Report to Council, 5th October 2017

APPENDIX 2:

MONITORING STATEMENT

CONTENTS:

PART 1

SECTION1

Introduction

What is a monitoring statement?

Planning Authorities have a statutory duty to review their Local Development Plan (LDP) at least every 5 years. An integral part of the review is ongoing monitoring work to gain an understanding of how well the current LDP has been performing and whether it is achieving its aims.

In order to structure the review, planning legislation requires that planning authorities monitor:

- changes in physical, economic, social and environmental characteristics of the area; and
- the impact of policies and proposals of the existing local development plan(s) (LDP) in its area.

The monitoring work and research forms the basis of a document called a "Monitoring Statement".

Why do we need the information?

Collecting data makes it easier to assess the continued relevance of the current LDP. It highlights issues that might require a renewed approach to keep it up to date and achieve desired outcomes. This is important for the Council, but also important for businesses and communities.

The issues that analysing data bring to the fore are likely to be subjects of particular concern or interest. These usually form the focus of attention in the first formal stage of a Local Development Plan review – the "Main Issues Report". The Monitoring Statement is published alongside the Main Issues Report and provides background information for the Main Issue Report, plus an insight into how the Council thinks its current LDP has been performing.

There is no strictly governed procedure or stipulation of what information goes into a Monitoring Statement, nor what form it should take, but it needs to show that the effectiveness of LDP1 has been considered and whether alterations are necessary to achieve desired outcomes, or necessary to keep it up to date, forward looking and relevant. We have structured our Monitoring Statement so that it's split into the same section headings contained in LDP1. Hopefully this will make it easier to follow. Some of the data is generated from our own analysis (for example, from recording the number of houses being built), and some information has been obtained by commissioning research (e.g. to get an independent understanding of how South Ayrshire compares to other parts of Scotland). We have also used statistics taken from official sources.

We haven't included details of every piece of research in this document, but have considered (and continue to consider) all aspects of the Plan. The matrix in Part 3 gives a quick insight into how effective we think LDP1 has been and the issues we think we need to concentrate on in the preparation of LDP2.

Background:

South Ayrshire's first Local Development Plan (2014): LDP1

Development Plans are spatial land use documents which guide the future use of land in our cities, towns and rural areas. They consider and address issues and implications of economic, social and environmental change, providing a document plan that sets out an ambitious but realistic long term vision for the area. In doing so, they have to indicate where development should happen and where it should not, thereby providing confidence for investors and communities alike.

The current South Ayrshire Local Development Plan (LDP1) was adopted in September 2014. It contains policies and proposals used to guide and consider planning applications and ideas for new development. It also incorporates a broad indication of the location and scale of development for the next 10 years. In addition to the main Development Plan, a number of more detailed documents called "Supplementary Guidance" sit alongside, compliment, and form part of the Plan.

LDP1 was adopted in 2014, but its preparation had begun much earlier – with the first stage, the "Main Issues Report" being published in 2010. The Proposed version of the plan was examined by Scottish Ministers between September 2013 and June 2014. During the time LDP1 was being drafted and since its adoption a number of external factors influencing change have taken place nationally (Scotland), regionally and locally. In turn, these changes have taken place within an environment that has also been affected by wider social, economic and indeed political change at UK and international levels.

Nationally changes include the publication of revised Scottish Planning Policy, National Planning Framework 3, and a number of practical planning guidance documents.

Regionally, a new Dark Sky park has been established, work is progressing towards the Clyde Estuary Plan, the possible designation of a new National Park, and particular emphasis is now being placed on an “Ayrshire Growth Deal” to improve economic fortunes of the three Ayrshire Council areas.

Locally, new conservation areas have been designated, tree preservation orders established, listed buildings and Scheduled Monuments added to the list of protected historic assets and development has continued. However, the effects of the recession of 2008, implications of population demographics, the local economic performance and changing consumer behaviour remain factors which present specific challenges for South Ayrshire.

The monitoring statement generally reflects the influencing factors mentioned above, together with the associated impacts, and considers whether LDP1 is as effective as we had hoped.

As a starting point, we needed to establish a baseline of data, and we have included that as **Part 2** of this statement.

SECTION 2

Section 2 of this Monitoring Statement takes a critical look at the 5 chapters of LDP1 to see whether its original aims and intent are being met. To do this we check progress on the development of sites, take stock of available land, resources and facilities, review environmental information and then decide if we need a different focus or strategy.

The 5 chapters of LDP1 under review are:

1. The Spatial Strategy
2. Economic Development
3. Communities
4. Environment and Climate Change, and
5. Transport

In each chapter review, we have structured our assessment as follows:

- What was the original policy intent?
- What Progress has been made on delivery?
- Review and position statement.
- What issues do we need to consider, and
- Is a substantial review required?

Where the above assessment concludes that a substantial or significant review may be required, it gives a strong indication of an item that the Main issues Report should be focussing on.

We have listed the main background documents and papers used at the start of each section, and included them as appendices or hyperlinks at the end of the Statement.

Chapter 1:
Monitoring of The Spatial Strategy.

The key evidence for this chapter is contained in the following background papers:

- South Ayrshire Local Development Plan 1: Policy Assessment Matrix
- South Ayrshire: key Statistics

Further evidence documents are listed within the appendix to this paper

LDP1 Policy framework:

The spatial Strategy of LDP1 is the framework on which the rest of the plan is based. It contains the structural and far reaching policies on key topics such as sustainable development, economic growth, protection of the environment, the greenbelt and a strategy for the location of future housing development.

Original policy intent

The Spatial strategy of LDP1 had a number of key objectives. It stated that we would:

- *Support development that encourages sustainable economic growth, improves the quality of the environment and creates sustainable communities.*
- *Direct development to the most environmentally suitable places with the best infrastructure.*
- *Assess all development against the priorities set out in the spatial strategy and sustainable development policies.*
- *Not support development outwith the boundaries of settlements except where we believe it can be justified because it will benefit the economy and / or there is a need for it in that particular area.*

Within subsequent sections of the Plan, LDP1 provided a finer grain of policy which reflected differing pressures and opportunities within certain localities, it provided guidance on the principles of sustainable development, and on the requirements for infrastructure and implications concerning development viability. Elements of the Spatial Strategy are repeated and reinforced throughout the plan and much of it is therefore also covered in later sections of the Monitoring Statement.

Progress on delivery of The Spatial Strategy.

The spatial strategy has been in place during a period of continued economic uncertainty at National level. Within South Ayrshire, pre-recession levels of construction and visible investment have not returned, although there are signs of a tentative recovery and recent speculative development. It is encouraging to note that some prime locations have witnessed strong growth and this appears to be inspiring confidence elsewhere.

Integral to the spatial strategy has been the continued presence of the greenbelt. Work to re-assess the appropriateness of its boundaries was undertaken as part of LDP1. The greenbelt continues to provide opportunities for open space recreation, provides a framework for urban expansion and town regeneration and protects the character, setting and identity of the towns it relates to. This is particularly evident at Ayr, where the focus of attention is on the renewal of the town centre, the redevelopment of brownfield sites and the promotion of a significant planned urban expansion at South East Ayr / Corton. There are signs that the continued presence of the greenbelt may be influencing the resurgent interest in brownfield redevelopment in Ayr, and the continued focus for greenfield development being on the development options at Corton.

The rate of housing development has been varied, with significant levels of output in Troon and Symington, steady output in Ayr, and modest development in Maybole but there has been a very slow rate of development elsewhere (more detail on this matter is in the Housing section of this document – **chapter 3**). Recent work to contact land owners and developers of the housing land supply sites does however suggest that confidence is returning to the Ayr Housing Market Area (which includes most of *Kyle*) in particular. There is a similarly positive prospect for the provision of affordable housing, where the Council's intent of developing sites in its ownership and investigating acquiring others presents a much more focussed priority for the next 5 years and into the 10 year period.

The Council has been focussing on urban renewal strategies in Ayr, and Girvan. Notably through the Ayr Renaissance project and Girvan harbourside "Quay Zone" redevelopment. Shop front improvements via the "Ambition Program" and Townscape Heritage Initiatives (THI) in Ayr and Maybole are also contributing to changing perceptions. Maybole is recognised as having particularly challenging issues and the delayed commencement of the A77 Maybole bypass has been anecdotally referenced as deterring private sector investment, particularly with regard to the LDP Maybole greenfield residential sites. Recent residential development at Cassillis Road and Culzean Road has however proven that the market has an appetite for new homes in the town and the commencement of the A77 by pass (confirmed for 2018), together with the THI is anticipated to be a catalyst for the commencement of more development sites.

Progress is being made on improving the road and sustainable travel infrastructure, with the development of the Ayr Hub at Ayr Railways Station, the establishment of the Ayr – Coylton Cycleway and improvements to the footpath and cycling network more generally. Improved park and ride facilities at Ayr are being planned, but the progress for the catchment park and ride at Monkton has for the time being, stalled.

Work to understand development viability and impacts that obligations have on development is ongoing and remains wide ranging. This work also includes discussion and consultation between public and private sector stakeholders.

Tourism and leisure development has been notable. The Council continues to support and promote fledgling and large scale initiatives. Private sector investment in holiday parks, hotels, leisure services and attractions is supported by significant public sector investment. The opportunities arising from the Biosphere and Dark Sky park are gathering momentum and the promotion of events such as the Scottish Airshow, National Bowls Tournament, "Burn's an A' That" and "Tam Fest" demonstrate the continued efforts of the public and private sectors working together. This joint working is contributing to a resurgent and distinctive tourism offer with key events throughout the calendar year. Golf events in particular contribute to a strong image for South Ayrshire, and with substantial investment at Trump Turnberry, the tourism and leisure market continues to provide world class facilities and products. Major investment is planned at Culzean and the recent completion of the Quay Zone in Girvan, upgrading of Belleisle in Ayr and the Clubhouse at Troon mean that large scale investment and lower key but notable improvements elsewhere support the intent of strategy.

Prestwick Airport, identified as a national priority in NPF2 has been the subject of intensive partnership working, where the establishment of an Enterprise Area and overt support for its operation and aviation linked industries has helped to stabilise its economic footing. Three years into LDP1, and the prospects of, and for the airport are now of a different magnitude with the prospect of a spaceport and the publication of the Airport's Strategic Plan 2017-22 (this theme is picked up in more detail in **chapter 2** of this statement).

Review and position statement

It is evident that the principles of LDP1 strategy, together with the linked subjects and principles of sustainable development, the greenbelt, and infrastructure provision are still compliant with National Policy and guidance. There is evidence of growing confidence for development and investment, and clear signs that work across the public bodies and through partnership activity, with the private sector is having positive effects. However, much of this has primarily been focussed on key honeypot locations, with only ripples of interest and activity being witnessed elsewhere.

Issues to consider

"Is LDP1 focus and direction of travel still relevant?"

It is considered that the Spatial Strategy of LDP1 remains relevant and aligns with the most recent guidance from Scottish Government. It's difficult to specifically apportion direct outcomes and development on the ground to the influence of the Strategy (partly because of its high level and strategic context) but development that has taken place has generally been compliant. It's not unreasonable to attribute the focus of development and investment activity, particularly with regard to the renewal of brownfield land and residential development, to the overarching aims of the Plan.

"Are aspirations of the Community, Businesses and the Council being met?"

There is now a formal requirement that local Development Plans are closely aligned to Community Planning, and that there should be more emphasis on actions and outcomes. A series of Charrettes and community consultation events have presented a range of issues of concern for local communities and the Council is preparing its first Local Outcomes Improvement Plan. Conjoined public consultation and discussion events were undertaken with Community Planning and Community Justice teams. These were held in 2016/17. The events highlighted similarities – and differences in the aspirations and expectations of communities, and the mechanisms that may be available to meet those expectations. It is apparent that whilst the various elements of the Council and its partner organisations ultimately want to create safer, healthier, happier, more prosperous and sustainable communities, it's expressed in different ways and this creates a confusing message in its presentation.

"Can the spatial strategy do more?"

The Spatial Strategy is the framework around which the rest of LDP1 is structured, but as a chapter in the plan, it perhaps fails to inspire. It meets statutory requirements and sets down the parameters for the rest of the Plan correctly but there is now an expectation that it should do more, and be more overtly community focussed and place based.

Requirement for substantial review?

It is considered that the Spatial Strategy remains fundamentally sound and appropriate, however, there would be merit in considering if it could do more, and be clearer in establishing the links between Community Planning, the aspirations of partner organisations, the wider community and a joint vision of what sort of South Ayrshire we want to see in the future. A review is therefore considered appropriate.

Chapter 2.
Monitoring Economic Development

The key evidence for this chapter Section is contained in the following background papers:

- Scotland's Economic Strategy (March, 2015)
- South, North and East Ayrshire Council: Ayrshire Growth Deal Bid Prospectus 2016
- South Ayrshire Local Development Plan 1: Policy Assessment Matrix
- South Ayrshire: key Statistics
- South Ayrshire Council: Rural Development Analysis.
- Pre Main Issues Report Delivery Workshop Events (Oct –Nov 2016) Report
- Ryden: Review of Employment land in South Ayrshire 2016.
- Oxford Economics: Economic Outlook Report 2016
- SQW: Ayrshire Socio Economic Profile and Analysis 2015
- AECOM Glasgow Prestwick Airport / Spaceport Masterplan

Further evidence documents are listed within the appendix to this paper

LDP Policy Framework

The Economic Development chapter of LDP1 contains policies on tourism, business, industry, offices, the ports, Glasgow Prestwick Airport and specific strategies for the Newton and Heathfield areas of Ayr/Prestwick.

Original Plan Policy Intent

The Economic development Strategy chapter of the plan encompassed a number of key principles:

- *Promoting sustainable tourism which supports local and rural economies.*
- *Supporting the needs of modern business and industry, continue to recognise traditional manufacturing and processing and develop a strong association within the aerospace and high technology industries.*
- *Supporting and protect important seaport facilities and encourage future growth at Glasgow Prestwick Airport.*
- *Adopting a flexible approach in promoting Newton as a lively and viable mixed use business and industrial area and manage Heathfield as an important location for industry, business and commercial activity where it supports Ayr and Prestwick town centres.*

Progress on delivery of the Economic Development Strategy.

In 2015, the three Ayrshire Council's commissioned SQW to prepare socio economic profiling and an analysis of the state and relative performance of the Ayrshire economy. This was compared to Scotland and the UK as a whole. The Executive Summary of that document provides a suitable précis of circumstances and it would be a duplication to review again here. Notwithstanding, it is readily evident that the facts and figures SQW provide do not make for comfortable reading.

There is however some evidence of a recovery, shown in the falling levels of unemployment, and increasing business birth rates, although this is reflective of national trends. It should also be noted that the SQW study pre-dates the more positive outlook for Prestwick Airport and the aviation / space industries, and the work now being undertaken with regard to the Ayrshire Growth Deal.

Whilst the picture for South Ayrshire is generally more positive than for Ayrshire as a whole, this is little cheer. There are some notable variations across Ayrshire reflecting the traditional business and industrial histories and strengths, but South Ayrshire has a low rate of Gross Value Added (GVA) in its employment offer when compared to the Scottish average, and is falling behind on other significant elements such as the level of investment in business enterprise, research and development (BERD).

Review and position statement

Policies in LDP1 directly covering economic development remain in accordance with Scottish Planning Policy and guidance. However from the SQW report it is readily evident that South Ayrshire's underperforming economy – and the socio profile of its population needs to be considered more fully in LDP2. It is essential for the plan to re-focus on economic issues so that it can continue to help foster faster growth in areas where recovery is being seen, and to help halt and reverse decline in underperforming sectors.

In order to gain a better understanding of the issues LDP2 could address, two specific research papers were commissioned. These helped to clarify the business sector's perspective on the quality, availability and suitability of the existing land and premises being offered within South Ayrshire.

One of the research papers, the Oxford Economics study "Business and Employment land Audit and Survey" stated that the available land identified for industrial development is appropriate to meet the needs of modern industry, offering choice and a good range of locations and size. It also confirmed that there is a reasonable spread of available industrial land and that in general, the larger industrial areas, locations in most demand, and sites of strategic importance have some additional capacity.

The Council's own research indicates that it currently has a supply of business and industrial land that is expected to last beyond the requirements of the next 10 years. The commercial market research has underpinned the Council's understanding of this issue, but suggests that more could be done to support small scale and micro-business start ups. Oxford suggests that there may be opportunities to re-allocate some industrial land if it is no longer deemed to be marketable and to consider trends in any usage which have changed the character of specific industrial areas.

In addition to the research undertaken on established industrial sites, we have investigated whether there may be an unmet demand for small scale industrial and business development in the countryside. Our own research is inconclusive and the consultants were unable to provide greater clarity, but evidence from a number of planning applications for this type of development suggests that it is an issue worth further consideration.

Land in, and around Prestwick Airport provides the greatest concentration of employment in South Ayrshire. Representative of the range and scope of its presence, some industrial premises are over 100 years old, and others only recently constructed. Vacancy rates around the airport vary from negligible to very high, depending on the specific locations (ref. Oxford Economics), some with substantial periods of vacancy and marketing. It is suggested that this implies mixed fortunes and that the area may require targeted attention on certain sites to ensure a successful strategy for useful occupancy. However, whilst this is an apparent weakness, Oxford Economics re-assure that it could be advantageous in terms of providing immediate flexibility regarding the future growth potential anticipated for the airport.

Issues to consider

"Is LDP1 focus and direction of travel still relevant?"
Research shows that there is a demonstrated adequate quantity, quality and locational spread of industrial land to meet the foreseeable future needs of South Ayrshire. The direction and focus of economic development policies in LDP1 remain consistent with National Policy and guidance and are considered by business and industry groups as being supportive of the economy.

"Are aspirations of the Community, Businesses and the Council being met?"
Through discussion with specific industries and business sectors during 2016 and early 2017, (including the port operators, and the airport company) there were no specific issues of concern for the immediate future. However, there were some concerns over the apparent ageing of available building and premises and that there

was anecdotal evidence that some small scale business opportunities were being overlooked, particularly within rural areas. Issues over transportation and access were of particular concern to the port operator, and more generally with regard to large scale manufacturing in close proximity to Prestwick Airport.

"Can LDP2 do more?"

Research consultants provided insightful, independent observations on the economic development policies of LDP1. They confirmed that from an industry perspective, the policies are regarded as being generally supportive. It was also acknowledged that LDP1 was particularly supportive of new rural based business with only a limited number of planning applications being refused. Some concern was raised with regard to the possibility of allowing non industrial uses to be established in predominantly industrial areas and concern was also raised because the policies are very traditional in scope and perhaps not best suited to meeting the needs of emerging micro businesses. LDP2 could seek to address these matters.

Requirement for Substantial Review?

There would be considerable merit in seeking to gain a better understanding of the opportunities and requirements at, and around Prestwick Airport. A specific study into the requirements Prestwick Airport and associated industries was commissioned in 2017. This will be used to guide the long term strategy for land around the airport.

The potential and importance of the Ayrshire Growth Deal is also an issue which is now of significance, and which needs to be given support and prominence in LDP2.

Research suggests that there may be a competitive advantage to be gained from allowing business opportunities outwith identified employment land – especially for small scale organic start up business in rural locations but this must be balanced against the need to protect inappropriate, unsustainable conflicting / detrimental uses.

Chapter 3
Monitoring Communities

The key evidence for this chapter Section is contained in the following background papers:

- South Ayrshire Local Development Plan 1: Policy Assessment Matrix
- South Ayrshire: key Statistics
- South Ayrshire Council Town Centres and Retailing LDP Monitoring Report
- South Ayrshire Council Town centres and Retailing LDP
- South Ayrshire Council Housing Technical Paper 2017
- South Ayrshire Council: Rural Development Analysis.
- Pre main issues Report Community Events (Nov 2016-Jan 2017) Report
- Savills: Housing Market Intelligence Report 2016

Further evidence documents are listed within the appendix to this paper

There are 2 main elements to this chapter LDP1:

- **Town Centres and Retailing**; and,
- **Housing**.

Secondary elements include Gypsy and Traveller accommodation, open space, community facilities, and telecommunications.

Town Centres and Retailing:

LDP policy framework

The LDP1 policy framework for retailing and town centres sought to operate the “town centre first” principles for retail and commercial development. This directed new retail and commercial leisure developments to town centre locations as a preference, and provided guidance for the type and scale of development that would likely be considered acceptable in alternative locations. In doing so, it created a hierarchy of retail and commercial centres, which included the Heathfield Retail Park as an important location for the sale of bulky and electrical goods.

Original policy intent

The retail strategy stated that:

- *“We will take a sequential approach to encourage investment in town centres and make sure retail centres continue to be viable.”*

Progress on delivery of the strategy

Following adoption of LDP1, South Ayrshire Council came under renewed and intense pressure from the owners of the out of centre retail park at Heathfield to relax historic restrictions on goods and permit the introduction of smaller kiosk/shop units and more family type restaurants / cafes. In tandem, pressure was also applied for further out of town supermarket development (Waitrose). This was despite the fact that the LDP settlement strategy was promoting the development of a new sustainable settlement expansion at another location (South East Ayr / Corton).

Elected Members of South Ayrshire Council decided to approve the development of the out of town supermarket (within the greenbelt), and a substantial increase in floorspace at the retail park. At the same time, it instigated an immediate full review of the retail policies within the recently adopted LDP.

The intent of review was to prepare a subject specific development plan to provide additional policy context, to reconsider relaxing goods restrictions at the Retail Park and to revise policy guidance for town centres and retail park development in light of the Council decisions.

Review and position statement

The pressure for out of town retail came at a time when Ayr Town Centre was subject to a rapid contraction of business with numerous store closures, lack of investment and an uncertain future for one of its two prime anchor shopping malls. In order to manage this pressure, and the Members' opinion that the LDP retail policies required urgent review, work was commenced on a specific subject Local Development Plan. The focus of attention in the review was Ayr Town Centre and Heathfield Retail Park, but it encompassed all town centres in its remit.

The result of the review was the South Ayrshire Town Centres and Retailing LDP, which was adopted in April 2017. The plan allowed for a measured relaxation of trade restrictions at the Heathfield Retail Park to include "homewares". This has resulted in further expansion of floorspace at the park and a near 100% occupancy. Vacancy rates within Ayr town centre continue to increase. The greenbelt supermarket has not been constructed.

<u>Issues to consider</u>

"Is LDP1 focus and direction of travel still relevant?"

LDP1 has already been superseded by the adoption of the South Ayrshire Town Centres and Retailing Local Development Plan (adopted in April 2017).

"Are aspirations of the Community, Businesses and the Council being met?"

Although the policies of LDP1 have only recently been superseded, vacancy rates in Ayr, Maybole and Girvan continue to be of concern and pressure remains for yet more out of town retailing. Close monitoring should continue so that the effectiveness of the Town Centre and Retail LDP can be assessed and its policies incorporated into LDP2 as appropriate.

"Can LDP2 do more?"

LDP2 could do more to incorporate statements of envisaged relative functions, roles and a future that the 5 town centres should aspire towards.

<u>Requirement for substantial review?</u>

Given the recent adoption of the Town Centre and Retailing LDP, a substantial review is not considered necessary, but there is an opportunity to consolidate and renew focus on town centres, with the incorporation of the Town Centres and Retail LDP policies within LDP2.

Monitoring of Housing Strategy

Note: A specific Housing Technical paper has been prepared to inform this section of the Monitoring Statement.

LDP1 Policy Framework

The housing strategy of LDP1 aimed to provide enough housing land to meet the anticipated demand for new homes. The strategy also sought to encourage the redevelopment of brownfield sites and relaxed the Council's policies for new rural housing.

Housing completions in south Ayrshire have been slowly recovering from a historically low level following the financial crisis of 2008. The Housing and Spatial strategy of LDP1 incorporated a response to the downturn in the housing market and wider economy. It aimed to address particular issues within the housing land supply at that time, which contained three very large undeveloped allocations at North East Troon, Greenan (Ayr) and South East Ayr/Corton. Smaller sites that had been allocated in the 2007 South Ayrshire Local Plan had mostly been developed, and there was therefore a mismatch and potential over reliance on the 3 large strategic sites. In preparing LDP1, Homes for Scotland and private housebuilders indicated that the sites most preferred, and most likely to be developed were those with minimal development constraints and infrastructure requirements, good access to transport routes and major towns, and of a medium scale (generally 30-200 units).

With regard to the provision of affordable housing, LDP1 sought a target contribution of 25% on sites greater than 0.6ha, or 15 units or more, with a lower target in Girvan and Maybole. This strategy was largely dependent on the private sector to bring sites forward.

Original policy intent

There were two elements to LDP1 Housing strategy, these corresponded to

- **the supply of housing, based around calculations of housing need, and**
- **the delivery of housing on the ground (for both the private and public sector).**

The strategy encompassed the following principles:

- *Ensure the maintenance of an effective five year supply of land for housing to meet demand*
- *Direct new housing to gap sites or to redevelopment or brownfield sites within settlements.*
- *Ensure that all future housing is of a high quality of safety, amenity, accessibility, sustainability, layout and design.*
- *Support proposals which help sustain rural communities.*
- *Seek to provide affordable housing as a contribution from the delivery of private housing.*

Progress on delivery of housing strategy

LDP1 was guided by the requirements for housing as defined in the 2009 Housing Needs and Demands Assessment. It allocated a generous number of new units (approximately 1900 units on 31 sites) in a range of locations, predominantly in settlements around Ayr, Prestwick and Troon which had been demonstrated as having have minimal infrastructure requirements and costs- and which could be considered as ‘effective’ sites. Areas immediately around the strategic housing sites at Greenan, North East Troon and South East Ayr were avoided, in order to protect the delivery of them. The new allocations increased the housing land supply by roughly one third and provided for a more balanced supply, focussed on the north of the area, but with a range of available sites both geographically and in terms of size and character covering all of South Ayrshire.

As of July 2017, there had been a disappointing level of activity on the LDP1 greenfield allocation sites. None of the sites had formally commenced development. Planning consent has been approved (or agreed subject to legal agreements) on just 3 sites, but planning applications have recently been submitted for a further 3 sites and pre-application enquiries made for several more.

Whilst the delivery of housing on the greenfield allocations of LDP1 has been disappointing, there has been a marked resurgence of interest and activity on brownfield and redevelopment sites, most noticeably within Ayr. This is an encouraging indication that the traditional market for mid-priced urban family housing is recovering, and signs are that this trend is likely to accelerate as developer and marketplace confidence returns.

The delivery of affordable housing has largely been dependent on the buoyancy of the private housing market (because the mechanism used to bring affordable housing forward is an integral element of private housing sites) and the availability of funding for its provision. Rates of development were initially low following adoption of LDP1, but recent increases in funding availability, renewed activity of the Council to develop new homes, and further interest from housing associations suggests it may be a challenge to identify and provide enough land and suitable sites to facilitate affordable housing, at least in the short term.

Review and position statement

The 2016 Housing Land Audit states that there are a total of 8,667 units in the Established Land Supply; that is, housing units that have received planning consent, released through the Local Development Plan, or have agreed planning potential for housing. Of this total, 2,719 units are considered to be 'effective' and capable of being delivered within 5 years. There is an effective land supply of 5.3 years, against the housing target from LDP1. This equates to 31% of the established land.

In order to gain a better understanding of the local market conditions and whether the present housing strategy is as effective as it could be, independent research was commissioned, and consultation with Homes for Scotland (and other housing providers) was undertaken.

Both the Housing Market Intelligence Report and the Homes for Scotland Matrix (contained in the Housing Technical Paper) suggest that the strategy adopted in LDP1 was correct to allocate mid-sized sites, free from constraints, in the north of the area, and to seek a more balanced housing land supply overall. Although the rate of delivery of these sites has been "slow" in the 3 years since adoption of LDP1, this has to be set against the wider context of a continuingly constrained market and a more limited range of housebuilders operating in the area. There are, however, signs that interest in LDP sites is increasing, and that a greater range of developers may be entering the local market to pick up sites that have proven less attractive since the recession. With increased Scottish Government funding now available, it is also likely that affordable housing construction will increase, although this may mean that finding enough effective affordable sites may be a challenge.

Of those sites which are considered to be non-effective, most do not have any significant physical or financial constraints to deliver them. Rather, it is recognised that the local housing market, which continues to recover slowly, is not currently strong enough to support development commencing at this time. However, a sustained upturn in the market could see a significant increase in both housing completions, and interest in sites that are currently considered to be non-effective. In considering the present circumstances, it should be noted that LDP1 was intended to provide for housing requirements as estimated in the 2009 HNDA (with an additional "generous" margin of +20%). LDP2 will be guided by the figures of the 2016 HNDA. Even with a similarly generous additional allocation figure, the housing requirements for the next plan period and beyond are calculated to be significantly lower than the figures anticipated when LDP1 was drafted (see housing technical paper).

With specific regard to the issue of rural housing, it is noted that individual and small scale building in the countryside has historically formed a modest but nonetheless significant contribution to the over-all annual house completion numbers**.** LDP1, and an associated Supplementary Guidance document relaxed the criteria through which new rural housing needed to be justified. The policy became operational at a time when activity in the house building sector was low, but there are now indications that there is an upwards trend in applications for single and small scale rural housing proposals, particularly in the northern part of South Ayrshire.

Issues to consider

"Is LDP1 focus and direction of travel still relevant?"

Most of the Housing land is allocated in the northern part of South Ayrshire, on sites of less than 200 units. Activity is increasing on brownfield/redevelopment sites, and there is renewed interest in sites within Maybole and the villages. The three strategic sites are seeing progress, although technical issues at the large urban expansion at South East Ayr have taken longer to resolve than anticipated. It is considered that the strategy framework of LDP1 remains relevant.

"Are aspirations of the Community, Businesses and the Council being met?"

Homes for Scotland, the representative body for house-builders has confirmed that sites within Kyle are the most desirable for its members, but has provided confirmation that sites elsewhere have potential for development, albeit at a lower rate of construction. Homes for Scotland would like to see more medium scale sites identified in areas of most demand, this being Ayr, Prestwick, Troon, Loans and Symington. South Ayrshire Council's assessment of housing land availability does however indicate that a 5 year supply of effective sites remains, and that the sites are appropriately distributed across South Ayrshire. Notwithstanding, the recently endorsed 2016 HNDA suggests that future requirements will be lower than had previously been estimated.

The rate of affordable housing provision has been subject to the availability of funding, but also to the progress of larger sites which are of a scale to require on site provision as a stipulation of consent. There has been some disquiet from house builders that the requirement for an affordable housing contribution is a disincentive to bringing sites forward, but the Council has been working with the industry to consider and adjust requirements according to viability on a site by site basis. Affordable housing provision has recently increased following the availability of funding for both housing associations and the Council, and there is evidence of community support for the development of more, particularly within pressured and rural areas.

LDP1 included a review of rural policies for housing, but supplementary guidance amended some text and there is evidence of confusion in its implementation.

"Can LDP2 do more?"

The Council has an obligation to provide for sustainable economic development, maximise benefits and balance competing interests. With respect to the identification of residential development land and guiding house-building to appropriate locations, it is considered that LDP1 provided a good balance and progress towards the aims of urban renewal. The rate of development apart from key locations (notably Ayr, Troon and Symington) however is disappointing. LDP2 could realistically try to address this issue.

Requirement for substantial review?

The aims and objectives, and policy direction of LDP1 remains valid, and in conformity with National Policy and Guidelines. However, there have been changes to the anticipated housing land requirement figures, and some disquiet evidenced by Homes for Scotland that the availability and viability of sites does not meet their members' aspirations. It would be prudent to fully review the availability of land, anticipated demand and to consider if there are mechanisms to address concerns without undermining the established effective strategy.

In tandem with a review of residential development land and associated policy, it would be advisable to consider the full range of options for housing provision and therefore a review of the position with regard to housing in rural areas, both in village locations and within the wider countryside. This may prove to be particularly relevant given the apparent lack of progress on rural village development sites identified in LDP1.

Chapter 4
Monitoring Environment and Climate Change

The key evidence for this chapter is contained in the following background papers:

- South Ayrshire Local Development Plan 1: Policy Assessment Matrix.
- South Ayrshire: key Statistics.
- South Ayrshire Council: Rural Development Analysis.
- Pre Main Issues Report Community Events (Nov 2016-Jan 2017) Report.
- Pre Main Issues Report Delivery Workshop Events (Oct –Nov 2016) Report.
- Ayrshire Local Plan District – Local Flood Risk Management Plan 2016
- South Ayrshire Council: Environmental baseline monitoring

Further evidence documents are listed within the appendix to this paper.

LDP policy Framework

The Environment and Climate Change chapter of LDP1 covered a wide range of subjects;
landscape, trees, woodlands and forestry, Central Scotland Green Network (CSGN), water and flooding, agricultural land, pollution, minerals, low carbon and renewable energy. It also covered aspects of the built and historic environment, archaeology, natural heritage, waste management and the recently designated Dark Sky Park.

Original policy intent

Given the wide range of subjects grouped within this chapter of LDP1, it is easier to refer to the intent of the over-arching Sustainable Development Policy of LDP1 for the Environment and Climate Change strategy. It states:
We will make sure development:

- *Is appropriate in terms of its amenity impact, layout, scale, massing, design and materials in relation to its surrounding,*
- *Is designed to maximise energy efficiency through building siting, orientation and materials,*
- *Respects the character of the landscape,*
- *Respects, protects and where possible, enhances natural, built and cultural heritage resources,*
- *Helps mitigate and adapt to the effects of climate change,*
- *Protects peat resources,*
- *Is appropriate to the local area in terms of road safety and effect on the transport network,*
- *Contributes to an efficient use of public services, facilities and infrastructure,*

- *Has sustainable urban drainage and avoids increasing risks of or from all forms of flooding,*
- *Supports and where possible, improves the Central Scotland Green Network,*
- *Does not have a negative effect on air and water quality,*
- *Is not within Health and Safety Executive safeguard zones if this would lead to increased risk of danger,*
- *Is designed in a way that helps prevent crime,*
- *Wherever possible, is in an accessible location, with opportunities for the use of public transport, and other sustainable transport modes including cycling and walking,*
- *Includes the use of micro renewables, where appropriate and feasible.*

Progress on delivery of the strategy

Because much of the policy strategy's intent is to prevent inappropriate development and safeguard sensitive assets, it is harder to actively monitor success than it is to monitor policies which promote physical development. Implementation of the spatial strategy does however require the protection of important environment assets, because it has these principles at its core.

With regard to positive action, since the adoption of LDP1, South Ayrshire Council has designated 2 new conservation areas, been integral to the work of Ayr Renaissance in Ayr and the successful THI bid for Maybole town centre. It has also adopted new Supplementary Guidance (SG) on wind energy- which was endorsed as best practice exemplar by Scottish Government. The SG on the Dark Sky Park has also been prepared and approved**.** Furthermore, the principles of the sustainable development policy are clearly reflected in the Reports of Handling for planning applications, and reports prepared for Regulatory Panel consideration.

Evidence of the above can be seen in proposals for the restoration and re-use of listed buildings (former Clydesdale, Ayr High Street), the work with SNH and SEPA to ensure appropriate mitigation for the protection of important habitats and species is implemented for large scale renewable energy developments (such as Glen App), and the comprehensive improvement and management regimes for large urban parks estates to increase recreational and wildlife value (Belleisle in particular). These are not exclusive examples but representative of the range and scale of activity that demonstrates success of policy in practice.

Notwithstanding, it is acknowledged that a number of listed buildings have fallen into disrepair, and tree work applications suggest that urban trees in particular are often regarded as a problem rather than an asset. There has been little overt activity with respect the Central Scotland Green Network and there are strong differences of opinion on the relative merits of large renewable energy projects.

Review and position statement

Polices within LDP1 are generally in accordance with Scottish Planning Policy and Guidance, and are proving to be generally effective. However, National and Key Agency targets and intent for sustainable development have been raised – issues including the National Heat Maps, and a drive towards incorporation of district heat systems in new development is an example of increased expectations.

Work with North Ayrshire Council regarding coastal flooding and shoreline management is progressing, the outcome of which will be used to guide decisions on the appropriateness of long term sea defences, but to date this work has yet to be completed.

Designation of the Dark Sky Park and Biosphere are anecdotally having a positive impact on perceptions of the importance of environmental resources, but the promotion of the CSGN is not presently high profile within South Ayrshire. The anticipated Supplementary guidance (expected to be developed in association with North and East Ayrshire Councils) has not been drafted. SNH is also advocating a review of local landscape designations and has prepared draft guidance on how this should be undertaken.

Issues to consider

"Is LDP1 focus and direction of travel still relevant?"
It is considered that the general direction of LDP1 is appropriate, but it is evident that some opportunities to follow or implement best practice have been missed. Part of the reason for this is due to the relative fragility of the economic recovery within South Ayrshire and the inherently risk averse nature of developers. Any potential increases in costs to development, without evidence/history of clear benefits, or need are difficult to impose.

"Are aspirations of the Community, Businesses and the Council being met?"
Aspirations and expectations at national level from the Scottish Government and Statutory agencies have increased, and are likely to continue to do so.

Community views are polarised in terms of renewable energy, particularly regarding wind farm development but the landscape around towns and villages is valued (evidenced from public engagement events 2016/17). Some rural communities are disproportionately affected by renewable energy development.

There is considerable concern with regard to a perceived lack of investment in the built environment and frustration with regard to the provision/availability of community facilities and transport infrastructure.

High quality historic environments, the quality of town centres and good accessibility to attractive natural and recreational resources are regarded by the business community (particularly commercial and residential developers) and the public as being strong economic drivers. Providing such environments however remains a challenge financially without strong incentive and/or access to substantial funding streams. Progress on the regeneration of Ayr Town Centre is regarded as frustratingly slow, and the Improvements to Maybole are still dependant on the commencement of bypass construction

"Can LDP2 do more?"

There is a Scottish Government expectation that LDP2 should build on the sustainability credentials of LDP1 and seek a more pro-active approach to environmental and climate change matters in particular. The expectations of businesses and the wider community are also increasing.

Requirement for substantial review?

Whilst the general principles of LDP1 are in line with Government policy, recent guidance and best practice advice suggests that certain elements should be given a greater profile. In particular, "Heat Mapping" which connects energy/heat generating uses with potential users is advocated by SEPA, and SNH advocates that a review of the Scenic Areas should be undertaken.

National Planning Framework 3 (NPF3) provides more guidance on the intent and scope for the Central Scotland Green Network, and the Central Scotland Green Network Trust gives examples of how the initiative could be better integrated within towns and into the countryside. This would also likely merit review for LDP2.

Chapter 5.
MONITORING TRANSPORT

Key evidence for this chapter is contained in the following background papers.
- Pre Main Issues Report Community Events (Nov 2016-Jan 2017) Report
- Pre Main Issues Report Delivery Workshop Events (Oct –Nov 2016) Report

Further evidence documents are listed within the appendix to this paper

LDP Policy Framework

The strategy of LDP1 aligned with the general principles of sustainable develop by seeking to make the most efficient use of previous infrastructure investment, encouraging the use of sustainable transport through its provision and by seeking to ensure that new land use designations are in readily accessible locations by public transport, cycling and walking networks.

LDP Policy Intent

The strategy aimed to:

- *Align with the Regional and local Transport Strategy,*
- *Improve integration of transport networks,*
- *Support proposals for improvements to rail and strategic road networks,*
- *Promote park and ride facilities,*
- *Encourage rail and sea freight,*
- *Manage town centre traffic, and*
- *Improve and protect public access, cycleways and core path networks.*

Progress on Delivery of the Strategy.
The Regional and Local Transport Strategies haven't been updated since adoption of LDP1. The allocation of residential development sites, prioritisation of brownfield site renewal and redevelopment, and the town centre first principle for retail and commercial development do however all tie together well with the aims of the Transport Strategy.

The construction of the A77 Trunk Road Maybole bypass has been delayed, which has affected the timescale for improvements to Maybole town centre . This has anecdotally had a negative impact on the rate of new build housing at maybole and impacted on the relative effectiveness of residential development sites allocated in LDP1. Construction is due to start in 2018. The programmed safety improvements at Symington have been completed, allowing residential development to progress in the the village.

The delayed start of the major Ayr urban expansion at Corton has had an effect on the anticipated timescale and deliverability of associated infrastructure improvements and the safe cycle crossing of the A77. Improvements specifically related to the urban expansion have not been initiated, and a wider strategy for road improvements on the Trunk Road more generally has also been delayed. Peak time congestion on the Ayr bypass has continued. Recent developments at Heathfield have added to congestion on local roads feeding into the Whitletts roundabout, and there are notable peak time delays on the A70/Holmston Road roundabout, and at the Bankfield / A713 roundabout. Development at a resurgent Glasgow Prestwick Airport may result in further peak time delays at the Dutchhouse Roundabout.

A review of traffic management through Ayr town centre is anticipated as part of the wider Ayr Renaissance and redevelopment project but this research has not yet commenced. Additional Parking facilities at Ayr Station, a cycle hub and new cycle parking facilities are now in place or planned, but anticipated additional parking at Barassie, Troon and Prestwick remain to be progressed. The proposed park at ride facility at Dutchhouse Roundabout has not been advanced, although planning consent was granted.

More progress has been made with regard to integrated cycle routes, with the recent implementation of the Ayr-Coylton route being a significant addition to the network. Cycle routes have also been incorporated into major residential developments at Greenan and Troon, and work is ongoing towards the masterplan and sustainable transport provision for the urban expansion site at South East Ayr / Corton

Review and Position Statement.

Polices within LDP1 are generally in accordance with Scottish planning policy and Guidance, and are in line with the Regional and Local Transport Strategies. Progress towards some major road infrastructure improvements has been delayed and this has likely had an impact on wider economic development, particularly with respect to residential development, especially to the south of Ayr.

There is evidence of difficulty in accessing facilities and services at a given time by public transport, particularly from rural communities where bus services are limited and trains not available. The commercial nature of bus operators means that improvements are difficult to encourage.

Issues to Consider.

"Is LDP1 focus and direction of travel still relevant?"

There is no evidence to suggest that the direction and strategy of LDP1 is out of alignment with National Policy or Guidance.

"Are aspirations of the Community, Businesses and the Council being met?"
Recent discussions with business groups (focus group on business interests and the economy held in Autumn 2016) did not raise new issues on transport infrastructure matters, but access to the ports of Ayr and Troon, and for industry at the Airport were highlighted as being areas where difficulties have, or may arise.

Rural communities in particular are concerned with the vulnerability of bus services and access to facilities, while communities in urban areas are concerned more with the volume of traffic and associated public health, safety and amenity implications.

It is disappointing that anticipated investment to the strategic road network hasn't taken place within the timescales originally envisaged but there are indications that programmed improvements to the A77 will act as a catalyst for development.

"Can LDP2 do more?"
Whilst the policies of LDP1 remain valid, there is evidence to suggest that the Action Plan associated with the Local Development Plan could be more focussed on facilitation and enabling development.

Requirement for Substantial Review?

The aims, objectives, and policy direction of LDP1 remain valid, and are in conformity with National Policy and Guidelines. General support for existing rural services, and the stabilisation of rural population levels remain sensible strategies.

It is not considered that a substantial review is necessary, but more focus is required on assessing issues concerning the capacity of the Trunk Road network and potential strategies for wider traffic management.

APPENDIX

Document/ reference list

National

Scottish Government: National Planning Framework 3 (NPF3)
Scottish Government: Scottish Planning Policy (SPP)
Scottish Government: PAN 2/2010 Affordable Housing and Housing Land Audit
Scottish Government: Scotland's Economic Strategy (March 2015)
Scottish Government: Scottish Vacant and Derelict Land Survey 2016
Scottish Tourism Alliance: Scottish Marine Tourism Strategy "Awakening the Giant"
Visit Scotland: Ayrshire and Arran Tourism Strategy 2012-17
Visit Scotland: National Tourism Strategy "Tourism Scotland 2020"

South Ayrshire

Ayrshire and Arran Tourism Strategy 2012/17
Ayrshire Local Plan District – Local Flood Risk Management Plan 2016
Regional transport Strategy 2008-2021
South, North and East Ayrshire Council: Ayrshire Growth Deal Bid Prospectus 2016
South Ayrshire Council: Economic Development Strategy 2013 -2023
South Ayrshire Council: Housing Need and Demand Assessment 2016-2020
South Ayrshire Council: Local Development Plan
South Ayrshire Council: Local Housing Strategy 2017-2022
South Ayrshire Council: Local Transport Strategy 2009-2014
South Ayrshire Council: Council Plan (2016-18)
South Ayrshire Council: Single Outcome Agreement 2013-17
South Ayrshire Council Town Centres and Retailing LDP 2017
South Ayrshire Greenbelt Review Update
South Ayrshire Council: Town Centre and Retail LDP Monitoring Report

Pre-MIR research papers (Reports available on line or by request to view)

South Ayrshire Council: Call for Assessment 2017
South Ayrshire Council: Housing Technical Paper 2017
South Ayrshire Council: Housing Land Audit 2016 draft (2017)
South Ayrshire Council: Rural Development Analysis.
South Ayrshire Council: Housing Site Effectiveness: Contact Research
South Ayrshire Council: Urban Capacity Study
South Ayrshire Council: Employment Land Audit

Pre-MIR Engagement events: (Reports available on-line or by request to view)

Pre main issues Report Community Events (Nov 2016-Jan 2017) Report
Pre main Issues Report Delivery Workshop Events (Oct –Nov 2016) Report

Royal Society Research Team of Scotland Rural College: "Ayrshire 21" Community Action Plans
Prestwick Town Centre charrette Report
Girvan Town Centre Charette Report
Maybole Town Centre Charrette Report

Consultant studies: (Reports available on-line or by request to view)
Ryden: Review of Employment land in South Ayrshire 2016.
Oxford Economics: Economic Outlook Report 2016
Savills: Housing Market Intelligence Report 2016
SQW: Ayrshire Socio Economic Profile and Analysis 2015
AECOM Glasgow Prestwick Airport / Spaceport Masterplan

PART 2

South Ayrshire Key Statistics

Introduction

This Appendix accompanies and informs the publication of the South Ayrshire Local Development Plan 2: Monitoring Report - Main Issues Report (September 2017). It records the changes in the physical, economic, social and environmental characteristics of the area and the impact of the effectiveness of the policies of South Ayrshire Local Development Plan (September 2014).

The Appendix sets out the statistics relating to the physical, economic, social and environmental change in the area over the period 2013-2016 and provides the baseline for monitoring the effectiveness of the South Ayrshire Local Development Plan 2. The figures used within the report are the most recent figures available.

Population and Demographics

1.1 South Ayrshire is located on the south west coast of Scotland and is bordered by the Council areas of North Ayrshire, East Ayrshire and Dumfries and Galloway. The area covered by South Ayrshire Council covers approximately 422 square miles (1,222 square kilometres), with the main centres of population being located at Ayr, Girvan, Prestwick, Troon and Maybole.

The 2016 population figure for the South Ayrshire area was 112,470 with 58,796 being female and 53,674 male. The 2016 population for South Ayrshire has increased by 0.1% from the 2015 figure of 112,400 (nrs Scotland.gov.uk). The demographic trends of South Ayrshire's declining and ageing population of 112,400 (NRS, 2017) have important feedback loops with development patterns and economic trends. Meanwhile, household numbers are increasing and there are localised areas of high unemployment and multiple deprivation within the area (SIMD 2016).

Year	South Ayrshire	Scotland
2011	112,980	5,299,900
2012	112,920	5,313,600
2013	112,870	5,327,700
2014	112,530	5,347,600
2015	112,400	5,373,000
2016	112,470	5,404,700

Source statistics.gov.scot and NRS Mid-Year Estimates

Projected Percentage Change in Population of South Ayrshire By age Group

1.2 The population of Scotland and South Ayrshire is ageing. By 2039 the population of South Ayrshire is projected to be 110,104, a decrease of 2.2% to the population in 2014, however, the 75+ age group is projected to increase in South Ayrshire. The population of Scotland is projected to increase by 6.6% between 2014 and 2039. By 2039 the projected population change for South Ayrshire indicates that there will be a 2.2% decrease in the population, as well as a significant 10% decrease in the working age population. Furthermore, it is projected by 2039 that there will be a considerable increase in the elderly population of both Scotland and South Ayrshire with an expected increase of 81% by 2039 on the number of people aged 75+. The projected increase in population aged over 75 years will make particular demands on suitable housing and public services.

Area	All ages	Children (0-15)	Working Ages	Pensionable Ages	Ages 75 and over
Scotland	6.6%	1.4%	1.2%	28.3%	85.4%
South Ayrshire	-2.2%	-7.5%	-10.8%	21.1%	81.8%

Source - Nrsscotland.gov.uk

Given the above projections, it is for LDP2 to create a framework encouraging the retention and inward migration of working age groups given that the projected population figures indicate a significant increase in the number of people aged 75+ within South Ayrshire.

Migration

1.3 The change to population figures involves two components, natural change, which is births and deaths and migration, which is the number of people moving into and out of the area. Trends in birth and death rates tend to be relatively stable and slow to change. Migration rates are more unpredictable, however, over the last 3 years the latest figures show a net gain in terms of overall migration in South Ayrshire.

Average migration figures for South Ayrshire (based on a 3 year average and do not include asylum seekers and armed forces movements)

Overall net migration for South Ayrshire is projected to be more people coming to South Ayrshire than leaving.

Age Group	In	Out	Net
0-15	610	477	133
16-29	1,028	1,287	-259
30-44	848	748	100
45-64	759	567	192
65+	389	279	110
All ages	3,634	3,358	276

Source nrscotland

Birth Rates

Year	South Ayrshire	Scotland
2011	1,073	58,590
2012	997	58.027
2013	998	56,014
2014	1,033	56,725
2015	1,030	55,098
2016	976	54,484

Source NRSScotland

Death Rates

Year	South Ayrshire	Scotland
2011	1,412	53,661
2012	1,386	54,937
2013	1,441	54,700
2014	1,404	54,239
2015	1,498	57,579
2016	1,446	56,724

Source NRSScotland

There has been a fall in Birth rates in both South Ayrshire and Scotland since 2011, whereas the death rate has increased in the same time period which in turn has an impact on the population figures overall.

Household Estimates

1.4 Despite the fall in population within South Ayrshire by 2039, household numbers are continuing to increase with a projected increase of 4,257 new households by 2039. As of 2016, the number of households in South Ayrshire has increased by 3.2% since 2006, compared with an increase of 6.8% in Scotland as a whole. The number of "single person households" within South Ayrshire is expected to increase 23% by 2039. The projected number of households within South Ayrshire by 2039 is a 5% increase than the 2014 figure and the 75+ age group of households is projected to increase significantly (78%) by 2039.

Year	South Ayrshire	Scotland
2006	50,316	2,295,185
2007	50,654	2,318,966
2008	50,866	2,337,967
2009	50,952	2,351,780
2010	51,184	2,364,850
2011	51,364	2,376,424
2012	51,515	2,387,211
2013	51,654	2,401,788
2014	51,874	2,418,336
2015	51,912	2,433,956
2016	51,923	2,451,869
2039	54,573	2,763,773

Source NRS Household Projections

Projected number of households by household type

Age group of household	2014		2039		Change	
	South Ayrshire	Scotland	South Ayrshire	Scotland	South Ayrshire	Scotland
16-29	4,188	281,213	3,918	281,448	-6%	0%
30-44	10,389	588,324	10,304	625,739	-1%	6%
45-59	14,915	701,133	12,215	706,765	-18%	1%
60-74	13,853	536,483	12,944	593,713	-7%	11%
75+	8,530	311,183	15,192	556,107	78%	79%

Source NRS Household Projections

Household Type	2014		2039		Change	
	South Ayrshire	Scotland	South Ayrshire	Scotland	South Ayrshire	Scotland
1 adult	18,205	868,884	22,399		23%	1,141,763
2 adults	17,374	747,340	18,555		7%	874,001
1 adult with children	3,129	156,051	4,060		30%	190,766
2+ adults with children	8,941	441,424	6,825		-24%	389,058
3+ adults	4,225	204,636	2,733		-35%	168,184

Source NRS Household Projections

The above household projections will have implications for the demand for different sizes of types of housing in South Ayrshire.

Housing Market and Housings Needs

1.5 Owner occupation is the largest tenure sector in South Ayrshire. The social rented sector accounts for 20% of the stock. There has been a significant rise in the private rented sector in recent years which now represents around 9% of all dwellings. This reflects national and UK wide trends, given the demand for housing.

Housing Tenure

	Housing Numbers	Owner-Occupied	Percentage	Social Housing	Percentage	Private Rented	Percentage
South Ayrshire	52,000	37,000	71%	10,000	20%	5,000	9%
Scotland	2,419,000	1,474,000	61%	600,000	25%	305,000	13%

Source - Scottish House Condition Survey 2013-2015

The table below (taken from South Ayrshire HNDA -2015) identifies the changes in tenure for the period 1991 - 2011 within South Ayrshire and Scotland.

Number of dwellings in South Ayrshire

Year	South Ayrshire	Scotland
2010	51,184	2,364,850
2011	51,364	2,376,424
2012	51,515	2,387,211
2013	51,654	2,401,788
2014	51,874	2,418,335
2015	51,912	2,433,956
2016	54,942	2,575,667
	% change 2014-2015 0.1%	% change 2014-2015 0.6%
	% change 2010-2015 1.4%	% change 2010-2-15 2.9%

Source NRS

Number of Second Homes in South Ayrshire

The table below provides information on the number of second homes in South Ayrshire by location and indicates that 3.2% of the houses in the rural south of the area are second homes..

	Total Dwellings	No Second Homes	% of Total Stock
Ayr	23,426	119	0.5%
Prestwick	7,700	40	0.5%
Troon	7,688	85	1.1%
Maybole	3,174	23	0.7%
Rural North	6,590	28	0.4%
Girvan	3,558	79	2.2%
Rural South	2,409	80	3.2%
Ayr Urban HMA	48,578	295	0.6%
G&SC HMA	5,967	159	2.6%
South Ayrshire	54,545	454	0.8%

Source South Ayrshire HNDA 2015

Housing Stock by Council Tax Band

1.6 The total housing stock in South Ayrshire as at 2016 stands at 55,213 Houses and Scotland's housing stock is around 2,592,695 Although there are only a small number of houses in the highest band H, this continues to see an increase over time.

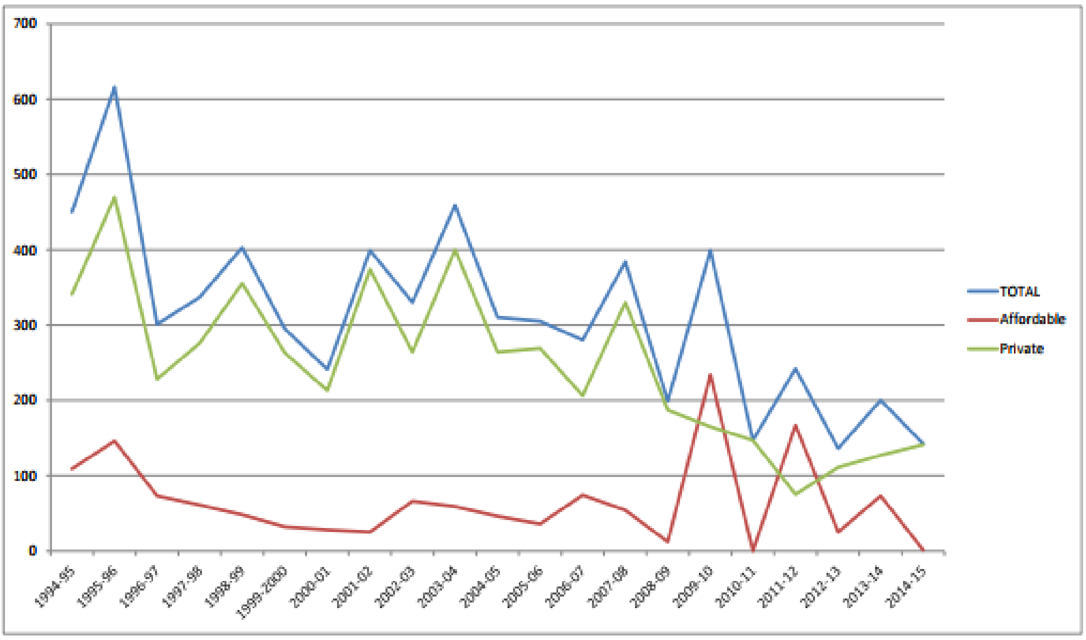
Council Tax Band	A - C	D - E	F - G	H	Total
2011 South Ayrshire	28,650	17,603	7,513	271	54,037
2016 South Ayrshire	28,781	18,004	8,138	290	55,213
2016 Scotland	1,563,056	692,122	323,848	13,669	2,592,695

Source saa.gov.uk

House Completions

1.7 Since 2013, a total of 911 new dwellings have been built in South Ayrshire.

Historical Completions for South Ayrshire



1.8 Private completions over the last 4 years have shown an average of 169 units per annum. 2013-14 saw a fall in the number of completions, however, the completions for the last two years are similar and have increased since 2013.

1.9 In the last 4 years, 232 social rented houses have been built in South Ayrshire, mostly all on brownfield land. Since 2007 until 2012, there have been 544 social rented houses built in South Ayrshire, with an average of 90 units per annum. The figures indicate that the rate of social rented housing being built within South Ayrshire has increased and this may be due to the finance available.

Completions	2013-14	2014-15	2015-16	2016-17
Private	127	141	202	207
Social Rented	73	1	80	87
Total	**200**	**142**	**282**	**287**

Source: SAC Housing Land Audits

South Ayrshire Council Housing Stock as of 2016 was 8,081. (Source: Housing Statistics for Scotland)

Completions by calendar year

	Private Sector		Local Authority		Housing Association	
	2006	2016	2006	2016	2006	2016
South Ayrshire	222	276	0	102	87	94
Scotland	21,358	12,576	6	1,215	3,941	2,707

1.10 In 2016, there were approximately 12,576 private new build units completed with 1,215 local authority and 2,707 housing association units completed in Scotland.

South Ayrshire had 276 new private builds and 102 social rented units for the same year. This compares to 21,358 new private builds and 3,941 housing association and 6 local authority units in Scotland in 2006 with 222 private builds and 0 local authority and 87 housing association units, within South Ayrshire for the same year.

1.11 Given the above, it is noted that the number of social rented builds are increasing both in Scotland and within South Ayrshire. In terms of private builds, it is noted that there is a dramatic decline within Scotland overall, however, the trend in South Ayrshire appears to have a small increase in completions for private building since 2006. Social rented completions are primarily influenced by the availability of public finance.
(Source: Housing Statistics for Scotland – Scottish Government)

1.12 The Housing Need and Demand Assessment (2015) for South Ayrshire estimates the housing needs projection in line with the Local Housing Strategy and the Local Development Plan by using a toolkit in the form of scenario testing and the figured are as follows:-

Between 2016 – 2020, the estimated housing need across South Ayrshire is:-

- 506 and 594 units in social rented sector
- 215 and 233 units in mid-market sector
- 768 and 838 units in private sector

Source HNDA June 2015

From the figures above it appears that there is sufficient capacity to meet the housing needs for South Ayrshire until 2020. The shortage of affordable housing within South Ayrshire is evident in the figures for the waiting list for social housing.

Housing Land

1.13 The Housing Land Audit is the mechanism within which the Council records activity and seeks to anticipate future growth. The HLA records all housing sites of over 4 units. At April, 2016, the South Ayrshire Housing Land Audit identified land which could provide almost 2786 houses. The total programmed output for 2016 to 2020 for all tenures is as follows:-

	Programmed Output All Tenures					Established Land Supply		
Supply Year/Period	2015-16	2016-17	2017-18	2018-19	2019-20	Total 2015-20	Post 2020	Total Established Land Supply
Total	255	421	602	730	778	2786	6359	9145

The format of the tables provides a comprehensive description of all current sites for housing within South Ayrshire of a capacity for 4 or more homes.

Established Private Sector Land Supply	2013	2014	2015	2016
Number of units	1438	1620	2786	2719

Source: SAC Housing Land Audits

Five Year Effective Land Supply – South Ayrshire

Agreed Housing Land Audit 2015 - 2020	LDP Housing Supply Target 2012-13	Completions 2011 to 2015 (all tenures)	Total Established Land Supply	Effective Land Supply 2015 - 2020	Five Year Effective Land Supply
Number of units	6108	867	9145	2786	Yes (5.5 years)

Programmed Output by Area within South Ayrshire 2016 -2020

	Programmed Output All Tenures					Established Land Supply		
Supply Year / Period	2015-16	2016-17	2017-18	2018-19	2019-20	Total 2015-20	Post-2020	Total Established Land Supply
Annbank and Mossblown	0	1	0	15	16	32	93	125
Ayr	147	200	253	294	296	1190	4049	5239
Barrhill	3	0	0	0	0	3	21	24
Colmonell	0	4	5	4	0	13	0	13
Coylton	5	16	37	47	60	165	213	378
Crosshill	0	0	0	4	7	11	47	58
Dailly	0	5	1	8	5	19	39	58
Dundonald	0	2	10	42	52	106	162	268
Fisherton	0	5	10	15	3	33	2	35
Girvan	2	2	7	17	33	61	76	137
Kirkmichael	0	0	11	16	10	37	10	47
Kirkoswald and Maidens	6	0	4	0	0	10	47	57

House Prices

1.14 The housing market nationally has been in overall decline since 2007. The 10 year Property Market Report by Registers of Scotland (2007-2017) indicates that average house price in South Ayrshire for the period 2007/08 was £160,949 and the average house price for 2016/17 was £154,542 (% change of -4%). South Ayrshire's average property prices have historically been lower than the national average. Over the last 4 years average house prices in South Ayrshire have generally increased by almost 3% following a decrease in house price in 2014. In Scotland over the period prices have increased by an average of 4%. House sales are continuing to recover both within South Ayrshire and Scotland following the recession.

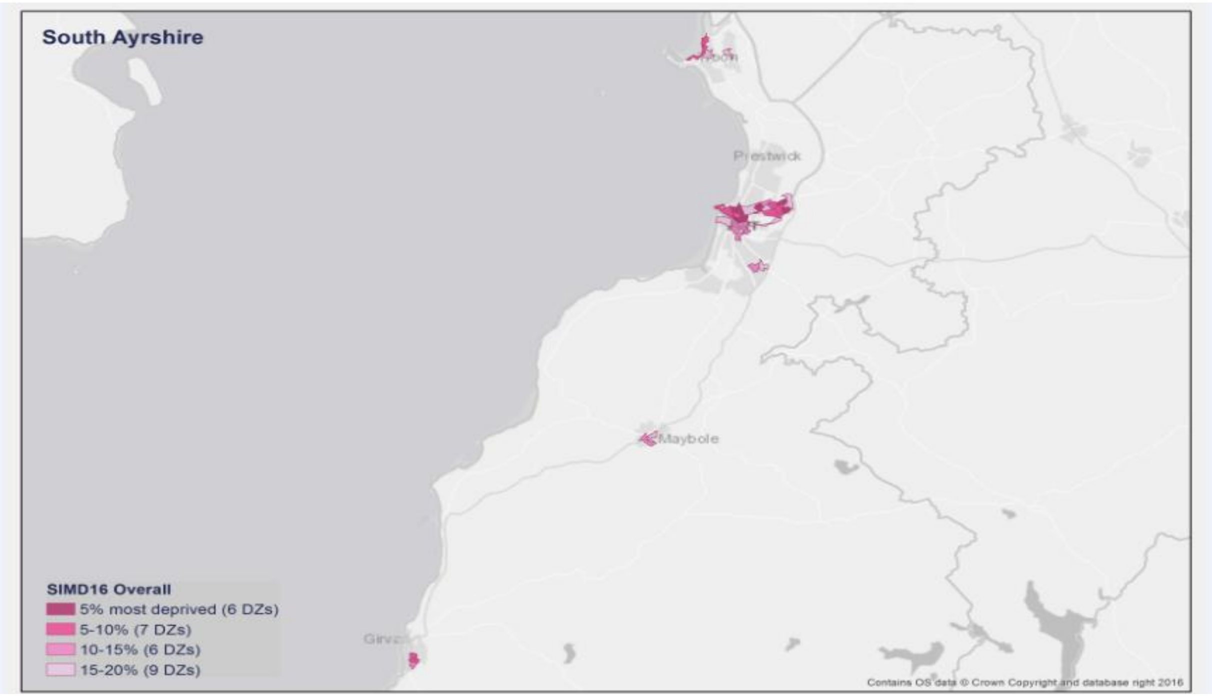
	2013	2014	2015	2016
Average house Price SAC	£149,218	£146,823	£153,418	£154,542
Average house price Scotland	£156,820	£163,563	£169,402	£166,056
Total sales SAC	1,771	2,027	2,019	2,226
Total sales Scotland	84,106	93,875	97,701	99,860

Source: Registers of Scotland

The South Ayrshire Local Housing Strategy 2017-2022 indicates that approximately 59% of all households in South Ayrshire cannot afford to purchase property on the open market.

Deprivation

1.15 Some of our communities within South Ayrshire show signs of deprivation. There are sharp contrasts in the prosperity of communities across South Ayrshire, with some experiencing significant deprivation while others are relatively affluent. South Ayrshire has 153 data zones with 28 data zones ranked within the 20% most deprived in the SIMD 2016. Results from the latest Scottish Index of Multiple Deprivation (SIMD) 2016 show that both the local and national economy has a similar share of the income deprived residents.



Source -SIMD 2016 - Deprivation across South Ayrshire

1.16 In SIMD 2012, 10.8% (12,014 people) of South Ayrshire's population fell within the 15% most deprived data zones in Scotland in 2012, notably in North Ayr and Girvan. Of the 12,014 people living in a deprived area in South Ayrshire, just under a third (30.9%) of adults and children were 'income deprived' in the sense that they are dependent on key benefits. This means that there are more than twice as many adults and children living in low-income households outside the so-called 'core' deprivation areas.

Economic Characteristics

Economic Performance

A key measure of economic performance is Gross Value Added (GVA).

The table below shows the range of GVA per head of population for the last 10 years both in South Ayrshire, Scotland and the UK. The general trends show the decline in the immediate years after 2008 reflecting the global economic recession.

South Ayrshire	GVA per head of population(Income Approach)	**Scotland**	GVA per head of population(Income Approach)	**UK**	GVA per head of population(income Approach)
2005	16,601	2005	18,762	2005	20,555
2006	17,929	2006	19,923	2006	21,549
2007	18,266	2007	20,720	2007	22,468
2008	19,164	2008	21,143	2008	22,873
2009	18,888	2009	21,127	2009	22,201
2010	19,034	2010	20,670	2010	22,541
2011	19,125	2011	20,976	2011	22,945
2012	19,021	2012	21,333	2012	23,477
2013	20,215	2013	22,250	2013	24,203
2014	21,625	2014	23,267	2014	25,145
2015	21,918	2015	23,685	2015	26,601

Source ONS Regional Gross Value Added

1.17 Economic output, as measured by Gross Value Added (GVA) per head of population, has grown more slowly in Scotland compared to the UK as a whole. In 2015, the GVA per head of population increased by 1.3% in South Ayrshire from the 2014 figure. In that same time period, Scotland's increase was 1.8% and the UK figure was 2.1%.. These figures indicate that South Ayrshire is falling behind in terms of economic output.

Household Income

1.18 Following a reduction in median household earnings in 2010 and 2011, within South Ayrshire, which may have been as a result of the economic down turn in 2012, household earnings rose to £559 per week.

South Ayrshire	Median gross weekly earnings (£s) residence based	Scotland	Median gross weekly earnings (£s) residence based
2005	485.10	2005	409.80
2006	493.30	2006	427.90
2007	472.40	2007	440.90
2008	516.30	2008	462.90
2009	553.90	2009	471.20
2010	552.40	2010	486.90
2011	549.30	2011	487.20
2012	559.80	2012	498.30

Source – Scottish Neighbourhood Statistics – Median gross weekly earnings for full time (residence based) employees

1.19 The above table indicates that median household earnings within South Ayrshire are higher than the Scottish average, this measure conceals significant differences between different areas in South Ayrshire which there are pockets of significant income deprivation i.e. within parts of North Ayr and Girvan.

Earnings (2016)

Gross Weekly Pay	South Ayrshire (£)	Scotland (£)
Full-Time Workers	519.30	535.00
Male Full Time Workers	543.90	568.00
Female Full Time Workers	501.00	482.60

Source – ONS annual survey of hours and earnings

1.20 Earnings for full time workers within South Ayrshire are less than the average earnings across Scotland, however, female full time workers within South Ayrshire earn more than the average income within Scotland.

Economic Activity

1.21 South Ayrshire Council has an economically active population of 52,500 of which 50,100 (71%) are in employment and 2,600 are unemployed (5%).(statistics for January 2016 to December 2016). This compares to 76.8% in employment and 4.8% unemployed for Scotland.
Source:- Nomisweb Labour Market Profile

Employment and Economy

1.22 The proportion of South Ayrshire's residents claiming out-of-work benefits is above the average for Scotland and the UK as a whole. three has been a significant increase in South Ayrshire and Scotland since the economic downturn of 2008. The gap between South Ayrshire residents claiming Jobseekers Allowance and the proportion of claimants in Scotland as a whole has narrowed in this period.

Employment and Unemployment (April 2016 to March 2017)

All (both male and female)	South Ayrshire (Numbers)	South Ayrshire (%)	Scotland (%)
Economically Active	52,200	74.6%	76.9%
Unemployed	2,300	4.4%	4.5%

Labour Market Profile, Nomis

Out of Work Benefit Claimant Figures (as of November 2016)

Total Number of Claimants

	South Ayrshire (Numbers)	South Ayrshire (%)	North Ayrshire (%)	East Ayrshire (%)	Scotland (%)	UK (%)
Job Seekers	1,090	1.6	2.5%	2.4%	1.4	1.1
ESA and Incapacity Benefits	5,590	8.2	10.0%	9.0%	7.8	6.1
Lone Parents	600	0.9	1.4%	1.3%	0.9	1.0
Carers	1,440	2.1	2.5%	2.5%	1.7	1.7
Income related Benefits	140	0.2	0.3%	0.2%	0.2	0.2
Disabled	590	0.9	1.0%	1.0%	0.9	0.8
Bereaved	160	0.2	0.2%	0.2%	0.2	0.2
Total number of Claimants	9,610	14.2%	17.9%	16.5%	13.0%	11.1%

Employee jobs, 2015

	South Ayrshire (Employee jobs)	South Ayrshire (%)	Scotland (%)
Total Employee jobs	45,000		

Full Time	29,000	64.4%	67.3%
Part Time	16,000	35.6%	32.7%

Employee jobs by industry, 2015

	South Ayrshire (Employee jobs)	South Ayrshire (%)	Scotland (%)
Mining and Quarrying	125	0.3	1.4
Manufacturing	4.500	10.0	7.4
Electricity, Gas, Steam and Air Conditioning Supply	30	0.1	0.7
Water Supply; Sewerage, Waste Management and Remediation Activities	125	0.3	0.7
Construction	2,000	4.4	5.4
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	8,000	17.8	14.7
Transportation and Storage	2,500	5.6	4.2
Accommodation and Food Service Activities	5,000	11.1	8.2
Information and Communication	350	0.8	2.6
Financial and Insurance Activities	600	1.3	3.5
Real Estate Activities	600	1.3	1.2
Professional, Scientific and Technical Activities	1,750	3.9	6.6
Administrative and Support Service Activities	900	2.0	7.5
Public Administration and Defence; Compulsory Social	2,250	5.0	6.3

Security			
Education	3,500	7.8	8.0
Human Health and Social Work Activities	10,000	22.2	16.9
Arts, Entertainment and Recreation	1,500	3.3	2.7
Other Service Activities	1,000	2.2	1.6

Source: ONS Business Register and Employment Survey

Employee Jobs by year

Year	South Ayrshire	Scotland
2013	45,800	2,231,000
2014	45,500	2,410,000
2015	45,000	2,416,000

1.23 The number of employee jobs in South Ayrshire fell in 2014 and 2015 which is not consistent with the general trend for Scotland which has increased in both 2014 and 2015.

The vast majority of jobs within South Ayrshire fall into the industries of human health/social work, wholesale/retail, manufacturing and education. There are also the more predominant employee job industries in Scotland, however, human health/social work (22.2%) and wholesale/retail (17.8%) have a higher percentage than Scotland as a whole.

Business Base

	South Ayrshire (Numbers)	South Ayrshire (%)	Scotland (Numbers)	Scotland (%)
Enterprises				
Micro (0 to 9)	3,065	87.7	150,985	87.8
Small (10 to 49)	360	10.3	17,470	10.2
Medium (50 to 249)	50	1.4	2,755	1.6
Large (250+)	15	0.4	171,900	0.4
Total	3,495	-	171,900	-
Local Units				
Micro (0 to 9)	3,675	81.4	177,410	81.2
Small (10 to 49)	685	15.2	33,455	15.3
Medium (50 to 249)	135	3.0	6,560	3.0
Large (250+)	20	0.4	1,050	0.5
Total	4,515	-	218,470	-

Source (ONS) Inter Departmental Business Register

Birth Rates for new business

South Ayrshire

2010	2011	2012	2013	2014	2015
280	340	310	385	380	410

Scotland

2010	2011	2012	2013	2014	2015
15,530	16,940	17,385	21,540	21,235	21,725

Death Rates for Businesses/Enterprises

South Ayrshire

2010	2011	2012	2013	2014	2015
320	280	335	305	310	300

Scotland

2010	2011	2012	2013	2014	2015
15,185	13,970	16,545	14,850	15,630	16,315

Active number of Business/Enterprises

South Ayrshire

2010	**2011**	**2012**	**2013**	**2014**	**2015**
3270	3225	3200	3225	3275	3380

Scotland

2010	**2011**	**2012**	**2013**	**2014**	**2015**
155,695	155,655	158,320	162,230	167,860	172,890

Source ONS Business Demography

Industrial and Employment Land

1.24 South Ayrshire’s main industrial and employment areas have traditionally been centred on Ayr, Prestwick, Troon, Maybole and Girvan. South Ayrshire continues to have a generous supply of employment land.

1.25 The total marketable land identified in the 2016 Draft South Ayrshire Industrial and Employment Land Audit is 641ha and the current site capacity figure is 119.5ha which represents a site capacity figure of 18.6% of the total marketable land and this indicates that there is a sufficient land supply of industrial land appropriate for the needs of modern industry, which also offers choice and a good range of size and locations

The 2016 draft figures indicate a growth in total marketable land of 6.5% from the previous employment land audit i.e. from 602ha to 641ha, and a 2.5% growth in site capacity from 96ha to 119.5ha. These increases reflect the policies and land allocations of the Local Development which allow flexibility in terms of the supply of land to accommodate changes in economic conditions and business requirements.

Individual Site

Number	Location	Site Size (Ha.)	Current Capacity (as identified in 2015 V&D Land Survey)(Ha.)
1.	Dundonald Palmer Mount	5	0
2.	Dundonald Olympic Complex	18	0
3.	Troon Troon Harbour	14	0.56
4.	Troon Dukes Road	2	0.14
5.	Prestwick Monktonhill	32	0
6.	Prestwick Monkton	60	0.7
7.	Prestwick Monkton Runway	46	0
8.	Prestwick Airport Terminus	31	4.11
9.	Prestwick Orangefield	32	0
10.	Prestwick Shawfarm Road	33	12.07
11.	Prestwick Glenburn Bing	14	14.04
12.	Prestwick Esperanto Road	8	0
13.	Prestwick Glenburn Road	13	2.45
14.	Ayr Ayr Port	19	0
15.	Ayr Newton	34	0.78
16.	Ayr McCall's Avenue	2.53	0
17.	Ayr Viewfield Road	2	0
18.	Ayr	20	7.05

	Somerset Road (total including Somerset, Walker, Lochside & West Sanquhar Roads)		
19.	Ayr Walker Road(total including Somerset, Walker, Lochside & West Sanquhar Roads)	20 – counted as per above	7.05 - counted as per above
20.	Ayr Lochside Road/West Sanquhar Road (total including Somerset, Walker, Lochside & West Sanquhar Roads)	20 – counted as per above	7.05 - counted as per above
21.	Ayr South Sanquhar	15	10.1
22.	Ayr Heathfield Road	29	5.07
23.	Ayr Boundary Road	16	6.79
24.	Ayr Heathfield North	36	16.76
25.	Ayr Whitfield Drive	11	1.68
26.	Ayr South East Ayr	30	(30)
27.	Ayr Mosshill	Not possible to quantify	No information available
28.	Girvan Grangestone	78	0
29.	Girvan Grangestone Extension 1	12	0
30.	Girvan Grangestone Extension 2	5	(5)
31.	Girvan Dipple	3.8	0
32.	Girvan Bridge Street/ Vicarton Street	2.1	1.25
33.	Maybole Murray Gardens	1.5	0

34.	Maybole Drumellan Street/ Crosshill Road	2.4	0
35.	Maybole A77 - Kirkoswald Road	0.7	0
36.	Maybole Cargill Road	0.3	0
37.	Maybole Redbrae	2.8	0.37
38.	Maybole Alloway Road	2.8	0
39.	Barrhill Off Main Street	5.7	0
40.	Tarbolton Ayr Road	1.5	0.58
	Total	641.1	119.5

Source Draft 2016 South Ayrshire Industrial and Employment land Audit

By Area

	No. of Sites	Site Size (ha.)	Available (ha.)
Ayr	14	214.5	78.23
Troon	2	16	0.14
Prestwick	9	269	33.37
Girvan	4	22.9	6.25
Maybole	6	10.5	0.37
Dundonald	2	23	0
Barrhill	1	5.7	0
Tarbolton	1	1.5	0.58
Total		641.1	119.5

Source – Review of Employment Land in South Ayrshire

Town Centres

1.26 The “Town Centre First Principle” reflects the Scottish Government’s objective which expects local authorities to put the health of the town centre at the heart of decision making, policy preparation and investment decision to deliver the best outcomes for the town centres.

There are five town centres in South Ayrshire – Ayr, Prestwick, Troon, Girvan and Maybole. Town Centre Health Check surveys are undertaken and are based on a physical count of town centre units. The results indicate that the level of vacancies within Ayr Town Centre has fallen significantly in recent years, from a peak of 24% in 2010 to 20% in 2015. This may correlate with the slow recovery from the economic recession.

Within LDP 1 (2014) the Spatial Strategy identifies Ayr Town Centre as a Core Investment Town and the primary town centre in South Ayrshire. Girvan, Maybole, Prestwick and Troon are also Core Investment Towns which are identified within LDP1.

Ayr is the largest of the 5 main towns and acts as retail and service hub for the catchment population of Ayrshire and is also popular with day visitors. The town centre of Ayr has a high level of independent retail businesses with a mix of retailers and business services.

Around 25% of the town's jobs are located within the town centre.

1.27 The town is well connected by bus and train to central Scotland and the wider Ayrshire area and is around 4 miles south of Glasgow Prestwick Airport.

1.28 In 2015 20% of retail units within Ayr Town Centre were vacant whereas Kilmarnock Town Centre has a 15% vacancy rate. Irvine Town Centre has a vacancy rate of 7%, however, this figure only relates to retail vacancy rates and not all commercial town centre properties.

As noted above, Ayr had a vacancy rate of 20% in 2015, however, the neighbouring towns of Prestwick and Troon had very low vacancy rates for the same period.

2010	Total Units Vacant	% Vacancy Rate	Nos. of Units
Ayr	175	24	776
Prestwick	4	3	149
Troon	14	7	211
Girvan	24	17	138
Maybole	11	22	51

2013	Total Units Vacant	% Vacancy Rate	Nos. of Units
Ayr	139	18.05	770
Prestwick	8	5	153
Troon	14	7	208
Girvan	22	17	133
Maybole	11	22	51

2014	Total Units Vacant	% Vacancy Rate	Nos. of Units
Ayr	172	19	1076
Prestwick	3	2	247
Troon	14	6	251
Girvan	25	18	137
Maybole	18	22	128

2015	Total Units Vacant	% Vacancy Rate	Nos. of Units
Ayr	52	20%	257
Prestwick	9	6	149

Troon	5	2	202
Girvan	21	15	137
Maybole	11	20	55

Summary of Vacancy Rates within Town Centres

	2010	2013	2014	2015
Ayr	23%	18.05%	19%	20%
Prestwick	3%	5%	2%	6%
Troon	7%	7%	6%	2%
Maybole	22%	22%	22%	20%
Girvan	17%	17%	18%	15%

Ayr Town Centre Unit Mix

Retail	Business and Property Services	Financial Services	Leisure Services	Other non-retail	Vacant
53%	5%	2%	19%	6%	15%

Source – Your town Audit October, 2016

Ayr Town Centre Floorspace, Occupation and Vacancies

Retail Category	Floor space sq.m. (sq.ft.)	% of Total	% UK	Variance %
Convenience	12,635 (136,000)	9.8	18.9	-9.1
Comparison	70,225 (75,900)	54.6	45.3	9.3
Service	23,780 (256,000)	18.5	25.0	-6.5
Vacant	1,910 (20,559)	16.0	10.5	5.5

Source – figures South Ayrshire Town Centre and Retail LDP Monitoring Report – September, 2015

1.29 South Ayrshire attracts a high number of tourists each year. In 2009 1.2m tourists visited South Ayrshire between January and September. (Source YTA – October, 2016)

Environment

1.30 South Ayrshire has a sizeable land mass and coastline and exhibits a wide variety of biodiversity resources, reflected in the numerous international, national and local sites presently designated in the area for their biodiversity value. Foremost amongst these are the internationally-designated Natura 2000 sites, of which South Ayrshire has two Special Protection Areas (SPAs) at Ailsa Craig and Glen App / Galloway Moors, and two Special Areas of Conservation (SACs) at Lendalfoot Hills and Merrick Kells. These designations are important for a number of key habitats.

34 Sites of Special Scientific Interests SSSI

Site	Area (ha)	Notified Natural Features	Condition and date of last site visit
Afton Lodge	2.8ha	Quatermary of Scotland	Favourable (20.02.2002)
Ailsa Craig	99.94ha	Beetles Flies Gannet (Morus bassanus), breeding Seabird colony, breeding Tertiary Igneous	Favourable (03.05.2002) Favourable (11.06.2012) Favourable (16.06.2014) Favourable (31.07.2003)) Favourable (31.01.2006)
Aldons Hill	235.6ha	Subalpine calcareous Subalpine dry heath Subalpine wet heath Upland assemblage	Recovering (10.07.2002) Favourable (12.05.20.15) Recovering (04.06.2003) Favourable (01.10.2008)
Auchalton	5.2ha	Lowland neutral grassland	Recovering (09.07.2013)
Ballantrae Shingle Beach	32.74ha	Coast	Unfavourable (27.06.2014)
Bennane Head Grasslands	70.86ha	Green-winged orchid (Orchismorio) Lowland neutral grassland	Favourable (17.05.2008) Favourable (21.08.2012)
Blair Farm	0.31ha	Llandovery	Favourable (05.02.2007)
Byne Hill	8.62ha	Ordovician Igneous	Favourable (27.07.2009)
Craig Wood	32.22ha	Upland oak woodland	Favourable (19.03.2009)
Craighead Quarry	2.42ha	Caradoc – Ashgill	Recovering (13.07.2001)
Dundonald Wood	35.39ha	Beetle assemblage Upland mixed ash woodland	Favourable (18.08.2010) Recovering (17.07.2001)
Feoch Meadows	82.25ha	Fen meadow Lowland neutral grassland	Favourable (28.07.2015) Unfavourable (28.07.2015)
Girvan to Ballantrae Coast Section	87.41ha	Arenig – Llanvim Caradoc – Ashgill Llandovery	Favourable (21.02.2002) Favourable (04.02.2007) Favourable (21.02.2002)

		Ordovician	Recovering (21.02.2002)
Glen App and Galloway Moors	8941.64ha	Hen harrier (Circus cyanneus) breeding	Favourable (27.07.2008)
Knockdaw Hill	387.33ha	Alkaline fen Subalpine calcareous grassland Subalpine dry heath Subalpine wet heath	Recovering (12.07.2002) Recovering (11.07.2002) Favourable (18.08.2015) Recovering (04.07.2008)
Knockgardner	0.28ha	Wenlock	Favourable (17.02.2015)
Knockormal	5.44ha	Ordovician Igneous	Favourable (18.02.2013)
Laggan Burn	2.56ha	Caradoc – Ashgill	Favourable (22.05.2000)
Littleton and Balhamie Hills	242.47ha	Alkaline fen Basin fen Subalpine calcareous grassland	Favourable (07.06.2008) Recovering (18.07.2002) Recovering (07.06.2008)
Maidens to Doonfoot	216.05ha	Carboniferous – Permian Igneous Invertebrate assemblage Lower Carboniferous (Dinantian Namurian (part) Maritime cliff Old Red Sandstone Igneous Shingle Upland mixed ash woodland	Favourable (29.01.2007) Favourable (18.09.2010) Favourable (29.07.2007) Favourable (15.06.2009) Favourable (07.02.2002) Favourable (18.06.2013) Favourable (05.08.2008)
Martnaham Loch and Wood	59.74ha	Mesotrophic loch Upland oak woodland	Unfavourable (11.09.2004) Unfavourable (25.06.2002)
Merrick Kells	8767.62ha	Beetle assemblage Blanket bog Blue aeshna (Aeshna caerulea) Breeding bird assemblage	Favourable (03.09.2015) Favourable (28.08.2013) Favourable (05.08.2011) Favourable (24.06.2010) Favourable (19.01.2001) Favourable (24.09.2013)

		Caledonian Igneous Quaternary of Scotland Upland assemblage	Unfavourable (28.08.2013)
Millenderdale	1.32ha	Ordovician Igneous	Favourable (28.07.2009)
Penwhapple Burn	28.46ha	Llandovery	Favourable (24.05.2000)
Pinbain Burn to Cairn Hill	522.38ha	Base-rich loch Calaminarian grassland and serpentine health Ordovician Igneous Subalpine acid grassland Upland assemblage	Favourable (04.06.10) Unfavourable (17.07.2002) Favourable (02.06.2003) Unfavourable (13.07.2008) Unfavourable(13.07.2008)
River Ayr Gorge	57.18ha	Beetle assemblage Upland oak woodland	Favourable (27/08.2013) Unfavourable (26.06.02)
Roughneuk Quarry	0.33ha	Llandovery	Favourable (09.05.2000)
Sgavoch	6.12ha	Ordovician Igneous	Favourable (04.02.2007)
South Threave	1.41ha	Caradoc – Ashgill	Favourable (21.06.2000)
Stairhill	1.02ha	Palaeozoic Palaeobotany	Favourable(26.07.2000)
Troon Golf Links and Foreshore	150.11ha	Sand dunes	Unfavourable (29.07.2013)
Turnberry Dunes	55.71ha	Beetle assemblage	Favourable (26.06.2003)
Turnberry Lighthouse to Port Murray	24.41ha	Old Red Sandstone Igneous	Favourable (03.02.2007)

Source - http://gateway.snh.gov.uk/sitelink/index.jsp

1.31 Numerous non-statutory wildlife sites and ornithological sites are also present, with wildlife and green corridors important for biodiversity passing through the main settlements. European protected species in South Ayrshire include bats, Great-crested newt, otters, dolphins and marine turtles. The Ayrshire Local Biodiversity Action Plan (LBAP) further identifies several UK priority habitats present in addition to 11 priority species.

Galloway and Southern Ayrshire is one of two modern biosphere reserve designations in Scotland, re-declared on 24 July 2012 in enlarged form and reflective of new UNESCO criteria pursuant to the 1995 Seville Treaty, which more greatly emphasised the human dimension and peoples’ relationship with the natural environment. The area comprises 5268km^2 and a population of 95,000, centred on the Galloway Hills water catchment. Whilst predominantly within Dumfries and Galloway council area, southern Kyle and Carrick fall within the Transition Area zone and the Carrick Forest area of eastern Carrick falls within the Buffer Zone. The designation seeks to catalyse and promote initiatives exhibiting good practice in conservation and environmentally sustainable development.

1.32 Land use in South Ayrshire is predominantly rural so there is a need to avoid loss of habitats and priority LBAP species as a result of the conversion of farmland and semi-natural habitats to development. There is therefore the potential for development to lead to fragmentation of habitats and wildlife corridors, resulting in isolation of populations of rare or threatened species. LDP2 must protect existing biodiversity from encroachment and fragmentation and promote opportunities to network habitats through wildlife corridors: the Central Scotland Green Network is a crucial, strategic opportunity to facilitate and deliver these benefits.

1.33 Built heritage is an important asset within the towns and villages of South Ayrshire, bringing social, environmental and economic benefits to the area. South Ayrshire contains a large number of designated sites, including scheduled monuments, listed buildings, conservation areas and archaeological sites.

1.34 The most notable centre from a built heritage perspective is Ayr Town Centre. This area contains a large number of listed buildings (a number of which are listed at category A) and a conservation area of ‘outstanding’ status. There has been some deterioration in the environmental quality of the town centre in recent years, particularly at the northern end of the town. There are 15 buildings within the town centre on the Buildings at Risk Register. The most recent town centre health check (2015) indicated that 20% of town centre units were vacant. 938 listed buildings within South Ayrshire (75 of which are A-listed).

- 23 conservation areas within South Ayrshire.
- 90 scheduled monuments
- 9 Historic Gardens and Designed Landscapes
- 946 listed buildings within South Ayrshire (76 of which are A listed)

1.35 Within South Ayrshire there are 23 Conservation Areas, a number of which cover town centres and small settlement centres. Six of these areas are covered by conservation area character appraisals, with a seventh in preparation.

1.36 South Ayrshire has 68 buildings identified within the Buildings at Risk Register and this provides an indication of the health of built heritage assets within the area. There are a high proportion of buildings on the register within the northern end of Ayr Town Centre, indicating that this area has suffered as a consequence of a lack of retailing activity and the associated investment this brings. Some of these buildings within the northern end of the town have now been demolished under the Ayr Renaissance Town Centre Regeneration project to regenerate the social, physical and economic environment of Ayr Town Centre.

Vacant and Derelict Land

1.37 The total amount of vacant and derelict land in Scotland has decreased by 253 hectares (2%) in the latest year, from 12,688 hectares in 2015 to 12,435 hectares in 2016.

1.38 At April, 2016, South Ayrshire had 63 individual sites categorised as vacant and/or derelict. These sites have an overall area of 109 hectares and account for around 2% of the authority's urban area, with a total of 59 sites of vacant and derelict land within South Ayrshire, which is 1% of the total area of South Ayrshire. This represents an increase in the total of vacant and derelict land since 2013 although 1 hectare has been brought back into re-use on the last year.

The results for 2016 represent a net increase of vacant and derelict land. A number of sites with a cumulative total of 49.77 ha have been removed from the annual surveys between 2009 and 2016.

1.39 A considerable majority of South Ayrshire's vacant and derelict land is located within concentrated localities at north Ayr and Prestwick Airport. The vacant and derelict land survey excludes sites less than 0.1ha in size and therefore derelict or vacant land which falls below this threshold is not recorded in the vacant and derelict land survey.

Vacant and Derelict Land	**2013**	**2014**	**2015**	**2016**
South Ayrshire	104ha	104ha	109ha	109ha
Scotland	11,053ha	13,143ha	12,688ha	12,435ha

Source – Scottish Vacant and Derelict Land Survey 2016

Transport

1.40 The key transport route relevant to South Ayrshire includes the A77 trunk road which forms the spine of the road network in South Ayrshire providing connections with the Dumfries and Galloway border to the south and in the north with the boundary of East Ayrshire. South Ayrshire is also served by rail links connecting to the central belt and Dumfries and Galloway. Prestwick Airport in the north of the Council area is one of Scotland's main airports, providing national and international connections.

South Ayrshire also has two sea ports based at Ayr and Troon and the harbour at Girvan includes a number of pontoons to berth a range of vessels.

1.41 The table below is an extract of the 2001 Census Scotland data about travel behaviour for commuting to work in South Ayrshire. The table suggests that South Ayrshire has a higher percentage of car commuters as a method of travelling to work than in Scotland overall. The use of bus as a method of commuting to work in South Ayrshire is significantly lower in South Ayrshire compared to Scotland.

Persons aged 16 to 74 in employment usual method of travel to work

Area and Number	Car	Train	Bus	On foot	Other
South Ayrshire(2011) 48,115	67.4%	3.2%	6.5%	8.5%	2.6%
Scotland(2011) 2,400,925	62.4%	3.7%	10.0%	9.9%	3.1%

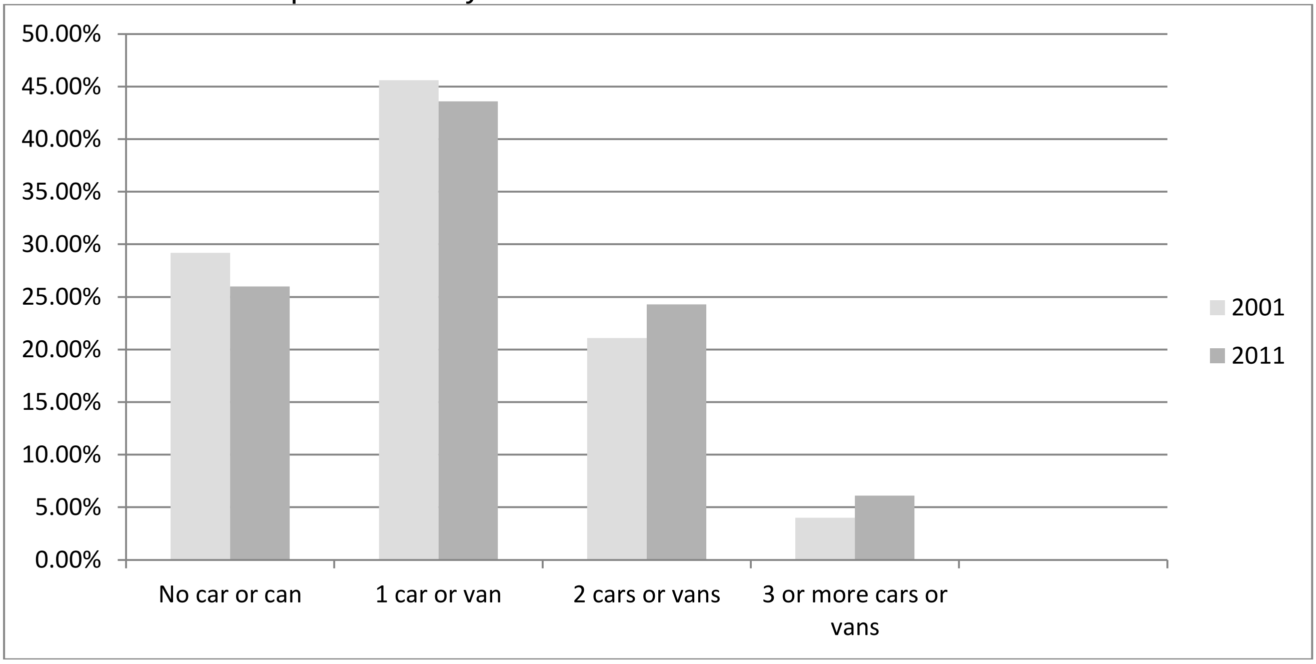
Source Census 2011 Scotland

Availability of car or van for households

Area and Number	% No car or van	% 1 car or van	% 2 cars or van	% 3 or more cars or vans
South Ayrshire(2011) 51,286	26%	43.6%	24.3%	6.1%
South Ayrshire(2001) 48,748	29.2%	45.6%	21.1%	4.02%

Source Census 2001 and 2011 Scotland

Car or van ownership in South Ayrshire



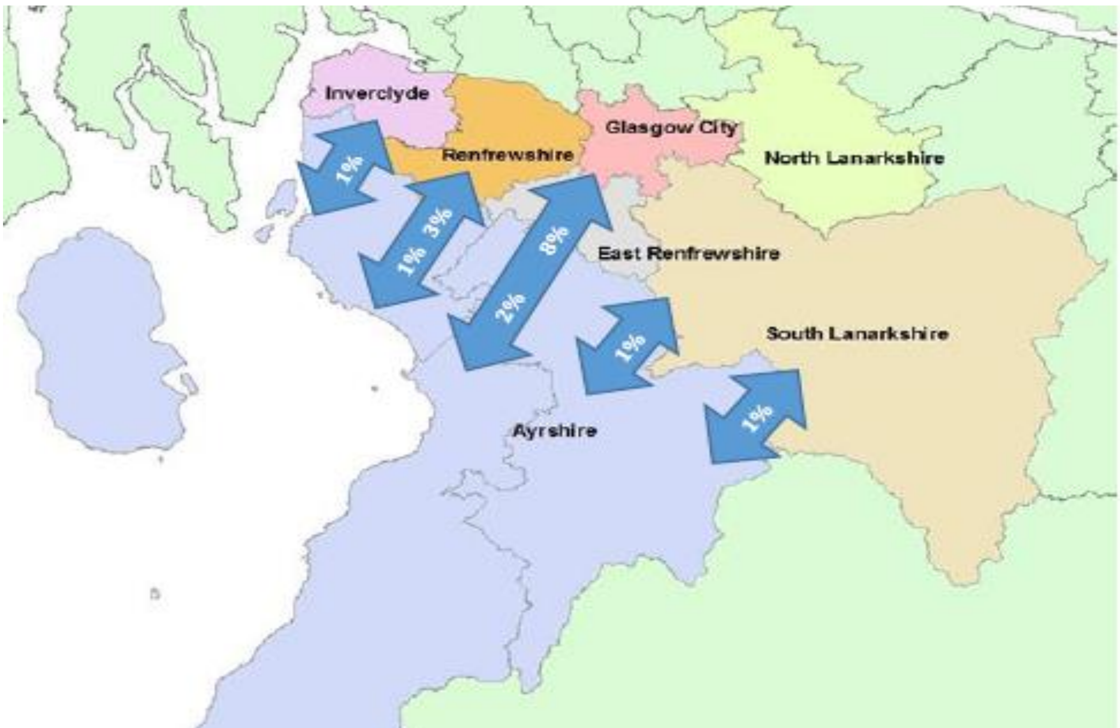
1.42 The number of households with no access to a car or van has dropped by more than 3% since the 2001 Census and the number of households with access to 2 or more cars or vans has increased by around 3%.

Commuting Patterns

1.43 The labour market within South Ayrshire is not self-contained. Many residents in employment travel outside the area to their place of work. The table below indicates the inward and outward commuting patterns for South Ayrshire as obtained from the 2011 Census. The table indicates that 12,731 works commute from South Ayrshire, however, there is a positive influx of workers coming to South Ayrshire whereas the neighbouring authorities have more workers commuting outward. The map below identifies that Glasgow is the area for outward commuting journeys from Ayrshire.

	Inward	Outward	Net
South Ayrshire	13,813	12,731	1,082
East Ayrshire	11,089	20,393	-9,304
North Ayrshire	9,808	21,345	-11,537

1.44 The predominant mode of transport for commuting to work or study in South Ayrshire is the car with approximately 67% either as a driver or a passenger. This is higher the Scottish average of 62%. In terms of travel to work or study in South Ayrshire by Train, Bus or on foot all these modes of travel have decreased since 2001. However, the figures indicate that the percentage of home working appears to be higher in South Ayrshire than Scotland as a whole.



Source: Produced by SQW (2015); Licence Number 100030994.
Contains Ordnance Survey data © Crown Copyright and database rights (2013)

Diagram taken from report by SQW commissioned by South Ayrshire Council June 2015

Reference Source

Scottish Government Labour Market Statistics	http://www.gov.scot/Topics/Statistics/Browse/Labour-Market/Local-Authority-Tables
NOMIS	https://www.nomisweb.co.uk/
Office for National Statistics Scotland	https://www.ons.gov.uk/methodology/geography/ukgeographies/administrativegeography/scotland
Statistics.gov.uk	https://www.gov.uk/government/statistics
NRS Mid-Year Estimates	https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates
Annual Survey of earnings	https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2016provisionalresults
NRS Household Projections	https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/housholds/household-projections
Scottish House Condition Survey 2013-2015	http://www.gov.scot/Topics/Statistics/SHCS
Saa.gov.uk	https://www.saa.gov.uk/
South Ayrshire Council Housing Land Audit	http://www.south-ayrshire.gov.uk/planning/housing-land-audit.aspx
Housing Statistics for Scotland – Sottish Government	http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS
Register of Scotland	https://www.ros.gov.uk/
South Ayrshire Local Housing Strategy 2017-2022	http://www.south-ayrshire.gov.uk/housingstrategy/lhs/
ONS Regional GVA	https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedincomeapproach/previousReleases

SNS Median Gross Weekly Earnings for Full Time (residence based) employees	http://www.sns.gov.uk
ONS annual survey of hours and earnings	https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2016provisionalresults
NOMISWeb – Labour Market Profile	https://www.nomisweb.co.uk/
ONS Inter Departmental Business Register	https://www.ons.gov.uk/aboutus/whatwedo/paidservices/interdepartmentalbusinessregisteridbr
ONS Business Demography	https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/businessdemography/previousReleases
Draft 2016 South Ayrshire Industrial Land Audit	
Review of Employment Land in South Ayrshire	
Your Town Audit, 2016	https://www.ayrren.com/assets/yta-ayr-2016-ekos-october-2016.pdf
South Ayrshire Town Centre and Retail LDP Monitoring Report September 2015	http://www.south-ayrshire.gov.uk/planning/local-development-plans/proposed-tcr-ldp.aspx
Gateway.SNH.gov.uk	https://gateway.snh.gov.uk/sitelink/
Scottish Vacant and derelict land	http://www.gov.scot/Publications/2017/04/3409
Census 2011 Scotland	http://www.scotlandscensus.gov.uk/

PART 3

POLICY MATRIX

The following Matrix is the concluded assessment of the effectiveness of LDP1 on a policy by policy basis. It may be generally inferred that a Review Status indicated as being "RED" will result in a policy area being a candidate for consideration and inclusion in the Main Issues Report.

Note: requirements for review:
Red = likely / significant
Amber = possible / modest
Green = unlikely / minor

	Policy	REVIEW	Commentary
Strategic Policies	LDP Policy: Spatial Strategy	**AMBER**	Economic, community and environmental factors have not altered substantially since the development of the LDP spatial strategy. NPF3 published, and Ayrshire Joint Structure Plan now superseded but the spatial strategy remains broadly appropriate. Spatial strategy predicted medium-term upturn in economic circumstances, which has not translated, yet, to any strong change in development pressure. Some localised signs of improvement and investment but not across all communities or sectors, particularly rural areas within Carrick. As such, the spatial strategy should be augmented to ensure it continues to promote short-term opportunities for growth, without compromising infrastructure capacity, or jeopardising development viability potential with infrastructure requirements. Signs of progress on significant development areas and urban renewal suggest strategy starting to provide desired outcomes and should not be undermined by inappropriate short term

			gains. Potential within rural areas could be further emphasised, particularly for economic development and housing.
	LDP Policy: Greenbelt	**AMBER**	Greenbelt has provided a long term framework for direction of growth, with emphasis on urban renewal, landscape protection and recreation opportunities. Evidence of developer interest in development, especially residential within green belt locations. Policy remains relevant but need to ensure boundaries allow appropriate level of future growth.
	LDP Policy: The Coast	**GREEN**	Policy continues to provide clear, appropriate guidance. Could be augmented with priorities of Scottish Government Marine Plan, especially tourism/sailing and ongoing work for Ayrshire Shoreline Management Plan when available.
	LDP Policy: Sustainable Development	**AMBER**	Minor modification to incorporate a statement that Scottish Planning Policy presumption in favour of development that contributes to sustainable development.
	LDP Policy: Deliv Infrastructure	**GREEN**	Minor modification to reflect progress in supplementary guidance preparation.
Economic Development	LDP Policy: Business & Industry	**AMBER**	Policy generally appropriate. Should also include guidance on small scale rural business enterprise and possible direct cross relationship with Spatial Strategy.
	LDP Policy: Glasgow Prestwick Airport	**RED**	Policy should reflect Spaceport potential. Detailed guidance on preferred uses remains appropriate, subject to revised airport/spaceport ,asterplan. Wider scope of spatial influence is likely. Also opportunities for district heat/power especially using heat

			map principles.
	LDP Policy: Newton-on-Ayr	**AMBER**	Guidance remains generally appropriate but evidence suggests emerging issues over condition of premises/building stock. Minor adjustment to encourage re-investment such as live/work units may be appropriate.
	LDP Policy: Heathfield	**RED**	Policies relating to retail park require change in line with Retail LDP. However, emerging retail and town centre LDP policies will be rolled forward into forthcoming LDP review. Other policy areas remain appropriate.
	LDP Policy: Ports	**GREEN**	Policies remain appropriate. add reference to National Renewables Infrastructure Plan at Troon and Ayr. Greater differentiation between working and leisure uses might be useful.
	LDP Policy: Development Opportunities	**AMBER**	Policy to remain unchanged. Review identified development opportunity sites required. Vacant and derelict land survey/urban capacity study may identify new opportunity sites for allocation. May be opportunities to encourage temp use of land and CSGN principles.
	LDP Policy: Office Development	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Tourism	**AMBER**	Policy requires minor amendment to reflect NPF3 and SPP emphasis of tourism as a priority sector, Scottish Gov. National Marine Plan and Scottish Marine Tourism Strategy "Awakening the Giant".
	LDP Policy: Galloway and Southern Ayrshire	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or

	Biosphere		desirable.
Communities	LDP Policy: General Retail	**RED**	Policies require change. However, emerging retail and town centre LDP policies will be rolled forward into forthcoming LDP review. No additional modification necessary
	LDP Policy: Town Centres	**RED**	Policies require change. However, emerging retail and town centre LDP policies will be rolled forward into forthcoming LDP review. No additional modification necessary
	LDP Policy: Local Centres & Small Settlement Town Centres	**RED**	Policies require change. However, emerging retail and town centre LDP policies will be rolled forward into forthcoming LDP review. No additional modification necessary.
	LDP Policy: Maintenance and Protection of an Effective Housing Land Supply	**RED**	Policy appropriate. Housing strategy requires to be augmented. Lower housing need projections will give rise to lower number of allocations in LDP; however, focus on hot spots for housing development activity, to ensure LDP continues to promote delivery of housing and is responsive to market conditions. Policy to remain unchanged but calculations substantially different.
	LDP Policy: Residential Policy within Settlements, Release Sites and Windfall Sites	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Rural Housing	**RED**	Issue of concern with perception of ambiguous / contradictory drafting of associated supplementary guidance.
	LDP Policy: Affordable Housing	**AMBER**	Policy remains compliant with National Policy and guidance. Review of associated SG may be appropriate .
	LDP Policy: Open Space	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors

			suggest alteration necessary or desirable.
	LDP Policy: Belleisle	**AMBER**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable. Masterplan has not been prepared.
	LDP Policy Craigie Estate	**RED**	Masterplan now largely redundant as development now nearing completion. Residential area could be identified as a specific opportunity site.
Environment & Climate Change	LDP Policy: Landscape Quality	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Landscape Protection	**RED**	SNH guidance on assessment and designation of local landscape suggests full review appropriate. policy should also refer to wild land designation/protection given that there is an area within South Ayrshire.
	LDP Policy: Woodland & Forestry	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Preserving Trees	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Green Networks	**RED**	CSGN re-affirmed in NPF3. Policy direction has potential to link across key plan priorities. Principles of policy remain relevant but could be more pro-active. Consider prioritising as a key theme for spatial strategy (include ref to active travel, temp land uses and distinctive places)..

	LDP Policy: Water Environment	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Flooding & Development	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Agricultural Land	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Air, Noise and Light Pollution	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Minerals & Aggregates	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable. No identified shortfall in 10 year supply within aggregates market area.
	LDP Policy: Renewable Energy	**AMBER**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable. Minor amendment to reflect opportunities of Heat Mapping
	LDP Policy: Low and Zero Carbon Buildings	**AMBER**	Minor amendment required to reflect Supplementary Guidance to be provided by Building Standards.
	LDP Policy: Wind Energy	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable. Mino amendment to reflect existence of supplementary Guidance
	LDP Policy: Historic Environment	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or

			desirable.
	LDP Policy: Archaeology	**AMBER**	The policy should protect archaeological sites and monuments in situ in the first instance and promote excavation and recording work where development which would result in the sterilisations of archaeological resources is justified.
	LDP Policy: Estates	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Natural Heritage	**GREEN**	The LDP should set out the reasons for local designations, their function and relevance. This would not have to form part of the policy and could be included within supporting text.
	LDP Policy: Waste Management	**GREEN**	Policy remains generally appropriate but could refer to Heat mapping opportunities.
	LDP Policy: Dark Skies	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable. Minor update to recognise and incorporate Dark Sky supplementary guidance.
Transportation	LDP Policy: Land Use and Transportation	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Rail Investment	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Strategic Road Development	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.

	LDP Policy: Public Transport	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Freight Transport	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Town Centre Traffic Management	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.
	LDP Policy: Cycling and Walking	**GREEN**	Policy remains compliant with National Policy and guidance. No local factors suggest alteration necessary or desirable.