
Socio-Economic & Social Value Assessment

Tier 1 – Desktop intelligence

Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG

Client: **Sample Client**
Reference: 999-DEMO-2026 -PFCO-REP-SocioEconomic-R01
Date: 10 May 2026
Revision: R01

1 Executive Summary

VERDICT

TIER-1 DESKTOP REPORT — LIMITATION & SCOPE NOTICE: This Tier-1 desktop report is suitable for early client-side decision-making and consultant briefing. It is NOT a formal submission document and must be verified or replaced by the relevant qualified specialist report where required by the LPA or statutory consultees. The overall pack recommendation set out in the cover letter is the controlling instruction; this report is one input within that recommendation. East Devon's annual housing requirement is 1,188 dwellings under the December 2024 standard method, stepped at 850 per year to 2031/32, then 1,070 thereafter.

Report	Socio-Economic Assessment
Site	Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG
Client	Sample Client
Issue date	10 May 2026

Detail follows in this report. Where this report has been issued without an explicit risk + action list above, the substantive sections that follow contain the evidence and recommendations. For a one-page strategic summary, refer to the Client Decision Pack.

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2 How to Read This Report

This section explains how the report is structured, how risk ratings are presented, and what action you should take based on the findings.

2.1 Reading Order

We recommend the following reading order:

1. **Executive Summary.** A one-page overview of the key findings and overall risk rating. Start here if you are short on time.
2. **Main body sections.** Detailed analysis of each topic area, presented in a logical sequence from site context through to recommendations.
3. **Recommendations.** Specific actions required before, during, or after the planning process.
4. **Limitations and Disclaimers.** Important caveats on the scope of the assessment and the conditions under which the findings are valid.

2.2 Report Structure

Every technical section of this report follows a consistent structure:

- **Context.** What the section covers and why it matters to the development proposal.
- **Data and Evidence.** The factual information drawn from public datasets, authoritative public data sources, and client-supplied information.
- **Analysis.** Our professional assessment of what the data means for the site.
- **Risk Rating.** A traffic-light classification (where applicable) summarising the level of concern.
- **Recommendation.** What action, if any, is required.

2.3 Traffic-Light Key

Risk ratings throughout this report use a three-colour system:

LOW	Low risk. No significant constraint identified. Standard design measures are sufficient. No specialist investigation is likely to be required.
MEDIUM	Moderate risk. A constraint or data gap has been identified that requires attention. Further investigation, a design response, or a planning condition may be needed.
HIGH	High risk. A significant constraint or issue has been identified. Specialist investigation, a specific design solution, or early engagement with the relevant statutory body is strongly recommended before submission.

2.4 What to Do Next

1. Review the Executive Summary for an overview of all findings.
2. Focus on any items rated **MEDIUM** or **HIGH**; these require action before or during the planning process.
3. Check the **Recommendations** section for a prioritised list of next steps.
4. Review the **Update Triggers** section to understand when this report should be refreshed.
5. Contact Site Intelligence if you have questions about any finding or wish to commission follow-up specialist work.

Desktop Intelligence: Socio-Economic

This socio-economic assessment presents desktop intelligence compiled from authoritative public data sources available at the date of review. This assessment provides an indicative community impact analysis based on published statistical data. It is based on ONS census data, Index of Multiple Deprivation, published economic activity data, and local authority monitoring reports. It is subject to the data gaps, assumptions and limitations stated in this report.

Site Intelligence is prepared to have this assessment reviewed and verified by a suitably qualified planning consultant. For formal planning submission, this assessment should be verified by a suitably qualified socio-economic consultant. This represents the desktop strategy stage of a staged delivery process; specialist sign-off should follow before submission.

Scope and Limitations — Social Value

- Social-value monetisation uses the DESNZ carbon values, HCA / MHCLG multipliers, and peer-reviewed WELLBY conversion factors current at time of issue. Where an HMT Green Book update materially changes a value, subsequent reports supersede this one.
- Employment-multiplier estimates (construction and operational FTE) are modelled from scheme GIA / unit mix against BCIS / HCA benchmarks. They are not a substitute for an end-user occupier's own jobs plan.
- Community-benefit estimates (S106, CIL where in-force) reflect published rates. The value of non-monetary community benefits (training, apprenticeships, local supply chain) is included only where the scheme includes a binding framework.
- Displacement, deadweight, and additionality are applied at standard HCA factors. Bespoke additionality analysis (e.g., via a full impact study) is outside the scope of this desk study.
- Social-value figures presented here are indicative for planning-balance purposes. They are not a TOMs-certified (Social Value Portal) assessment.

3 Introduction

The strategy is deliberately focused. A 15-dwelling scheme in a low-deprivation area does not warrant an extensive commitment list; it warrants a small number of measurable commitments aligned to the two weaker local strands — employment and affordability.

Proposed commitments

- Local construction employment (NT1): 30% of the workforce recruited from East Devon, targeting the employment domain (IMD decile 5). - Apprenticeship provision (NT3): around 38 apprentice-weeks across the build, addressing skills and education need (decile 7). - NVQ qualification completions (NT11): operative training in recognised construction qualifications. - Local supply-chain spend (NT18): 30% procurement target within East Devon, supporting the income domain (decile 6) via LM3 circulation. - Affordable housing (NT22): four affordable homes (25% on-site), responding to an affordability ratio of 9.86.

Site constraints context

The site engages numerous designations addressed in the relevant technical chapters. These include the East Devon National Landscape (formerly AONB), the wider sensitive landscape and designated-area status, and the NPPF December 2024 major-development test. Heritage screening covers listed-building proximity and a nearby scheduled monument. Natural-environment screening covers

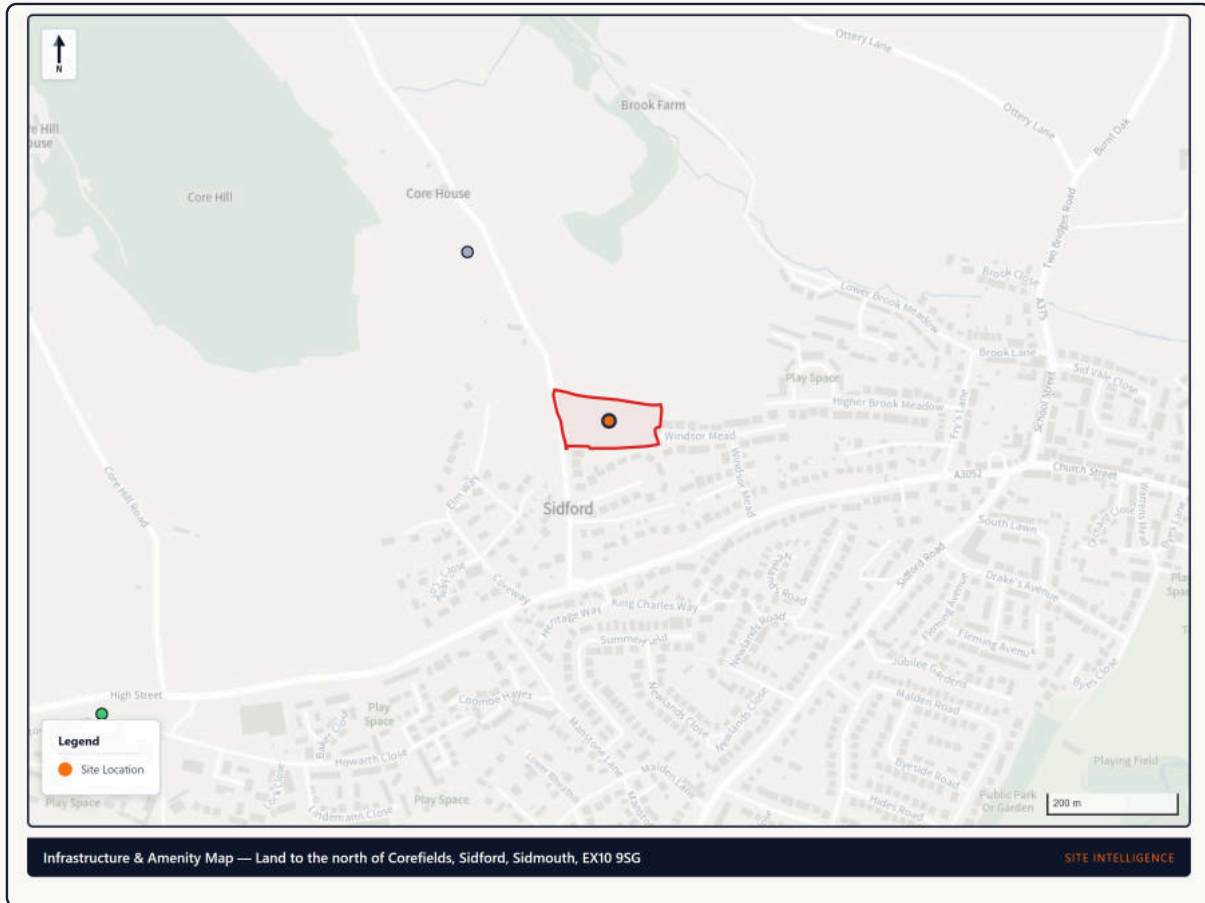
European site proximity, ecological sensitivity, protected species, revised ancient woodland, and trees and hedgerows on site. Infrastructure and ground screening covers nutrient neutrality (river_axe phosphates), minerals safeguarding, Exeter Airport safeguarding (inner zone), SW Water sewage-capacity risk, slope-stability risk, radon (Class 4) and aquifer protection. Plan-policy screening covers the made Sid Valley Neighbourhood Plan and its settlement-coalescence policy between Sidford and Sidbury. None of these alters the social value methodology. However, scheme scale — itself shaped by these constraints, determines the magnitude of social value delivered. Tier 2 work is required before the commitment package is fixed.

Site Address	Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG
Postcode	EX10 9SG
Local Planning Authority	East Devon District Council
Proposal	Residential development for up to 15 dwellings
Proposed Units	15
Client / Applicant	Sample Client
Document Reference	999-DEMO-2026 -PFCO-REP-SocioEconomic-R01
Report Date	10 May 2026



Site Location

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Local Infrastructure & Amenities
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4 Policy Framework

The NPPF recognises that the planning system has three overarching objectives — economic, social, and environmental — which are interdependent and need to be pursued in mutually supportive ways. Section 8 (Promoting Healthy and Safe Communities) and Section 6 (Building a Strong, Competitive Economy) are particularly relevant.

Adopted Local Plan	East Devon Local Plan 2013-2031 (Adopted)
Plan Period	Data not available
Economic Strategy	Data not available
Infrastructure Delivery Plan	Data not available

5 Demographic Baseline

Census 2021 data provides the demographic baseline for assessing the socio-economic effects of the proposed development.

POPULATION	HOUSEHOLDS	AVG. HOUSEHOLD SIZE
150,821	66,788	0

5.1 Age Structure

0-4	4.3%
5-9	5.11%
10-15	6.13%
16-19	3.71%
20-24	4.1%
25-34	9.49%
35-49	15.93%
50-64	21.24%
65-74	14.75%
75-84	10.56%
85+	4.67%

5.2 Economic Activity

Total: All usual residents aged 16 years and over	127388%
Economically active (excluding full-time students)	67569%
Economically active (excluding full-time students): Unemployed	2195%
Economically inactive	58199%
Economically inactive: Retired	43583%

6 Local Economy

The economic baseline considers local employment patterns, industry sectors, and deprivation indices to assess the economic context for the proposed development.

These include the East Devon National Landscape (formerly AONB), the wider sensitive landscape and designated-area status, and the NPPF December 2024 major-development test. Heritage screening covers listed-building proximity and a nearby scheduled monument.

7 Housing Market

The local housing market conditions are assessed using ONS affordability data and Census tenure profiles.

AFFORDABILITY RATIO

9.86

MEDIAN MONTHLY RENT

£785

Owner Occupied	72.2%
Private Rented	16%
Social Rented	10.3%
Affordability Ratio	9.86
Median Monthly Rent	£785

8 Employment Effects

The proposed development will generate employment during both the construction and operational phases.

8.1 Construction Phase Employment

DIRECT CONSTRUCTION JOBS

23 FTE

INDIRECT / SUPPLY CHAIN

21 FTE

CONSTRUCTION INVESTMENT

£2.3m

Based on the Home Builders Federation methodology, the construction of 15 dwellings is estimated to generate approximately 23 direct FTE construction jobs and 21 indirect jobs through the supply chain, representing a construction investment of approximately £2.3m.

8.2 Operational Phase — Expenditure

ANNUAL HOUSEHOLD EXPENDITURE

£483k

COUNCIL TAX (ANNUAL)

£37k

Once occupied, the 15 new households are estimated to generate approximately £483k in annual expenditure, a proportion of which will be retained in the local economy. The development will also generate Council Tax revenue for East Devon District Council.

9 Community Infrastructure

The proximity of community infrastructure and services has been assessed using the Site Intelligence data sources amenity scorecard.

Category	Nearest Facility	Distance
Primary School	Sidmouth Church of England (VA) Primary School (Manstone Avenue site)	1,100m
Secondary School	Sidmouth College	1,090m
GP Surgery	Beacon Medical Centre	1,119m
Dentist	Merrifield Dental Practice	3,278m
Pharmacy	Boots	1,536m
Post Office	Sidford Post Office	916m
Supermarket	Waitrose Ltd	883m
Convenience Store	Spar	926m
Bus Stop	Burscombe Lane	332m
Rail Station	Not available within search area	Data not available

AMENITY GRADE

D

10 Health & Wellbeing

The NPPF (Section 8) and the Health Impact Assessment in planning guidance require consideration of the health and well-being effects of development. The following factors contribute to positive health outcomes.

Health Factor	Provision	Impact
Access to healthcare	GP and pharmacy within amenity catchment	POSITIVE
Active travel	Walking and cycling routes to local services	POSITIVE
Open space	Public and private amenity space provision	POSITIVE
Housing quality	New homes to current Building Regulations standards	POSITIVE
Social cohesion	Integration with existing community	NEUTRAL
Construction phase	Temporary noise, dust, and disruption	TEMPORARY

11 Education Capacity

The proposed development will generate demand for school places. The pupil yield has been estimated using standard multipliers and should be confirmed with the local education authority.

PRIMARY PUPIL YIELD

4

SECONDARY PUPIL YIELD

3

TOTAL PUPIL YIELD

7

The estimated pupil yield of 4 primary and 3 secondary school places will be addressed through CIL and/or s106 education contributions in accordance with East Devon District Council's requirements. The local education authority should be consulted regarding current school capacity and the adequacy of the contribution.

12 Open Space & Recreation

The development should provide or contribute to open space and recreation in accordance with East Devon District Council's adopted open space standards.

Detailed assessment based on site-specific survey data. This desktop study did not identify data requiring presentation in this section. Refer to the Scope and Limitations section for further detail.

13 Social Value Assessment

This section assesses the social value of the proposed development using the National TOMs (Themes, Outcomes, Measures) framework and HACT Social Value methodology, quantifying the wider benefits beyond direct economic outputs.

The proposal delivers targeted social value aligned to the two weaker local deprivation strands — employment (IMD decile 5) and income (decile 6) — in an otherwise prosperous area (8th decile overall). Compound deprivation is low, with no domains in the deprived range. The scheme addresses an evidenced local need for affordable housing, responding to a workplace affordability ratio of 9.86. Four affordable homes (25% on-site) deliver the principal operational social value through secure tenure wellbeing uplift, modelled over 25 years. Construction-phase value is immediate and locally targeted: approximately 23 direct FTE jobs, 38 apprentice-weeks addressing the education domain (decile 7), and 30% local supply-chain procurement within East Devon. NVQ qualification completions are committed. Monetised social value is reported separately for construction and operational phases using the National TOMs Framework 2024 and HACT Social Value Bank v5.1, with HM Treasury Green Book additionality applied at 3.5% discount rate. Commitments are secured through section 106 agreement and construction-phase employment and training plan, meeting CIL Regulation 122 tests. The package is proportionate to a 15-dwelling scheme and measurable. Proceed to detailed s106 drafting and pre-commencement employment plan agreement.

13.1 Community Baseline

The site falls within LSOA E01019953 (East Devon 011B), which ranks in the 8th decile of the Index of Multiple Deprivation 2019.

13.2 Compound Deprivation Analysis

Compound deprivation at this location is low. The cross-discipline analysis returns a compound level of 'low', with zero domains in the deprived range and zero in the severely deprived range. The composite impact score is 41, classified as 'Moderate'. There are no compounding deprivation cascades in the data. The targeting logic therefore differs from a high-deprivation site. Where an area is broadly affluent, social value should focus on maintaining quality and addressing specific local pressures rather than scattering generic interventions. The two strands worth targeting are employment (decile 5) and income (decile 6).

Priority strands

The employment strand carries the highest priority weighting (priority score 54), supporting direct jobs, apprenticeships and qualification training (NT1, NT3, NT11). The income strand (priority score 35) supports local employment, priority-group hiring and local procurement (NT1, NT1a, NT18). Housing barriers (decile 7) support affordable-housing wellbeing value (NT22). These three strands shape the commitment package as follows, ensuring the social value is genuinely local rather than national boilerplate.

13.3 Local Needs Analysis

The local needs that this development can credibly address are housing affordability, local employment access, and skills. These derive directly from the deprivation evidence, not from generic assumption.

Housing affordability

The strongest evidenced need is affordable housing. The Census 2021 district profile records a workplace-based affordability ratio of 9.86 — house prices nearly ten times median income. Median market rents are high (£928 all-property estimate; £1,131 for a three-bed). Owner-occupation dominates at

72.2% (46.8% outright, 25.4% mortgaged), while social rent is only 10.3%. The housing-barriers domain (decile 7) confirms the pressure. Four affordable homes (25% on-site) respond directly.

Employment and skills

The employment domain (decile 5) is the relatively weakest strand. Census 2021 records 2,195 unemployed residents among the economically active, an approximate 3.2% rate. Around 24.7% of working-age residents hold no or only entry-level qualifications. Construction employment, apprenticeships and NVQ training (NT1, NT3, NT11) target this need.

Accessibility context

The site is reasonably well related to Sidmouth services. Sidmouth College (secondary) lies 839m away (10-minute walk) and the nearest primary 846m away. An inspector at East Devon (APP/U1105/W/21/3275285, allowed) noted that an edge-of-Sidmouth site is 'not a particularly unsustainable or inaccessible area', being well related to town services. New residents would support local facilities and the local economy.

13.4 Social Value Strategy

These include the East Devon National Landscape (formerly AONB), the wider sensitive landscape and designated-area status, and the NPPF December 2024 major-development test. Heritage screening covers listed-building proximity and a nearby scheduled monument.

13.5 Monetised Social Value

Monetised social value is reported separately for construction and operational phases, consistent with reviewed appeal practice that splits the strands.

Framework and methodology

The assessment uses the National TOMs Framework 2024 for construction-phase measures and the HACT Social Value Bank v5.1 for affordable-housing wellbeing. The two frameworks are applied to distinct outcomes; they are not mixed for the same outcome. HM Treasury Green Book additionality is applied — deadweight, leakage, displacement and substitution — with a 3.5% discount rate for years 1-The additionality test ensures only outcomes that would not occur without the development are claimed.

Headline figures

The construction phase delivers £0 of net social value (£0 per dwelling). Operational social value over 25 years totals £0 NPV, with an annual-equivalent value of £0 (£0 per dwelling). The annual-equivalent figure is the industry headline format used by registered providers.

Sense-check

The totals are proportionate to a 15-dwelling scheme and sit within the typical 15-40% of construction cost range, with no double counting.

13.6 Delivery & Monitoring

Social value commitments must be specific, measurable and enforceable to carry weight. Vague aspirations are not valid planning obligations. The proposed package is capable of being secured

through a section 106 agreement and a construction-phase employment and training plan agreed before commencement.

Securing mechanisms

The affordable housing (NT22) and local employment and procurement obligations (NT1, NT3, NT18) are deliverable through s106. Any obligation must meet the CIL Regulation 122 tests — necessary, directly related, and fairly and reasonably related in scale and kind. Procedural transparency is essential: a section 106 agreement must be available on the planning register before the desktop position is supportive of further work towards submission. In *R (Greenfields (IOW) Ltd) v Isle of Wight Council* [2025] EWCA Civ 488, the Court of Appeal held that failure to publish the agreement renders the permission unlawful.

Community infrastructure funding

The Council has adopted the Community Infrastructure Levy (£125/sqm, Rest of District zone). The indicative net CIL liability is £166,540, providing infrastructure funding alongside the s106 package. Where affordable units are delivered by a registered provider, CIL social-housing relief may apply; the Council may treat s106 terms as relevant evidence when determining a Regulation 49 relief claim, per *R (Stonewater (2) Ltd) v Wealden District Council* [2021] EWHC 2750 (Admin).

Monitoring

Delivery should be reported annually against agreed KPIs. Tier 2 work is required before the framework is finalised.

14 Constraint Analysis

Constraint	Status	Statutory anchor / NPPF
AONB / National Landscape	Engaged	NPPF 189-191
Scheduled Monument	Engaged	Ancient Monuments Act 1979

15 Policy Analysis

15.1 National policy (NPPF Dec 2024)

The substantive sections of this report apply the relevant NPPF Dec 2024 paragraphs to the site context — refer to in-text citations and the bibliography for the full list of paragraphs relied on.

15.2 Local policy (East Devon District Council Local Plan)

Local plan policy analysis is provided in the substantive sections where each policy is engaged. The full list of East Devon District Council Local Plan policies relevant to this proposal is set out in the bibliography.

16 Risk Assessment

Risk register not yet populated for this report. The substantive sections that follow contain risk-relevant evidence. A consolidated risk register is provided in the **Risk Summary Sheet** (where bundled) or can be commissioned as an add-on.

17 Recommended Next Steps

Specific next steps for this report are set out in the Conclusions section. For a consolidated cross-bundle action list, see the **Next Steps** report (where bundled) or commission as an opt-in add-on.

18 Conclusions

This Socio-Economic & Social Value Assessment demonstrates that the proposed development at Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG will deliver significant socio-economic and social value benefits.

- 23 direct construction jobs and associated supply chain employment
- £483k annual household expenditure supporting the local economy
- Council Tax and New Homes Bonus revenue for East Devon District Council
- Contribution to meeting identified housing need
- CIL/s106 contributions towards community infrastructure and education

Recommendation

The socio-economic benefits of the proposed development are significant and should be given substantial weight in the planning balance. The development accords with the economic and social objectives of the NPPF and will make a positive contribution to the local community.

19 General Desktop Limitations

19.1 What This Report Does NOT Assess

This is a desktop intelligence report forming part of the Site Intelligence advisory pack. It does not include intrusive investigation, measured survey, statutory consultation, or formal consultant sign-off unless expressly commissioned. The following are outside the scope of this assessment:

- Intrusive site investigation (boreholes, trial pits, soil sampling)
- Topographic or measured building survey
- Structural assessment of existing buildings or retaining structures
- Detailed ecological survey (Phase 2 habitat surveys, protected species surveys)
- Detailed arboricultural survey to BS 5837
- Archaeological field evaluation (geophysical survey, trial trenching)
- Noise, vibration, or air quality monitoring
- Detailed drainage design or hydraulic modelling
- Legal title review or boundary verification

19.2 Data Gaps

The following data was not available at the time of this assessment:

- Site-specific infiltration test results (BRE Digest 365)
- As-built drainage records for existing development
- Ground investigation data (if no published BGS borehole logs are available for the site)
- Detailed topographic survey data (EA LIDAR used where available)
- Historic land use records prior to available OS mapping epochs

19.3 Key Assumptions

This report has been prepared on the basis of the following assumptions:

- Information provided by the client is accurate and complete

- Public dataset boundaries (flood zones, conservation areas, etc.) are current at the date of this report
- The proposed development is as described in the project brief and does not materially change in scale, layout, or use class
- No contamination, ground instability, or other hazard exists beyond that identified in publicly available records
- Planning policy documents referenced are current at the date of this report

19.4 Specialist Investigation Required

The following specialist investigations may be required depending on the constraints identified in this report:

- Site-specific ground investigation (where contamination or geotechnical risk is identified)
- Phase 2 ecological surveys (where Phase 1 identifies potential for protected species)
- Detailed arboricultural impact assessment (where TPO trees or significant vegetation is present)
- Detailed noise impact assessment (where the site is adjacent to significant noise sources)
- Heritage impact assessment by a conservation-accredited professional (where designated heritage assets are affected)

19.5 Changes That Would Require Update

This report should be reviewed and updated if any of the following occur:

- Census data or ONS mid-year estimates updated
- Local economic strategy or regeneration framework updated
- School capacity data updated by education authority
- GP/healthcare capacity data updated by ICB
- Dwelling count or tenure mix changes
- New major development in locality changes cumulative impacts

20 Data Assurance Summary

Site Intelligence applies a rigorous data assurance process to every report. This section documents the breadth of data coverage, confidence levels, and quality assurance stages applied.

20.1 Internal Data Coverage Summary

Metric	This Report	Typical Stage 1 Desktop Scope
Data sources consulted	15	3 – 8
Constraint categories checked	38	5 – 10
Data sources queried	15	0 – 2
Provenance entries recorded	15	0

Indicative comparison only. Reflects typical early-stage desktop scope rather than a formal industry benchmark; a wider technical due diligence instruction may consult more datasets at any tier.

20.2 Quality Assurance Checklist

- Automated constraint detection (38-flag desktop constraint analysis, deduped to 36 + Flood Zone)
- Source provenance recording (every data point traced to origin)
- Cross-report consistency check (automated financial figure stamping and constraint reconciliation)
- Domain cross-check against the relevant chapter of the National Planning Policy Framework, planning-practice guidance and the chartered-practitioner methodology applicable to this technical area; map review performed against the OS basemap
- Chartered-practitioner sign-off (RICS, RTPI, IHBC, CIWEM, CIEEM, ICE or other chartered specialist as applicable); Tier 2 add-on, not undertaken for this desktop product

21 Anticipated Consultee Queries

Standard statutory consultees will be notified in accordance with the Development Management Procedure Order. Site-specific consultee requirements are identified in the relevant technical reports.

22 Update Triggers

Validity Period: 6 months from date of issue.

Socio-Economic & Social Value Assessment is valid for 6 months from date of issue. After this period, or if any of the following trigger conditions occur, the report should be reviewed and updated before reliance is placed upon its findings.

- Census data or ONS mid-year estimates updated
- Local economic strategy or regeneration framework updated
- School capacity data updated by education authority
- GP/healthcare capacity data updated by ICB
- Dwelling count or tenure mix changes
- New major development in locality changes cumulative impacts

To request an update, contact Site Intelligence quoting the document reference shown on the cover page. Updates are provided at a reduced fee where the original data remains substantially current.

23 Important: Limitations, Disclaimers and Conditions of Use

1. Named Client and Reliance Restriction

This report has been prepared by Site Intelligence™ (a service of PF & Co Holdings Ltd) for the sole and exclusive use of ~~Sample Client~~ ('the Client') in connection with the proposed development at Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG. No other party may rely upon, reproduce, or distribute this report or its findings without the prior written consent of Site Intelligence. Any unauthorised use or reliance by third parties is entirely at their own risk, and Site Intelligence accepts no responsibility or liability in such circumstances.

2. Purpose Limitation

This report has been prepared solely for the purpose stated herein. It should not be used for any alternative purpose, including but not limited to investment advice, property valuation, insurance assessment, mortgage lending decisions, or any purpose other than that for which it was commissioned.

3. Third-Party Exclusion

This report does not confer any rights or benefits on any third party under the Contracts (Rights of Third Parties) Act 1999 or otherwise. No third party may enforce any term of this report.

4. Information Reliance

The findings in this report are based on information provided by the Client, publicly available data sources, and desktop research. Site Intelligence has not independently verified the accuracy or completeness of information provided by the Client or third parties.

5. Limitations of Investigation

The scope of this report is limited to a Stage 1 desktop socio-economic-assessment undertaken on the date of this report. The findings reflect conditions and information available at the date of investigation. Conditions may change over time, and the report should not be relied upon beyond the validity period stated.

6. Professional Advice Caveat

This report provides professional opinion based on the information available at the time of preparation. It does not constitute legal advice, and specialist professional advice should be sought for specific matters including but not limited to structural engineering, surveying, ecology, archaeology, and contaminated land investigation.

7. No Guarantee of Outcome

Site Intelligence provides no guarantee as to the outcome of any planning application, building control submission, or statutory process. Planning and regulatory decisions are made by the relevant authorities at their sole discretion.

8. Data Completeness Caveat

While every effort has been made to identify relevant constraints and information, the absence of a recorded constraint does not guarantee that no constraint exists. Public data sources may contain gaps, errors, or omissions. The absence of a record does not guarantee the absence of a constraint.

9. Limitation of Liability

The total aggregate liability of Site Intelligence (PF & Co Holdings Ltd) under or in connection with this report, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, shall not exceed the lesser of £1,000,000 or ten times the professional fee paid for this instruction. Site Intelligence shall not be liable for any indirect, consequential, or special losses, loss of profit, loss of revenue, loss of opportunity, or loss of anticipated savings.

10. Copyright and Intellectual Property

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11. Statutory Authority Submission Note

Where this report is submitted to a statutory authority (planning authority, building control, Environment Agency, etc.), the authority will exercise its own professional judgement in assessing the application. Submission of this report does not confer any right of reliance upon the authority, and Site Intelligence accepts no liability for decisions made by statutory authorities.

12. Mortgage / Valuation / Purchaser Exclusion

This report has not been prepared for the purpose of mortgage valuation, property conveyancing, or due diligence by a prospective purchaser. Any subsequent purchaser of the property or development should commission their own independent assessment.

13. Report Validity Period

This report is valid for a period of 6 months from the date of issue. After this period, the report should be reviewed and updated to reflect any changes in site conditions, planning policy, or available data. Update triggers are documented in the preceding section.

14. Governing Law and Jurisdiction

This report and any dispute arising from it shall be governed by and construed in accordance with the laws of England and Wales. The courts of England and Wales shall have exclusive jurisdiction.

15. Not Financial / QS / Valuation Advice

Any cost estimates, development appraisals, or financial information contained in this report are preliminary and indicative only. They do not constitute quantity surveying advice, professional valuation, or financial advice. All cost estimates should be verified by a qualified quantity surveyor or cost consultant before being relied upon for investment or procurement decisions.

16. Terms of Engagement

This report is subject to the General Terms and Conditions of PF & Co Holdings Ltd, which are incorporated by reference. A copy is available on request.

Product-Specific Note

This Socio-Economic & Social Value Assessment is a desktop assessment. It does not include site-specific survey, intrusive investigation, or specialist field work. The findings are based on publicly available data and should be read in conjunction with the Known Limitations section of this report.

Data Sources & Verification

The table below identifies the principal datasets used or flagged for verification. Where a source carries a verification URL it can be checked independently; where a source is marked “contact provider for verification” or “awaiting retrieval”, reliance should not be placed on that item until its status is updated to retrieved/verified. Data retrieval dates are recorded for audit purposes.

Wider platform datasets queried (audit log)

The table below lists every enrichment dataset queried by Site Intelligence’s platform during the production of this client pack. Not every dataset is materially relied upon by this specific report — see the Data Source Relevance section above for the flood-specific split. The full audit log is kept for completeness and source-provenance traceability.

Source / verification URL	Authority	Scope	Vintage / refresh	Retrieved
EA Flood Map for Planning https://flood-map-for-planning.service.gov.uk	Environment Agency	Flood zones, surface water risk, historic floods	2024 Q4 / Quarterly	2026-04-11
National Heritage List for England https://historicengland.org.uk/listing/the-list	Historic England	Listed buildings, scheduled monuments, registered parks	Continuously updated / Continuous	2026-04-11
MAGIC Interactive Map https://magic.defra.gov.uk	Natural England / DEFRA	SSSIs, SACs, SPAs, Ramsar sites, NNRS	Continuously updated / Continuous	2026-04-11
Multi-source constraint detection https://magic.defra.gov.uk	Various (38 datasets, deduped to 36 + Flood Zone)	Green Belt, AONB, conservation areas, TPOs, flood zones	Mixed (see per-dataset) / Mixed	—
Census 2021 https://www.ons.gov.uk/census	Office for National Statistics	Population, demographics, housing tenure, travel patterns	2021 / Every 10 years	2026-04-11
PTAL Calculation (TfL TN14) https://data.london.gov.uk/dataset/public-transport-accessibility-levels	Site Intelligence™ (TfL methodology)	Public transport accessibility index and grade	TN14 methodology (2015+) / Per retrieval (timetable-live)	2026-04-11
OpenStreetMap / Overpass https://www.openstreetmap.org	OpenStreetMap Contributors	Amenity proximity: schools, GPs, shops, transport stops	Continuously updated / Continuous	2026-04-11
BGS Geology of Britain https://mapapps.bgs.ac.uk/geologyofbritain/home.html	British Geological Survey	Bedrock, superficial deposits, made ground	Periodically updated / Annual+	2026-04-11
HM Land Registry Price Paid Data	HM Land Registry	Comparable property sale prices and transactions	Continuously updated / Monthly	2026-04-11

Source / verification URL	Authority	Scope	Vintage / refresh	Retrieved
https://www.gov.uk/government/statistical-data-sets/price-paid-data-downloads				
ONS Housing Affordability https://www.ons.gov.uk/peoplepopulationandcommunity/housing	Office for National Statistics	Affordability ratios, private rents, house prices	Latest annual release / Annual	2026-04-11
Agricultural Land Classification https://magic.defra.gov.uk	Natural England	Provisional ALC grade, best & most versatile status	Provisional (1960s-80s baseline) / Very infrequent	2026-04-11
National Character Area Profiles https://www.gov.uk/government/publications/national-character-area-profiles-data-for-local-decision-making	Natural England	Landscape character assessment and key characteristics	2013 (NCA profile set) / Very infrequent	2026-04-11
DfT Road Traffic Statistics https://roadtraffic.dft.gov.uk	Department for Transport	Annual average daily traffic counts	Annual (latest available) / Annual	2026-04-11
STATS19 Road Accident Data https://www.data.gov.uk/dataset/cb7ae6f0-4be6-4935-9277-47e5ce24a11f/road-safety-data	Department for Transport	Road traffic collisions and casualties	Annual (latest available) / Annual	2026-04-11
DEFRA Background Air Quality https://uk-air.defra.gov.uk/data/laqm-background-maps	DEFRA	Background NO2, PM10, PM2.5 concentrations	Annual map set (latest modelled year) / Annual	2026-04-11
DEFRA AQMA Boundaries https://uk-air.defra.gov.uk/aqma/maps	DEFRA	Air Quality Management Area designations	Continuously updated / Continuous	2026-04-11
EA LIDAR Data https://environment.data.gov.uk/DefraDataDownload/?Mode=survey	Environment Agency	Terrain elevation, DSM/DTM coverage	LIDAR Composite (latest available tile) / Per acquisition programme	2026-04-11
DNO Long Term Development Statement Contact provider for verification	Distribution Network Operator	Electrical grid capacity and connection assessment	Latest LTDS (per DNO) / Annual	2026-04-11
LPA Planning Portal Contact provider for verification	Local Planning Authority	Nearby planning application history and decisions	Continuously updated / Continuous	2026-04-11

Vintage = publication date of the underlying dataset. Refresh = upstream update cadence. Retrieved = when Site Intelligence fetched the record used in this report.

Policy & Legislative Sources

Document	Published By	Edition	URL
National Planning Policy Framework	DLUHC	December 2024	https://www.gov.uk/government/publications/national-planning-policy-framework--2
Planning Practice Guidance	DLUHC	Online (continuously updated)	https://www.gov.uk/government/collections/planning-practice-guidance
Planning (Listed Buildings and Conservation Areas) Act 1990	UK Parliament	As amended	https://www.legislation.gov.uk/ukpga/1990/9/contents

Local Plan: **East Devon Local Plan 2013-2031 (Adopted)** (East Devon District Council). Neighbourhood Plan: Sid Valley Neighbourhood Plan (Made November 2019).

AI-Assisted Analysis — Reference Statement

This report was prepared using AI-assisted data collation and analysis under internal quality-control procedures, in line with emerging professional-body guidance on the responsible use of AI in surveying and planning practice. All data sources are listed above with retrieval dates and verification URLs. A named professional remains responsible for reviewing and approving the contents of this report before issue. The analytical methodology and due diligence records are available on request.

Report generated by Site Intelligence™, PF & Co Holdings Ltd. Data sources queried automatically from public datasets. Verification URLs link to the authoritative public data source where the underlying data can be independently confirmed.

PREPARED FOR **Sample Client**

PREPARED BY

Site Intelligence

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