

# **SOUTH SOMERSET DISTRICT COUNCIL**

## **ANNUAL MONITORING REPORT**

**April 2004-March 2005**



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## 1. Executive Summary

### Introduction:

- 1.1 This is the first Annual Monitoring Report (AMR) for the District and covers the period 1<sup>st</sup> April 2004 to 31<sup>st</sup> March 2005. Preparation of the AMR is a requirement of the new planning system and is to be submitted to the Secretary of State by 31<sup>st</sup> December of each year. This AMR was agreed by the District Council's Executive at its meeting on 8<sup>th</sup> December 2005.

### Local Development Scheme:

- 1.2 The Local Development Scheme (LDS) was approved by the District Council in March 2005 and submitted to, and approved by the Secretary of State, later that month. The LDS did not start until part way through the monitoring year (September 2004) and during the period to 31<sup>st</sup> March 2005 progress was generally satisfactory but with some slippage in pre-production stages for the Core Strategy and Statement of Community Involvement. More significantly, there has been further delay in the time since 1<sup>st</sup> April 2005 and the LDS has been amended in respect of the following documents:
- South Somerset Local Plan: delay in receipt of the Modifications Inspector's report and adoption now expected in April/May 2006;
  - Core Strategy: pre-production stage not yet completed and slipped back to end of May 2006. Time scales for other stages reviewed, in light of experience, and amended accordingly. Estimated adoption June 2009;
  - Yeovil Town Centre Area Action Plan: programmed in parallel with Core Strategy above;
  - Statement of Community Involvement: pre-production delayed by 6 months and programme rescheduled accordingly;
  - Annual Monitoring Report: Preparation of AMR and review of LDS to reflect the monitoring cycle;
  - Affordable Housing SPD: Overtaken by events and abandoned; and
  - Henstridge Airfield SPD: Overtaken by events and abandoned;

### Contextual Indicators

- 1.3 Set of indicators which, for the most part, reflect joint working with other Somerset authorities and the South West Regional Assembly. Notable characteristics drawn from these indicators relate to the District's rural nature, the importance of manufacturing to the economy and ageing population.

### Policy Performance

- 1.4 As the first, this AMR is not comprehensive, in line with government advice, and concentrates on Local Development Scheme progress, contextual and core output indicators. Even within these indicators, full data is not available and it is difficult to draw meaningful conclusions on many issues. Future AMR's will seek to address policy performance more fully and monitoring systems and procedures reviewed to provide wider data coverage. The following conclusions can be drawn from meaningful data:
- Distribution of housing development has been focussed to a greater degree on urban areas, particularly the District's five main towns. About 62% of planned housing over the period 1991-2011 is expected in these towns. This compares with them having about 46% in 1991. Additionally, a higher percentage of new housing is planned for Yeovil, from about 28% in 1991 to about 37% in 2011;
  - Overall housing development has been below that required to meet strategic requirement but recent years have shown relatively high levels. Planned

provision, illustrated in the Housing Trajectory, shows a cumulative overprovision of about 5% by 2001, reflecting the implementation of local plan allocations;

- The amount of new housing on previously developed land was significantly higher for the year April 2004 to March 2005 and suggests that policy in this area is having an impact. For the overall period 1991 to 2011, provision is expected to be in line with local plan target;
- Provision of affordable housing continues to be well below target provision. The Council is investigating the issue further and continues to seek means of achieving higher levels of provision.

### **Significant Effect Indicators**

- 1.5 Significant Effect Indicators are linked to Sustainability Appraisal objectives and indicators. Work on the Sustainability Appraisal has not advanced sufficiently to include Significant Effect Indicators in this AMR

### **Future AMRs**

- 1.6 Monitoring procedures and systems will need to be reviewed and improved in order to provide information to more fully address AMR requirements. Refinements to the Contextual Indicators will continue with the joint working arrangements. For policy performance, there is still much data to be collected and for the next AMR should prioritise the areas of housing (refining existing monitoring systems), employment and town centres (extension of housing monitoring system to collect more useful data).

## 2. Introduction

- 2.1 The Council has a statutory requirement under the 2004 Planning and Compulsory Purchase Act to submit an Annual Monitoring Report (AMR) to the Secretary of State by 31 December of each year. The role of the AMR is to assess the implementation of the South Somerset Local Development Scheme (LDS) – a three year work programme - and the extent to which policies and proposals are being achieved. This therefore is the first AMR produced for South Somerset District Council.
- 2.2 The new planning system requires more comprehensive and detailed monitoring and full results will take some time to introduce. This first Annual Monitoring Report (for the period April 2004 to March 2005) is, therefore, not comprehensive and concentrates on LDS progress, contextual and national output indicators, but with some limited local indicators. However, national guidance indicates that it is acceptable for AMRs to develop gradually to take account of ongoing discussions, tools to assist in monitoring being developed by statutory bodies, and emerging best practice. Work to develop the AMR for next year will start once this report is submitted, to ensure that relevant information is collected and interpreted, to take into account comments received and emerging national best practice. Sub Regional workshops are planned in January 2006 to allow discussion and comparison of output, and to provide Local Authorities with the chance to analyse the LDF process as a whole and the positioning of the AMR within this. This sub regional work will assist in the development of future AMR's in the region.
- 2.3 Owing to their recent introduction to monitoring at a District Council level, there are both Core Output Indicators (COIs) and locally derived indicators where either the information is not yet available or where further guidance is required. Gaps in information are identified and the steps the Council will be taking to have the information for future AMRs is outlined. Issues with the Core National Output Indicators have been highlighted and the consultation work in early 2006 will inform comment to ODPM regarding the usefulness of these indicators.
- 2.4 Regular officer meetings take place between the Local Authorities and the Regional Planning Board (RPB) to coordinate and share best practice on monitoring and information, coordinated through the Strategic Information Providers (SIP) group and local groups, including the Somerset SIP. Reference is made in recent ODPM advice to this work as an example of good practice. A copy of this document can be found on the South West Observatory planning module website. <http://www.swrpm.org.uk/LDF/index.asp>
- 2.5 Discussions have taken place with the South West Regional Assembly, South West Observatory and with the local authorities in the region, with the intention of coordinating and streamlining the collection and analysis of information of common relevance, particularly in relation to the COI's and other contextual indicators. A draft set of contextual indicators has been produced, which enables consistency of reporting between neighbouring LAs and across the region. The information on contextual indicators in this report draws on this work, and a summary of the suggested contextual indicators can be found on the South West Observatory planning module website. <http://www.swrpm.org.uk/LDF/index.asp>
- 2.6 The new planning system requires local authorities to undertake a 'Sustainability Appraisal' (SA) of DPDs and SPDs. The purpose of a SA is to promote sustainable development through better integration of sustainability considerations into the preparation and adoption of the documents. The Significant Effect Indicators, required as part of the AMR, will be linked to the SA objectives and indicators.
- 2.7 The South West Local Government Association (SWLGA) and South West E-Government Group (SWEKG) have recently received funding from ODPM to develop an SA tool for

monitoring purposes. The work to develop the contextual indicators has greatly informed the development of this tool namely the 'One Stop Sustainability Appraisal Shop' (OSSAS). (more details are available on the planning module web site via the ODPM Document: '[AMR - FAQs & Seminar Feedback on Emerging Best Practice 2004/05. ODPM. Sept 05](#)'.) <http://www.swrpm.org.uk/LDF/index.asp>

- 2.8 The project will deliver a web-based tool kit to aid local authorities to undertake Sustainability Appraisals/SEAs of their Local Development Frameworks (LDFs), and other plans and programmes (such as Local Transport Plans, Local Minerals and Waste Plans as specified in ODPM SEA guidance). The tool kit will be an online 'One Stop Shop' for quick, easy, and free access to standardised and reliable core baseline data for Sustainability Appraisals for all local authorities. These tools will comprise a GIS<sup>1</sup> capability, guidance and a report facility. The datasets will have standardised definitions and draw from reliable data sources. It will also provide links to guidance and good practice in undertaking SEA or SAs. A date of March 2006 has been set as a deadline for the 'live' running of the SA Tool, and it is envisaged that the tool will enable LAs to enhance their AMR dataset collection.

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<sup>1</sup> GIS is a technology that is used to view and analyze data from a geographic perspective. It manages, analyzes, and disseminates geographic knowledge.

### 3 LOCAL DEVELOPMENT SCHEME PROGRESS

#### Introduction

- 3.1 The South Somerset Local Development Scheme (LDS) was approved by the Council's District Executive at its meeting on 3<sup>rd</sup> March 2005 and submitted the Government Office for the South West (GOSW) on 21<sup>st</sup> March. GOSW responded on 23<sup>rd</sup> March agreeing the LDS, which came into effect on 1<sup>st</sup> June 2005.
- 3.2 One of the key monitoring tasks required under the new system is to review actual progress in terms of local development document preparation against the timetable and milestones in the LDS. In doing so, paragraph 4.47 of PPS12 advises that, AMRs should assess whether the authority:
- i has met the local development scheme targets and milestones, is on target to meet them, is falling behind, or will not meet them;
  - ii is falling behind schedule or has failed to meet a target or milestone and the reasons for this; and
  - iii the need to update the local development scheme, particularly in light of (ii). Where necessary to update the local development scheme, the steps and the timetable for revision.

#### LDS Progress

- 3.3 In respect of LDS progress, this AMR monitors the period from the commencement of the Act, in September 2004, to 31<sup>st</sup> March 2005. For the purposes of Regulation 48, the LDS programme is reproduced as Appendix 1. The LDS progress is set out in Table 1 below.

**Table 1: Local Development Scheme Progress**

LDS Document	Progress
Local Development Scheme	Target in period was submission to the SoS before 28 <sup>th</sup> March 2005. This target was met and the LDS approved (see para 3.1 above See below for comments on LDS revisions.
South Somerset Local Plan	Small delay in publishing Further Proposed Modifications - December 2004 compared to November 2004 as programmed. Report on response to Further Proposed Modifications commenced in this period, as programmed. Pre-Inquiry Meeting held on 17 <sup>th</sup> March as programmed. Preparation for Modifications Inquiry commenced. See below for comments on current programme.
Core Strategy	Pre-production/survey work commenced in respect of: <ul style="list-style-type: none"> <li>• County-wide Housing Needs Assessment</li> <li>• Audit of Open Space and Recreation provision</li> <li>• District-wide retail study</li> <li>• Contribution to RSS preparation</li> <li>• On-going monitoring of housing supply, employment land and town centres/shopping.</li> <li>• Car parking strategy</li> </ul>

	Delay in commencement of District Housing Potential and Economic Potential studies. See below for comments on revised programme.
Yeovil Town Centre Area Action Plan	Pre-production/survey work on general studies as detailed for Core Strategy above. Additionally, continued preparation of Yeovil Urban Development Framework as important part of evidence base. See below for comments on revised programme.
Chard Town Centre Area Action Plan	No targets in period to 31 <sup>st</sup> March 2005
Crewkerne Town Centre Area Action Plan	No targets in period to 31 <sup>st</sup> March 2005
Generic Development Control Policies	No targets in period to 31 <sup>st</sup> March 2005
Statement of Community Involvement	Pre-production phase commenced but not completed as programmed. See below for comments on revised programme.
Affordable Housing SPD	Overtaken by events – see explanation below
Henstridge Airfield SPD	Overtaken by events – see explanation below
Annual Monitoring Report	No targets in period to 31 <sup>st</sup> March 2005 See below for comments on revised programme

3.4 Despite satisfactory progress in much of the programmed work up to the end of March, subsequent progress has been restricted due to a number of problems, foremost of which was the realisation that the LDS programme was too optimistic and reflected the limited understanding of the time and resources required to effectively implement the new system. Additional problems affecting delivery have been experienced with the following:

- Delay in Local Plan preparation and the need for greater staff resources than anticipated. In particular, the Inspector's report took longer than expected to arrive and required. Progressing the Plan to adoption is a priority within the Planning Policy Unit and efforts continue to be directed to responding speedily at remaining stages;
- Staffing problems resulting from
  - difficulty in obtaining cover for 12 month maternity leave. There was no interest in the post when advertised. In response it was decided to promote from within the Unit's support staff;
  - Planning Policy Manager's absence for extended period through illness, coinciding with the lead-in to the Modifications Inquiry. Preparing for the Modifications was high priority and resources were directed to this with other work prioritised accordingly; and
  - Increased workload resulting from difficulties in development control staffing at the Council, including secondment of a Policy Planner for equivalent of 1-2 days per week. Arrangements have been put in place to restructure the development control service to address performance and to recruit staff to full establishment. Improvements can be expected from early 2006.
- Involvement in emerging Regional Spatial Strategy preparation was significantly greater than anticipated and required much of the time of one officer since April.

### South Somerset Local Plan

3.5 Local Plan Inquiry held June 7<sup>th</sup> and 16<sup>th</sup> as programmed. However, Inspector's report not received until 3<sup>rd</sup> November compared to early August as programmed. The report was

reported to the Council in December 2005, as a result of which Further Modifications, along with other notices requiring deposit, are required in response to the Inspector's recommendations. These will be published in early January 2006, following which adoption of the Local Plan is expected in May 2006.

### **Core Strategy Development Plan Document (DPD)**

- 3.6 It is now accepted that the programme in the LDS was unrealistic, not only in light of the unanticipated problems outlined above, but also in the time and resources required to undertake the work required by the new system. The programme has been reviewed in the light of the delays and the experience gained since preparing the first LDS and, for the programme to September 2008, revised as follows:
- Pre-production stage continuing until end of May 2006;
  - Options and strategy development June 2006 to February 2007 (9 months compared to 6 months originally programmed);
  - Development of preferred option March to August 2007 (6 months compared to 5 months originally programmed);
  - Pre-submission consultation on preferred option September/October 2007 (6 weeks as programmed);
  - Consider representations October 2007 to February 2008 (4 months compared to 3 months originally programmed);
  - Prepare final DPD March to June 2008 (4 months as programmed);
  - Submission to Secretary of State June 2008;
  - Public consultation on submission July to August 2008 (6 weeks as planned);
  - Consider representation/prepare for Examination August to December 2008 (4 months as planned); and
  - Subsequent stages as programmed with estimated adoption June 2009.

### **Yeovil Town Centre Action Plan DPD**

- 3.7 This DPD is programmed in parallel with the Core Strategy and the revisions above equally apply.

### **Statement of Community Involvement**

- 3.8 Pre-production (scoping) stage completed September 2005, being a delay of 6 months on the programme. Remaining stages are considered to be realistic and overall programme will be slipped 6 months with estimated adoption June 2007.

### **Annual Monitoring Report**

- 3.9 The original programme proposed data collection and analysis April to October each year, with review and revision of LDS commencing thereafter until March the following year. Experience with the preparation of this AMR shows that the data collection and analysis period runs until December, when the AMR has to be submitted, and submission of a revised LDS is also expected with the AMRs submission. The LDS programme should therefore be amended to reflect this cycle.

### **Affordable Housing Supplementary Planning Document**

- 3.10 Pre-production stage progressed in the period to March 2005 where viability issues were being assessed and investigated with stakeholders. However, at about this time the District Council began work to establish an effective, open and consistent way to deal with the negotiation of planning obligations on major planning applications. A draft Planning Obligations Protocol was agreed by District Executive on 12<sup>th</sup> May 2005, the effect of

which will be to address all planning obligations including affordable housing. The Affordable Housing SPD is therefore no longer necessary and has been abandoned.

### **Henstridge Airfield Supplementary Planning Document**

- 3.11 Because of continuing pressure for development and the need for an overall framework to guide development, the Local Plan Inquiry Inspector concluded that Supplementary Planning Guidance (SPG) should be prepared as a matter of urgency. Preparation therefore began on the preparation of Guiding Principles for the Future of Henstridge Airfield. With the introduction of the new planning system and the preparation of the LDS it was decided to prepare SPD on the matter and work would continue on the Guiding Principles as evidence base to the SPD. Work on the Guiding Principles was largely complete by the beginning of March 2005. However, the granting of a Certificate of Lawful Use on 8<sup>th</sup> March 2005 (05/00195/COL) highlighted the fact that the number of vehicle movements that could be generated from extant planning permissions on the airfield was far in excess of that previously anticipated by the Local Plan Inspector and a different approach was considered necessary.
- 3.12 This matter was reported to the Council's Area East Committee on 13 July when it was agreed that a consensual Master Plan for the airfield, backed by a legal agreement, be produced with the full participation of the local community. Work is well underway to achieving this. When backed by a legal agreement the Master Plan will be more binding than SPD and be binding upon future owner(s) of the airfield presenting a solution to the long-standing development issues at the airfield. The decision has therefore been taken to abandon the Henstridge Airfield SPD.

### **Revised LDS**

- 3.13 The LDS programme has therefore been revised to reflect the changes detailed above and will be submitted to GOSW with this AMR.

### **Future AMRs**

- 3.14 Furthermore, in order to parallel the AMR monitoring cycle (April to March) it is proposed that the LDS programme also run from April rather than the current October (reflecting commencement of the new planning system in September 2004). The reviewed LDS three-year programme will therefore run from April 2005 to March 2008 and next years AMR will report progress for the full year April 2005 to March 2006.

## **4. SOCIAL, ECONOMIC AND ENVIRONMENTAL BACKGROUND (CONTEXTUAL INDICATORS)**

### **Introduction**

2.1 Contextual indicators, as is suggested by the title, provide the context, or background, against which to consider the effects of policies and inform the interpretation of other indicators. They measure changes in the wider social, economic and environmental background. This section therefore provides a brief analysis of some notable characteristics of the District together drawn from the contextual indicators detailing statistical information and showing, where possible, changes over time and/or comparing with the region and the country as a whole. The schedule of contextual indicators reflects joint working with other Somerset Authorities and the South West Regional Assembly.

### **Commentary**

2.2 South Somerset is one of the largest District Council's in England and is characterised by its rural nature. There are five main towns, Yeovil, Chard, Crewkerne, Wincanton and Ilminster. However these contain less than half the District's population. This rural nature is clear from the population density, which is below that of the region and significantly below the national figure. Other indicators can be directly related to this rurality:

- Access deprivation is a real issue in the rural areas; although South Somerset does not figure highly in the Index of Multiple Deprivation, access deprivation in rural areas is a real issue, with Islemoor Ward in the worst 5% and others in the worst 10% in the country;
- There is generally poor public transport in rural areas, necessitating high levels of car ownership;
- Housing affordability, with average house prices nearly 8 times income. Average house price is lower but close to the national average whereas incomes are notably lower.

2.3 Incomes are a reflection of the nature of the economy of the District, a notable feature of which is the high employment in the manufacturing sector; 21% of the population are involved in this activity. The relatively lower incomes are a reflection of the manufacturing dominance, traditional sectors of which are low paid. Although the economy is buoyant, with unemployment consistently low and currently at about 1%, there has been a reduction in the manufacturing base and other sectors are developing to provide alternatives.

2.4 Another notable characteristic of the District illustrated by the contextual indicators is the nature and mix of the resident population, in particular the relatively ageing population. This can be illustrated by the age structure which shows a higher than regional and national average for persons aged 75 years or over, and also the notably higher number of pensioner only household – 28.2% compared to 23.8% nationally. Elderly persons are more likely to live in 1 or 2 person household and the aging population will contribute to the average household size also being lower than the national figure.

**DEMOGRAPHIC STRUCTURE**

<b>Population change 1981-2001</b> (Census)	1981	1991	2001
South Somerset District	129,288	141,655	150,969
<i>% increase</i>		9.56%	6.58%

<b>Population</b> (ONS mid year estimates)	2001 (Census)	2002	2003	2004
South Somerset District	150,969	151,800	153,300	155,100
<i>% increase</i>		0.55%	0.99%	1.17%

<b>Age Structure as %</b> (Census)	1991				2001			
	0-15	16-29	30-74	75+	0-15	16-29	30-74	75+
South Somerset District	19	19	54	9	20	14	57	10
South West					19	16	56	9
England and Wales					20	18	55	8

<b>Population Density</b> (Census)	1981	1991	2001
South Somerset District	1.38 per ha	1.49 per ha	1.57 per hectare
South West			2.1 per hectare
England and Wales			3.8 per hectare

**HOUSEHOLDS**

<b>Total Households</b> (Census)	1981	1991	2001
South Somerset District	47,598	56,974	63,796
<i>% increase</i>		19.7%	12.0%

<b>Average Household size</b> (Census)	1981	1991	2001
South Somerset District	2.71	2.43	2.32
South West			2.31
England and Wales			2.36

<b>Household Type %</b> (Census 2001)	Couples: dependent children	Couples: no children	Lone parents: dependant children	Pensioners only	Others
South Somerset District	27.3	20.6	7.0	28.2	16.9
South West	20.2	19.5	5.4	27.1	27.8
England and Wales	20.8	17.7	6.4	23.8	31.3

**DWELLINGS**

<b>Total No. of Dwellings</b> (HFR Returns)	April 2003	April 2004	April 2005
South Somerset District	67,393	68,186	68,951
<i>% increase</i>		1.2%	1.1%

<b>Tenure %</b> (Census 2001)	Privately owned	Shared ownership	Social Housing	Private rent & others
South Somerset District	74	<1	14	11.0
South West	72	<1	14	13
England and Wales	69	<1	19	12

<b>% Second Homes</b> (SSDC)	2001	2005
South Somerset District	0.82	1.14

<b>% Dwelling failing to reach decent homes standard</b> (SSDC)	2004
South Somerset District	42.4%

<b>Statutorily Homeless</b> (SSDC Homeless Strategy 2005-08)	2001/02	2002/03	2003/2004
South Somerset District	809	756	346

**CRIME**

<b>Total Crime per 1,000 population</b> (Avon and Somerset Constabulary)	2002/03	2003/04	2004/05
South Somerset District	83	75	77

**SOCIAL**

<b>Deprivation</b> (IMD)	Indices of Multiple Deprivation Ranking (1 = most deprived)	
	2001	2004
South Somerset District	230	240

<b>Indices of Multiple Deprivation – number of wards in top 20%</b> (IMD)	2004
South Somerset District	3

<b>Average House price – Apr-June quarter</b> (HM Land Registry)	2001	2002	2003	2004	2005
South Somerset District	£110,647	£131,219	£156,529	£182,218	£180,674
South West					£195,495
England and Wales			£150,048	£169,149	£187,199

<b>Earnings by Residence (Employees living in the District)</b> (Annual Survey of Hours and Earnings)	2003		2004	
	Weekly	Annual	Weekly	Annual
South Somerset District	£348.40	£18,117	£394	£20,488
South West			£393	£20,436
England and Wales			£422	£21,944

## HEALTH

<b>Life Expectancy</b> (ONS)	1991/1993		2001-2003	
	Male	Female	Men	Women
South Somerset District	75.3	80.7	78.0	82.1
South West			77.4	81.8
England and Wales			76.24	80.72

<b>Long Term Limiting Illness (% of population)</b> (Census)	2001
South Somerset District	17.4

<b>People of Working Age with long term limiting illness - % of population</b> (Census)	2001
South Somerset District	6.9

## ECONOMY

<b>Employees by Sector - % Employee jobs</b> (Annual Business Inquiry)	South Somerset	South West	England and Wales
Manufacturing	25.3	12.5	12.6
Construction	3.4	4.4	4.4
Distribution	26.3	27.4	24.7
Transport	3.2	4.7	6.0
Business	14.9	17.3	19.8
Public	22.1	27.2	25.8
Other Services	2.7	4.6	5.2

Tourism	4.9	9.0	8.1
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<b>Unemployment Rate (NOMIS)</b>	March 2003	March 2004	March 2005
South Somerset District		1.1%	1.1%
South West			1.5%
England and Wales			2.4%

## ENVIRONMENT

<b>Area Designated as SSSI 2005</b> (English Nature)	Total Area (Ha)	% of total land area
South Somerset District	2185	2.2
South West	166,576	7.0
England and Wales	1,072,537	8.2

<b>No. of Air Quality Management Areas (AQMAs) (SSDC)</b>	2005
South Somerset District	1 (Yeovil)

## Future AMRs

- 2.5 The information against the above indicators reflects the fact that this is the District's first AMR and for the next AMR (2005-06) it is proposed to improve the scope of information gathered, particularly in relation to comparisons at regional and national level.



## 5 POLICY PERFORMANCE (OUTPUT INDICATORS)

### Introduction

- 5.1 Government guidance emphasises the importance of indicators in monitoring the significant effects of policies, using a three-tiered approach reflecting different purposes. Firstly contextual indicators (see Section 4 above), secondly output indicators used to assess policy performance, and thirdly, significant effects indicators (see Section 6 below).
- 5.2 The main purpose of Output Indicators (OIs) is to measure the effects of implementation of planning policies with two levels of indicators; **Core Output Indicators** and **Local Output Indicators**.
- 5.3 Core Output Indicators (COIs) are identified by Government and, as a consistent data source, can be used to build a wider picture of planning performance. They are detailed below and have been completed as far as is possible for this monitoring period. Where data for a particular indicator is not yet available this is explained and an indication of how this will be obtained for the 2006 Annual Monitoring Report is included.
- 5.4 Local Output Indicators (LOIs) are used to address the outputs of policies not covered by core indicators and help assess local policy performance. The local policy context is that set by the emerging South Somerset Local Plan which, although not yet adopted, provides the most-up-to-date planning policies. In general, Local Plan policies are not easy to monitor, lacking, for the most part, clear targets or outputs.
- 5.5 Government guidance advises that fully developed monitoring systems will take time to establish and the COIs should provide the focus for first AMRs. As this is the first AMR for the District it follows this advice including, where relevant, indicators from the South Somerset Local Plan. The structure of the following section follows that of the Local Plan chapter order, presenting COIs and or LOIs where relevant. For each there is a brief commentary analysing results and setting out issues for future AMRs.

### Chapter 2: Local Plan Strategy

#### **Core Output Indicators:**

- 5.6 There are no relevant core output indicators for this topic.

#### **Local Output Indicators:**

<b>South Somerset Local Plan Strategy – Distribution of Development</b>	
Towns to be primary focus of development.	No specific target for the five towns overall, but Yeovil estimated to have 37% of all dwellings between 1991-2011

### Commentary

- 5.7 Between July 1991 and March 2005, there has been a total of 8,554 dwelling completions (net), of which 4,889 (57%) dwellings were built in the towns. Dwellings with planning permission at 1<sup>st</sup> April 2005 totalled 2184 dwellings, of which 1156 dwellings (53%) are in the towns. Additionally, a further 2818 dwellings are expected to be completed on sites allocated in the Local Plan, of which 2381 are in the towns. In total these commitments amount to some 13,556 dwellings, of which 8,426 (62%) are expected to be built in the five towns. In comparison, in 1991 the five towns totalled about 46% of the District's

population. It is concluded therefore that the Local Plan is achieving the general objective of focussing new housing development in the five main towns.

- 5.8 With regard to the specific target for Yeovil the comparable figures are: 2681 dwellings completed between July 1991 to March 2005, 607 dwellings with planning permission at April 2005, and 1398 dwellings expected to be built on sites allocated in the Local Plan. Commitments in Yeovil total 4684 dwellings, representing about 35% of total commitments. This figure is just below the Local Plan estimate but in itself represents an increased focus of development in the town which, in 1991, in had about 28% of the District's population.

### **Chapter 3: Countryside Environment**

#### **Core Output Indicators:**

<b>8: Biodiversity</b>		
8	Change in areas and populations of biodiversity importance, including (i) change in priority habitats and species (by type); and  (ii) change in areas designated for their intrinsic environmental value including sites of international, national, regional, sub-regional or local significance	Data not available – see below for further comment.

#### **Commentary:**

##### **8 (i): Priority Habitats and Species**

- 5.9 Data on priority habitats nearing completion by not yet readily available, this should be available at District level (although not readily available at present). However, once available the information is unlikely to change much year on year and is likely to be monitored over 5-10yr period. Data on priority species more patchy, monitoring of this is likely to be the thrust of Somerset Environmental Records Centre (SERC) activity in future. However, baseline data is not complete and there is very little available at District level. Unlikely ever to be able to comment on changes over one year.

##### **8 (ii): Change in Designated Areas**

- 5.10 Data on changes in area designated at local level is being checked. However, likely to show only small change and unlikely to have significant change at any other level.
- 5.11 In view of the difficulties in data on these indicators and the usefulness of the data when available, the value of COI 8 is questioned and should be reviewed at national level in favour of more effective indicators.

#### **Local Output Indicators:**

- 5.12 There are no relevant Local Output indicators for this monitoring report. The area of lands designated as Sites of Special Scientific Importance (SSSI) is a contextual indicator.

**Chapter 6: Utilities****Core Output Indicators**

<b>7: Flood Protection and Water Quality</b>		
7	Number of planning permissions granted contrary to the advice of the Environment Agency on either flood defence grounds or water quality	14

**Commentary**

5.13 The above data is taken from the Environment Agency web site and represents applications objected to in the monitoring year April 2004 to April 2005 rather than the Council's decisions. In the monitoring year there may well have been decisions on which the Environment Agency commented earlier. No analysis of these decisions has been carried out and this will be necessary in future AMRs. Consideration will also be given to collection of data relating to all decisions in the monitoring year.

<b>9: Renewable Energy</b>		
9	Renewable energy capacity installed by type	No major installations. 2 sites connected as part of Historic Water Mills Partnership, generating approximately 44 MWhr per annum.

**Commentary**

5.14 No major installations were installed in the monitoring year and no planning permissions were granted in that time. The Historic Water Mills Partnership resulted in 2 schemes, Gants Mill and Cole Manor Mill, generating about 30 KWhr and 14 KWhr per annum respectively. This is in addition to the scheme previously implemented and 8 other sites in the pipeline, some of which will be grid connected in the next monitoring year. The majority of other renewable energy installations will be restricted to small-scale developments, such as solar panels, which are very difficult to monitor.

**Local Output Indicators:**

5.15 Local Plan Policy EU2 restricts development in areas at risk from flooding, unless acceptable mitigation measures are provided. Core Output Indicator 7 above links to this and this local plan policy has not therefore been monitored separately.

**Chapter 7: Transport****Core Output Indicators:**

<b>3: Transport</b>		
3a	Amount of completed non-residential development within Use Class Orderss A, B and D complying with car-parking standards set out in the local development framework.	Data not available – see below for further Comment.
3b	Amount of new residential development within 30 minutes public transport time of: a GP; a hospital; a primary school; a secondary school; areas of employment; and a major retail centre(s).	Data not available – see below for further comment.

Commentary3a: Car Parking

5.16 The Council has not monitored this information, which will be difficult to obtain. Local Plan Policy TP7 establishes car parking standards but has a threshold below which it does not apply and includes allowances in relation to the sites accessibility profile. The quality of information available with planning applications is variable. Consideration will be given as to how this data can be collected.

3b: Residential Development Accessibility

5.17 Monitoring this indicator will require significant information collection, in terms of the location of all such facilities and the use of GIS to map in relation to residential completions. Further consideration will be given to the monitoring this indicator in future AMRs.

**Local Output Indicators:**

<b>South Somerset Local Plan: Travel Plans</b>	
Modification MOD/07/007 introduced the target of 8 travel plans for major employers in Yeovil by 2006.	7 completed travel plans with a further 4 being considered.

5.18 This target is likely to be achieved in 2006 and further travels plans beyond the original figure likely to be completed. Overall, these plans have raised awareness of travel issues, particularly the need to reduce use of the car, and will result in some reduction in car use.

**Chapter 8: Town Centres and Shopping****Core Output Indicators:**

<b>4: Local Services</b>		
4a	Amount of completed retail, office and leisure development	Data not available – see below for further comment.
4b	Amount of completed retail, office and leisure development in town centres.	Data not available – see below for further comment.

Commentary

5.19 Comprehensive data is not available for either indicator. Existing monitoring systems collect some information on town centre uses, retail uses and employment uses but this is not sufficiently developed to provide relevant information. A review of monitoring systems will be carried out to allow data collection for future years. Office provision with Use Class 2a is currently collected under employment development, in accordance with Structure Plan definition of employment land. There is the risk therefore of confusion between the different indicators.

**Local Output Indicators:**

5.20 There are no relevant Local Output Indicators in this monitoring report.

**Chapter 9: Employment and Tourism****Core Output Indicators:**

<b>1: Business Development</b>		
1a	Amount of floorspace developed for	B2b – 0.64 ha.

	employment by type (B1b&c, B2 or B8)	Data not available – see commentary below for further explanation. Data on floorspace not available. Additionally, not all data on recycled employment land likely to be collected. Excluding B2a (offices) from definition of employment land is questioned – conflicts with Structure Plan definition which has been basis of monitoring.
1b	Amount of floorspace developed for employment, by type, in employment or regeneration areas	Not applicable.
1c	Amount of floorspace by employment type, which is on previously developed land	0ha
1d	Employment land available by type	Total employment land available: <ul style="list-style-type: none"> <li>• 31.88 ha with planning permission</li> <li>• 3.45 ha under construction</li> <li>• 91.86 ha proposed in emerging local plan</li> </ul> Data on employment type and floorspace not currently available. Includes land likely to be within Use Class B1a (offices)
13	Losses of employment land in (i) employment/regeneration areas and (ii) local authority area	Not applicable.
1f	Amount of employment land lost to residential development	Data not available – see below for further comment.

### Commentary

5.21 Analysis of these indicators is difficult at this time as the monitoring systems are not sufficiently developed to monitor all the information. This is for the most part a reflection of the more limited monitoring required for Structure Plan policy which does not disaggregate the different employment uses and has been seeking to identify land area (hectares) rather than floorspace. Additionally, the Structure Plan requirement has been expressed as net additional land and employment development involving the recycling of employment land has not been included. Consideration will be given to necessary changes to employment monitoring systems to collect and analyse data required. Comment is made below on employment land provision in relation to Structure Plan requirement, although this does include all B2 uses.

### Local Output Indicators:

<b>South Somerset Local Plan: Employment Development</b>	
Policy ME1 makes provision for about 125 ha of employment land	42.5ha completed 3.45ha under construction at April 2005 31.88ha with planning permission 82.86ha allocated in the local plan

5.22 Local Plan Policy ME1 makes provision for about 125 hectares of employment land (Use Classes B1, B2 and B8) for the period 1991-2011. By March 2005, the commitments above totalled 77.83 hectares. Further development is expected from allocated sites, totalling 82.86 hectares, some of which will not come forward until the key sites commence. Although the planned totals exceed the 125 hectare target, not all of the

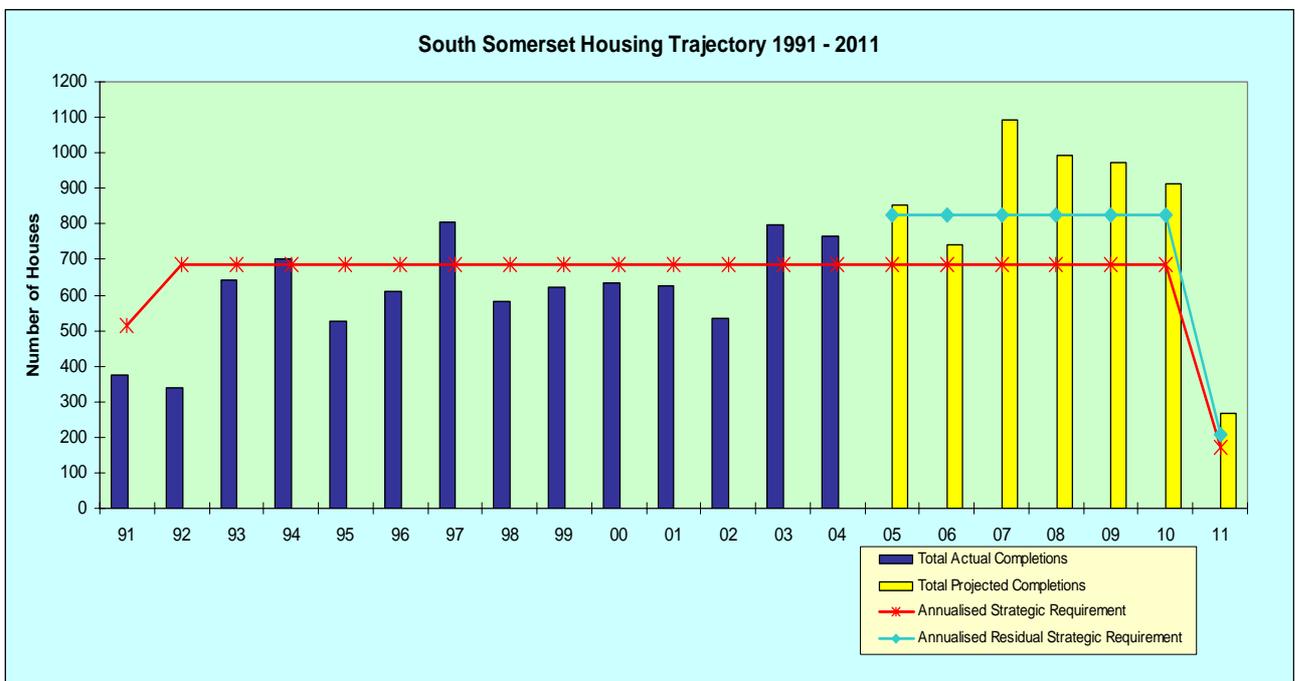
allocations are expected to be completed in the plan period and some overprovision is made to allow for lost employment land. Progress on allocations will continue to be monitored and reviewed in due course in an Employment Land allocations review.

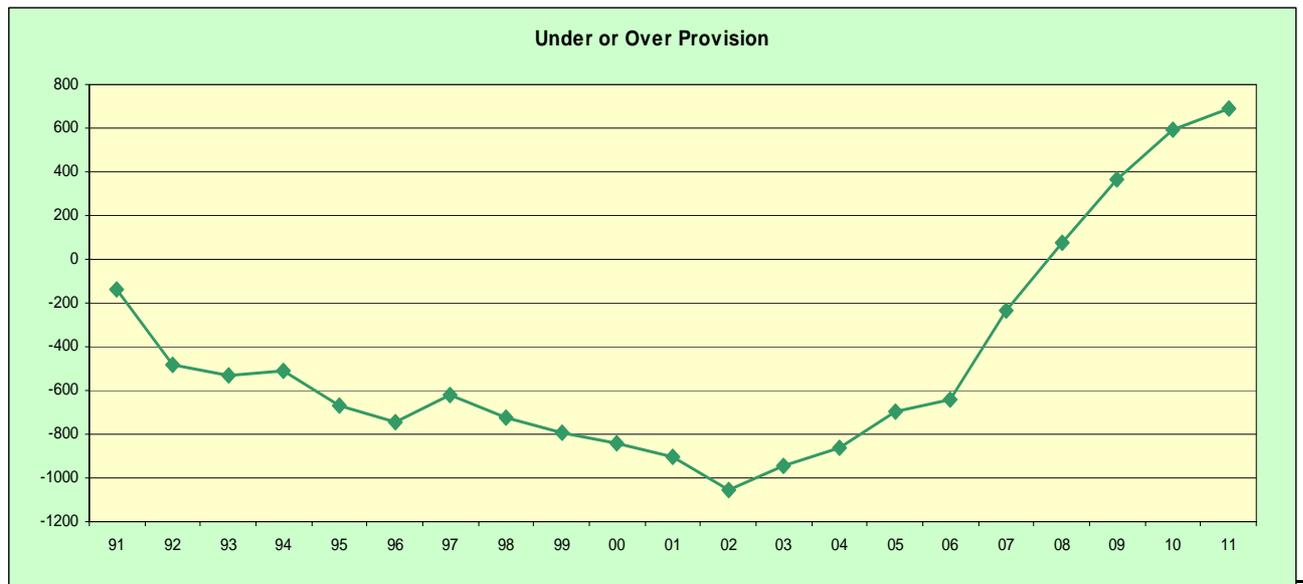
**Chapter 10: Housing**

**Core Output Indicators:**

2: Housing		
2a	Housing trajectory showing: (i) net additional dwellings over the previous five year period or since the start of the relevant development plan document period, whichever is the longer; (ii) net additional dwellings for the current year; (iii) projected net additional dwellings up to the end of the relevant development plan document period or over a ten year period from its adoption, whichever is the longer; (iv) the annual net additional dwelling requirement; and (v) annual average number of net additional dwellings needed to meet overall housing requirements, having regard to previous year's performance.  <i>Note: housing trajectory based on adopted Joint Somerset and Exmoor National Park Structure Plan Review (1991-2011)</i>	8554 dwellings net, since July 1991 (gross completions not available)  765 dwellings (825 dw gross)  5848 dwellings net  685 dwellings pa  823 dwellings pa
2b	Percentage of new and converted dwellings (gross) on previously developed land.	58%
2c	Percentage of new dwellings completed at: (i) less than 30 dwellings per hectare; (ii) between 30 and 50 dwellings per hectare; and (iii) above 50 dwellings per hectare.	34% 38% 28%
2d	Affordable housing completions	112 dwellings net (118 dw gross)

**Housing Trajectory Graphs:**





Commentary

2a: Housing Trajectory

5.23 The trajectory below shows that overall levels of housing completions are below that required by the adopted Structure Plan; cumulative under provision by March 2005 was 865 dwellings. The residual annual requirement has risen to about 823 dwellings. There is no consistent pattern in levels of development but the two years to March 2005 show completions above the annualised requirement. The trajectory shows this trend continuing and increasing, reflecting in large part, particularly from 2007, the commencement of the sites allocated in the Local Plan, particularly key sites in Yeovil, Crewkerne and Wincanton. By the end of the plan period, March 2011, the trajectory shows a cumulative over provision of about 690 dwellings. Without the Local Plans allocations there will continue to be a cumulative under provision, about 650 dwellings at 2011. Nevertheless, housing provision will continue to be monitored and the need for the Local Plan’s greenfield allocations reviewed in light of the Housing Trajectory, which itself will be updated as new and relevant information becomes available, notably the Urban Housing Potential Study due to be completed shortly.

2b: % Previously Developed Land

5.24 The 2004-05 total represents a marked increase on previous annual figures since April 2000 (see below) when the first full year of detailed monitoring is available. Together with a high percentage previously developed land (pdl) total (64%) for committed dwellings with planning permission, it suggests that policy is beginning to have an impact. The Local Plan has a target of at least 45% new dwellings on recycled land, (pdl plus conversions of existing buildings). A separate pdl target is not specified but is likely to be about 40%. Since April 2000, an average of 45% of total dwellings have been built on pdl. Because detailed monitoring has only been undertaken since October 1999, the overall level of new housing development for the plan period since 1991, approximately 43%, is an estimate based on available information. The high level of housing with planning permission on pdl suggests that the local plan target is likely to be exceeded. However, further greenfield development on allocations will be needed to meet the strategic requirement and using the Housing Trajectory as guidance, about 40% of new buildings are likely to be on pdl.

<b>Previously Developed land:</b>	2000-01	2001-02	2002-03	2003-04	2004-05
% of new dwellings (gross) on pdl:	44%	35%	47%	44%	58%

**2c: Development Densities**

5.25 Information on net densities has only been available for the last two monitoring years, 2003-04 and 2004-05. The results for these two years are set out below but it is too early to draw clear conclusions. Additionally, the information is from all sites and, given the large number of small sites developed across the District, may not give proper indication of density trends on larger sites where increased densities can be expected. Consideration will therefore be given to refining analysis for more meaningful results, reflecting site size and location; policy encourages highest density in town centres.

% of new dwellings completed at:	2003-04	2004-05
(i) less than 30 dwellings per hectare (dph)	23%	34%
(ii) between 30 and 50 dph	59%	38%
(iii) above 50 dph	18%	28%

**2d: Affordable Housing**

5.26 Affordable housing provision since 2002/03 has been increasing, albeit it remains well below the local plan target of 185 dwellings per annum., at 112 dwellings (net), continues to be well below the target of 185 dwellings in the Local Plan. The contextual indicators show, unsurprisingly, that affordability is a major problem in the District and the Council continues to pursue measures to improve supply.

**Local Output Indicators:**

<b>South Somerset Local Plan: Housing Provision</b>	
Proposed Modification MOD/10/003 introduces a recycled land target of at least 45% of the overall housing requirement.	Addressed under COI2b above.
Policy HG1 makes provision for development of about 13,700 dwellings (net) between 1991 and 2011.	Addressed under Housing Trajectory above.
Modification MOD/10/008 introduces a phasing policy, restricting greenfield allocations outside Yeovil Key Sites for development 2007-11, subject to monitoring and review.	Applications for several phased sites under consideration.
Modification MOD/10/010 introduces a new policy whereby new housing development should at be at least 30 dph.	Addressed under COI2c above.
Modification MOD/10/016 introduces target of 185 affordable dwellings per annum.	Addressed under COI2d above.

**Chapter 11: Recreation and Community Facilities****Core Output Indicators:**

<b>4: Local Services</b>		
4c	Amount of eligible open spaces managed to Green Flag Award standard.	3% (2 out of 61 principal open spaces). Hectarage not known - see below for further comment.

**Commentary**

5.27 The two sites awarded Green Flag standard are Yeovil and Ham Hill Country Parks. Area of these parks not readily available and details will be sought for the next AMR. Management plans for all principle open spaces are being developed for completion during 2007. Options regarding choice of further sites to be managed to Green Flag

standard will be considered during this process and future returns on this COI will reflect any additional sites. Consideration will be given to collecting information on size of open spaces.

**Local Output Indicators:**

5.28 There are no relevant Local Output Indicators in this monitoring report.

**Future AMRs**

5.29 This is the District's first AMR and focuses on Core Output Indicators. Future AMR's will seek to address more fully policy performance, increasing the range of monitoring of both core and local output indicators. Monitoring procedures and systems will continue to be review and revised, with priorities for the next AMR being housing (refining existing monitoring systems), employment and town centres (extension of housing monitoring system to collect more useful data).



## **6 Significant Effects Indicators (SEIs)**

- 6.1 Significant effects indicators are used to assess the significant social, economic and environmental effects of policies and are linked to the sustainability appraisal (SA) objectives and indicators. However, work is not sufficiently advanced on the Sustainability Appraisal for these indicators to be identified. Following preparation of the SA, appropriate indicators will be included. Next years AMR will include SEIs resulting from SA work to be carried in association with Local Development Documents. It should be noted however that a number of contextual indicators (Section 4, page 9 above) address issues which may be relevant to SEIs.