

Urban Capacity Study 2006-2026

September 2006



Exeter City Council

Exeter Local Development Framework

Exeter Urban Capacity Study 2006
ALL FIGURES ARE ESTIMATES
PURELY FOR THE PURPOSES
OF THE STUDY

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1.0 INTRODUCTION

Purpose

- 1.1 The purpose of the Urban Capacity Study is to estimate the extent to which additional housing can be provided on previously developed land in the City up to 2026. It is required to provide background information in support of the Exeter Local Development Framework and the South West Regional Spatial Strategy (SWRSS).

Study area

- 1.2 The Urban Capacity Study covers the built up area within the City as indicated by Plan 1

Consultation arrangements

- 1.3 The study has been prepared with the assistance of a consultation group comprising representatives of the House Builders Federation, the Campaign to Protect Rural England, local house builders, Exeter Community Initiatives and the Council's Housing and Estates Services.

Supporting information

- 1.4 The documents and other sources referred to in the study are listed in Appendix I. Appendix II provides definitions of some of the terms that have been used. The results of research and survey work undertaken are set out in Appendices III to VIII.

Policy background

- 1.5 An Urban Capacity Study was published by the Council in 1999 in support of the First Review of the Exeter Local Plan. Its replacement is necessary because Government advice has been revised through the publication of Planning Policy Guidance Note No 3 on housing (PPG3) in March 2000. Detailed advice on how to prepare Urban Capacity Studies: "Tapping the Potential. Assessing Urban Housing Capacity: Towards Better Practice" was made available by the Government in December 2000. This guidance has been followed in the preparation of the study although the results have been reassessed in the light of draft Planning Policy Statement 3 (PPS3), which the government proposes as a replacement to PPG3. Revised guidance on the preparation of urban capacity studies was published at the same time in "Housing Land Availability Assessments: Identifying Appropriate Land for Housing Development – Draft Practice Guidance" after this study had largely been completed.
- 1.6 The First Review of the Exeter Local Plan, which covers the period up to 2011, was adopted by the Council in March 2005. Under the transitional arrangements for the replacement of Local Plans with Local Development Frameworks (LDFs) the plan has been 'saved' up to 31 March 2008. The Local Development Scheme provides for the Core Strategy of the LDF to be formally adopted by that date. The other key parts of the LDF will be adopted by mid 2010. The study will inform these documents, particularly the Core Strategy.

- 1.7 The Local Development Framework will have to provide for housing requirements set out in the draft South West Regional Strategy to Study 2021/2026 (RSS). This proposes that 7,875 dwellings are built within the City boundary in the 15 year period up to 2021. A further 2,600 dwellings will be required by 2026.

Commitments

- 1.8 Set out below are the number of dwellings covered by current commitments at 1 April 2006 which contribute towards meeting the RSS target:

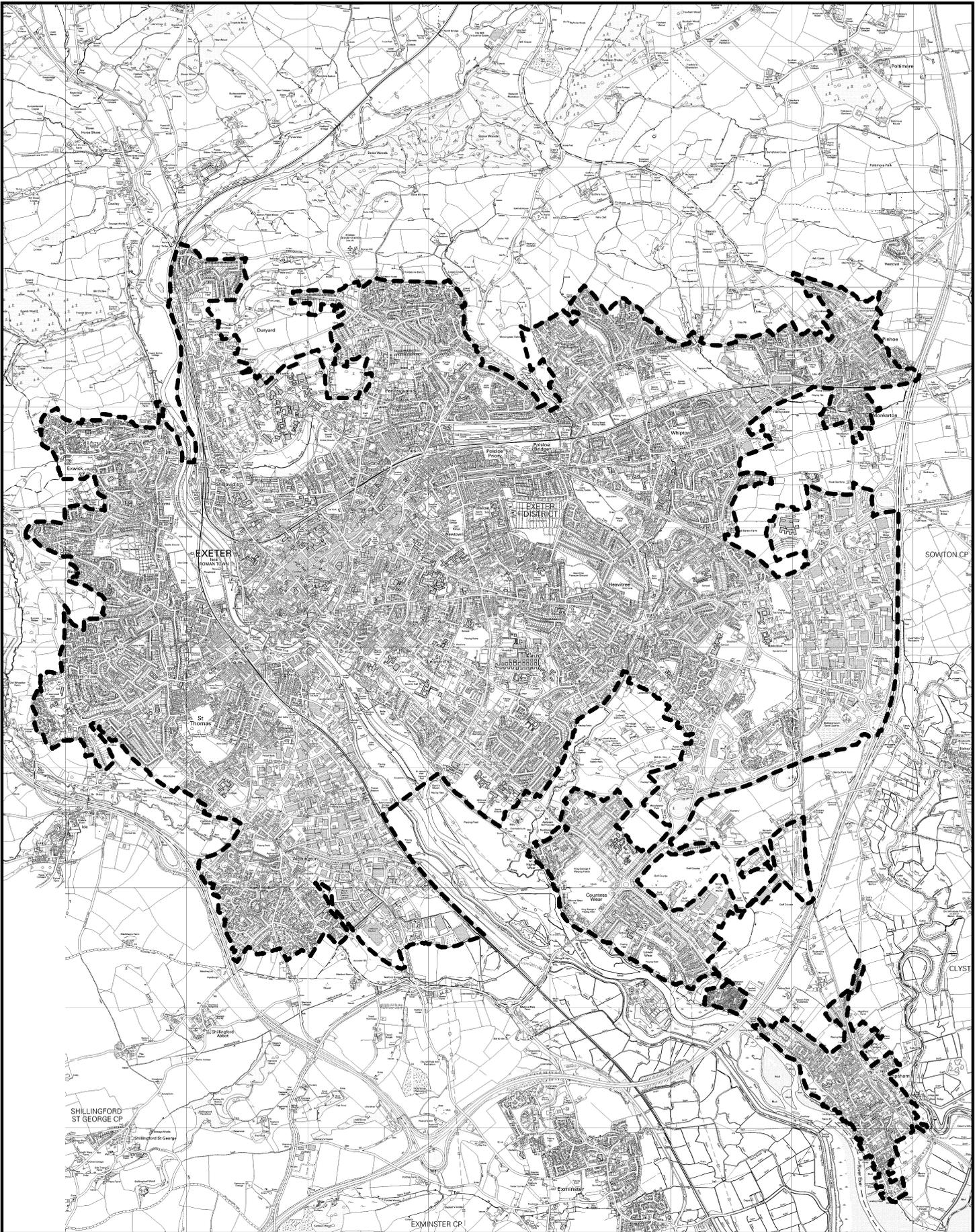
RSS 2006- 2021 Target	7,875
Unimplemented planning permissions	2,028
Approvals subject to Section 106 Agreement	305
Unimplemented Local Plan First Review Allocation	925 to 1,063
Shortfall 2021	4,479 to 4,632
Shortfall 2026	7,079 to 7,232

The University of Exeter

- 1.9 The RSS target does not take into account the need to provide housing for students. The University of Exeter has been steadily expanding over a number of years and this is expected to continue. Discussions with the University have suggested that most future student housing needs will be met in purpose built accommodation on a combination of sites already identified on and off the campus. The University owns a considerable area of land on two separate sites offering a number of opportunities for development. Nevertheless some 25% of students choose to live in private rented accommodation usually by sharing an existing house. The University anticipates that about 200 private dwellings will be brought into use for this purpose by 2016, housing around 900 students. There is likely to be a similar require between 2016 and 2026. Student housing is proposed on two sites that have, between them, permission for 65 conventional dwellings. A limited amount of additional private land may be needed for student development by 2026. It is suggested therefore that estimates for additional dwellings to be provided on previously developed land up to 2026 should be reduced by 500 units to allow for student needs.

Structure

- 1.10 The Government guidance, "Tapping the potential" recommends four main stages for assessing urban capacity. These are listed below:
- identifying capacity sources;
 - surveying the capacity;
 - assessing yield; and
 - discounting potential.



Not To Scale



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Plan 1 Study Area



Exeter City Council

Planning Services, Exeter City Council, Civic Centre, Paris Street, Exeter, EX1 1NN

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- 1.11 It identifies the following possible sources of new housing to be considered by urban capacity studies:
- a) sub-division of existing housing;
 - b) flats over shops;
 - c) empty homes;
 - d) intensification of existing areas;
 - e) redevelopment of existing housing;
 - f) previously-developed vacant and derelict land and buildings (non housing);
 - g) redevelopment of car parks;
 - h) conversion of commercial buildings
 - j) review of existing housing allocations in plans;
 - k) review of other existing allocations in plans;
 - l) land not previously developed.
- 1.12 The practicalities of doing a study of this kind have suggested the collection of data from these sources using the following surveys:

SURVEY

CAPACITY SOURCE (see 1.11 above)

Major sites

All sites over 0.2 ha and/or capable of providing 10 or more dwellings;

- previously developed non housing Land;
- redevelopment of car parks;
- conversion of office buildings;
- vacant land not previously developed.

Minor developments in shopping areas

Land/buildings within shopping areas defined by the Local Plan;

- accommodation over shops in shopping centres identified by the Local Plan;
- previously developed non-housing land;
- conversion of office buildings.

Sub-division of dwellings;

Other minor developments in housing areas;

Sample survey of residential areas by census output areas

- accommodation over shops outside shopping centres;
- intensification of existing areas;
- redevelopment of existing housing;
- redevelopment of car parks;
- conversion of office buildings;
- vacant land not previously developed.

Empty homes;

Redevelopment of older Council estates;

Re-appraisal of Local Plan allocations;

- review of existing housing allocations;
- review of other allocations in plans.

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- 1.13 The opportunities for additional housing development identified by each survey is considered in turn below. The survey of the capacity provided by Appendix III and the information about past trends provided by Appendix IV have been used, together with other evidence as necessary, to gauge the amount of housing that might be expected to come forward. Estimates must be treated with considerable caution bearing in mind the long period into the future that is being considered. Figures are rounded to the nearest 10 to reflect this.

2.0 ASSESSMENT

Defining the search area (see Appendix III A)

- 2.1 A number of areas and potential sites were excluded from the area within which opportunities for development on previously developed land was sought. These include recently developed land; land affected by current permissions and other policy commitments; land which it would be very difficult to develop and land where housing development is exceptionally unlikely or would be especially undesirable.

Major sites

Identification and grading (see Appendix III B (i))

- 2.2 The study identified the major sites of all types within the search area. From these were selected those sites that it was thought would almost certainly be developed (Category A). They were considered in some detail. Information about them, including their location, is provided in Appendix V.
- 2.3 The remaining major sites were graded so that those that are in a well established use and in suitable up to date premises and are therefore most unlikely to be developed by 2026 (Category C), are distinguished from those (Category B) where current use seems less likely to be permanent but there are no indications of possible redevelopment in the foreseeable future (see 2.9).
- 2.4 The potential for new housing to be provided on previously developed non-housing land and on vacant land not previously developed has been considered in the selection of sites for each of the different categories.
- 2.5 No public surface car parks are identified as being likely to be developed for housing in the study period. Local Plan policy T11 opposes the loss of parking serving the City Centre. The other car parks are important to the prosperity of adjoining district centres. The larger City Centre surface car parks are all affected by major constraints including major underground services and are not included in windfall estimates. The remainder have been included in category C of the windfall estimate to cover the limited potential for them to be released because the car parking would need to be re-provided on a non-residential site.
- 2.6 One partially vacant office building, Dean Clarke House, is included in the list of major sites where development is thought likely. There is current interest in disposal of this listed building and conversion to provide a mixed office/residential development seems likely. No other vacant office premises are included although they are placed in category B sites in the windfall assessment. This is because of the need to take into account the extent to which the Government guidance in PPS 6, "Planning for Town Centres" relating to the location of office will be implemented. The guidance advises planning authorities to give priority to town centres when considering office location. The position will be re-considered when the Council's Employment Land Review is completed.

Assessing amount of development (see Appendix III B (ii))

- 2.7 The likely density of the major sites identified was assessed taking into account characteristics of the site, its location and Government guidelines.
- 2.8 The density and number of dwellings that it is thought each of the sites anticipated to come forward by 2026 is likely to provide is provided by Appendix V.

**ESTIMATED YIELD FROM IDENTIFIED
DEVELOPMENT SITES 1230**

- 2.9 It is estimated in Appendix III that about 3,400 dwellings could be provided by windfall developments on major sites in the period up to 2026. Some 1,500 of these (Category B) are considered reasonably possible. Development of the remaining 1,900 (Category C) is thought most unlikely.
- 2.10 As can be seen from Appendix IV, there are wide fluctuations in the number of dwellings completed per annum. Nevertheless the average number of completions on previously developed land as a part of major developments has increased since 2000 from an average of around 240 dwellings per annum to about 300 per annum. Development on this scale on previously developed land almost certainly will not be possible because of the limited number of suitable opportunities.
- 2.11 The study has identified all major sites that, on the basis of current knowledge, have some potential for development. However, the study is attempting to predict what is likely to happen during a period extending 20 years into the future during which there probably will be changes in circumstances and in policy that cannot be anticipated. It is evident that there is a significant shortage of housing in Exeter and the surrounding area. If this is considered in conjunction with past trends it appears more likely that change will result in an increase rather than a reduction in opportunities for housing development. In the light of these considerations and given the nature of the sites selected, it is suggested that around 60% of the 1,500 possible (Category B) and 20% of the 1,900 unlikely (Category C) sites will come forward as a result of windfall developments.

**ESTIMATED YIELD FROM MAJOR
WINDFALL DEVELOPMENTS 1300**

Minor developments- Conversions

Capacity through conversion in shopping areas (see Appendix III C (i))

- 2.12 Some 260 additional dwellings could be provided by minor developments involving conversions in shopping areas. Although there has been an increase in the number of dwellings arising from this source in recent years many upper floors will continue to be used for storage or other uses in connection with the retail outlet. It is considered therefore that only some of these will come forward and this will be roughly in line with current trends for conversions overall.

Capacity through sub-division of dwellings (see Appendix III C (ii))

- 2.13 There would appear, theoretically, to be significant potential for additional dwellings to be provided through the conversion of existing dwellings into flats. The planning system, in practice, has no ability to persuade individual property owners to make more accommodation available especially if they live on the premises. In many residential areas there is strong resistance to subdivision of housing because of concerns about the quality of life in these areas. Existing policies recognize this concern and are likely to be retained in line with Government guidance aimed at sustaining varied communities in urban areas.

Capacity through conversion of non-residential buildings in housing areas (See Appendix IIIC (iii))

- 2.14 The assessment of capacity to provide additional dwellings through minor developments in existing housing areas suggests 560 of these are likely to arise from the conversion of buildings that are not in residential use.

Total yield from conversions

- 2.15 According to Appendix IV an average, of 45 dwellings per annum were created by conversions as a part of minor developments of all types between April 1993 and April 2005. Averages for periods after 2000 were roughly the same. It is considered that past trends provide the best guide to the yield from this source given the available capacity and the inability of the Council to influence supply.

ESTIMATED YIELD FROM MINOR CONVERSIONS 900

Minor developments- Redevelopment and Infill

Capacity in shopping areas through redevelopment (see Appendix III C (i))

- 2.15 Around 30 dwellings could be provided in the study period through small scale redevelopment in shopping streets.

Capacity from minor sites in housing areas (see Appendix III C (iii))

- 2.16 There appears to be potential to provide up to 770 dwellings through minor developments in residential areas other than through conversion of existing dwellings.

Yield other than through conversion.

- 2.17 Appendix IV shows that minor developments, other than conversions, have increased in recent years to over 50 dwellings per annum. If this trend could continue over 1,000 dwellings would be added to the housing stock by 2026 from this source. From the analysis above, it would seem that there is only capacity for 800 units of this type. Taking into account the high level of demand for housing and the constrained capacity, it seems likely that 70% of these sites will come forward by 2026.

ESTIMATED YIELD FROM MINOR
DEVELOPMENTS OTHER THAN
CONVERSION **560**

Empty homes (see Appendix III D)

- 2.18 There are clearly relatively few empty homes in the City. The ability of the Council to bring more into use is very limited. Any estimate can only be indicative.

INDICATIVE YIELD FROM OCCUPATION OF
EMPTY DWELLINGS **100**

Redevelopment of older Council estates (see Appendix III E)

- 2.19 Opportunities for small scale redevelopment to provide additional dwellings have been taken into account in the estimate of additional dwellings expected to be produced through minor developments in existing housing areas. The assessment of the potential for redevelopment of older council estates has suggested that there is limited scope for comprehensive redevelopment to increase densities. Densities already tend to be high and there are few concentrations of property still in public ownership and in need of repair and improvement. The Council is steadily improving the quality of its housing stock and council house sales continue, albeit, at a reduced rate. On the other hand, possible small scale developments are being explored on some estates where, for example, there are groups of buildings that have been constructed to low specifications after the second world war or underused garages and parcels of open space. These developments could cause a small increase in overall densities.

INDICATIVE YIELD FROM
REDEVELOPMENT OF OLDER COUNCIL
ESTATES **100**

Re-appraisal of Local Plan allocations

- 2.20 Appendix VI provides an appraisal of Exeter Local Plan First Review Policies. It suggests a modest increase of around 100 dwellings in the overall amount of housing proposed. This reflects new Government guidance and the result of discussions with prospective developers.

<p>ESTIMATED YIELD FROM RE-APPRAISAL OF LOCAL PLAN POLICIES 160</p>

3.0 CONCLUSIONS

3.1 The number of dwellings which it is anticipated will be provided within the existing urban area between 2006 and 2026 is therefore made up of the following:

Figure 1

Identified Major Sites	1230
Major windfall sites	1300
Minor conversions	900
Other minor developments	560
Empty homes	100
Major redevelopment of housing areas	100
Reappraisal of Local Plan allocations	160
Total	4350
Deduct student housing requirement	500
GRAND TOTAL	3850

3.2 The total is best expressed as being within a range of expectations of **3,700 to 4,100** reflecting the level of uncertainty.

3.3 Figure 2, below, suggests when opportunities will come forward taking into account the affect of a lack of capacity on yields from some sources as 2026 is approached.

Figure 2

Source	No of dwellings anticipated in the period			
	2006-2011	2011-2016	2016-2021	2021-2026
Identified major sites	300	560	370	
Major windfall sites	50	300	500	450
Minor conversions	130	300	240	230
Other minor developments	150	170	140	100
Empty homes	20	25	25	30
Major redevelopment of housing areas	20	25	25	30
Reappraisal of Local Plan allocations	100	60		
Total	770	1440	1300	840
Deduct student housing requirement	125	125	125	125
GRAND TOTAL	645	1315	1175	715

3.4 This information is used to show, in figure 3, the total contribution of previously developed land by specified dates

Figure 3

Source	No of dwellings anticipated in the period up to 1 st April			
	2011	2016	2021	2026
Identified major sites	300	860	1230	1230
Major windfall sites	50	350	850	1300
Minor conversions	130	430	670	900
Other minor developments	150	320	460	560
Empty homes	20	45	70	100
Major redevelopment of housing areas	20	45	70	100
Reappraisal of Local Plan allocations	100	160	160	160
Total	770	2210	3510	4350
Deduct student housing requirement	125	250	375	500
GRAND TOTAL	645	1960	3135	3850