintained when compliance is breached. Particular attention is given to reducing particulate matter, a pollutant associated with transport emissions, exposure to which can exacerbate existing respiratory conditions.	Consider sustainability objectives to reduce pollution and protect and improve air quality.
The Groundwater (Water Framework Directive) (England) Direction 2016	This document sets out instructions on obligations to protect groundwater (water found below the surface). It updates requirements including: the monitoring and setting of thresholds for pollutants in groundwater; adding new pollutants to the list of pollutants to be monitored and changing the information to be reported to the European Commission.	The SA framework will include relevant objectives for water environment.
Natural Environment and Rural Communities Act 2006	The act places a duty on public authorities to have regard to biodiversity as far as is consistent with the proper exercise of their functions. The act also requires the government to publish, review and revise lists of living organisms and types of habitats in England that are of principal importance for the purpose of conserving biodiversity.	Ensure the implications of this Act are met through the SA.
Countryside and Rights of Way Act 2000	Places a duty on relevant authorities in exercising their functions, to have regard to the effect on land in an AONB, and to have regard to the purpose of conserving and enhancing the natural beauty of the AONB.	SA objectives should seek to protect areas of landscape and wildlife importance.
Wildlife and Countryside Act 1981	The act sets in place protective measures for wildlife, including wild birds and plants. The act requires local authorities to take steps to bring the protection of wildlife to the attention of the public and schoolchildren. The act (though subsequently amended) allows designation of Sites of Scientific Interest (SSSIs) setting their management and protection measures, and also allows the designation of national nature reserves.	The implications of this Act have to be met through the SA.
Climate Change Act 2008	Act aims to improve carbon management and help the transition towards a low carbon economy. It sets out legally binding targets for green house gas emission reductions through action in the UK and abroad of at least 80% by 2050.	Take full account of the requirement to ensure greenhouse gases are reduced or minimised and that energy use comes increasingly from renewable sources.
Conservation of Habitats and Species Regulations 2010 (and Amendment 2012)	The regulations require land use plans that are likely to have a significant effect on a European site to make an appropriate assessment of the implications for the site in view of the site's conservation objectives. The local authority may only give effect to the land use plan after having ascertained that it will not adversely affect the integrity of the European site.	Relevant habitats need to be identified in the Sustainability Appraisal and appropriate assessment is required to ensure the protection of species and habitats.
UK Post-2010 Biodiversity Framework. (DEFRA, 2012)	A framework of priorities for UK-level work for the Convention on Biological Diversity covers the period from 2011 to 2020.	An objective protecting biodiversity should be included in the SA framework.
England Biodiversity Strategy – Climate Change Adaptation Principles (DEFRA, 2008)	The principles include conserving existing biodiversity, conserving protected areas and all other high quality habitats, conserving the range and ecological variability of habitats and species, maintaining existing ecological	SA framework will include an objective relating to biodiversity and consider impacts on biodiversity in

	networks, creating buffer zones and high quality habitats, understand change is inevitable, make space for the natural development of rivers and coasts and raise awareness of the benefits of the natural environment to society.	accordance with existing guidance.
DCLG: Waste Priorities (2014)	Objectives of government waste policy include: preparation of planning strategies by local authorities in which communities take more responsibility for their own waste; handling waste safely, without endangering human health and without harming the environment, and disposing of waste on one of the nearest appropriate places; assessing the suitability of waste sites, including the physical and environmental constraints on development and the cumulative effect of previous waste disposal facilities on the well-being of the local community.	Include the relevant objectives within the SA framework.
DCLG: National Planning Policy for Waste (2014)	Sets out detailed waste planning policies for local authorities. The policy stresses the importance of close co-operation between waste planning authorities, encourages the use of heat as an energy source where energy from waste development is being considered.	The SA framework should consider objectives which relate to re-use, recycle and reduce.
Safeguarding Our Soils: A Strategy for England (DEFRA, 2009)	Soils perform valuable functions including nutrient cycling, water regulation, carbon storage, support for biodiversity and wildlife, and providing a platform for food and fibre production and infrastructure. Planning decisions must take sufficient account of soil quality, particularly when significant areas of the best and most versatile agricultural land are involved. The document also considers the need for local authority officers to make proportionate and robust decisions regarding the remediation of contaminated land.	The SA Framework should include an objective or guide relating to the effects of policies/proposals on soils.
National Character Areas (Natural England)	National Character Areas (NCAs) divide England into 159 distinct natural areas. Each is defined by a unique combination of landscape, biodiversity, geodiversity and cultural and economic activity. Their boundaries follow natural lines in the landscape rather than administrative boundaries, making them a good decision making framework for the natural environment.	The SA will need to address landscape, geodiversity & economy considerations contained in the guide.
UK Renewable Energy Roadmap (DECC, 2013)	The UK has made very good progress against the 15% target introduced in the 2009 EU Renewable Energy Directive. This, alongside a healthy set of deployment pipelines, demonstrates the progress that is being made to decarbonise the economy and secure future electricity supply.	The Roadmap establishes a process of monitoring and evaluation that will enable the SA to be adjusted when appropriate.
Planning Practice Guidance – Renewable and Low Carbon Energy (DCLG, March 2014)	The guidance assists local councils in developing policies for renewable energy in their local plans, and identifies the planning considerations for a range of renewable sources such as hydropower, active solar technology, solar farms and wind turbines.	The SA framework will include objectives to ensure that renewable energy has been taken account of.

National Heritage Protection Plan (English Heritage, 2012)	The plan seeks to ensure that England's historic environment is not needlessly at risk of damage, erosion or loss; is experienced, understood and enjoyed by local communities; contributes to sustainable and distinctive places to live and work; and helps deliver positive and sustainable economic growth.	The SA framework will include an objective relating to the historic environment and will consider impacts on this in accordance with existing guidance.
The Historic Environment in Local Plans (Historic England, July 2015)	Provides information on good practice to assist local authorities, planning and other consultants, owners, applicants and other interested parties in implementing historic environment policy in the National Planning Policy Framework (NPPF) and the related guidance given in the National Planning Practice Guide (PPG).	The SA/SEA should investigate if and how the historic environment can add social, economic and environmental value to people and communities.
Rural Statement (DEFRA,2012)	Rural areas are home to one-fifth of the English population, and 28% of England's businesses. The key priorities include wanting rural businesses to make a sustainable contribution to national growth; engaging directly with rural communities; wanting rural people to have fair access to public services and be actively engaged in shaping the places in which they live.	Include the relevant priorities within the SA framework.
Planning Practice Guidance – Rural Housing (DCLG, May 2016 update)	It is important to recognise the particular issues facing rural areas in terms of housing supply and affordability, and the role of housing in supporting the broader sustainability of villages and smaller settlements. Rural housing is essential to ensure viable use of local facilities.	Include the relevant objectives within the SA framework.
Planning Practice Guidance – Housing & Economic Development needs assessment (DCLG, 2014)	Provides a guide for councils on how to assess housing and economic development needs.	The guidance will help to inform the SA.
Planning policy for traveller sites (DCLG, August 2015)	Overarching aim is to ensure fair and equal treatment for travellers, in a way that facilitates the traditional and nomadic way of life of travellers while respecting the interests of the settled community. There should be due regard to the protection of local amenity and local environment.	The aims of the document should be considered in policy making, which would help achieve the SA/SEA objectives
Lifetime neighbourhoods (DCLG, Dec 2011)	Guidance on the design of neighbourhoods to make them inclusive regardless of age or disability. The components that make up lifetime neighbourhoods include good access (enabling residents to get out and about in the area they live), services and amenities (neighbourhoods with a mix of residential, retail and employment uses and access to services including health, post office, banking facilities or cash machines).	The SA framework will need to formulate objectives that address the built environment and design of neighbourhoods.
Technical housing standards – nationally described space standard (DCLG, March 2015, & amends May 2016)	The nationally described space standard replaced the previous different space standards used by local authorities. It is not a building regulation and remains solely within the planning system as a new form of technical planning standard.	The standard highlights the need to consider levels of space for new development.
Department for Transport Priorities (2014)	DfT priorities include: continuing to develop the preparations for a high speed rail network; improving existing rail network and creating new capacity; tackling congestion on roads; continuing to improve road safety; encouraging sustainable local transport; promoting lower carbon transport, such as walking and cycling.	The SA framework will need to formulate objectives that address a number of the transport priorities, including encouraging sustainable local transport and

		promoting lower carbon transport.
Door to Door: A strategy for improving sustainable transport integration (DfT, 2013)	The government wants more journeys to be made by public transport, cycling and walking. The vision is for an inclusive, integrated and innovative transport system where the use of sustainable transport is made more attractive for the entire door-to-door journey.	The SA framework will need to formulate objectives that address requirements for sustainable transport and related actions.
Creating Growth, Cutting Carbon: making sustainable local transport happen (White paper, DfT, 2011)	Contains a vision for a transport system that is an engine for economic growth, but is also greener and safer and improves quality of life. It notes that investment on its own is not enough, as people will need to make transport choices that are good for society as a whole. The report highlighted key areas which needed to be addressed to encourage more people to use sustainable travel options including: making connections between different steps in the journey, and different modes of transport, easier; and providing better interchange facilities.	The SA framework will need to formulate objectives that address key areas, including encouraging sustainable travel options and promoting lower carbon transport.
Fixing the foundations: Creating a more prosperous nation (HM Treasury, July 2015)	Sets out a 15-point plan to boost the UK's productivity growth around two key pillars: encouraging long-term investment, and promoting a dynamic economy. There is a focus on building more homes that people can afford to buy and a zonal system for brown field land.	The plan will help to inform the SA.
National Infrastructure Delivery Plan 2016 to 2021 (HM Treasury, Infrastructure & Projects Authority, March 2016)	The Plan brings together the government's plans for economic infrastructure with those to support delivery of housing and social infrastructure. Investment will lead to economic benefits of supporting growth and creating jobs and raising the productive capacity of the economy.[1]	The delivery plan will help to inform the SA.
Gas Generation Strategy (DECC, 2012)	The government expects gas will continue to play a major role in our electricity mix over the coming decades, alongside low-carbon technologies. Measures outlined in the plan are designed to ensure that: adequate gas generation capacity is available, including ensuring we maintain an appropriate capacity margin to maintain security of electricity supply; flexible plant is available to meet the intermittency associated with renewable sources.	The Strategy highlights the need to ensure gas and other energy supplies are properly planned for.
Localism Act 2011	The aim is to devolve more decision making powers from central government to local communities. The act contains more rights for communities, including the community right to bid for assets of community value, community right to build, and neighbourhood planning.	Duty to co-operate in relation to planning of sustainable development.
National Planning Policy Framework (DCLG, 2012)	Core planning principles include: Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth.	Ensure the priorities are the backbone of the SA: sustainable consumption and production, climate change and energy, protection of natural resources and sustainable communities.

Local

Relevant Plans/Guidance	Implications for Strategic Plan	Implications for SA
Water Resources Strategy Regional Action Plan for the South West (Environment Agency 2009)	The action plan shows how the South West region will meet the challenges posed by pressures on water resources over a 50 year period. Actions include ensuring the water supply and demand is resilient to the effects of climate change, reducing carbon emissions associated with the supply of water, managing catchments better to protect water resources, enhancing biodiversity, reducing flood risk and improving the water efficiency of new housing and commercial developments.	The action plan highlights the need to manage supply of water and catchments and protect water resources.
South West River Basin Management Plan (Environment Agency, 2009)	Priorities for local government include ensuring that local planning documents take into account the objectives of the SWRBMP.	The management plan emphasizes the importance of mitigation for development that affects water bodies.
Shoreline Management Plan (South Devon and Dorset Coastal Advisory Group, Dec 2010)	The document is an assessment of shoreline and estuary processes. It outlines the approach to managing coastal change in the area. The objectives of SMPs are to: • Improve our understanding of coastal processes. • Work in partnership with all interested organisations and the public. • Prepare a setting for the long term planning of coastal defences. • Set out a plan over a 50 year timescale.	The SA framework should consider impacts on coastal resources in the plan area.
Managing Flood and Coastal Erosion Risk for the Exe Estuary – Final Strategy (Environment Agency, May 2014)	The Strategy has reviewed the policies that are set out in the South Devon and Dorset Shoreline Management Plan (SMP) and covers a 100 year period. Key components are: -maintaining, improving and constructing new coastal defence schemes; -providing flood warning systems; -working with local authority planners to restrict development in flood risk areas; -encouraging the use of flood resilience measures for existing properties in flood risk areas.	The SA framework should consider impacts on coastal resources in the plan area, and consider objectives to ensure flood risk has been taken account of.
The Nature of Devon – A Biodiversity and Geodiversity Action Plan (DCC, 2009)	Objectives of the action plan include ensuring that planning policies recognise the importance of biodiversity and the geological features of Devon, to ensure consideration is given to nature conservation issues in the implementation of planning.	SA framework should ensure, as far as possible, biodiversity is supported and protected.
Devon Landscape Character Assessment (Devon Landscape Policy Group)	Devon's landscape character assessment describes the variations in character between different areas and types of landscape in the county. It provides an evidence base for local development frameworks and plans, articulating what people perceive as distinctive and special about all landscapes in Devon. It also set out strategies and guidelines for the protection, management and planning of the landscape.	SA framework should consider the impact on landscape.
Devon Landscape Policy Group Advice Note 2: Guidance on the siting, design & assessment of	Balancing the need to support the transition to a low carbon future and the need for energy security with the management of Devon's unique and valued landscape is a key challenge. The	The advice note highlights the need to harness renewable energy

wind & solar PV developments in Devon. (DCC, June 2013)	landscape is also a major contributor to a strong tourism industry. The conservation of special landscape character is a core principle of the NPPF. Devon has good conditions to produce wind and solar electricity, but it is important that the characteristics of Devon's landscape are not unacceptably harmed by poor design or inappropriate siting of renewable or low carbon technologies.	development opportunities in landscape context.
Historic Seascape Characterisation South West Peninsula (English Heritage, Jan 2014)	The report allows an understanding of historic trends and processes to inform and frame the broader sustainable management of change through marine spatial planning, outreach and research projects. It is one of three projects commissioned to complete strategic-level HSC coverage of England's coasts.	SA framework should consider the impact on marine environment.
Heritage at Risk 2015 / South West (Historic England)	The Register provides an annual snapshot of historic sites known to be at risk from neglect, decay or inappropriate development. It records relevant listed buildings, places of worship, scheduled monuments, industrial sites, conservation areas, parks and gardens, protected wrecks and battlefields.	The SA should contain an objective for and consideration of the protection and enhancement of the historic environment.
Devon Minerals Plan (Incorporating Potential Main & Additional Modifications – Third Draft, DCC, April 2016)	The plan contains the Council's vision and objectives for minerals planning and policy framework and site proposals to maintain the supply of minerals and limit the impacts of their working.	The SA framework should consider recognised mineral areas and if possible avoid development of these areas.
Devon Waste Plan (DCC, Dec 2014)	There are six Objectives that identify how sustainable waste management will be achieved, including targets for recycling and energy recovery and measures for the provision of waste management capacity, addressing climate change, supporting communities and businesses, conserving and enhancing Devon's environment, and the transportation of waste.	SA framework should assess whether the Plan helps to minimise waste.
Devon Sustainable Community Strategy 2008 – 2018)	The Devon SCS identifies 7 key priorities for the County: Economy, Environment, Health and Wellbeing, Homes and Housing, A Safer Devon ,Strong and Inclusive Communities & Inspiring Young People.	SA framework should ensure the strategy objectives related to land-use planning are considered.
Devon Education Infrastructure Plan (2016 – 2033) (DCC)	The key aims of the plan are to provide: • schools with a clear understanding of how decisions are reached about pupil planning, estate maintenance processes and capital investment; • Local Planning Authorities and housing developers with an understanding of their role in supporting the future pattern of education provision; • the wider community with an understanding of how education provision will be delivered to support the development of Devon over the next 20 years;	SA should consider educational needs and identify any potential deficiencies.
Devon Partnership Gypsy and Traveller Accommodation Assessment Report 2015 (Devon Partnership of local & national park authorities)	The purpose of the assessment is to quantify the accommodation and housing related support needs of Gypsies and Travellers (including Travelling Showpeople) in terms of residential and transit/emergency sites, and bricks and mortar accommodation for the period 2014/15-2034/35.	The assessment will help to inform the SA.

Heart of the South West Local Enterprise Partnership (LEP) Business Plan	Objectives include promoting infrastructure to connect markets. Priorities include addressing existing and future constraints on business growth (emphasising the need for ongoing public and private investment to improve connections into and within the area where current connectivity is impacting on productivity and competitiveness), encouraging the roll out of future electronic communication technologies for the region, encourage a joined up approach to future housing development to secure economic prosperity (including social infrastructure and appropriate affordable housing), ensure an integrated approach to economic development recognising the constraints the planning system can place on business growth, particularly affecting rural businesses.	The business plan will help to inform the SA.
Heart of the South West LEP Strategic Economic Plan 2014 – 2030	This approach has been translated into three core aims. Creating the conditions for growth by Infrastructure and services to underpin growth (transport infrastructure, broadband and mobile connectivity, skills infrastructure), Maximising Productivity and Employment by stimulating jobs and growth across the whole economy to benefit all sectors (including tourism, agriculture and food and drink) and Capitalising on our Distinctive Assets.	SA framework should reflect the main land-use planning related measures of the strategic economic plan.
Local Transport Plan 3, Devon & Torbay Strategy 2011 – 2026 (DCC, 2011) and Implementation Plan (DCC, 2011)	The plan has five key objectives: • Deliver and support new development and economic growth • Make best use of the transport network and protect the existing transport asset by prioritising maintenance • Work with communities to provide safe, sustainable and low carbon transport choices Strengthen and improve the public transport network • Make Devon the 'place to be naturally active'	SA should assess how the transport plan helps to deliver travel, transport and movement objectives.
State of Environment report (Devon Local Nature Partnership, up-dated March 2016)	The report considers trends which point to the future condition of the environment, as well as identifying current and likely future pressures that need to be considered in decision making. Such issues as Accessibility and Recreation, Land Use, Water Environment & Geology and Soil are covered.	The environment report will help to inform the SA.
Plymouth & South West Devon Joint Local Plan (pre-draft status July 2016)	The Joint Local Plan will set out where potential development could take place and how the area will change through to 2034. It is based on the Plymouth Housing Market Area, which includes all of Plymouth, South Hams and West Devon (excluding those parts of South Hams and West Devon within the Dartmoor National Park). There is an overall housing requirement of 30,300 homes between 2014 and 2034, being distributed across the city, towns and villages. This assumes 21,000 homes being developed in and around the city; 8,700 homes being in the towns and villages.	The joint local plan will help to inform the SA.
SWW Water Resources Management Plan 2015 – 2040 (South West Water, June 2014)	The Plan presents supply demand projections to 2039/40 which have been completed in accordance with Environment Agency guidelines. The supply appraisal includes a full assessment of Water Available For Use (WAFU) in each of the three Water Resource Zones (WRZs).	The SA framework will consider relevant objectives for water resources/ environment.

Devon Energy Policy and Action Plan (DCC, Oct 2015)	Sets out responsible energy management through continuous improvement of energy performance in order to avoid unnecessary expenditure, reduce carbon emissions and protect the environment. Commits DCC to reduce its energy consumption from corporate buildings, street lighting and transport by at least 2% per year to achieve a 30% reduction from 2012/13 levels by 2030, together with providing 30% of remaining energy consumption from renewable sources by the same date. The total package will reduce carbon emissions by about 50%.	The SA framework will include objectives to ensure that renewable energy has been taken account of.
Devon Green Infrastructure Strategy (DCC, 2012)	Nine guiding principles promote a joined-up approach to planning and delivery of green infrastructure across local authority boundaries as part of sustainable development delivery.	The SA framework will consider relevant objectives for biodiversity and green infrastructure.
Devon Local Flood Risk Management Strategy – 2014-2020 (DCC, June 2014)	It should act as a first point of call to provide guidance on any flood risk management issues in Devon and sets out principles that will balance the needs of communities, the economy and the environment through partnership working, with effective and sustainable risk management and prioritisation.	The SA framework will consider objectives to ensure flood risk has been taken fully into account.
Western Power Distribution Business Plan (R110-ED1) 2015-2023. (April 2014)	WPD is a Distribution Network Operator (DNO) and distributes electricity to 7.8 million customers across the Midlands, South Wales and the South West. The greatest challenge to be faced is adaptation of networks and business processes to the demand for a low carbon environment. The plan has used a 'best view' of the scale of low carbon technology and its impact on the network as informed by independent analysis. Alternative scenarios have been modelled to provide a range of potential outcomes.	The WPD business plan will help to inform the SA.
4th Devon Local Aggregate Assessment 2005 – 2014. (DCC, Feb 2016)	Devon's diverse geology results in a wide range of land-won aggregate resources being available. The LAA is required to: -forecast the demand for aggregates based on average 10 year sales data and other relevant local information, -analyse all aggregate supply options and, -assess the balance between demand & supply.	The Devon Assessment will help to inform the SA.
Devon Rural Housing Enabler Business Plan 2014 -2018 (Devon RHE Team, April 2015)	The main aims are to: -Continue to support delivery of affordable rural housing through partnership working, -Support partners in responding to changing external environment and developing new and innovative methods of delivering affordable rural housing, -Continue to evidence the need and make the case for affordable rural housing, -Build a long-term sustainable RHE programme along socially enterprising lines.	SA should ensure affordable rural housing aims are taken into account.
Teignbridge Council Strategy 2016 – 2025	The strategy's key objectives are: more affordable housing, reducing carbon emissions, job creation, sustainable travel options, community-led planning, encouraging young people to stay & keeping the district clean, green and safe.	SA framework should be broadly compatible with the corporate objectives.
Teignbridge Local Plan 2013 – 2033	The plan sets out to: increase the self-sufficiency of the district as a whole and the settlements within it; focus the majority of housing, employment and other development at the Heart of Teignbridge (the	SA/SEA of the Local Plan has been carried out.

	settlements of Kingskerswell, Kingsteignton and Newton Abbot)	
Teignbridge Community Infrastructure Levy – Charging Schedule (July 2014) & Regulation 123 List (Feb 2016)	TDC is the Charging Authority for the Teignbridge Local Plan Area. (i.e. excluding the Dartmoor National Park area of Teignbridge) The CIL raised will be spent within communities on improving and providing new infrastructure services, including roads, education, recreation, public transport etc. The latest Regulation 123 List has sixteen groups of project, including priority for Suitable Alternative Natural Green Space provision at Dawlish and SW Exeter.	SA may consider the economic, social and environmental benefits or costs resulting from the CIL.
Teignbridge Housing Strategy 2015 – 2020	The strategy is divided into the following themes: a place to live, access to services, healthy lives & money matters. It includes the following aims: - to maximise the delivery of affordable housing according to need - to make sure that local housing is in a good state of repair - to make best use of existing stock.	SA framework should ensure that all relevant housing strategy objectives are considered.
Exminster Neighbourhood Development Plan (March 2015)	ENDP seeks to maximise the benefit to the whole neighbourhood area from the proposed Matford settlement development in terms of provision of accessible community, sports and leisure facilities. Maintaining the visual landscape quality and contribution of the rural setting of Exminster village by enhancing and protecting the quality and contribution of surrounding green space & maintaining a natural buffer zone between Exminster village and the settlement at Matford is a key objective.	The SA may consider how community aspirations have translated into the Strategic Plan.
Newton Abbot Neighbourhood Development Plan (June 2016)	NANDP states that the future of the town should be founded on the principles of creativity, accessibility and sustainability; seeking to ensure the highest possible standards in all forms of development. The plan seeks to promote a strong sense of community within and across the town. In particular, by supporting the health and well-being of its residents through the provision of improved sports, community and recreation facilities.	The SA may consider how community aspirations have translated into the Strategic Plan.
East Devon Council Plan 2016 - 2020	The plan's identified priorities are for encouraging communities to be outstanding, developing an outstanding local economy and delivering and promoting an outstanding environment.	SA framework should be broadly compatible with the corporate priorities.
East Devon Local Plan 2013- 2031	A vision for East Devon to: play its part in boosting the economy of the Exeter sub-region by encouraging significant growth within the West End of the district, provide for more balanced communities where homes and jobs are in better alignment by for example providing major employment, housing and community facilities in Exmouth.	SA/SEA of the Local Plan has been carried out.
East Devon Community Infrastructure Levy – Charging Schedule (April 2016) & Regulation 123 List (April 2016)	East Devon DC is the Charging Authority for the East Devon Local Plan Area. The CIL raised will be spent within communities on improving and providing new infrastructure services, including roads, education, recreation, public transport etc. The latest Regulation 123 List has thirteen projects or infrastructure, including Exmouth Regeneration Area Projects, Exe Estuary Mitigation and Clyst Valley Regional Park.	SA may consider the economic, social and environmental benefits or costs resulting from the CIL.

East Devon AONB Management Strategy 2014 – 2019.	The primary purpose of AONB status is to conserve and enhance natural beauty. The strategy has key purposes to: present an integrated vision for the future of the AONB, highlight its special qualities, set out key objectives and policies with key priorities to help secure these qualities.	SA framework should consider the impact on landscape and related objectives identified in the management strategy.
Cranbrook Plan DPD (Draft version)	Cranbrook is a new community in East Devon close to the city of Exeter. The DPD will help shape and direct future development. An Issues and Options Report was published in June 2016 for consultation purposes.	An SA of the document is being carried out.
Lympstone Neighbourhood Plan (April 2015)	LNP seeks to encourage and support: responsible development along with enhanced provision of amenities, activities and facilities; accessibility for all – maintain and improve transport, affordable housing and infrastructure; retention of rural identity and independence from Exmouth with no steps towards coalescence, amongst others.	The SA may consider how community aspirations have translated into the Strategic Plan.
Exeter Core Strategy DPD (Feb 2012)	The plan vision contains an aim of providing houses, jobs and supporting infrastructure through maximising the use of previously developed land within the city, and through sustainable urban extensions to the east, at Newcourt and Monkerton/Hill Barton, and to the south west at Alphington. In delivering growth Exeter will build on its strengths and assets by safeguarding the hills to the north and north west, protecting the historic environment and enhancing green infrastructure.	SA of the Local Plan has been carried out.
Exeter Community Infrastructure Levy – Charging Schedule (Oct 2013) & Regulation 123 List (Oct 2013)	Exeter City Council is the Charging Authority for the Exeter Development Plan Area. The levy is expected to raise around £25m in the period to 2026 which can be used to fund a wide range of projects so long as they support development growth. The Regulation 123 List identified infrastructure considered likely to benefit from the application of CIL funding for twenty projects. These included mitigation of recreational impact on European designated habitats, off site broadband infrastructure and sporting facilities, excluding multi use games areas.	SA may consider the economic, social and environmental benefits or costs resulting from the CIL.
Exeter Housing Strategy 2016 – 2020 (April 2016)	The housing strategy aims to respond to some of the complexities and realities of the housing crisis by addressing housing need and vulnerability, providing more housing and being a good landlord.	SA framework should ensure that all relevant housing strategy objectives are considered.
St James Neighbourhood Plan (July 2013)	SJNP identifies the following aims: define a local hub for St James, restrict HMO development and rebalance the community, encourage those types of development that meet the needs of the community, manage the impacts of traffic and encourage sustainable transport, improve the natural and built environment of the ward and support and maintain community facilities and services within the ward.	The SA may consider how community aspirations have translated into the Strategic Plan.
Mid Devon Corporate Plan 2016 to 2020 (March 2016)	The plan has 4 main priorities for the Economy, Homes, Community and Environment which will focus on amongst other things: bringing new businesses into the district, building more council houses, working with local communities to encourage them to support themselves and increasing recycling and reducing the amount of waste going to landfill.	SA framework should be broadly compatible with the corporate priorities.
Mid Devon Core Strategy 2026 (July 2007)	The market towns of Tiverton, Cullompton, Crediton and Bampton will be the main focuses of new	SA of the Core Strategy has been carried out.

	development, in scale with their individual infrastructures, economies, characters and constraints. A network of villages with sufficient employment, services and public transport provision will be locations for limited development.	
Mid Devon Local Plan Review – Proposed Submission (Feb 2015)	The document includes fourteen policies on development strategy, setting out the overarching principles that should guide development. The strategic site to the east of junction 28, Cullompton, has been identified as the strategic option for the direction of future housing and employment growth in Mid Devon. The revised plan period goes through to 2033.	SA/SEA of the Local Plan Review is being carried out.
Mid Devon Community Infrastructure Levy – Draft Charging Schedule (Feb 2015) & Draft Regulation 123 List (Feb 2015)	Mid Devon DC is the charging authority. The draft 123 list contains nine groups of project which includes education, early years, youth and children's centre facilities and home to school transport.	SA may consider the economic, social and environmental benefits or costs resulting from the CIL.
Blackdown Hills AONB Management Plan 2014 – 2019	The plan describes the special qualities of the area and why the AONB is important, sets out an agreed vision for its future, identifies the challenges and opportunities for the area, and how these will be tackled. It sets out the objectives and policies for managing the AONB that will work towards achieving the longer term vision. There are three main themes divided into several topics; Landscape - topics related to the primary purpose of conserving and enhancing natural beauty, Sustainable Development – topics related to the secondary purposes of recognising the economic and social needs of the local community, promoting sustainability and recreation and finally Communication and Management – the core functions of AONB management.	SA framework should consider the impact on landscape and related objectives identified in the management plan.
Mid Devon Draft Housing Strategy 2015 – 2020 (Sept 2015)	The strategy has the following priorities: - delivering affordable housing - making better use of existing housing stock - preventing homelessness - managing the impact of an aging population - reducing the impact of welfare reform It provides a framework and an evidence base for all the housing related activities of the Council and other partners.	SA framework should ensure that all relevant housing strategy objectives are considered.
Dartmoor National Park Management Plan 2014 – 2019 (Nov 2013)	Central to the plan is the overall Vision and Ambitions, setting out where Dartmoor wants to be in 2034. There are 3 themes of Sustain, Enjoy and Prosper and within each a number of priorities for the first five years.	SA framework should be broadly compatible with the management plan priorities.
Dartmoor Core Strategy DPD 2006 – 2026 (June 2008)	The core strategy sets a vision for the park, highlighting the distinctive characteristics and special qualities of Dartmoor and points to the role of planning in sustaining those qualities. The document sets a settlement strategy, focusing development in 8 Local Centres with development for local needs in thirty-four Rural Settlements.	SA of the Core Strategy has been carried out.
Dartmoor Affordable Housing SPD (May 2014)	It aims to make clear the authority's expectations and provide guidance to support the delivery of affordable housing, from identifying need through to	SA framework should ensure that all relevant

	viability and legal agreements. The SPD is split into six topic areas; these aim to address the process of developing affordable housing, from identifying need through to viability and legal agreements.	affordable housing objectives are considered.
Dartmoor Development Management & Delivery Plan (July 2013)	The plan sets out two main areas of planning policy: - subject related policies (e.g. housing, employment, tourism) to advise and manage development. - site specific policies to set the planning framework for particular areas and land use. Together with the Core Strategy its policies form the basis for decision making for development in Dartmoor National Park, to the period up to 2026.	Ensure the implications of this document are met through the SA.

Appendix 3: Baseline information

Supplementary Environment Baseline Data

Air Quality
There are a total of 8 AQMA's in Greater Exeter consisting of:

- Crediton, Exeter Road & High Street.
- Cullompton, Station Road, Higher Street & Fore Street
- Exeter, covers all main traffic routes in the city
- Honiton, Exeter A30/Exeter Road, A375 High Street
- Dawlish, Iddesleigh Terrace.
- Kingskerswell, A380
- Newton Abbot Town Centre & Kingsteignton (incl Newton Road, Gestridge Road)
- Teignmouth, Bitton Park Road

There are a total of 14 AQMA's in Devon, excluding Plymouth. The plan area therefore accounts for over half of these, though the plan area is home to a number of the larger urban areas in Devon.

The location of AQMA's shows that they are associated with vehicle emissions which cause levels of nitrogen dioxide to exceed the health based annual mean air quality objective for residential properties.

In Exeter, for example, there is a need to reduce traffic emissions generally and emissions of nitrogen dioxide specifically along the five main arterial routes into the city. However the majority of national air pollutant objectives are met in the wider urban area, where air quality is generally very good and concentrations of all pollutants measured are stable or decreasing.

Air quality in the county (as taken from Defra's air quality monitoring station in Devon) has improved since 1988. Instances of moderate and high air pollution are generally attributable to high levels of ground level ozone which is a trans-boundary pollutant affected by factors beyond the Greater Exeter area. Concentrations tend to be higher at the coast and high altitudes.

Advancements in vehicle efficiency and low emission engines are expected to contribute to future improvements although the emissions from new vehicles have not in practice fully delivered the predicted benefits. In addition, a reduction in air pollution even where levels are below the objectives will bring public health benefits. Air quality remains an important issue for some of the urban areas.

Sources: Exeter/East Devon/Mid Devon & Teignbridge Air Quality Action Plans; Number of days when air pollution is moderate or higher in the UK, 2010 to 2014 (detailed site data) – revised threshold (Defra, 2014); Exeter Air Quality Strategy 2015-2020 (ECC, 2015).

Green Infrastructure

Green Infrastructure (GI) refers to the network of natural and semi-natural features within and around our villages, towns and cities. These features range in scale, from street trees, green roofs and private gardens through to parks, rivers, transport corridors and woodlands. At the larger scale, wetlands, forests and agricultural land are all captured by the term GI. This network can provide a vast array of benefits that support the health and wellbeing of communities.

The Greater Exeter area exhibits a great wealth of natural green assets as measured by the diversity and value of wildlife, quality and character of the landscape. It also has a rich built and cultural heritage. The area's high quality natural environment is a major economic asset. It underpins the tourist economy and is a major factor in attracting and retaining employers. Prominent GI features in the area include the Exe and Teign Estuaries, the Haldon Hills and the Valley Parks of Exeter.

Green infrastructure is a holistic concept that interacts with many strands of the SA baseline data which follow, particularly sections on biodiversity, landscape and walking and cycling networks.

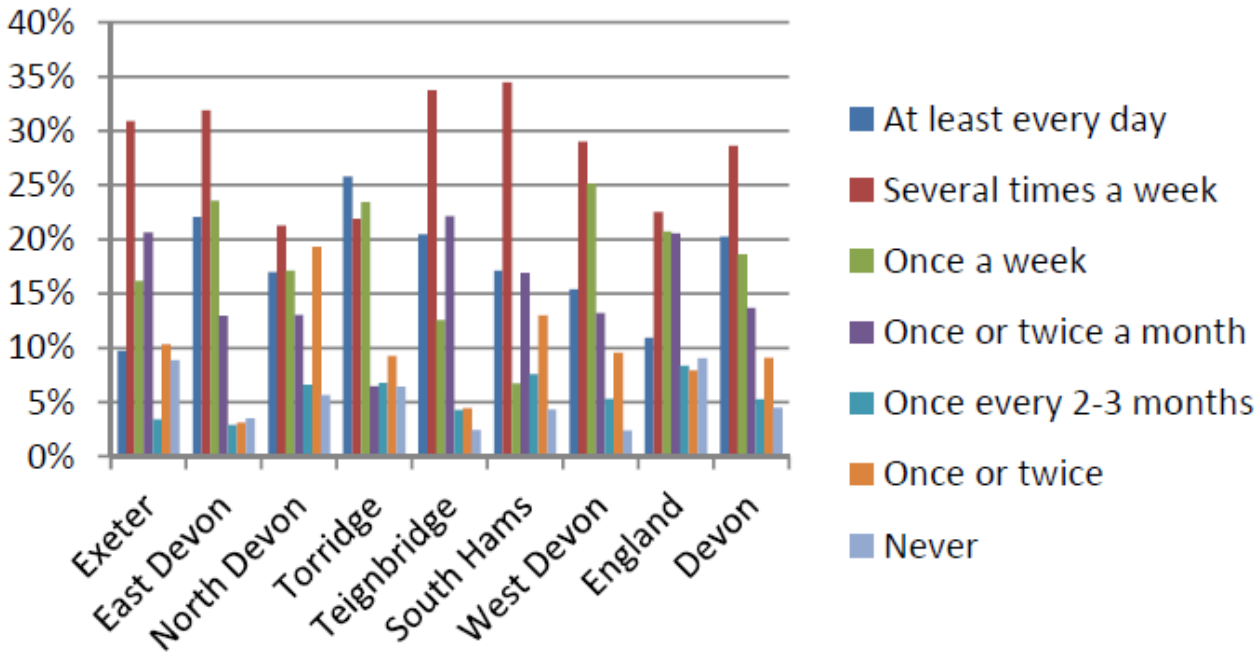

Figure 18: Frequency of visits to the natural environment by percentage of resident population. Data for Mid Devon is unavailable due to small sample size (Devon State of the Environment Report 2015)

This shows that over 30% of residents in Exeter, East Devon and Teignbridge visit the natural environment several times a week. Less than 5% of residents in East Devon and Teignbridge never visit the natural environment while this is nearer to 10% in Exeter.

Source: Devon State of the Environment Report (DNLP, 2016)

Landscape

Exeter is surrounded by undeveloped hills that form a distinctive green backdrop to the City. These 'Landscape Setting Areas', which are defined and protected within the City Council boundary through Local Plan designation, are mainly used for the

purposes of agriculture, recreation or forestry. The city is interspersed with green spaces and several designated Valley Parks. The River Exe runs roughly from north to south through the heart of the city and is accompanied by the Riverside Valley Park. Following the course of the River Exe, the relatively flat valley floor leads to the open expanse of the Exe Estuary landscape, which provides a transition between the boundaries of East Devon to the north-east and andTeignbridge to the south-west.

In East Devon, the landscape varies quite dramatically east to west, with the west end area and closer to Exeter being characterised by mainly unsettled farmed valley floors, gently undulating lowland plains and lower rolling farmed and settled slopes. Locally distinctive landscapes within this include some small wooded ridges and hilltops associated with the National Trust Killerton Estate, and a distinct area of Pebblebed Heaths in the centre of the District. The coast and countryside in the eastern side of the district by comparison includes cliffs, coastal slopes and combes, steep wooded scarp slopes and upper farmed and wooded slopes. The scenic and special qualities of the landscape here are protected through national and international designations including the East Devon and Dorset Coast World Heritage Site, the Blackdown Hills Area of Outstanding Natural Beauty (AONB) and the East Devon AONB. Such designations cover 66% of the district.

The landscapes within Teignbridge are varied and diverse with many distinct and recognisable areas. This includes the Haldon Ridge and Foothills with its steep wooded slopes, forested plateau and upper farmed and wooded valley slopes, the Teign Estuary with its surrounding coastal slopes and combes, and the Bovey Basin with its lowland plains and farmed valley floors much modified by past and current mineral and waste development. The central part of the district has more gentle landscape features comprising rolling farmland and settled valley floors and slopes. The wooded ridges and hilltops in the south-west of the area provide the setting for Dartmoor National Park, its mass rising on western skylines beyond the planning area of Teignbridge. Sections of coast are valued for their undeveloped character, including areas around the Exe Estuary, the Teign Estuary and between Dawlish and Teignmouth. The scenic quality and distinctive rural character of much of the eastern half of Teignbridge is locally valued and protected through local plan designation of Area of Great Landscape Value. Although once occurring throughout Devon, Teignbridge is the only District to retain this designation. In the other rural districts it was phased out in favour of landscape policies linked to landscape character assessments.

Unlike the other authorities within the Greater Exeter area, Mid Devon is landlocked with no coastal landscape. There are however a wide network of watercourses and distinct valley landscapes including the Exe, Culm and Yeo Valleys, with often sparsely settled farmed valley floors cocooned by river valley slopes and combes in upper reaches. Reference to the latest dark skies data published by CPRE indicates that many areas in the north and west of the district offer dark night skies, including the area in the far north that is within the setting of Exmoor National Park. These areas are deeply rural and tranquil with a strong sense of place. More gently undulating lowland plains occur in a wide belt stretching from the east of Tiverton, along the M5 corridor and east of Cullompton. Another distinct area of lowland plain stretches to the east and west of Crediton. Elsewhere, lower rolling farmed and

settled valley slopes, and upper farmed and wooded valley slopes are common in the area. Less frequently occurring landscape types include secluded valleys found in the central northern belt, wooded hilltops and ridges on the northern and southern fringes, steep wooded scarp slopes of the Blackdown Hills AONB in the far east of the District and larger patches of inland elevated undulating land dissected by sparsely settled farmed valley floors in the south- western corner. The latter provides the setting to Dartmoor National Park beyond.

Water Quality

The main reasons for poor groundwater chemical status are high or rising nitrate concentrations, with some failures for pesticides and other chemicals. Large parts of the Greater Exeter area have been designated as Nitrate Vulnerable Zones (NVZs). Within these areas, farmers are required to follow mandatory rules to tackle nitrate loss from agriculture.

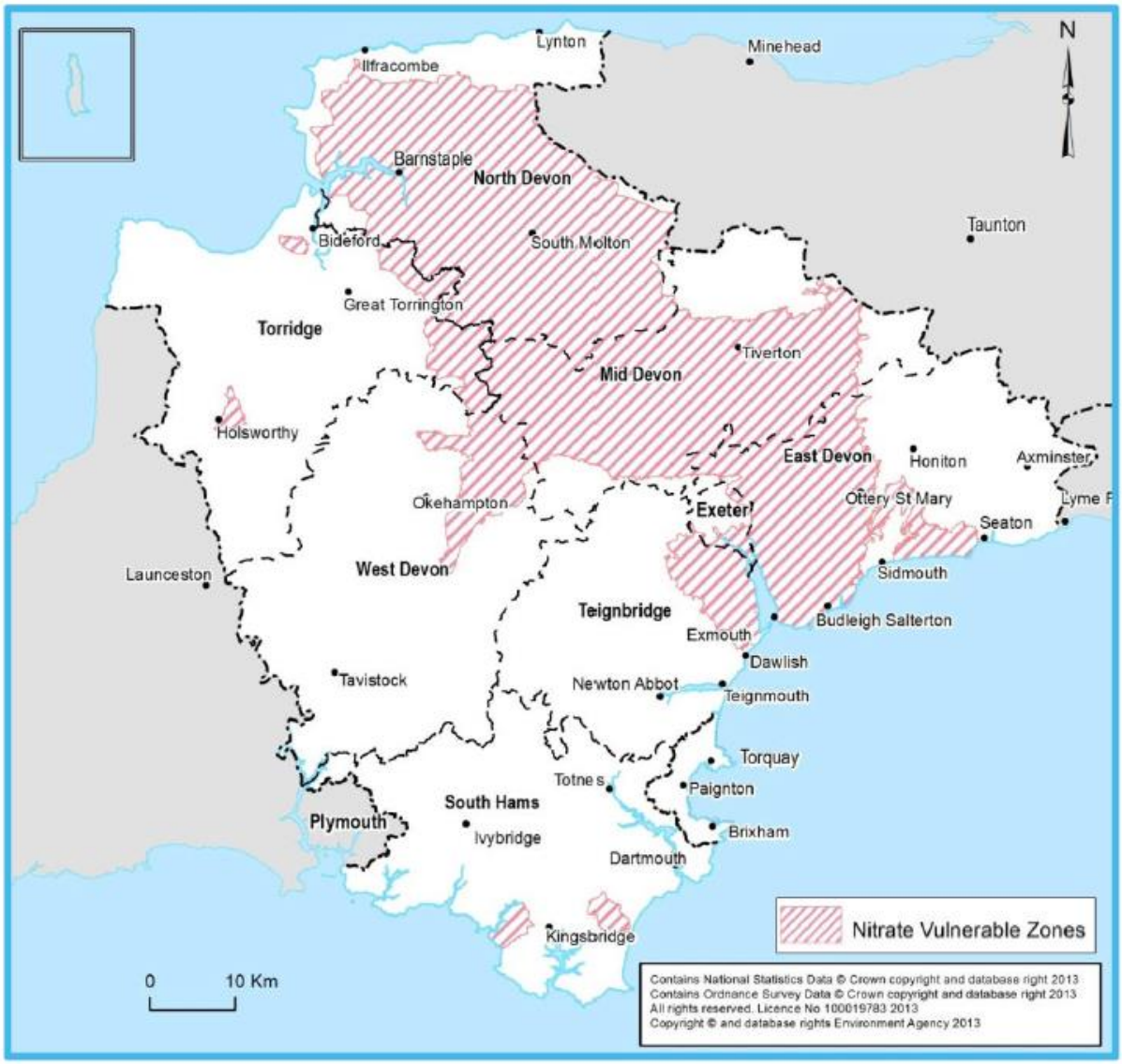

Figure 19: Nitrate Vulnerable Zones (State of the Environment Report 2015)

Historic Environment

There are approximately 7,711 Listed Buildings or structures in the Greater Exeter area; 3,081 in East Devon, 2569 in Mid-Devon, 1,069 in Teignbridge and approximately 992 in Exeter. The Greater Exeter Study Area contains a high proportion of the Listed Buildings designated in Devon. The size, age, condition, appearance and use of these buildings vary enormously. The vast majority of Listed Buildings are of Grade II classification and are currently used as domestic residential dwellings and farmsteads. The area's Listed Buildings and structures are largely concentrated in historic city, district and local centres but are widely distributed throughout both urban and rural areas and make a very significant contribution to the quality of streetscape and countryside. Listed buildings often have associated curtilage buildings or settings and designed landscapes and views. Apart from the statutorily listed buildings in the area it is also important to understand the historic and architectural significance of the hundreds of un-designated historic buildings that are recorded on the Devon County Historic Environment Record or on formal or informal local lists maintained by the local planning authorities. To date only Mid Devon has formally adopted a local list in accordance with procedures set out national guidelines. This list identifies 169 heritage assets. At present, there is a total of 153 Conservation Areas in the Greater Exeter area (41 in East Devon, 51 in Mid-Devon, 40 in Teignbridge and 21 in Exeter). A conservation area is an area of special architectural or historic interest, the character or appearance of which it is desirable to preserve or enhance. The main attributes that define the special character of an area are its physical appearance and history, i.e. the form and features of buildings and the spaces between them, their former uses and historical development. In similarity to the location of Listed Buildings, Conservation Areas are largely situated in and around central urban areas and the historic cores of village settlements comprising a patchwork of positive heritage assets. The majority of Conservation Areas in the sub-region have been established over the past 10-30 years. The local planning authorities in the Greater Exeter Area all identify the conservations areas designated within their District but there is notable variation in the level of information available regarding approved conservation area appraisals and management plans; Exeter provides appraisals and management plans for all 20 of its conservation areas, Teignbridge has appraisals for all but management plans for the highest priority designations, East Devon offers 29 appraisals and 4 management plans, and Mid Devon has 16 appraisals and 13 management plans. In addition to containing notable concentrations of designated and un-designated historic buildings, Conservation Areas frequently contain high archaeological potential relating to centuries of cumulative settlement activity.

A Registered Historic Park and Garden is a designed landscape considered to be of national importance and included on the national Register. There are 22 Registered Historic Parks and Gardens in the Greater Exeter area (8 in East Devon, 2 in Exeter, 3 in Mid Devon and 9 in Teignbridge). This represents roughly half the total in Devon. These include designed urban landscapes such as civic parks and cemeteries and the often extensive landscaped gardens and parkland of grand rural houses. The Devon Gardens Trust has also compiled a Devon Gazetteer of Historic Parks & Gardens to be considered for inclusion in the national Register. The gazetteer contains 87 designed landscapes (24 in East Devon, 23 in Exeter, 18 in Mid Devon and 22 in Teignbridge).

A Scheduled Monument is an historic (not currently in residential or ecclesiastical use) building or site considered to be of national importance which is included in the Schedule of Monuments. This Schedule includes archaeological sites and monuments, including upstanding buildings or ruins and also below ground evidence. Scheduled Monuments include Bronze Age burial mounds, Iron Age hillforts, Roman forts, villas and larger settlements, medieval castles, bridges, earthworks, the remains of deserted villages and more modern industrial sites. There are 208 Scheduled Monuments (SAMs) in Greater Exeter. By far the biggest contribution to this figure comes from East Devon where there is a total of 112 SMs followed by 49 in Mid Devon and 28 in Teignbridge. Exeter has only 19 SAMs. However, many of these assets are particularly well known and valued such as the Roman legionary bath house, Exeter City Wall, Rougemont Castle, Medieval Exe Bridge and the Underground Passages. The Scheduled area of the Roman legionary fortress and civil town, beneath Cathedral Close, is also extensive. The Greater Exeter area contains only one nationally designated Protected Wreck, the Church Rocks Wreck, which lies in shallow water off Teignmouth.

In addition to the designated sites listed above, there are a significant number of heritage assets across Greater Exeter which do not benefit from statutory protection. These are archaeological sites and buildings of historic interest that are recorded on the Devon County Historic Environment Record (HER) and/or on local lists maintained by the local planning authorities. There are 33,487 non-designated heritage assets in the Greater Exeter area (15,923 in East Devon, 2,307 in Exeter, 8,444 in Mid Devon and 6,813 in Teignbridge). These assets may range in date from Palaeolithic handaxes of up to a quarter of a million years ago, right up to Cold War defensive structures of the later 20th century. They range in scale from find spots of single Roman coins, to extensive well-preserved examples of medieval field systems. Some of these heritage assets may be of equivalent significance to designated assets but have not yet been Listed, Registered or Scheduled. Others may be of regional, county or more local significance.

Historic landscape character mapping has been produced for the Greater Exeter area. This identifies the contribution that different historical eras have made to the evolution of the landscape that we see today. This influence is best considered alongside wider Landscape interest. However, the Greater Exeter area includes discrete areas of particular historic landscape significance, such as intact medieval field systems, later reclamation landscapes and historic parkland that warrant particular consideration. The Greater Exeter area formerly had much more extensive historic landscape features such as field boundaries, orchards and water meadows, which should be considered alongside planning for enhancement of the natural environment, green infrastructure provision and sustainable water management.

Collectively, Heritage Assets are a vitally important component of the environment and local distinctiveness across the plan area. These assets are highly valued and their conservation or development is guided by NPPF and appropriate planning policies in each local authority area. In addition to commemorating cultural history the historic environment plays an important role in attracting tourism and investment to Greater Exeter. There are potentially very significant synergies to be developed between heritage assets and access to and enjoyment of the wider environment. In particular heritage assets can also be green infrastructure assets and should also be

considered alongside ‘green play’, health and wellbeing, and environmental education strategies.

Source: Historic Environment Records (HER); Exeter Urban Database; Historic England’s National Heritage List of Designated Assets

Brownfield Land

Greater Exeter has not seen the scales of past development and industrial activity that characterises some of the major urban areas of the United Kingdom and as a consequence it does not have the widespread legacy of underused brownfield land that exists in some areas. There are, however, localised concentrations and also smaller brownfield sites across the plan area. The legacy of past industrial and commercial activity, leaving behind brownfield land, is most significant in respect of:

- past mineral working sites: the greatest concentration being Ball Clay extraction sites north of Newton Abbot (however many working minerals sites will have associated restorations plans in place);
- In some older parts of urban areas: e.g. in Exeter City around and north of St Davids station;
- Major infrastructure developments: such as currently non-operational land at Dunkeswell and Smeatharpe airfields.

There are, as well, many smaller areas of brownfield land, dotted across the plan area where businesses or past activities have ceased to operate or otherwise land has been left in a despoiled state. In villages and rural areas, however, the presence and frequently the negatives associated with brownfield land, diminish in number and scale.

Relatively high land values in the plan area mean that brownfield land, where suitable for redevelopment, will often be bought back into productive use quite quickly. However, where not suitably located for redevelopment or there are expensive to address reclamation costs or other constraints such as complex patterns of multiple land ownership brownfield land can remain untouched for many years. It can also be the case that it may not suit an owner’s interest to seek a new use for their brownfield land.

The Greater Exeter planning authorities have pilot registers of brownfield sites that are seen as suitable for redevelopment. Details of site numbers and areas on the registers are set out below, data was correct at October 2016.

It is stressed that Brownfield Registers are not and do not seek to be a definitive record of all Brownfield land in the plan area. An actual record of all brownfield sites does not exit and it would be an enormously long exercise to seek to identify and map out every area of brownfield land. If such an exercise were undertake it would record vastly more brownfield land than the table shows.

The registers do, however, give an overview of development potential of land by District and plan area. The registers indicate a range, albeit it is not huge, of sites that could come forward for residential development with most by number and area

being in Mid Devon though East Devon and Teignbridge levels are not far behind. It should be noted that differing recorded levels might reflect, to some degree, differing approaches to register completion rather than absolute comparative numbers and areas of brownfield land.

Minerals and Resources

The four main groups of minerals worked in the county/plan area comprise:

a. Nationally Important Industrial Minerals
One important industrial mineral found in the plan area is ball clay within the Bovey Basin in south Devon. It provides an important resource for the international ceramics industry, pharmaceuticals and fertilisers. 84% of Britain's ball clay is exported. Ball clay deposits in the Bovey Basin of Teignbridge contain the most important UK source of deposits and accounted for 50% of UK production in 2008.

b. Aggregates
The plan area is well served by aggregate quarries with a spread of operational ones in East Devon, Mid Devon and Teignbridge as shown below. At the end of 2015, Devon had crushed rock reserves of 115 million tonnes, giving a land bank of 49 years. Sand and gravel reserves amounted to 7 million tonnes with a land bank of 12.5 years.
The Devon Minerals Plan (2016) emphasizes that the Budleigh Salterton Pebble Beds will remain the main source of sand and gravel due to the high quality and versatility of the resource in comparison to alternatives. Two new areas have been proposed at Straitgate Farm, Ottery St Mary and West of Penslade Cross, Uffculme for sand and gravel supply.

c. Building Stone
Only a small proportion of the wide range of stone quarries used in Devon are now being worked. There were nine active building stone quarries in the county (at 2015) with only two in the greater Exeter area at Westleigh, Burlescombe (Mid Devon) and Stoneycombe, Kingskerswell (Teignbridge) both for limestone.
Planning permissions have been granted at Dunscombe Manor and Beer Quarry in East Devon for recommencement of working for building stone in connection with maintenance of Exeter Cathedral, but neither has yet been implemented.
Devon Minerals Plan (Proposed Adoption Version) (Policy M15) will encourage the reopening or development of building stone quarries for small-scale extraction. These are likely to be in rural locations, 'small-scale' is regarded as annual production of up to 10,000 tonnes.

d. Other Minerals
There are a range of other mineral extracted and used in the plan area, including chalk and clay for use in the manufacture of bricks and pottery and there is limited potential for extraction and use of energy minerals.

Chalk – The outcrop of chalk within the county is limited to the eastern part of the Greater Exeter area, falling within East Devon and Blackdown Hills AONB.
Marine aggregates – marine dredged materials make only a minor contribution in Devon which is significantly different from the wider country where these form an

important element of aggregates supply. Small quantities are taken from the Bristol Channel for locations in North Devon outside the plan area.

Ref No	Quarry	District	Mineral
2	Babcombe Copse	Teignbridge	Sand & Gravel
4	Blackhill	East Devon	Sand & Gravel
8	Linhay Hill	Teignbridge	Limestone
11	Rockbeare Hill	East Devon	Sand & Gravel
12	Stoneycombe	Teignbridge	Limestone
13	Town Farm	Mid Devon	Sand & Gravel
14	Venn Ottery	East Devon	Sand & Gravel
16	Westleigh	Mid Devon	Limestone
17	Whitecleaves	Teignbridge	Dolerite
18	Zig Zag	Teignbridge	Sand & Gravel

Table 19: 5th Devon Local Aggregate Assessment 2006 – 2015 (DCC Aug 2016)

Sources: Devon Minerals Plan 2016

Climate Change

The provision of renewable energy is an important element of addressing climate change in the Greater Exeter area. Solar power represents the largest contributor to non-domestic renewable energy generation in the Greater Exeter Area. Mid Devon currently has a higher percentage of domestic heat met from renewable heat generation and higher percentage electricity met from renewable electricity generation than other authorities in Greater Exeter. There are major disparities in the distribution of commercial renewable energy production schemes in the area with many schemes located alongside major transport corridors such as the M5 Motorway and very few within protected areas.

The many highly valued and protected landscapes of the Greater Exeter area act as constraints to the installation of large-scale energy infrastructure, such like wind turbines or ground-mounted solar panels.

Waste

The Exeter Energy from Waste Facility at Marsh Barton received its first consignment of waste in April 2014. It will treat up to 60,000 tonnes of residual, non-recyclable waste from households across Exeter, East Devon and Teignbridge.

It is predicted that household and business waste will grow over the period to 2031. Recycling is expected to increase beyond present levels, and there is adequate existing capacity available for the sorting, bulking, composting and recycling of this waste.

The Devon Waste Plan identifies Exeter, Newton Abbot and Barnstaple as the foci for strategic waste development in terms of waste management facilities. (Policy W3 refers) This means strategic recycling, recovery and disposal capacity will be located in these centres.

Supplementary Social Baseline Data

Age

In terms of the major towns and city within Greater Exeter, there are significant differences across the region with some listed below:

- Exmouth has a higher percentage of over 65s when compared to overall Greater Exeter with 23%.
- Exeter has a considerably larger working age population with those aged between 16 and 64 making 68% of the total.
- Newton Abbot is equal to Greater Exeter in all but over 65 year olds where it has less (23%).
- Tiverton has slightly more under 16s (19%) but slightly less 16-64 (60%) and over 65 year olds (21%).

It is evident that the city of Exeter is the most attractive location for those of working age and shows a clear disparity between the city and Greater Exeter's other major towns. Exeter also has a relatively higher number of working age residents due to the presence of Exeter University.

The age profile of the population is significant as it has a direct effect on the local economy. An above average number of residents aged 65 and over and a below average number of working age population results in reduced labour force availability in comparison with other areas of the country.

Ages	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon
Under 16	20,800	19,000	14,600	20,400	74,800 (17%)	119,400
Age 16 - 64	74,900	81,400	47,100	74,100	277,500 (61%)	447,800
Over 65+	38,700	19,000	16,700	30,500	104,900 (23%)	171,700

Table 20: Population Distribution by Age (Mid-Year Estimate, 2012)

Source: Devon Facts and Figures Mid-Year Estimates (DCC)

Ethnicity

The majority of Greater Exeter's population is white with 97% (438,796) of the population falling under this classification. Table 2 highlights ethnicity by district. Whilst these figures indicate that Greater Exeter, much like the rest of Devon, is not particularly diverse in terms of ethnicity, there are still pockets of ethnic minorities within the urban areas, and issues associated with isolation experienced by some in rural areas.

Ethnicity	Mid Devon	Teignbridge	East Devon	Exeter	Greater Exeter	Devon
White	76,696	122,163	130,347	109,590	438,796	728,073
Mixed	484	925	904	1,938	4,251	6,520
Asian	428	893	930	4,595	6,846	8,710
Black	94	117	146	667	1,024	1,413
Other	48	122	130	983	1,283	1,683

Table 21: Ethnicity by District (Mid-Year Estimate, 2012)

Source: Devon Facts and Figures Mid-Year Estimates (DCC)

Deprivation

In terms of ranking, deprivation is measured across geographies known as Lower Layer Super Output Areas (LSOAs). Lower ranks determine higher levels of deprivation. The authorities that make up Greater Exeter are ranked (out of 326) as follows:

East Devon – 209
Teignbridge – 175
Mid Devon – 155
Exeter – 139

In comparison to the rest of Devon, the overall ranking is better within the Greater Exeter area with Torridge being ranked 101, North Devon 126, West Devon 149 and South Hams 204.

Sources: Indices of Deprivation 2010 (DCC)

Health and Wellbeing

The Greater Exeter area, much like the rest of Devon, has relatively good health. It has a significantly higher proportion of the population in very good health when compared to the rest of England. The average for England for those in good health is above the Greater Exeter average; however Greater Exeter has less people in fair and bad health than nationally. Some main challenges identified in terms of health and wellbeing across Greater Exeter include:

- An ageing population which is also growing faster than the national average increasing demand for health and care services
- New towns such as Cranbrook and new housing developments in existing towns with a young population structure are very different to the rest of Devon, and there are a different set of challenges relating to health-related behaviours, child health and sexual health. Community development and preventive approaches will be vital in these areas
- A sparse and predominantly rural population, creating additional challenges around access to health and care services and the need for sophisticated models of home-based care, outreach and work to reduce social isolation.
- Patterns of deprivation marked by isolated pockets and hidden need within communities and higher levels of rural deprivation, with groups experiencing health inequalities likely to be geographically dispersed.
- Average earnings below the national average and house prices and cost of living above the national average contribute to a number of issues including food poverty, homelessness, mental health and wellbeing, and fuel poverty.

Health	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	England

Very Good Health	58,004	58,775	36,263	55,819	208,861 (46%)	344,059 (46%)	34%
Good Health	47,716	39,301	27,554	43,342	157,913 (35%)	259,032 (35%)	43%
Fair Health	19,960	14,075	10,398	18,237	62,670 (13%)	104,498 (14%)	18%
Bad Health	5,285	4,331	2,785	5,268	17,669 (4%)	30,137 (4%)	5%
Very Bad Health	1,492	1,291	750	1,554	5,087 (1%)	8,673 (1%)	1%

Table 22: Self-Assessment of Health by District (Office for National Statistics, 2015)

Sources: Self-Assessment of Health by District (Office for National Statistics, 2015); Joint Strategic Needs Assessment Devon Overview (DCC and Public Health Devon 2010)

Housing Delivery

	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
East Devon	374	284	224	393	565	321	467	824	1089	1027
Exeter	891	512	414	368	857	899	473	555	753	618
Mid Devon	429	427	384	268	265	212	321	320	316	288
Teignbridge	270	220	313	310	349	308	458	819	632	622
Greater Exeter	1964	1443	1335	1339	2036	1740	1719	2518	2790	2555

Table 23: Housing Completions by Local Authority (Local Plans)

Housing Stock

The majority of properties in the Greater Exeter area are larger detached dwellings making up 32%. This larger stock exist largely in more rural parts of Greater Exeter, while the stock in more urban areas such as Exeter tends to be more predominately semi-detached (25%) and terraced (33%).

A large majority of this housing stock is privately owned with particular areas seeing 88% private ownership. Of 40 local authority areas with the lowest proportion of social housing, the Greater Exeter area has 2 of the lowest in East Devon and Teignbridge. Although it varies depending on where in the Greater Exeter area is being discussed, properties are more likely to be owned outright with certain areas ranging between 40% and 48.4% home ownership, considerably higher than the national average

Stock	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter
Detached House	24,567 (44%)	6,926 (14%)	13,079 (37%)	21,165 (38%)	65,737 (32%)

Semi-Detached	16,399 (26%)	13,072 (25%)	9,700 (29%)	13,883 (25%)	53,054 (26%)
Terraced	12,484 (20%)	16,707 (33%)	7,811 (23%)	13,082 (24%)	50,084 (24%)
Purpose Built Flat	6,067 (10%)	10,363 (20%)	2,133 (6%)	4,874 (9%)	23,437 (11%)
Flat in Converted or Shared House	3,057 (5%)	3,002 (6%)	720 (2%)	2,919 (5%)	10,418 (5%)
Flat in Commercial Building	969 (2%)	571 (1%)	358 (1%)	719 (1%)	2,617 (1%)
Total	63,543	50,641	33,801	55,642	205,347

Table 24: Stock by District (Office for National Statistics, 2015)

Housing Condition

Much of the private housing sector within Greater Exeter is relatively poor. On the other hand, council housing stock is essentially sound but a significant number of properties need upgrading.

With reference to the indices of deprivation, living environment is one of the indicators and takes into account the condition of both indoor and outdoor environment. Overall, Devon has slightly above average living environment. Mid Devon also has above average living environment, surpassing the rest of Devon, as do Teignbridge and Exeter though both achieve less than Devon overall. East Devon has only an average level of living environment.

Sources: Indices of Deprivation 2010 (DCC)

Affordability

There are a number of reasons as to why the housing market in Greater Exeter is so expensive and residents struggle to afford homes:

- A general imbalance between housing supply and demand results in a lack of affordability
- Limited supply of existing affordable homes creates an acute housing problem
- Significant in migration from older age people with financial ability to afford homes in the Greater Exeter area reduces available stock
- Average earnings for Devon residents is low, standing at £420pw against the national average of £507pw
- High proportion of larger houses = higher house prices

All of the Greater Exeter authorities have worse affordability than England as a whole, the higher prices referred to above combining with incomes below the England average. Affordability in England has worsened somewhat over the period 2009 – 2015, and this trend has been closely matched by changes in East Devon, Mid Devon and Teignbridge. Exeter has shown some improvement in affordability over that time.

Sources: Department for Communities and Local Government and Stats Wales; Local Authority Monitoring Reports

Supplementary Economic Baseline Data

Wages

Average weekly wages in Greater Exeter (£370.70) are above averages for Devon (£365.10), but are below the national average (£416.50).

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
Average Weekly Resident Wages	£397.0	£371.3	£350.5	£364.0	£370.7	£365.1	£416.5
% of UK average	95.3%	89.1%	84%	87.4%	89%	87.7%	N/A
Average FT Weekly Resident Wages	£449.8	£443.1	£441.1	£454.1	£447.0	£443.4	£505.9
% of UK average	88.9%	87.6%	87.2%	89.8%	88.3%	87.6%	N/A
Total weekly workplace earnings	£363.6	£406.1	£317.3	£310.9	£349.5	£340.0	£405.0
% of UK average	89.7%	100.3%	78.3%	76.8%	86.3%	84.0%	N/A
Total FT weekly workplace earnings	£429.9	£482.2	£418.4	£402.1	£433.15	£430.0	£505.9
% of UK average	85%	95.3%	82.7%	79.5%	85.6%	85%	N/A

Table 25: Average Wages (ONS Annual Survey of Hours and Earnings - Resident Analyses 2012 and 2013 and Workplace Analysis 2012)

Employment Density

Employment density is measured as employee jobs in a defined area per 100,000 working age residents of that area. It shows the numbers working in an area in relation to those living there. A figure of over 100,000 shows that the area is attracting inward commuting and figures below 100,000 show that people are commuting elsewhere.

Per 100,000 working age residents, Greater Exeter has 65,511 in employment. In comparison to the national average of 67,699 it falls just short. Greater Exeter does however boast a higher average than Devon's 64,799.

There are considerable geographic variations in employment density across Greater Exeter. Of the districts, Exeter has the highest with 102,279, followed by East Devon

with 57,192, then Teignbridge with 56,723 and finally Mid Devon with 45,849. Employment density in Exeter is more than twice that of Mid Devon. This pattern reflects the distribution of employers and jobs across the area, and shows how large numbers of people live outside the city boundary but work within it.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	National
No. in employment per 100,000 working age residents	57,192	102,279	45,849	56,723	67,699	64,799	65,511

Table 26: Employment Density (ONS Business Demography 2009 and ONS Mid-year Population Estimates 2004-2009)

Business Density

Business density is the number of businesses per 1,000 working age residents in a defined area. The average business density for Greater Exeter is 65. This figure is slightly below Devon's average of 67 but higher than the national average of 60.

East Devon has the highest business density with 72, followed by Mid Devon with 69 and Teignbridge with 68, all of whom are above national average. The only district to fall below the national average is Exeter with 50 businesses per 1,000 working age residents. This is likely to be because the size of businesses within the city are larger than those in the surrounding rural areas and is perhaps related to the large student population. The presence of a large number of small businesses does not necessarily indicate a better/stronger economy and there is an argument that it may indicate fragility rather than strength in a local economy.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	National
Business density per 1000 working age residents	72	50	69	68	65	67	60

Table 27: Business Density (ONS Business Demography 2009)

Value Added

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
Value added	£30,600	£33,500	£30,900	£29,500	£31,125	£31,100	£36,600
% of UK average	83.6%	91.5%	84.4%	80.6%	85%	85%	

Table 28: Value Added (Cambridge Econometrics data / IER Estimates July 2010)

Enterprise Births/Business Start Up Rate

The number of enterprise births per 1,000 of the working age population provides an indication of the dynamism of the economy in terms of business creation. The business composition of an area impacts upon the number of newly born enterprises. In rural areas with more small businesses, numbers of enterprise births tend to be higher than in areas with larger employers, which are often located in urban areas.

Greater Exeter has a business start up rate comparable to the national average. The lower business start up rate of Exeter reduces the average for Greater Exeter area and, with the exception of Exeter, the rest of the Greater Exeter area has business start-up rates comparable to national averages.

Year	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
2009	5.6	4.5	5.8	5.5	5.4	5.3	5.9
Average between 2005 - 2009	6.8	4.9	6.9	6.8	6.4	6.5	6.7

Table 29: Business Start Up Rate (ONS Business Demography 2009)

Enterprise Survival Rate

In each year Greater Exeter has exceeded the national new business survival rate (i.e. the proportion of enterprises that are still trading one year after starting up). The performance of each area within Greater Exeter is comparable, with less than 1% variation of averages.

Year	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
2008	95.3%	94.9%	94.9%	94.8%	95.0%	94.8%	92.0%
Average 2004- 2008	95.6%	94.8%	95.5%	95.3%	95.3%	95.4%	94.5%

Table 30: Enterprise Survival Rate (ONS Business Demography 2009)

Inactivity

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	UK
Jul10 – Jun11	28.9%	20.3%	22.5%	22.9%	23.7%	23.8%	21.6%	23.9%
Jul11 – Jun12	22.3%	23.9%	18.2%	20.2%	21.2%	20.4%	21.3%	23.6%
Jul12 – Jun13	19.2%	20.8%	26.3%	18.2%	21.1%	20.5%	21.0%	22.9%

Jul13 – Jun14	21.8%	17.6%	16.1%	20.9%	19.1%	20.3%	20.5%	22.7%
Jul14 – Jun15	18.5%	21.7%	15.3%	16.1%	17.9%	20.1%	19.2%	22.5%
Jul15 – Jun16	14.4%	19.5%	13.0%	16.6%	15.9%	19.1%	19.4%	22.1%

Table 31: Inactivity Rate (ONS National Population Surveys)

Inactivity is defined as people not in employment who have not been seeking work within the last 4 weeks and/or are unable to start work within the next 2 weeks.

Since 2010, Greater Exeter's level of economic inactivity has been consistently lower than the national average. During the year of July 2015 – June 2016, Greater Exeter had an inactivity rate of 15.9%, in relation to Devon's rate of 19.1% and the national rate of 22.1%.

Each of the Districts that make up the Greater Exeter area has demonstrated an overall significant fall in inactivity rate between July 2010 and June 2016, with East Devon's figure falling from 28.9% in the year of 2010-11 to 14.4% in 2015-16. Exeter has the highest rate of economic inactivity within the Greater Exeter area, which is likely to be attributed to the high proportion of students in the city.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	UK
Jul10 – Jun11	20.8%	Info not available	Info not available	Info not available	Unable to calculate	19.1%	21.2%	24.4%
Jul11 – Jun12	Info not available	49.6%	Info not available	Info not available	Unable to calculate	27.1%	23.6%	25.3%
Jul12 – Jun13	Info not available	49.6%	Info not available	30% (Apr 12 – Mar 13)	Unable to calculate	25.2%	24.1%	25.6%
Jul13 – Jun14	Info not available	54.5%	Info not available	35.3%	Unable to calculate	27.2%	25.8%	26.5%
Jul14 – Jun15	Info not available	42.0%	Info not available	Info not available	Unable to calculate	26.1%	23.0%	26.2%
Jul15 – Jun16	Info not available	52.9%	Info not available	33.5% (Jan 15 – Dec 15)	Unable to calculate	26.7%	24.7%	26.1%

Table 32: Students as Percentage of Economic Inactivity (ONS National Population Surveys)

Although comprehensive data across the 4 Districts that make up the Greater Exeter area is unavailable, the above figures do demonstrate how the higher economic inactivity rate in Exeter is attributable to its high number of students, which is approximately double the figure of the national average.

Job Types and Distribution

East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	National
51.6%	51.8%	41.1%	46.4%	47.7%	47.1%	45.35	44.9%

Table 33: Percentage of District's employees employed as Managers, Directors, Senior Officials, Professional Occupations and Associate Professional and Technical - Jul 2015-Jun 2016

East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	South West	National
10.7%	8.8%	Data not available	8.2%	9.2% (using data available)	9.4%	10.2%	10.7%

Table 34: Percentage of District's employees employed in Elementary Employment ONS Annual Population Survey 2016

Full Time/Part Time Working

Average full time employment across the residents of Greater Exeter (72.6%) is slightly lower than the national average of 73.9%. Similarly, part time employment is higher at 27.3% compared to the national average of 25.6%.

These trends are likely to be reflective of the demographics of the population of Greater Exeter, which includes a higher than average proportion of older residents, who are likely to work reduced hours. It may also be explained by the number of people wishing to have a healthy life/work balance. It may however, indicate underemployment, poor quality jobs that require workers to have more than one job, or seasonal work related to the tourism industry.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	UK
Full time	72.6%	67.5%	80.2%	69.9%	72.6%	71%	73.9%
Part time	27.4%	31.7%	19.8%	30.1%	27.3%	28.9%	25.6%

Table 35: Full time and part time employment split (ONS Annual Population Survey - Resident Based - April 2012 - March 2013)

Travel to Work Areas (TTWAs)

Travel to Work Areas (TTWAs) reflect self-contained areas where the majority of an area's resident workforce work, and where the majority of the workforce live. The criteria used for defining TTWAs is that generally at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The TTWAs relate to working populations of at least 3,500.

As the TTWAs have been defined in a consistent manner, it is possible to make meaningful comparisons between the number of TTWAs over time, and geographically across the UK. What has been observed is a persistent reduction in

the number of TTWAs over time. With the 1991 TTWAs, there were 308 TTWAs covering the UK, with the 2001 TTWAs there were 243 TTWAs, and there has been a further reduction to 228 with the latest 2011 TTWAs.

This reduction over time in the number of TTWAs reflects an increasing proportion of workers commuting longer distances to travel to work. More people commuting further means that most areas tend to become less self-contained, leading to a decrease in the number of TTWAs and hence an increase in the average land area and population size of TTWAs. The growth of longer distance commuting may be attributable to 1 or more of a number of different factors, including:

- sustained increase in car use, which allows access to more workplaces
- fewer jobs in traditional employment sectors, such as manufacturing and mining, where local working was common
- diffused job opportunities (such as employers de-centralising to city edges)
- more jobs at professional/managerial levels with higher pay levels allowing more costly travel
- more households with 2 earners who often cannot live near both workplaces
- more complex working patterns (such as people working part of the week at home)

Tourism

Greater Exeter has proportionately fewer people employed within tourism than the average for Devon. Again, the evidence provides a picture of disparity cross Greater Exeter, with the coastal areas within East Devon and Teignbridge attracting more visitors.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter (Greater Exeter as % of Devon)	Devon
UK trips	461,000	402,000	183,000	553,000	1,599,000 31%	5,121,000
Overseas Trips	41,000	52,000	17,000	34,400	144,400 32.5%	444,000
Total Trips	502,000	454,000	200,000	587,400	1,743,400 31%	5,565,000
UK Nights	1,776,000	1,347,000	667,000	2,310,000	6,100,000 31%	19,687,000
Overseas Nights	295,000	542,000	115,000	229,400	1,181,400 38%	3,120,000
Total Nights	2,071,000	1,889,000	782,000	2,539,400	7,281,400 32%	22,807,000
UK Spend	£92,911,000	£76,981,000	£31,557,000	£109,257,000	£310,706,000 28%	£1,097,452,000
Overseas Spend	£16,779,000	£35,152,000	£5,881,000	£12,044,000	£69,856,000 36%	£192,454,000

Total Spend	£109,690,000	£112,133,000	£37,438,000	£121,301,000	£380,562,000 29.5%	£1,289,906,000
Tourism Day Visits	4,137,000	1,630,000	1,712,000	3,695,000	11,174,000 38%	29,715,000
Tourism Day Visit Spend	£139,316,000	£61,183,000	£54,203,000	£123,692,000	£378,394,000 37%	£1,103,981,000
Overall Spend	£249,006,000	£173,316,000	£91,641,000	£244,993,000	£758,956,000 33%	£2,303,887,000

Table 36: Tourism – Trips/Nights/Spend (Information on tourist accommodation based on SWRTB and Local Authority databases 2014)

% employed in tourism	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon
2009	5%	3%	3%	4%	3.75%	4%
2010	5%	3%	3%	5%	4%	5%
2011	6%	5%	3%	6%	5%	7%
2012	6%	3%	4%	6%	4.75%	5%
2013	6%	2%	3%	5%	4%	5%
2014	5%	2%	3%	5%	3.75%	5%

Table 37: Percentage employed in tourism (Information on tourist accommodation based on SWRTB and Local Authority databases 2014)

Car Ownership

The percentage of households with no access to a car has steadily reduced over the past 20 years within Greater Exeter. This increase should not, however, be taken as an indication of an increase in the use of the car.

Levels of car ownership have increased the least in Exeter. This is not unexpected, given the accessibility of services and facilities within a city area along with good public transport links. This has been accompanied by a steady increase in the average number of cars per household.

Business Trips

a) Number of Business Trips

Business trip numbers have steadily fallen nationally over the past 20 years. It is unlikely that this represents a decrease in economic activity and more likely that this is a result of the use of enhanced digital connectivity, enabling people to work from home. This is demonstrated by the doubling of the proportion of people working from home from 1991 to 2011 (National Census Travel to Work data).

Purpose	1995/97	1998/00	2002	2004	2008	2011	2014
Business	38	37	35	35	30	28	32
All Trips	1,094	1,073	1,043	1,039	981	954	922
Percentage	3.5%	3.4%	3.3%	3.4%	3.2%	3.0%	3.3%

Table 38: Number of business trips (National Traffic Survey Data 2015)

b) Method of Travel to Work

Although as a nation the number of travel to work trips per person is falling, the proportion made by car has increased. Numbers by rail have also increased, although proportions for all other sustainable modes have either reduced or, for cycling, stayed constant.

In terms of gross numbers, between 1991 and 2011 the population of working age in the Greater Exeter area has increased by a third, from 161,000 to 215,000. Over this period cycling, rail and working from home have increased at a greater rate than the population increase. Car driving and walking have largely followed the change in overall population (albeit increasing at a slightly slower rate). Whilst gross numbers have not decreased, bus usage has dropped proportionately across Greater Exeter.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	National
Driving car or van	58.2%	45.1%	57.8%	62.1%	55.8%	59%
walking	11.1%	22.1%	11.3%	10.1%	13.7%	10%
Bus/Mini Bus/Coach	2.6%	9.1%	2.2%	2.7%	4.2%	6%
Work from home	16.8%	8.4%	20.8%	14.6%	15.2%	11%
Bicycle	2.1%	6.2%	1.1%	1.6%	2.8%	3%
Passenger in Car/Van	4.7%	5.2%	4.4%	5.0%	4.8%	5%
Train	2.3%	1.9%	0.6%	2.2%	1.8%	4%
Other	2.6%	2.0%	1.9%	1.8%	2.1%	n/a

Table 39: Modal split for travel to work (National Traffic Survey Data 2015)

Shopping Trips

In 2014, 66% of shopping trips were made by car/van, either travelling as the driver or as a passenger. 22% were made on foot and 11% were made by public transport. Whilst only 11% of shopping trips are made by public transport, the proportions of trips by public transport are significantly higher than the comparable splits for travelling to work (3%), perhaps suggesting that public transport accessibility plays an important role in the strength of local retail centres.

Whilst overall, the numbers of business trips have fallen, national evidence shows how van traffic has grown faster than car traffic in recent years. In 2014 van traffic reached its highest level and the proportion of traffic accounted for by vans has increased over the past 30 years from 9% in 1984 to 14% in 2014.

	Walk	Car/van driver	Car/van passenger	Public transport	Other	All modes

2002	25%	42%	21%	11%	1%	100%
2006	25%	42%	21%	11%	1%	100%
2011	23%	44%	20%	11%	1%	100%
2014	22%	45%	21%	11%	2%	100%

Table 40: Modal split of shopping trips (National Traffic Survey 2014)

It has not been possible to find information identifying the number of shopping trips made within Greater Exeter or the modal split.

Education Trips

Overall, in 2013, a higher proportion of children walked to school in Greater Exeter than the national average and a much lower proportion were driven, particularly to primary schools. The numbers using public transport were well below the national average for both primary and secondary trips.

The proportion of secondary school children cycling to school in Greater Exeter was 150% of the national average, with levels in Exeter more than double the national average. This trend is not replicated across all of Greater Exeter and the more favourable modal splits for Exeter schools are likely to be driven by the shorter distances of pupils to the schools.

	Primary				Secondary			
Location	Walk	Cycle	Car	PT	Walk	Cycle	Car	PT
National	46%	1%	46%	6%	37%	2%	23%	36%
Greater Exeter	59%	1%	36%	3%	45%	3%	15%	36%
Exeter	68%	2%	26%	3%	60%	9%	17%	14%

Table 41: Education trips modal split (National Traffic Survey 2014)

Leisure Trips

Like commuting and business trips, the number of leisure trips per person has also fallen at a rate consistent with the overall fall in total trips between 1995 and 2014 (taken from the National Traffic Survey 2014).

The number of trips generated by visiting friends at private home has fallen by 35%, whilst the number of trips generated by visiting friends elsewhere has remained unchanged, although with the fall in total leisure trips, it accounts for a higher proportion.

The number of trips generated by entertainment/public activity has increased by 25-30% and having only accounted for less than 1 in 7 leisure trips in 1995, by 2014 it accounted for more than 1 in 5 of all leisure trips. There has been a 40% decrease in trips generated by sport/participation. Whilst there has been a 15% fall in trips generated by holiday stays, this is proportionate to the fall rate of all trips.
Greater Exeter has experienced a 40% increase in day trips, resulting in a 50% increase in terms of day trips as a proportion of all leisure trips.

The breakdown in different categories casts light on some interesting light on how leisure related trips are changing. In particular, there are substantially fewer trips to see friends, either at home or elsewhere. This 30% fall could be driven by enhanced social mobility through social media interaction and applications like Skype.

Whilst day trip activity has increased as a proportion of all leisure trips, trips associated with sport participation have fallen dramatically.

Rail

The use of stations within East Devon has increased by an average of 54%, with the use of stations at Axminster, Exton and Whimple increasing by more than 80% each. The use of stations with Exeter has increased significantly and by an average of 383%. The highest increase is found at Exeter St Thomas, whose use has increased by over 1349%. The use of stations within Mid Devon has increased by an average of 460%. This figure is, however, skewed by the enormous increases in the use of Copplestone and Newton St Cyrus stations (1527% and 1095% respectively).) However, even omitting these figures, the average increase in the use of the remaining stations within Mid Devon is approximately 100%. The use of stations within Teignbridge has increased by an average of 127.8% with the most marked increase at Dawlish Warren of 240%. This may be linked to its popularity with tourists.

The following table shows station usage (total entries and exits) summarised over the past 15 years.

	2000/1	2004/5	2009/10	2014/15	% Increase since 2000
EAST DEVON					
Axminster	208,879	181,825	211,204	386,226	85%
Exmouth	578,218	623,832	722,922	927,182	60%
Exton	12,299	10,583	15,834	23,073	88%
Feniton	58,778	57,541	60,048	70,534	20%
Honiton	241,650	256,356	292,400	391,860	62%
Lympstone Commando	68,465	55,875	60,558	54,972	-20%
Lympstone Village	67,241	63,325	77,700	99,052	47%
Whimple	36,700	34,779	59,354	68,896	88%
EXETER					
Digby & Sowton	87,639	134,804	271,316	571,510	552%
Exeter Central	1,031,718	1,045,697	1,512,286	2,343,636	127%
Exeter St David's	1,473,219	1,632,285	2,152,786	2,509,220	70%
Exeter St Thomas	35,673	64,295	103,488	213,848	499%
Pinhoe	6,132	12,959	38,326	88,872	1349%
Polsoe Bridge	39,728	43,788	70,038	116,552	193%
St James' Park	27,126	27,477	46,754	64,586	138%
Topsham	98,174	127,903	186,056	231,122	135%
MID DEVON					
Copplestone	828	356	8,164	13,476	1527%
Crediton	16,243	22,478	36,784	52,492	223%
Eggesford	13,245	14,152	22,858	29,106	120%
Lapford	6,740	2,104	1,878	2,704	-60%
Morchard Road	4,454	3,442	6,482	11,882	167%
Newton St Cyrus	210	702	1,784	2,510	1095%
Tiverton Parkway	178,153	202,588	354,648	447,284	151%

TEIGNBRIDGE					
Dawlish	272,539	281,659	400,922	556,796	104%
Dawlish Warren	46,278	69,763	114,376	157,212	240%
Newton Abbot	569,090	720,606	940,862	1,141,040	100%
Starcross	50,332	69,175	83,066	100,178	100%
Teignmouth	291,219	318,532	451,154	566,620	95%

Table 42: Office of Rail Regulation 2015

Bus Use

Over the past 7 years the use of public transport bus services in Devon has remained fairly constant, varying between the highest level of 37.5 passenger journeys per head of population during the year of 2014/15 and the lowest level of 34.1during 2015/16. Devon bus use is slightly lower than that within the wider area of the South West, which has also remained fairly constant over the past 7 years. Devon performs well in relation to the general year by year decrease over England, from 88.8 passenger journeys per head of population in 2009/10 to 82.7 in 2015/16.

Although bus use has remained fairly constant, public transport use in Devon is far lower than the English average.

It has not been possible to source information relating to Greater Exeter.

	Devon	South West	England
2009/10	34.5	38.7	88.8
2010/11	36	39.2	88.2
2011/12	35.9	39.5	87.8
2012/13	36.2	37.9	85.8
2013/14	37.1	39.1	86.7
2014/15	37.5	39.8	85.6
2015/16	34.1	39.7	82.7

Table 43: Passenger journeys per head of population (Dept. for Public Transport Public Service Vehicle Survey 2016)

Walking and Cycling

Based on information collected from Census and the Annual Population Survey 2014/15, the proportion of full time workers who cycle to work across Greater Exeter (1.25%) is comparable with levels across England (1.3%). The proportion is significantly higher within the urban area of Exeter (2.7%), where more than double the English average cycle to work. This high level within Exeter skews the overall Greater Exeter figures, as levels of cycling to work in all other Districts is lower than the English average.

The proportion of full time workers within Greater Exeter who walk to work is significantly above the national average. The figures follow similar patterns to those for cycling, with a significantly higher proportion of residents of Exeter walking to work than in any other District. 7.3% of the full time working residents walk to work within this urban location in comparison to the English average of 3.1% or Devon average of 3.9%. This high figure again skews the overall level for Greater Exeter.

	East Devon	Exeter	Mid Devon	Teignbridge	Greater Exeter	Devon	England
% of adults in full time work who cycle to work	0.8%	2.7%	0.8%	0.7%	1.25%	1.1%	1.3%
% of adults in full time work who walk to work	2.9%	7.3%	3.1%	2.7%	4.0%	3.9%	3.1%

Table 44: Full time workers who walk or cycle to work (2011 Census and Annual Population Survey 2014/15)