



Report of the Torbay and South Devon Joint Study Area Working Party

**Torbay and South Devon Sub-Regional Study Findings:
Draft Input to the South West Regional Spatial Strategy**

June 2005

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Executive Summary

- E1. This report assesses the broad brush strategies for the development of the Torbay and South Devon Sub Region during the period 2006-26. It was prepared by an Officer and Member Joint study Area working group, comprising representatives from, Devon, South Hams, Teignbridge and Torbay Councils, Government Office of the South West (GOSW) and the South West Regional Assembly. The study has been the subject of public consultation and discussion by Local Strategic Partnerships, as set out in Section 7 of the main report. The report is a technical assessment of the sub-region's potential for growth, and does not represent the spatial policy of any of the above mentioned authorities. In particular, the District breakdown of figures will need to be refined through the emerging Regional Spatial Strategy, the work of Section 4/4 (Former Structure Plan) Authorities and the Regional Assembly.
- E.2 The Torbay and South Devon Sub-Region covers the Unitary Authority of Torbay, along with areas of Teignbridge, including the Newton Abbot Sub Regional Centre, Teignmouth and Dawlish; and the east of the South Hams, including Totnes and Dartmouth. The sub-region has a population of around 200,000, which rises to 300,000 in the summer.
- E.3 The sub-region is one of the most significant tourist areas in the country, with a combination of attractive seaside resorts, historic towns and stunning scenery.
- E.4 However, parts of the sub-region face significant economic difficulties in terms of declining industries, while low wage rates are common throughout the area. There is a particular need for regeneration in Torbay. The whole sub-region has a pressing need for affordable housing, which is highlighted by the significant gap between house prices and low local wages. In-migration, particularly of retired people, threatens to worsen the affordability gap for local people. There is limited capacity to meet this need on previously developed land, although significant windfalls are anticipated over the RSS period.

Vision

Our vision for Torbay and South Devon to 2026 recognises the need for sustainable urban and rural regeneration; providing a mix of new jobs and housing, together with the services and facilities to support them. Improved infrastructure and communications are essential in order to attract high-quality business and improve accessibility. The local needs for development in all parts of the sub-region should be carefully balanced with the protection and enhancement of our unique environment, including our estuaries and coastline, and maintenance of the separate identities of our towns and villages.

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E.5 Growth within the whole sub-region will be based on the following **Sustainable Development Principles**.

Sustainable Development Principles underpinning the Sub-Regional Study

- Focus on previously developed land, bringing under used land and buildings into use, improving existing stock and other urban capacity. However this must not be at the expense of the quality of urban living;
- Environmental management measures - including landscaping, ecological protection, energy efficiency, sustainable drainage and construction techniques etc, - and avoiding the coalescence of settlements;
- Creating sustainable, self-sufficient communities with good provision of community facilities and proper attention to community safety, integration and social inclusion. In particular the avoidance of excessive commuting to adjoining sub-regions will be avoided. It is, however, likely that there will be continued retail and cultural links with Exeter and Plymouth ;
- Economic regeneration, particularly the creation of higher wage jobs. Transport and infrastructure improvements are critical for this; and
- The scale of development should reflect the functionality of settlements. Torbay will remain a focal point for development reflecting its status as a Principal Urban Area, and urgent need for regeneration. Newton Abbot Sub Regional Centre has scope to maintain its rate of growth to 2016, reflecting the pressing need for affordable housing. Elsewhere in the sub-region, development will focus on meeting locally arising needs.
- The sub regions 2 major urban areas (i.e. Torbay PUA and Newton Abbot SRC) will also be the focus for jobs, skills, community facilities and retail development, consistent with their function within the region and relationship to the Exeter Sub-Region.

E.6 The vision and principles translate into the following development strategies. Figure 15 of the main document provides a breakdown of housing numbers.

Development Strategies

- For Torbay, scope is likely to exist to deliver an accelerated rate of growth above the current RPG Baseline, to around 500 dwellings per year (i.e. RPG base rate +50%). A significant proportion will need to be for affordable housing for local people;
- Tourism will remain a dominant element of the sub region's economy. It is nationally significant in terms of its tourism function. There will be an emphasis on promoting high-quality tourism;
- Torbay needs significant regeneration and diversification to broaden its economic base;

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- Improved infrastructure is required, particularly transport infrastructure. Improving rail, bus and road links are important, as is demand management within both Torbay and Newton Abbot;
- For Newton Abbot Sub Regional Centre, growth is expected to continue (around 200 dwellings per year) to 2016. Growth post 2016 will be lower (around 100 per year). There will be a heavy emphasis on providing a range of affordable housing for local people and developing local job opportunities and economic investment;
- Elsewhere in Teignbridge, development will focus upon meeting the locally arising needs of smaller settlements and communities; and
- In the South Hams part of the sub-region, scope may exist for a limited acceleration of growth (around 160 per annum) to meet the severe shortage of affordable housing. This will be aimed at meeting the locally arising needs of small settlements and communities.
- It is vital that the need for urban and rural regeneration throughout the sub-region is balanced with the need to protect the environment, including estuaries and the coastline. Many of these features are covered by landscape and wildlife designations, and priority should be placed on the safeguarding of their special qualities, minimising the impacts of development and wherever possible seeking opportunities to enhance them.

E.7 The Sub-Regional Study's aims are set out in the Key Diagram (Map 2).

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1. The Torbay and South Devon Study Area

1.1 The Torbay and South Devon Study Area centres on the Principal Urban Area (PUA) of Torbay, population 130,000, and the 5th largest PUA in the South West. Its hinterland comprises a pattern of towns and smaller settlements, with Newton Abbot, 4 miles to the north of Torquay, standing out as the largest and most strategically important of these towns. The other principal towns within the study area are, Ashburton, Bovey Tracey, Chudleigh, Dartmouth, Dawlish Totnes and Teignmouth,.

1.2 The map of the extent of the study area is shown in Map 1, below. The boundary is only shown indicatively, and is not intended to coincide with any local authority boundaries. There is a broad relationship between the study area and the boundaries of the Torbay Housing Market (as defined by the recent DTZ/Pieda Study) and the South Devon Health Care catchment area.

Map 1 Torbay and South Devon Sub-Regional Study - study area



TORBAY AND SOUTH DEVON SUB-REGION

- Approximate boundary of Torbay Housing Market (based on DTZ Pieda study)
- Approximate boundary of South Devon Health Care Trust catchment area (based on practice referrals, data from Torbay Primary Care Trust)
- Overlap between Exeter and Torbay Housing Market areas
- Main urban areas

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- 1.3 There is also a significant degree of overlap with the Exeter Sub-Regional Study Area, which is also shown on Map 1. However, the differences between the two PUAs - Exeter and Torbay - are significant, and this is reflected in their very different economies and housing markets. Exeter is at the centre of a relatively prosperous sub-region, with good economic prospects. Torbay, on the other hand, faces the prospect of a declining economy (especially without any form of intervention) and is in need of significant regeneration. There is an exceptionally high need for affordable housing in the Torbay and South Devon Sub-Region. Clearly, the degree of influence Exeter has on the Torbay and South Devon Study Area varies with distance from Exeter. The Torbay PUA itself has limited economic linkages with Exeter in terms of journey to work, structural links and clusters of economic enterprises, and unemployment rates, with Exeter below the national average and Torbay above.
- 1.4 There is a clear separation between the Torbay and South Devon Study Area and the Plymouth Study Area. Although Torbay's and Plymouth's economic problems and regeneration needs are similar in many ways, the quality of both road and rail communication between the two PUAs is of a significantly lower quality than between Torbay and Exeter.
- 1.5 Tourism is a key element in the economy of the entire area, and as a consequence, the population of the study area rises from around 200,000 in the winter to 300,000 at the height of the holiday season in August. Other key industries are fishing (based at Brixham), a much reduced hi-tech sector (based in Torquay, Paignton and Brixham), food manufacture (throughout) and engineering (mainly concentrated in Newton Abbot). Other key employers include local government and the health sector. Agriculture is also a significant employer throughout the study area.
- 1.6 Much of the study area is covered by landscape designations, including the South Devon AONB and it also fringes the Dartmoor National Park. Much of the rest of the area is designated as AGLV, Coastal Preservation Area, a range of significant wildlife conservation zones, high quality agricultural land, and important mineral reserves. This means that many growth options are severely constrained throughout the study area.

2. Background to the Sub-Regional Study

- 2.1 Sub-regional studies are an integral part of the emerging South West Regional Spatial Strategy (RSS). They are required to *"fill the strategic policy deficits which might arise as structure plans are removed from the development plan system"* (SWRA letter on Joint Studies of the Larger Urban Areas: JSAs dated 20 October 2004).
- 2.2 The Ministerial Statement by Keith Hill (20 May 2004) makes it clear that sub-regional studies will need to be prepared to inform the process of preparing RSSs. All the Principal Urban Areas (PUAs) in the South West (plus the towns of central Cornwall) are the subject of Joint Studies, taking in their surrounding areas or hinterlands. The strategic authorities have been asked by the Regional Assembly (RA) to take the lead in the technical work, including administering the process, policy development and consultation. There is a need for the emphasis of the work to be strategic, and not to overlap with the work of the LDFs.

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- 2.3 The Regional Assembly has indicated that sub-regional studies should set out the following:
- A clear spatial strategy for the Joint Study Area in the form of a concise strategy document which can feed into the RSS and other regional strategies such as the RES.
 - A key diagram for the JSA.
 - The strategy document should be supported by detailed technical reports on relevant topics, and a recommendation of which core policies of the JSA strategy should be included in the RSS.
- 2.4 The RA expects all the sub-regional studies to be completed in early June 2005, so that their input can be taken on board in the preparation of the RSS Core Strategy by July 2005, and the preparation of the full Consultation Draft in September 2005. The Torbay and South Devon Joint Sub-Regional Study (the Sub-Regional Study, or SRS) was initiated at the first meeting of the Study Group on 26 January 2005, following initial officer meetings in the previous autumn. It started much later than the other SRSs, although the RSS deadlines can still be achieved and the RA has welcomed our rapid progress.
- 2.5 Torbay has made a recent request for a Panel Hearing with the RSPTG Panel, in line with the other SRSs. This will enable the key strategic issues to be debated in some depth with the key regional decision-makers.
- 2.6 The joint sub-regional study looks at a number of policy options, and the implications of those options. The Torbay and South Devon Joint Study Area Working Group encompasses a wide range of views, and it is considered to be appropriate for a range of options to be encapsulated within this report.
- 2.7 In particular, this report looks at various scenarios related to increased numbers of new housing and associated employment, community and transport and other infrastructure needs, as well as environmental impact. Based on the consideration of consultation responses, a fourth option has been included as a possible basis for consensus on development within the sub-region.
- 2.8 It may be that individual authorities would wish to set out in more detail, which precise policy option they consider to be the most appropriate for the sub-region.
- 2.9 The remit of this study - the Study Brief - which was tabled at the initial meeting of the Working Group, and modified following comments from various parties, is attached as Appendix 1 to this report.

3. The National Policy Background

- 3.1 The Government's Sustainable Communities Plan seeks to ensure the provision of enough new housing to meet the serious problems of under-provision as highlighted in the Barker Report, within a sustainable context.
- 3.2 The South West daughter document 'The Way Ahead', seeks to set the proposals in the Communities Plan into a regional context. In particular, it aims to achieve an acceleration of growth in employment and housing to meet the real needs of the region, based on PUAs.

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3.3 The document states in relation to Torbay: *“Torbay (population 132,000), has a significant concentration of deprivation and low-wage economy, leading to significant housing affordability problems. To address these issues, and significant out-commuting, will require an emphasis on training/retraining, provision of a range of business employment sites, increased provision of affordable housing and improved connections to national road and rail networks to assist the restructuring of local economic activity.”*

3.4 This Sub-Regional Study aims to build on the vision in ‘The Way Ahead’, and in particular its comments in relation to Torbay, and by implication, its sub-regional context.

4. Policy Context

Strategic Planning Framework

4.1 **Regional Planning Guidance 10 (September 2001) Policy HO1** proposes 4,300 new dwellings in Devon with no sub-county breakdown. Torbay is designated as a Principal Urban Area, which acts as an important sub-regional centre. **Policy SS16** recognises the need for economic restructuring. **Policy SS5** sets out priorities for growth in PUAs. RPG10 has been upgraded to RSS pending the adoption of the emerging Regional Spatial Strategy.

4.2 **Policy SS6** sets out the development strategy for sub-regional settlements outside the PUAs. This states that significant growth in larger / dormitory towns within easy commuting distance of PUAs should be avoided, while ensuring provision for balanced and self-contained development in other designated centres for growth (i.e. market and coastal market towns - see also **Policies SS19** and **SS21**).

4.3 **Policy SS2** recognises the need for towns outside the PUAs and other designated centres for growth to act as local service centres for rural areas, and for smaller settlements to focus on provision for local needs.

4.4 **Policy SS20** provides guidance for the protection of the region’s best assets for environmental and recreational purposes. This promotes the enhancement and management of the urban fringe, woodland and the best quality farmland and soils, by protection from adverse forms of development and support for a range of environmental enhancement schemes.

4.5 **Devon Structure Plan 2001 - 2016 (Adopted 2004)**. The Devon Structure Plan is a saved development plan under the Planning and Compulsory Purchase Act 2004. Policies ST 1-4 set out strategies for sustainable development, self sufficiency and infrastructure provision. Policy ST21 promotes economic and social regeneration, particularly in PUAs and resorts.

4.6 **Policy ST13** sets out objectives for the **Torbay Principal Urban Area**, including: improving the balance between homes and jobs; economic restructuring; providing sufficient housing to meet local needs and support growth; and regeneration and improved transport links. Torbay should act as the primary focus for development, economic investment and regeneration in the southern part of Devon.

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4.7 **Policy ST13a** defines Newton Abbot as a **Sub Regional Centre**, which should serve as the primary focus for development within Teignbridge. Improved transport links, including the Kingskerswell Bypass, economic development and greater self sufficiency of the settlement are also promoted. The settlements of Newton Abbot, Kingskerswell, Kingsteignton and Ogwell Cross are identified as comprising the Sub Regional Centre in the Teignbridge Local Plan.

4.8 The following towns are identified as **Area Centres** in Teignbridge and South Hams Local Plans respectively, using criteria set out in **Policy ST15 of the Structure Plan**. This sets out that they should cater primarily as the strategic focus for the provision of local housing and employment opportunities.

Teignbridge

- Teignmouth
- Dawlish

South Hams

- Dartmouth
- Totnes

4.9 The following towns are identified as Local Centres in the above Local Plans, using criteria set out in Policy ST16 of the Structure Plan. Local Centres should act as a focus for a modest scale of development specifically to provide essential local facilities for rural areas, including affordable housing, small scale employment and other local services.

Teignbridge

- Bovey Tracy
- Coldeast / Heathfield
- Chudleigh

4.10 **Policy ST17** sets out proposed housing and employment land provision between 2001 and 2016. Figure 1 sets out the Devon Structure Plan's proposed development in areas covered by the Torbay and South Devon Sub-Regional Study over the Plan period of 2001 - 2016.

Figure 1 Housing Provision in the Devon Structure Plan 2001 - 2016

	Dwellings 2001-2016	Annual Average	Employment (per annum)? hectares
Torbay PUA	4,300	290	60
Newton Abbot Sub Regional Centre	3,100	210	30
Parts of Teignbridge outside Newton Abbot Sub Regional Centre and within Torbay and South Devon Sub-Region*	2,100	140	25
Parts of South Hams outside Plymouth PUA and within Torbay and South Devon Sub-Region*	1,925	130	12
Total provision within Torbay and South Devon JSA	11,425	770	127

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**Note this is calculated on the assumption that 75% of Teignbridge's provision and 50% of South Hams' provision is within the Torbay and South Devon Joint Study Area.*

- 4.11 The Devon Structure Plan (2001 - 2016) sets out a restrained provision around 17% below the demographically implied number of dwellings (i.e. the number that would be built on a 'predict and provide' basis). These figures set a rough baseline against which future needs and Sub-Regional Study Options should be assessed.

5. Evidence Base informing the Sub-Regional Study

Projections of Housing Numbers in Torbay and South Devon Sub-Region

- 5.1 Until the mid 1990s, a regime of 'predict and provide' extrapolated housing numbers on the basis of population projections. Concern about excessive loss of greenfield land led to a regime of 'Plan, Monitor and Manage', which is set out fully in PPG3 Housing (2000).
- 5.2 Plan, Monitor and Manage plans housing provision, taking into account population along with capacity of previously developed land and other constraints. Housing delivery should be monitored on a regular basis and reviews of plans should occur regularly to address signs of under or over supply of housing (PPG3, paragraph 8).
- 5.3 There has been increasing concern about the under provision of housing land and the impact that this has upon affordability and social inclusion. In particular, the Treasury Commissioner's Barker Review of Housing Supply (March 2004) indicates that the national average housing supply needs to increase by 120,000 private sector homes, to reduce the trend in real house price rises to 1.1% per year. It also states that there is an additional national annual need for 25,000 more social homes.
- 5.4 The Government has issued draft guidance on affordable housing (Planning for Mixed Communities, ODPM 2004) and its response to the Barker Review is expected later in 2005 (probably as part of the expected Planning Policy Statement 3). It remains to be seen how far this will change the regime of Plan, Monitor and Manage. However, the message appears to be that regional spatial strategies should increase the supply of housing above existing baseline figures (in the South West's case, RPG10, September 2001).
- 5.5 The Sustainable Communities Plan and daughter documents, particularly 'Homes for All' (2004), set out a five year strategy for creating sustainable communities. As well as increasing housing supply, the provision of community facilities, good public transport, job opportunities and a safer environment are all seen as essential elements of sustainable development. These themes need to be worked through in a South Devon context.
- 5.6 **ONS Mid Year Estimates 2003.** Although we are not in a regime of 'predict and provide', demographic projections are an important element in estimating the requirement for new housing.
- 5.7 Figure 2 indicates hypothetical household provision based on a 'predict and provide' (demographically implied provision) interpretation of the 2003 ONS mid-year estimates of population for the Torbay and South Devon Sub-Region.

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These provide an estimate of growth levels against which the options put forward in the Torbay and South Devon Sub-Regional Study can be assessed for their ability to create a sufficient number of additional dwellings.

Figure 2 Demographically Implied Housing Provision - Torbay and South Devon Sub-Region (to nearest 10)

Year	Demographically implied provision - total (dwellings)	Demographically implied provision per year (dwellings)
2006-2016	8,930	890
2016-2026	10,350	1,035
Total	19,280	1,925

Source: ONS Mid-year estimates 2003. Full workings and District breakdown are set out at Appendix 2.

- 5.8 **Chelmer Model, South West Regional Assembly 2005.** In addition to ONS projections, detailed projections of housing and population growth are available from the Chelmer Model, a detailed demographic computer projection carried out for the Regional Assembly. However, these figures should be treated with caution, since they vary widely depending upon the assumptions made, particularly on what migration rate is assumed. Given that migration into the South West is likely to continue, the models that assume a continuation of past migration rates are more likely to be accurate indicators of future growth, than the zero migration model. Further details of the Chelmer Model's predictions are set out at Appendix 2.

Figure 3 Chelmer Model Projections for Torbay and South Devon Sub-Region 2001-2026 - approximate growth per year

Year	Zero Net Migration	Continuation of short term migration rate, 98-03	Continuation of medium term migration rate, 93-03	Sub-Regional Study Options*		
				Low-RPG Baseline	Medium RPG+25%	High RPG+50%
New dwellings 2001-2026	2,040	41,800	39,800	24,630	30,780	36,940
Average per year 2001-2026	82	1,672	1,592	985	1,231	1,478

*Option 1 = RPG10 Baseline, Option 2 = RPG10 Baseline+25, Option 3 = RPG Baseline+50%

- 5.9 In assessing the sub-region of Torbay and South Devon, it became clear that constraints prevented a straightforward extrapolation of accelerated RPG or migration rates. In addition, there is a sustainability case for development to be focused on areas which have sufficient capacity to accommodate additional

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growth. It is worthy of note that both ONS and Chelmer Models predict very high growth levels. However, landscape, flooding and other constraints would influence such high growth rates. The link between housing and jobs is also an important strategic planning consideration.

- 5.10 It is important to note that in-migration is a principal cause of population growth in the sub-region. Therefore constraining the level of growth significantly below demographically implied provision would need to be accompanied either by (unrealistic) measures to reduce in-migration of non-key workers, or to ensure that adequate local needs affordable housing is provided. Paradoxically, constraining overall housing supply in urban areas may reduce the supply of affordable housing.

Housing Need

- 5.11 The Torbay and South Devon Sub-Region has a very pressing need for affordable housing. The nature of housing need differs across the sub-region; however, in summary, the area is characterised by low wage rates and high house prices. Many of the housing needs are cross boundary in nature.
- 5.12 Research for the Joseph Rowntree Foundation (Wilcox 2004) has indicated that the South West is the least affordable region for young buyers. In particular, this analysis provided ratios of house prices to incomes of working households aged 20-39. This showed Torbay as the 13th least affordable Local Authority area and the South Hams as the 28th least affordable. These are summarised in Figure 4. Research by the National Housing Federation (2005) has found that the South West is the Country's least affordable region, with house prices being 9.5 times average incomes. In parts of the sub-region the figure is 12 times. More recent work has focussed upon a balancing housing markets approach which looks at affordable housing in the context of overall housing markets.

Figure 4 House price to income ratio

Area	Ratio	Rate (where given) (1 = least affordable 354 = most affordable)
London	4:69	
South East	4:61	
South West	4:66	
Torbay	5:81	13
South Hams	5:38	28
Teignbridge	5:09	

Source: Wilcox for JRF 2004

- 5.13 In addition, there is a shortage of affordable housing the sub-region. 7% of the housing stock in Torbay and 8.5% in Teignbridge is social rented housing, compared to 16% in the South West and 19% in England.

Housing Needs Surveys

- 5.14 **Torbay's Housing Needs Survey (Fordham Research 2003)** identifies a yearly need for 1,816 affordable homes over the next five years to address the

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back log and newly arising housing need. It is recommended that three quarters (1,362) of these dwellings should be for rent, and the bulk (about 80%) of housing need is for 2+ bedroom properties. The Torbay Housing Needs Survey also contained a balancing housing markets analysis, which found a need for 537 affordable houses in Torbay per year (i.e lower than the basic housing needs survey approach, but still significant).

- 5.15 **Teignbridge District Housing Needs Survey 2002-2003 (Opinion Research Services 2003)** identifies a need for 302 subsidised affordable dwellings per year. However, it also depicts an annual shortfall of 926 dwellings to meet aggregate needs and demand (i.e. there is unmet demand for 624 additional homes per year). However housing need is likely to have increased significantly since 2002. For example, the current (May 2005) Housing Register indicates that there are over 2,000 people in defined housing need in Teignbridge, though it should be noted that a proportion of these will be outside the Sub-Regional Study area.
- 5.16 **South Hams Housing Needs Study update (Opinion Research Services 2002)** identifies a net shortfall of 630 dwellings per year in the whole of South Hams. The shortfall outside the Plymouth travel to work area is 229, of which 114 should be for social rent and 104 intermediate (sub-market) units. There is an annual shortfall below demand for around 11 market homes.

Sub-Regional Housing Needs

- 5.17 An estimate of the need for affordable housing across the sub-region is summarised in Figure 5. Around 1,600 of these units need to be for social rent:

Figure 5 Sub-Regional Housing Need

Torbay	1,816
Teignbridge	302
(75% of total) South Hams (outside Plymouth TTWA)	218
Sub-Regional Housing Need	2,264 per year

Source: Torbay, Teignbridge and South Hams Housing Needs Surveys

Urban Capacity Studies

- 5.18 The availability of previously developed land is likely to be a major driver determining the suitability for housing growth. Government Guidance in PPG3 (2000) and daughter documents, strongly promotes the use of previously developed land in preference to greenfield sites. This emphasis on housing growth is likely to remain.
- 5.19 The South West has already exceeded expected rates of development on previously developed land. For example, Torbay has achieved a rate of 68% between 1995-2004. Although market slow down may dampen the supply of brownfield sites, it is important not to underestimate opportunities for development on previously developed land over the RSS period.
- 5.20 It is important to recognise that Urban Capacity Studies are usually expressed as a constrained capacity (i.e. what the market is likely to bring forward). The

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availability of gap-funding, such as Housing Corporation Assisted Development Pot (ADP) is likely to make viable sites that would not otherwise come forward.

- 5.21 An assessment of urban potential in the sub-region from the Districts' latest Urban Capacity Studies (UCS) is as follows:

Torbay Urban Capacity Study (Scott Wilson, 2005 forthcoming) (to follow)

Figure 6 Torbay Urban Capacity (1998, Draft 2005)

- 5.22 The 1998 Urban Housing Potential Survey identified a total of 1,975 dwellings achievable on previously developed land, which equals 152 per year over the Plan Period. Torbay's brownfield rate of development has been 65% of dwellings built 1995-2004. The average completion rate 1995-2004 was 491 dwellings a year.

- 5.23 The draft 2005 Torbay Urban Capacity Study (Scott Wilson June 2005) estimates a constrained capacity of 4368 dwellings, assuming medium demand. The majority of these arise from small sites. This equates to 364 dwellings per year arising from previously developed land 2004-2014. It is important to note that these figures are draft and have not been fully scrutinised, however it does suggest that recent growth rates are sustainable in terms of previously developed land targets.

- 5.24 **Teignbridge Draft Urban Capacity Study 2001-2016 (2004)**

Figure 7 sets out the estimates of urban capacity along with past trends for Teignbridge:

Figure 7 Teignbridge Urban Capacity

	Windfall Projection (based on UCS)	Windfall Projection (past trend)	Recommended Windfall allowance
Newton Abbot Sub Regional Centre	556-906	559	694
Teignmouth	349-423	520	471
Dawlish	208-259	273	266
Bovey Tracey	111-156	286	156
Chudleigh	92-125	78	125
Buckfastleigh	29-42	0	29
Total within Torbay and South Devon Sub-Regional Study area	1345-1911	1,716	1,741

- 5.25 However, the consultation exercise response has indicated that there may be potential for windfalls within the countryside zone of Teignbridge, which would increase the scope for development on previously developed land in this area.

- 5.26 **South Hams Urban Capacity Study 2001-2016 (2001)**

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Figure 8 summarises urban capacity in the South Hams part of the Torbay and South Devon JSA. This identifies a constrained capacity of 570 dwellings to 2016.

Figure 8 South Hams Part of the Torbay & South Devon Sub-Region Urban Capacity (2001)

	Constrained Capacity 2001-2016		Total Constrained Capacity 2001-2016
	Site Survey	Past Trends (assuming 70-75% will come forward)	
Dartmouth	55	148	203
Totnes	76	291	367
Total	131	439	570

5.27 Annual dwelling completions (based on an analysis over the last five years) and consideration of new housing sites for local needs, which will be advanced through the plan process, are estimated to yield an annual completion rate of 160 dwellings in the eastern part of the South Hams. These are broken down as follows:

Dartmouth 45 units (25 windfall units + 20 LDF planned units)
 Totnes 55 units (25 windfall units + 30 LDF planned units)
 Rest of eastern South Hams 60 units (maintaining the annual average of 60 windfall units)

Economic Background

5.28 Torbay has a particularly pressing need for regeneration. Although low by historic standards, unemployment is significantly higher than the national average, and there is a particular problem with male unemployment. All the JSA Authorities have low average earnings as set out in Figure 9.

Figure 9 Earnings within the Torbay and South Devon Sub-Regional Study Area

	Mean gross average earnings 2004
Torbay	£15,539
South Hams	£16,271
Teignbridge	£16,641
Exeter	£18,768
Plymouth	£19,812
South West	£19,492
England and Wales	£22,542

Source: ONS Survey of hours and earnings 2004

5.29 Torbay's major industries of tourism, fishing and telecommunications all face the prospect of decline, although strategies are in place to address this,

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particularly by focusing on increasing the quality of the tourism product and developments in Brixham and Torquay harbours and waterfronts

- 5.30 Cambridge Econometrics estimates of total employment and gross value added (GVA) in the Torbay travel to work area (TTWA) are set out in Figure 10.

Figure 10 Cambridge Econometrics Estimates of Employment and Gross Value Added in the Torbay and South Devon Sub-Regional Study Area

	Employment (000s)	Gross value added (£)
2001	65.5	1555.3
2004	61.5	1473.1
2006	62.8	1566.1
2011	64.6	1727.6
2016	66.3	2039.0
2021	67.4	2342.8
2026	68.7	2719.6
Increase 01-26	+3.3	1164.3

- 5.31 In preparing its input into the SWRA 'The Way Ahead - Delivering Sustainable Communities in the South West', Torbay Council assessed the potential to deliver accelerated economic growth on the allocated employment sites, small business areas and business investment areas in the Adopted Torbay Local Plan 1995-2011. The potential for job creation is set out in Figure 11. These figures are an estimate of potential and an important challenge will be to unlock investment. At recent planning inquiries, shortage of suitable serviced employment sites and poor external road links to Torbay were cited as key reasons for both lack of major inward investment and the exodus of a number of companies from Torbay.
- 5.32 Improved transport links and gap funding are therefore likely to be critical. Survey work carried out by SQW BBP Consultants in 2002 pointed to an increase of 8000 additional jobs in South Devon within five years of the completion of the Kingskerswell Bypass. Section 7 sets out infrastructure requirements in more detail.

Figure 11 Scope for job creation from allocated sites and windfalls on existing sites within Torbay (to nearest 10, full time equivalent)

	E1 Sites 2005-2011		Windfalls		Total	
	Yearly	Total 2005- 2011	Yearly	Total 2005- 2011	Yearly	2005- 2011
Low (baseline with no intervention or pump-priming)	80	490	70	420	150	910

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Medium (some market led pump-priming)	340	2020	100	600	440	2600
High (successful intervention)	1140	6830	140	840	1280	7670

Note: Windfalls include jobs from Business Investment Areas, Small Business Areas and Town Centre Mixed Use Developments 2005-2011

- 5.33 Although there is a clear link between housing growth and employment, there is not a one for one ratio between dwellings and work places. As noted in Figure 10 above, the Cambridge Econometrics figures suggest a possible job growth of 3200. Other workforce projections (by Devon County Council) indicate that performance in the Sub region could be higher, depending upon the assumptions made regarding the future of the economy and the likelihood of increased activity rates amongst older age groups. This suggests that the scale of development being proposed in the Sub-Regional Study Options is sustainable in terms of economic growth, and can therefore be justified in terms of housing needs.
- 5.34 In addition, housebuilding is beneficial to the local economy in terms of supporting the construction industry (and its multiplier effects). A proportion of residents spending will also be on local goods and services. In addition, providing additional housing is likely to benefit the local economy by providing housing that is affordable for key workers and other people essential to the local economy.

Tourism

- 5.35 The tourist industry is of key importance to the Torbay and South Devon Sub-Region. 50% of bed nights in Devon are spent in the South Hams, Teignbridge and Torbay. Half of these are spent in Torbay, making it the largest holiday destination in Devon in terms of bed spaces (Devon County Council Tourist Nights by District 2003 (thousands)).
- 5.36 The tourist industry has been the cornerstone of Torbay's economy since the mid-nineteenth century. The industry currently employs 16,000 people in full and part time employment (Torbay Tourism Strategy 1995-2005). In 1999 direct spending by staying visitors amounted to £300 million, the largest element of which was accommodation, accounting for £107 million. It is therefore vital to ensure that the stock of holiday accommodation in Torbay's core holiday areas (defined as 'Principal Holiday Accommodation Areas') are protected, particularly as the pressure for residential development grows, and that the standard of accommodation is encouraged to undergo continued improvement and upgrading in line with tourist expectations.
- 5.37 The contraction of the industry since the late 1970s, notably due to the decline of the traditional seaside holiday, has been partly offset by strategies to diversify into new 'niche' tourism markets and to increase the length of the holiday season. There has been an increase of weekend and off-peak breaks, special interest holidays, second holidays and business / conference tourism.

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- 5.38 The provision of good quality tourism is essential to this, in particular the development and regeneration of Torquay and Brixham harbour and waterfront areas. The Torquay Waterfront Project is especially significant to the regeneration of Torbay. This is a multi-million pound scheme scheduled for the next few years. The first phase was completed in 2003 with the creation of a footbridge linking the two sides of the harbour and creation of high-profile leisure facilities on the historic Beacon Quay site, which have proved a great success, far exceeding anticipated targets. Other future schemes of note are the upgrading of a number of significant hotels in Torquay, which will continue to consolidate the provision of high-quality accommodation for the upper end of the market.
- 5.39 Tourism plays an important part in the economic regeneration of the rural parts of the sub-region also, bringing significant benefits to rural communities. It is of course vital here, as in urban parts of the sub-region, that environmental assets are safeguarded from adverse forms of development due to their contribution to the tourist character of the area. Green tourism is being promoted in the South Hams through the South Hams Green Tourism Business Scheme to help manage and reduce the environmental impact of visitors.
- 5.40 The coastal resorts of Teignmouth, Shaldon and Dawlish are significant to the economy of Teignbridge and brought in approximately £95 million of direct spending to the district in 1999. However, these towns face similar problems as Torbay with a need for upgrading of tourist facilities in seaside resorts.

Retail

- 5.41 Retailing similarly makes an important contribution to the economy of the sub-region and the implications for levels of growth will have an impact on the retail role of specific centres.
- 5.42 Studies have shown that Torquay is the dominant shopping centre in the Torbay and South Devon Sub-Region and serves a catchment area of around 285,000. Other important centres include Paignton, Newton Abbot, Totnes and Brixham. These centres all tend to attract trade from each other. Within the wider regional context, Plymouth and Exeter are the two principal shopping centres which in turn attract shoppers from across the sub-region.
- 5.43 The CACI Baseline Retail Assessment of the Regional / Sub Regional centres in the South West (2004) places centres in a retail hierarchy of centre type. Torquay is classified as a 'major centre' along with Plymouth and Exeter. Newton Abbot is defined as a 'regional town'. These classifications are in turn sub-divided into further categories - Exeter is defined as a 'quality centre', Torquay and Plymouth are defined as 'average centres', and Newton Abbot as a 'value regional town'.
- 5.44 Current policy guidance on the way retail development should take place at the regional and sub-regional levels is set out in RPG10 (Policy EC6: Town Centres and Retailing) and the Devon Structure Plan 2001-2016. Policy SH2 'Shopping Facilities and Settlement Hierarchy' of the Adopted Devon Structure Plan seeks to maintain a range of facilities within the central areas of the Principal Urban Areas, Sub Regional Centres, Area Centres and Local centres, so as to sustain and preserve the settlement hierarchy. More recently, PPS6 has clarified the

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role of the Regional Spatial Strategy in preparing a strategic framework for the development of a network of centres, (paragraphs 2.12 to 2.14).

5.45 The future direction of growth of retail centres will clearly relate closely to the level of future growth of the sub-region. The Torbay Retail Study 2005 has been commissioned to assess a number of the issues that PPS6 highlights, in order to inform the JSA work and the emerging core strategy for the Torbay LDF. The overall aims of the Retail Study are:

- to assess the retail performance of Torbay's towns and key centres;
- to establish the Council's retail floorspace needs over the period 2005 to 2016; and
- to identify action required to maintain / improve the competitive position of the Torbay towns in the sub-region.

5.46 The outcomes of this research will provide a significant input to the areas of work that the Regional Assembly have identified as being required to complete work on a spatial retail strategy, i.e. retail health checks, forecast requirements of the retail sector, including the identification of quantitative and qualitative change, market realism of possible options, physical scope for the accommodation of growth, response to changes in the retail market and the need to address adverse competition from other centres.

5.47 It is inappropriate to speculate on the findings of the Torbay Retail Study but it is reasonable to suggest that the following considerations will apply:

- a. retail and population / household trends are likely to support the provision of new retail floorspace in Torbay, particularly comparison goods;
- b. the current policy framework will focus growth in the established centres; and
- c. whatever JSA option is pursued, the maintenance and improvement of the retail roles of Torbay's centres will be essential as part of a broader economic regeneration agenda.

5.48 It is unlikely that any major shift in status of the existing retail centres in the sub-region would be appropriate or indeed commercially or physically possible. However, retention of a competitive edge in relation to competing centres such as Plymouth and Exeter will be essential. This is especially important in Torbay given the enormous economic significance of its three towns as the major resort destination in the South West.

5.49 Therefore, it will be critical that RSS retail policy should take account of the specific role and characteristics of specific settlements as retail centres (referred to by the Baker Associates 'Fitness for Purpose' Report as 'regional specificity'), in order to ensure that retail development is commensurate with the role and function of the various settlements within the sub-region. The self-sufficiency of all retail centres in urban and rural areas should be promoted through the RSS.

6. Sub-Regional Study Vision Options

6.1 The Torbay and South Devon Sub-Regional Study's vision is set out on page 1 of this report.

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- 6.2 Consultation on the Torbay and South Devon Sub-Regional Study developed this vision and focussed on 3 Options for housing growth. These are summarised in Figure 12.

Figure 12 Sub-Regional Study Options - Consultation Figures

Option 1 - Low. 300 dwellings per year in Torbay, 100 per year in Newton Abbot and partially meeting local needs in market towns and smaller settlements.		
	Dwellings per year	Total 2001-2026
Torbay	300	7,500
Newton Abbot	100	2,500
Smaller settlements	100	2,500
Sub-Region	500	12,500
Option 2 - Medium. 400 dwellings per year in Torbay, 200 per year in Newton Abbot and partially meeting local needs in market towns and smaller settlements.		
	Dwellings per year	Total 2001-2026
Torbay	400	10,000
Newton Abbot	200	5,000
Smaller settlements	150	3,750
Sub-Region	750	18,750
Option 3 - High. 500 dwellings per year in Torbay, 200 per year in Newton Abbot and partially meeting local needs in market towns and smaller settlements.		
	Dwellings per year	Total 2001-2026
Torbay	500	12,500
Newton Abbot	300	7,500
Smaller settlements	150	3,750
Sub-Region	950	23,750

- 6.3 Options 1 and 2 represent a constrained rate of house building below demographically implied provision, as summarised in Figure 13. Option 3 represents a modest over provision in the early years of the plan period, which turns into a deficit by 2011 (see Appendix 2).

Figure 13 Sub-Regional Study Options and Demographically Implied Provision

Year	Demographically implied provision per year, to nearest 10 dwellings	Option 1	Option 2	Option 3
2006-2016	900	400	150	+50

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2016-2026	1,040	540	290	90
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6.4 It should be noted that these are a straight forward extrapolations of numbers. Taking growth projections from the Chelmer model would suggest the growth rates set out in Figure 14. A break down of these is set out at Appendix 2.

Figure 14 Sub-Regional Study Options - Chelmer Model Figures

	Dwellings 2001-2026	Dwellings per year (2001-2026)
Option 1	15,890	640
Option 2	22,590	900
Option 3	26,840	1,070

7. Consultation Exercise on Torbay and South Devon Sub-Regional Study

7.1 The consultation exercise covered the entire sub-region and the extended consultation period lasted from 28 February to 8 April 2005. The exercise included:

- Press coverage, including a front page article in the Herald Express.
- Questionnaires sent out at random to 500 households across South Devon
- Questionnaires sent to statutory consultees and other interested parties by each of the participating local authorities.
- An on-line questionnaire on the consultation pages of the Torbay Council website, which was advertised on A3 posters and on the South West Regional Assembly's web page.
- On 25 February, three panels (covering the environment, the economy and the community) met in Torquay Town Hall to engage with representatives of the participating authorities in question and answer sessions.
- The Local Strategic Partnerships of Torbay, South Hams and Teignbridge all considered the Sub-Regional Study during or at the end of the consultation period.

7.2 The exercise generated some response in the local press, and a wide response was received.

Consultation Response

7.3 130 responses were received during the consultation period, divided as follows:

- 54 responses from the 500 random questionnaires (10.8% response rate)
- 30 responses received on-line
- 28 paper questionnaire responses
- 19 'written statement' responses, from a variety of regional and national bodies, parish councils and South Hams and Teignbridge Councils

7.4 45% of all respondents completely or largely agreed with the vision (Question 1) and 30% largely or completely disagreed with it.

7.5 The detailed responses are set out in Appendix 3. In summary, there was a significant difference between the randomly selected group, which went 50/50

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for and against the low growth option, and the self-selecting responses (both paper and on-line), two thirds of which opted for the low growth option (1). The 'written representation' responses were different again, with half stating no comments, and the other half opting largely for the high growth option (3).

7.6 Despite the differences in support for the Options, some important common themes have emerged:

- Prioritisation of development on brownfield sites and avoidance of urban sprawl and coalescence of settlements.
- Protection of the unique environment.
- Investment in transport.
- Provision of affordable housing for local people (not second homes).
- Protection of quality of life for existing residents.

7.7 Other important points were made in the 'written statement' responses, and perhaps the most important and strategic were:

Environment

- Devon's landscape is culturally important (English Heritage)
- Conservation and enhancement of the area's environmental assets, including ancient woodland (The Woodland Trust and Teignbridge DC)
- Important constraints limit sustainable growth (South Hams DC and Teignbridge DC)
- Protection of environmental quality is important (South Hams DC and Teignbridge DC)
- The need to prevent coalescence of settlements (Teignbridge DC)

Economy

- The regeneration issue is critical to Torbay (Belgrave Hotel, Torquay; South Hams DC; RDA)
- Need to recognise important contribution of fishing and tourism to the economy of Torbay
- Need to ensure a greater number of high quality jobs in Torbay (RDA) and in Newton Abbot (Teignbridge DC)
- Failure to tackle the economy within the area could lead to increased levels of commuting to other PUAs for employment (RDA)
- Torbay needs to tackle severe levels of deprivation (RDA)
- Options 1 and 2 would make Torbay less competitive and attract less external funding (Bovis Homes)

Housing

- High level of housing need throughout Teignbridge District (Teignbridge DC)
- More affordable housing needed (RDA; South Hams DC)

Community facilities

- Future growth could benefit the education and upskilling of the sub-region (RDA)

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- Balance between housing and the economy is important, to avoid growth of dormitory settlements (Newton and Noss PC)

Infrastructure

- There is a requirement to improve road and rail links (RDA)
- Support for South Devon Link Road/ KKBP (South Hams DC)
- Past high Rates of growth have not been supported by improved infrastructure (Teignbridge DC)

Strategic amount and distribution of growth

- A high degree of development accompanied by an understanding of the ecological and environmental background of an area can be far less damaging than a lower amount – if mitigation and environmental enhancement are planned for (English Nature)
- Need to address relation of Torbay and Exeter sub-regions (RDA)
- Torbay's PUA status should be retained (Teignbridge DC)
- Need to meet local needs of market towns and smaller settlements (SHDC)
- Aim to provide for well being of all local communities through increased self sufficiency (SHDC)
- Avoid coalescence of key settlements (South Hams DC; Hennock PC)
- Too much emphasis on Torbay, when the main sustainable growth option is Newton Abbot/Kingsteignton/Drumbridges (Arnold White Estates; Clifford Estate Company; RPS Planning; Persimmon Homes)
- Detailed studies of each settlement in South Devon needed (RPS Planning; Persimmon Homes)
- Study is too dominated by Torbay, and it needs to relate more to the other districts (Totnes and District Society)
- Growth should be centred on Torbay, Newton Abbot and Totnes (Dartington Hall Trust)
- A high level of growth will inject regeneration, transport improvements and other infrastructure requirements and affordable housing (Dartington Hall Trust)
- Vision should be more fine-grained and enlarge on the different aspirations of the various settlements, whilst clarifying Torbay's role as the sub-region's highest order settlement and focus more on its specific needs (Teignbridge DC)
- Precautionary approach to growth advocated (Teignbridge DC)
- Growth rates of Torbay and Newton Abbot should not be linked (Teignbridge DC)
- Torbay's adjacent settlements offer better land availability than Torbay to accommodate additional population and job growth (RDA)

Key themes to arise from Panel Hearing (25th February 2005)

- 7.8 The following is a summary of the key themes to emerge from the panel hearings on 25th February 2005. It is not intended to be a comprehensive minute of the meeting; a more comprehensive account is set out in Appendix 4.

Environment Panel: “Constraint and opportunity”

- Important to protect the area's high quality environment.

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- AONB is both a constraint and an opportunity: opportunities for recreation, positive management and some limited development of degraded brownfield areas.
- Focus on protecting high quality environment. Tourism relies on this and is the area's unique selling point. (Note there was some disagreement about this).
- Climate change will have a significant effect on the South West. E.g. flooding issues.
- Sustainable development is not *just* about the environment, but the environment is an essential element of sustainability.
- Need for a long term vision.

Economic Panel: “*It’s not just about housing*”

- Debate should not just focus on houses. It is about delivering a range of economic and community benefits that will foster sustainable development.
- Need to improve transport links.
- Need to increase the rate of growth in order to deliver regeneration.
- Need for careful diversification: Should promote home grown investment as well as inward investment. Danger of relying on a single multi-national.
- We have wonderful natural assets that can be a focus for tourism, e.g. sailing.
- Need for a long term vision.

Community Panel: “*Sustainable communities need careful planning*”

- High level of need for affordable housing across the sub-region. Low stock of affordable housing. Low wages are a problem.
- Quality of life is as important as numbers of houses alone.
- New development needs to be carefully managed as part of a sustainable community. There is local concern about parachuting very high density social housing developments into already deprived areas.
- Importance of good design and management. Developer contributions have an important role in delivering Sustainable Communities.
- Need for better transport links - these could benefit existing communities.

8. Sub-Regional Study Options

- 8.1 It is very important to remember that the remit of the Sub-Regional Study extends beyond housing numbers, a point made by several respondents. In particular, the creation of sustainable communities requires growth in employment opportunities, which are also likely to require land take up. In addition a range of community facilities must also be provided.
- 8.2 However, housing numbers are an important part of the Sub-Regional Study and are critical to providing everyone with the chance of a decent home.

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Housing projections are carried out in various ways and there is currently some debate at national level about house building levels.

9. Implications of the Three Options

Option 1 “Low” - Maintain RPG10 Baseline

- 9.1 Option 1 proposes keeping to the existing constrained level of growth for the Sub-Region, based on the current Devon Structure Plan / RPG10 position. This would approximate to around 300 dwellings per year in Torbay and a reduced rate of around 100 in Newton Abbot, plus partially meeting the local needs of market towns and smaller settlements in South Hams and Teignbridge. However, growth rates will vary significantly across the sub region.
- 9.2 The Devon Structure Plan (2001-2016) sets out a restrained provision below the demographically implied number of houses (i.e. the number of dwellings that would need to be built on a ‘predict and provide’ basis). The figure from the 1999 Devon Structure Plan (First Review) was set at around 17%.
- 9.3 On the basis of the 2003 ONS projections, the population of Torbay is projected to rise to 147,700 by 2016 and 159,800 by 2026. The sub-regional population is predicted to rise to over 300,000 by 2020. On this basis, the Option 1 growth rates suggest a shortfall below demographically implied provision of around 50% at the start of the RSS period (2006-2011). This shortfall rises to 66% by 2026.
- 9.4 On the basis of the above, Option 1 would lead to a serious shortfall in housing supply in relation to projected need. This could be partly mitigated by the delivery of a high proportion of affordable housing. However, the overall effect would be to exacerbate existing problems identified in the Barker Review. The possible implications of this are set out in the following paragraphs:

Shortfall of Affordable housing

- 9.5 Further constraint to housing supply without decreasing the demand for existing (and new) housing, would put upward pressure on prices and possibly increase price instability. The area already has very high levels of need for affordable housing and Option 1 would be likely to exacerbate this.
- 9.6 Moreover, reducing the supply of new housing will reduce the supply of affordable housing. Research by the Regional Assembly suggests that it is unrealistic to expect that more than 30 - 40% of new housing in urban areas could be provided as affordable housing, without substantial increases in Housing Corporation funding. There may be some scope to increase the proportion of affordable housing in small settlements, through lower thresholds and rural exceptions sites.
- 9.7 The severe restriction of in-migration which would be needed to implement this option, would probably not be feasible or legal. Assuming that such measures are not imposed, the pressure from people relocating from the elsewhere in the Country is likely to continue. Many of these people will be selling more expensive properties in the South East, which will consequently increase upwards pressure on house prices in South Devon. This could lead to a

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crowding out of local needs with increased out-migration of young people (particularly graduates) and in-migration of older people. Alternatively, additional housing is likely to come forward through the appeals system, particularly where proposals are on previously developed land. However, this would inherently be unplanned and sporadic.

Impact on Social Services

- 9.8 Increased house prices could create shortages of care staff and other key workers. Option 1 could also exacerbate the ageing population rate in Torbay and the Sub Region. Around 23% of Torbay's population are aged 65+, compared to 18.5% in the South West and 16% nationally. Constraining housing supply as severely as is implied in Option 1 is likely to exacerbate this, putting serious pressure on health and social services; whilst simultaneously making housing less affordable for care workers. In more rural areas, pressure on house prices could jeopardise local services, harm local business and the agricultural sector, and force the out-migration of young people to areas with better economic and housing prospects.

Inward Investment

- 9.9 Option 1 is unlikely to attract significant inward investment into Torbay or the sub Region (see RDA's comments). Regionally allocated funding is increasingly being targeted at areas where development opportunities exist. Therefore, Option 1 is likely to result in the loss of funding for affordable housing and gap funding to pump-prime employment land. This may worsen economic prospects and prevent the effective development of allocated employment sites. Option 1 may also prejudice other funding such as Housing Corporation programmes, which would be targeted at larger PUAs.

Greenfield Development

- 9.10 It is likely that most housing growth could be on previously developed land. There would be much less danger of coalescence of settlements than in the other Options. Depending on the delivery of dwellings on previously developed land, it is possible that greenfield housing allocations in existing plans could be postponed. Clearly, the environmental benefits of this would need to be balanced against the economic cost and possibly the loss of opportunities to manage some environmentally valuable land more effectively.
- 9.11 The Torbay Housing Land Monitor indicates that average house building in Torbay is 491 per annum (1995-2004). The forthcoming Torbay Urban Capacity Study (Scott Wilson) will provide an assessment of future brownfield potential. However, initial assessments based on past trends and known windfalls suggest that this rate of brownfield development is maintainable.
- 9.12 In addition, the Barker Review of Housing Supply (Barker 2004), advocates a significant increase in housing supply. The Government's response to Barker, in the form of a PPS3, is expected in late 2005. However, there are good reasons for assuming that the Government will be looking to accelerate rather than further constrain housing, particularly on previously developed land. There is a strong possibility that Government will seek to expedite the development of greenfield sites that are identified in development plans, rather than postpone their development.

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- 9.13 If local planning authorities seek to constrain development unrealistically, this could result in 'planning by appeal'. This would tie up money and time resources in the appeal system and result in sporadic development with few of the benefits of the development, such as Section 106 contributions, Housing Corporation funding, etc, coming into the sub-region.

Summary of Option 1

- 9.14 Option 1 is a very heavily constrained development option, likely to yield figures below the 2003 mid-year estimates of population growth. It would be likely to exacerbate problems of affordability, increase the trend of an ageing population and lead to loss of funding and investment opportunities. Job opportunities would be unlikely to improve, and the level of restraint would constrain the construction industry.
- 9.15 Services may deteriorate and there is likely to be increased pressure on health care and Social Services to meet the needs of an ageing population.
- 9.16 Greenfield sites and the separation of settlements are likely to be safeguarded. However, seeking to secure a high level of constraint may conflict with quite specific Government guidance in the forthcoming PPS3 and lead to 'planning by appeal', with consequent loss of overall direction and funding opportunities.

Option 2 "Medium" - RPG + 25%

- 9.17 Option 2 assumes a baseline of the RPG10 growth rate, plus 25% for Torbay (approximately 400 dwellings per year), continuation of current levels of provision for Newton Abbot (approximately 200 per year), plus meeting the local needs of smaller settlements, including market towns and resorts within South Hams and Teignbridge.
- 9.18 On the basis of ONS population projections, this still represents a constraint below the demographically implied provision for the sub-region of nearly 30% between 2006-2011, rising to 45% by 2026. A more detailed breakdown by local authority area is set out in Appendix 2.
- 9.19 It is questionable whether this level of growth would lead to a significant increase in the supply of affordable housing in Torbay and other large settlements. Although an increase in 100 dwellings per year above the RPG baseline could increase affordable housing supply by 30 units, this is dependent upon the new houses coming from large sites. If the supply came from small windfall sites, the affordable housing yield would be less, due to the operation of a site size threshold. More opportunities for affordable housing may however come forward from smaller settlements in Teignbridge and the South Hams.
- 9.20 The annual housing monitor and known windfalls suggest that, in Torbay, this level of accelerated development is achievable predominantly on previously developed sites, so that pressure on additional greenfield sites would be low. Additional funding would be needed to achieve adequate levels of affordable housing and to provide employment opportunities.
- 9.21 This rate of growth is below the actual recent rate of housing provision in Torbay, indicated in the Annual Housing Monitor. It would also be exceeded if

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significant windfalls arose in the sub-region. Clearly, recent rates of development occurred during a boom in the property market, which may be coming to an end. However, this indicates a physical potential to accommodate a level of growth above the RPG10 baseline.

- 9.22 Option 2 is still a constrained rate of growth in Torbay and may be deemed inadequate to deliver upon the need to increase housing supply in line with the Barker Review of Housing Supply. This option may not be perceived by the Government and Regional Assembly as a significant acceleration of growth rates. Funding may therefore be focused on the larger PUAs (Plymouth, Exeter and Bristol) which would be seen as having the greatest potential for new employment and housing. Therefore, funding for major infrastructure projects may not be forthcoming.
- 9.23 However, outside of the PUA, this level of growth is considered to be an appropriate one to meet local needs, whilst reflecting the environmental constraints and function of the settlements. In the Newton Abbot Sub Regional centre, there is concern that this level of growth would not be sustainable after 2016.

Summary of Option 2

- 9.24 This option demonstrates an increase on RPG Provision for Torbay, but not significantly elsewhere in the sub-region. It is likely to be achievable with minimal loss of greenfield land. However, it is doubtful whether the option will significantly reduce the affordability gap of housing, or lead to sufficient inward investment to address the area's serious economic problems. It is therefore likely to result in a more elderly demographic structure than currently exists, although not as unbalanced as would result from Option 1. Outside of the PUA there would be increased opportunities to meet local needs, however there is danger that that there would be development of greenfield sites in parts of Teignbridge post 2016.

Option 3 "High" - RPG + 50%

- 9.25 This proposes Regional Planning Guidance rate of growth, plus 50% for Torbay (approximately 500 dwellings per year) and an increased level of growth for Newton Abbot (approximately 300 dwellings per year), plus meeting the local needs of market towns, resorts and smaller settlements within South Hams and Teignbridge.
- 9.26 The consultation leaflet suggested that RPG +50% is a high rate of growth. However, it is slightly below the demographically implied provision based on 2004 mid year estimates. Although a small surplus is indicated in 2006, this rapidly becomes a shortfall by 2011. By 2016, annual provision would be 18% below demographically implied provision and 30% below by 2025. Appendix 2 provides a breakdown of these figures by District. However, this level of growth is still considered to be very high for Teignbridge and the South Hams.
- 9.27 In addition, the Torbay Annual Housing Monitor indicates that average housing completions per year 1995-2001 were 491. There are several known large brownfield sites in Torbay and the sub region that suggest strongly that the potential is not likely to be exhausted in the short to medium term (e.g. 2016).

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- 9.28 The main threats to the continuation of this trend are likely to be a market slowdown. However, this would increase the prospects of providing affordable housing by making RSLs more able to compete with private house builders. In addition, demonstrating the physical potential to deliver significantly greater growth rates than the RPG10 baseline may unlock additional funding for employment and housing.
- 9.29 Option 3 would present an opportunity to address issues such as housing affordability and would generate external funding and planning contributions for the delivery of sustainable communities. It is therefore the option that is most likely to deliver on the Government's Sustainable Communities Plan Objectives.
- 9.30 There would be some development of greenfield land. However, this would be through planned expansion and in many cases the land is already allocated in development plans. The focus of development would still be on maximising development on previously developed land, through the sequential approach advocated in PPG3, as well as measures to bring vacant and under used housing stock back into use. The environmental impacts of greenfield development would need to be carefully regulated through robust planning control. However, development may also present opportunities to enhance the environment, as well as delivering social and economic benefits. For example, it could achieve environmental and visual improvements to degraded areas as a planning gain arising from development in the vicinity.
- 9.31 There will be a pressing need to improve employment prospects in the sub-region, in order to avoid major increase in commuting to Plymouth and Exeter. An interim review of Torbay's employment land allocation indicates that there is sufficient land to provide an increase in employment by 100-140 jobs per year on existing employment allocations in the Torbay Local Plan (1995-2011). (Torbay Council, Submission to Communities Plan for the South West).
- 9.32 Constraints in terms of low land values for employment land, and poor transport links reduce the desirability of employment development, and create pressure for non-business use of employment allocations. Option 3 would have to address these problems. However, Option 3 could unlock increased regional and other funding to gap fund employment development and also fund training and other capacity building programmes.
- 9.33 Improving transport links are also critical to increasing economic prosperity.
- 9.34 It is important not to underplay the importance of linking job creation to the provision of new housing. However, although an increase in commuting is not desirable on sustainability grounds, increasing the working age population of Torbay would broaden the demographic base of the area, which would help the creation of mixed and balanced communities. This in turn would make the area more attractive to inward investment and economic activity. There would be a strong justification, as well as an opportunity, for requiring a significant proportion (possibly all) of the accelerated number of homes to be for local needs, key workers and first time buyers.
- 9.35 It is important to note that Option 3 *may* occur as the result of a trend planning basis (i.e. through windfalls naturally coming through the planning system). Failure to identify proactively the opportunities for accelerating development and creation of sustainable communities, may mean that housing expansion occurs

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in the sub-region without the increased investment needed to provide improved infrastructure, employment opportunities and sustainable communities. This would not reflect the positive planning agenda.

- 9.36 Whilst this level of growth is considered to be appropriate for Torbay, there is concern that it would represent an unduly high rate of growth outside of the PUA. Although such a rate may be justifiable on economic and social grounds, there is concern that it would lead to an unacceptable level of greenfield development and the coalescence of settlements, particularly after 2016.

Summary of Option 3

- 9.37 Although promoted as a 'high' growth rate, Option 3 mainly represents a continuation in recent trends (1995-2004) with a higher rate for Teignbridge. It offers the opportunity to address some of the sub-region's problems such as shortage of affordable housing. There will be a higher rate of development of greenfield land in the sub region, although the focus will be on previously developed land within the PUA. Careful planning is likely to render the loss of greenfield land within environmentally acceptable limits. Significant investment in transport and employment infrastructure would be essential to provide economic regeneration and ensure that development is part of a sustainable community, rather than a dormitory settlement.
- 9.38 There are concerns about the urban capacity within Teignbridge and South Hams to accommodate this level of growth.

10. Conclusions - Need for an Alternative Option

- 10.1 In assessing the Options it became apparent that there was need for a fourth option that reflects more closely the particular characteristics and constraints of the various parts of the sub-region, and their status in RPG.
- 10.2 The Joint Steering Group, at its meeting on 23rd May 2005 favoured adopting a differential approach, referred to here as **Option 4**. This divides the RSS period into 2 periods, 2001-2016 and 2016-2026. Torbay is proposed to grow at RPG +50%, reflecting its need for regeneration and affordable housing, as well as its status as a PUA. Teignbridge, particularly Newton Abbot Sub Regional Centre, is proposed for an intermediate level of growth (RPG rate/ JSA Option 2) to 2016. This is largely to accommodate the need for affordable/local needs housing. Growth in Newton Abbot is projected to be much lower post 2016 (below current RPG10 rates). The pressing need for affordable housing is recognised by a medium growth rate (RPG+25%) in the South Hams. Growth within smaller settlements in the sub-region is predominantly intended to meet locally arising needs. This proposed approach is summarised in Figure 15. *The numbers of dwellings are provisional, in particular the district breakdown will need to be refined through preparation of the RSS and assessment of urban capacity.*

Figure 15 Sub-Regional Study - Steering Group's Favoured Option 4

Area	Strategy	2006-2016			2016-2026		
		Total	Per Annum	Target for Affordable Housing	Total	Per Annum	Target for Affordable Housing
Torbay PUA	RPG+50 %	5,000	500	1,500	5,000	500	1,500
Newton Abbot Sub Regional Centre	RPG rate / slight increase to 2016. Reduced growth post 2016.	2,700	270	1,350	1,000	100	350
Market towns and smaller settlements in Teign-bridge*	RPG rate / slight increase to 2016. Reduced growth post 2016.	1,800	180	950	1,450	150	440
Market towns and smaller settlements in South Hams*	RPG+25 % for towns/ RPG base rate for smaller settlements.	1,600	160	900	1,600	160	900
Sub-Region Total		11,100	1,110	4,700	9,050	910	3,190

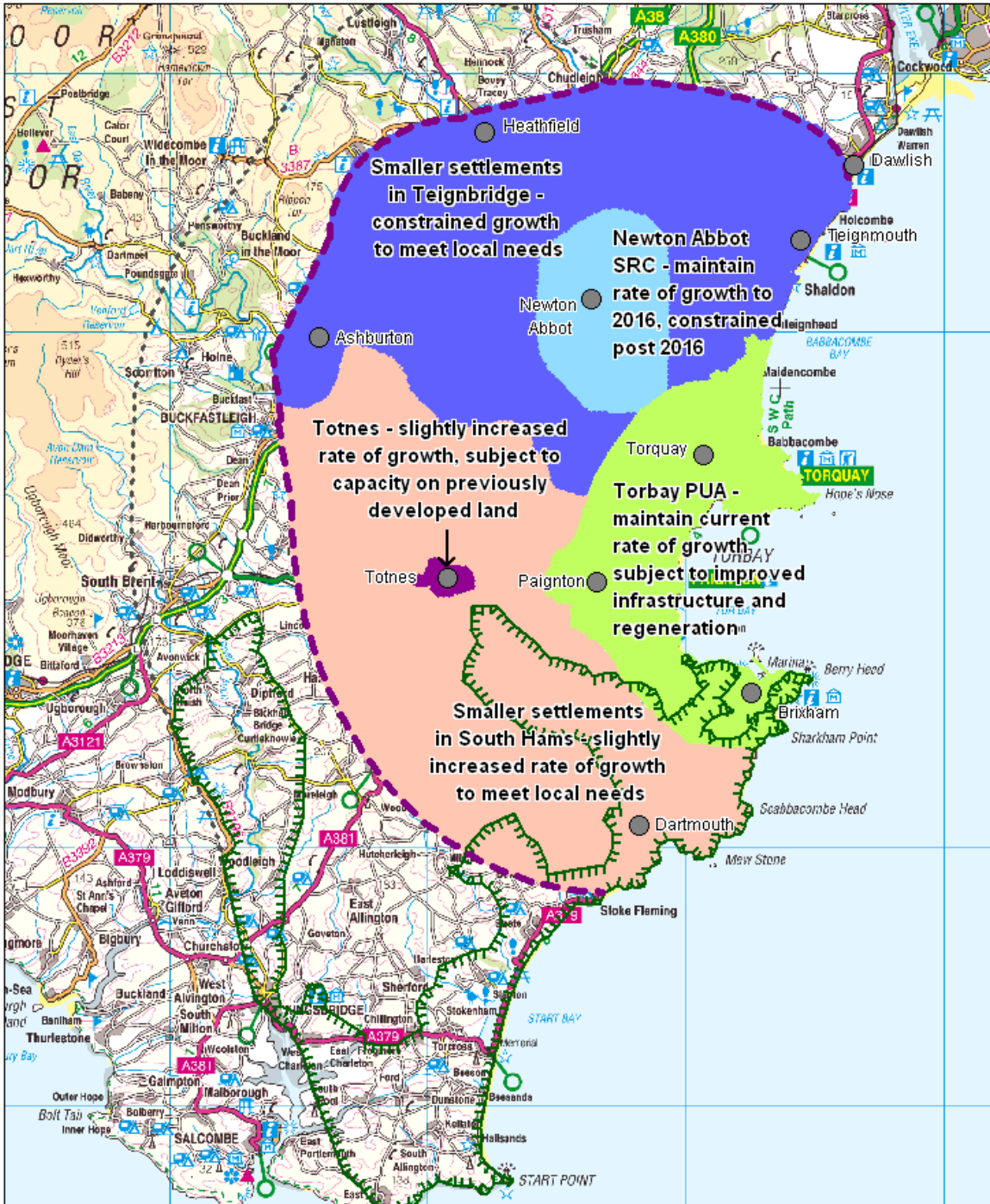
**Note: figures for smaller settlements are for indicative purposes only and will be dependent upon supply of previously developed land, and local needs.*

10.3 A significant proportion of new dwellings must be affordable housing in order to meet the very serious housing need that exists across the sub region. The table above sets out indicative figures. However, proportions of sites, thresholds, types of affordable housing etc need to be established in Local Development Frameworks. The site size threshold in operation and availability of public funding will be critical to achieving this target.

10.4 Map 2 indicates Option 4 along with key constraints, in the form of a proposed key diagram.


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Map 2 Torbay and South Devon Sub-Regional Study - Key Diagram for Option 4



KEY DIAGRAM FOR OPTION 4

 South Devon AONB

 Approximate boundary of South Devon Health Care Trust catchment area (based on practice referrals, data from Torbay Primary Care Trust)

 Approximate boundary of Torbay Housing Market (based on DTZ Pieda study)

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11. The Way Ahead and Infrastructure Requirements

11.1 Much of the housing development identified in Option 4 is likely to occur without particular intervention. However, there will be a need for infrastructure improvements, particularly to achieve economic regeneration and create sustainable communities.

11.2 In particular the following areas are important:

- **Improvement to transport infrastructure.** Torbay is the only major resort in the country that is not served by a dual carriageway. There is a pressing need for the **Kingskerswell Bypass/South Devon Link Road**, to improve links with the motorway network. It has been estimated that the Kingskerswell bypass would lead to the creation of 8,000 jobs within 5 years.
- Better **rail services** from Newton Abbot are needed to improve integration with the Paddington-Penzance mainline. Torbay Council is in discussions with rail operators to increase the number of services. Torbay Council is making extensive use of S106 Planning Contributions to improve the bus network.
- **Provision of Serviced Employment.** Table 11 sets out achievable job yield from land allocated within Torbay. There is likely to be a need for gap funding to provide services for the land and help job start ups.
- **Affordable Housing.** All the Authorities in the sub-region have very high affordable housing needs. Although part of this will be achieved through S106 contributions, there will be a need for Housing corporation ADP and HIP funding to assist this; particularly increase the supply of rented rather than intermediate housing.
- **Economic, Social and Cultural Regeneration** There is a pressing need for regeneration and upgrading of the resorts in the Sub Region. In addition community regeneration and economic diversification will need to be addressed in rural areas.
- **Landscape and wildlife protection and enhancement** are essential, particularly in nationally and internationally important areas. Careful management of the AONB, coastal areas and rural/urban fringes are critical.

Opportunities to Develop Without Grant

11.3 Torbay has access to EU Objective 2 and Objective 3 Structural Funds Programmes. Other sources of funding include the National Lottery Fund.

11.4 However, there are opportunities to develop sustainable communities without grant. Land values are sufficiently high to support S106 contributions, principally to provide affordable housing, education and bus provision. Planning for mixed communities (ODPM 2005) requires Planning Authorities to have fallback mechanisms to ensure delivery of affordable housing without a grant (for example, a different split between social rented and intermediate housing or a different proportion of affordable housing).

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- 11.5 There are other ways of achieving affordable housing, such as intermediate housing, public private partnerships, use of public sector land and emerging new models of tenure, such as those being promoted by Affordable Homes UK.
- 11.6 Torbay is one of the country's premier resorts and tourism is very significant in the sub-region and there are opportunities for major investment into key hotels and tourist attractions. The Torbay Tourism Strategy 2005-2015 promotes the improvement in quality of the tourism product. This will allow the re-development of some poorer quality and less central accommodation for other uses such as residential or employment.
- 11.7 The strategy also focuses upon utilising the area's unique assets such as the coastline, Dart Valley, Sailing opportunities and the archaeological/geological and environmental heritage. Planning Contributions also provide opportunities for improved management and improvement of landscape/ wildlife areas, particularly the remediation of degraded land.

12. Sustainability Appraisal

- Material to be provided

13. Risk Assessment

- 13.1 The main risks associated with the JSA preferred option are as follows:
- Insufficient capacity from previously developed land, leading to pressure on greenfield sites. However, past trends and urban capacity studies suggest that there is an adequate supply of previously developed land. In addition there are high levels of housing need that may justify greenfield land release.
 - Lack of job opportunities to accommodate the increased workforce from additional housing. However, much of the proposed housing in the JSA option is from previously developed land and therefore likely to come forward in any event. There is a pressing need for regeneration and improving wage levels for the existing population. It is arguable that not making provision for the level of growth identified in the JSA is unlikely to prevent the quantum of residential development occurring. However failing to plan positively for the growth is likely to result in it occurring without adequate social and physical infrastructure to create sustainable communities.
 - Focus on small sites may limit the amount of affordable housing that is achievable. However this approach is likely to increase the supply of entry level housing (i.e modestly sized market properties). There is scope to reduce site size thresholds below 15 units/0.5 ha in emerging Government guidance.

14. Relationship to Exeter and Plymouth Sub-Regional Studies

- 14.1 Torbay and other resorts in the Sub Region are more than regionally significant in terms of their tourism function. Moreover, Torbay is the Nation's leading long stay tourism resort.
- 14.2 There is an overlap between the Torbay and South Devon and Exeter sub-regions, since both areas cover parts of Teignbridge. For the housing market area it has been assumed that 75% of Teignbridge falls within the Torbay and

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South Devon Sub Region. Exeter exerts a stronger pull on the Torbay and South Devon Sub- Region, commensurate with its regional function.

- 14.3 There is a clearer functional division between the Plymouth and Torbay and South Devon sub regions due to weaker transport links between Torbay and Plymouth than between Exeter and Torbay. It is assumed that about half of the South Hams falls within the Torbay and South Devon sub Region, with the western half within the Plymouth Sub Region.

15. Next Steps

- 15.1 This report is a technical study by the Torbay and South Devon JSA authorities (Torbay Council, South Hams District Council, Teignbridge District Council and Devon County Council). Officers from the Regional Assembly, Regional Development Agency and GOSW also contributed to the study.
- 15.2 The practicability of the Options will need to be tested by further evidence, particularly on urban capacity. The preparation of options for the districts' local development frameworks will help to inform this.
- 15.3 The Section 4/4 Authorities will be making more detailed submissions into appropriate growth levels by September 13th 2005,

Appendices (To follow)

- 1. Study Brief**
- 2. Demographic and Housing Statistics**
- 3. Urban Housing Capacity Studies**
- 4. Econometric Data**
- 5. Travel to Work Data**
- 6. SWRA Retail Assessment**
- 7. Functionality of Settlements**
- 8. Consultation Leaflet**
- 9. Consultation Response**

MF/DP/EB
20/06/05

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Appendix 2

Figure 16 Demographically Implied Housing Provision - Torbay and South Devon Sub-Region

Year	Demographic ally implied provision per year (dwellings*)	Option 1 RPG baseline Shortfall per year	Option 2 RPG + 25% Shortfall per year	Option 3 RPG + 50% Surplus (+) Shortfall
2006	740	350	140	+60
2011	860	480	250	50
2016	930	560	330	130
2021	980	610	380	180
2026	1,090	720	480	280

* Average dwelling requirement per year over 5-year period, to nearest 10. Full workings and District breakdown are set out at Appendix x: Source ONS Mid year estimates 2003.

Figure 17 Chelmer Model projections for Torbay and South Devon Sub-Region 2001-2026 - total dwellings (to nearest 100 dwellings)

Year	Zero Net Migration	Continuation of short term migration rate, 98-03	Continuation of medium term migration rate, 93-03	Sub Regional Study Options*		
				1 (Low)	2 (Medium)	3 (High)
2001	120,900	120,900	120,900	120,900	120,900	120,900
2006	121,700	128,900	128,400	125,800	127,100	128,300
2011	122,800	137,600	136,700	130,800	133,200	135,700
2016	123,900	146,800	145,500	135,700	139,400	143,100
2021	124,300	155,500	153,800	140,600	145,500	150,500
2026	122,900+	162,700	160,700	145,500	151,600	157,800

* Option 1 RPG 10 Baseline
 Option 2 RPG 10 Baseline +25%
 Option 3 RPG 10 Baseline +50%

+ Zero immigration results in population fall in latter years of plan period.

These figures give a projection forward from assumed past rates of migration and growth on RPG baseline figures at 2001.

Source: Chelmer Model (SWRA 2005).