

City Development

Authority's Monitoring Report

2011-2012

December 2012



Exeter City Council

Exeter Local Development Framework

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EXECUTIVE SUMMARY

The aim of the Authority's Monitoring Report is to provide information about progress against the timetable set out in the Local Development Scheme¹, identify where planning policies are not being implemented and include a statement of the reasons why and provide key data on development in its area and on any CIL and Neighbourhood Plans.

The Localism Act 2011 changed the requirement for Local Planning Authorities to produce an Annual Monitoring Report. Following the Town and Country Planning (Local Planning) (England) Regulations 2012² and the removal of Local Development Framework Monitoring Indicators, the format of previous City Council published AMR's³ has been amended. Most significant is the removal of local and contextual data (such as population, unemployment and house prices), but this can be found in the Council's Economic Trends Reports⁴.

The Local Development Scheme has also been revised to reflect the requirements set out in the Localism Act 2011 and the National Planning Policy Framework (NPPF) 2012, and came into effect on 25 June 2012. The timetable for the preparation of documents updates the previous LDS (March 2011) version.

Work has progressed on the Site Allocations and Development Management Development Plan Document (DPD) with an initial consultation stage between July and September 2012 as timetabled in the LDS. The Sustainable Transport Supplementary Planning Document (SPD) and the Affordable Housing SPD have been agreed as a basis for public consultation, the consultation period for the former ended on 7 December 2012, but the timetable for the latter has slipped because of discussions on relaxing affordable housing requirements during the economic downturn.

The number of houses completed during the year⁵ is on target, but overall since the start of the plan there is an under provision. This is most likely due to the economic downturn and the time required to bring forward strategic allocations.

The city now has a designated Neighbourhood Forum and Neighbourhood Area. The Exeter St. James Forum has submitted a draft Neighbourhood Plan to the Council.

The Community Infrastructure Levy (CIL) has not been implemented in the city yet⁶. Proposals have been submitted for Examination.

Exeter City Council has co-operated⁷ with Teignbridge District Council in the preparation and completion of the South West Masterplan work, which forms part of both LPAs evidence base for their development plan documents. Evidence for the Habitats Regulations Assessment (HRA) has also been completed along with Teignbridge and East Devon. Exeter City Council, East Devon District Council and Teignbridge District Council continue to work cross-boundary on infrastructure planning.

¹ Local Development Scheme (June 2012) <http://www.exeter.gov.uk/index.aspx?articleid=4089>

² Part 8, Authorities Monitoring Reports <http://www.legislation.gov.uk/uksi/2012/767/contents/made> (accessed 06/09/12)

³ Annual Monitoring Reports <http://www.exeter.gov.uk/index.aspx?articleid=4738>

⁴ Economic Trends Report <http://www.exeter.gov.uk/index.aspx?articleid=994>

⁵ 597 net additional dwellings were completed during the reporting year, which is April 11 to March 12

⁶ The CIL Regulations 2010 <http://www.legislation.gov.uk/uksi/2010/948/regulation/62/made>

⁷ Duty to Co-operate <http://www.legislation.gov.uk/ukpga/2011/20/section/110>

1. Introduction

- 1.1 The Localism Act requires the Local Planning Authority (LPA) to prepare an Authority's Monitoring Report (AMR) setting out progress on the timetable specified in the Local Development Scheme (LDS), and to identify where planning policies are not being implemented and the reasons why. The report should also present information on the number of housing completions, as well as Neighbourhood Planning, the collection of any Community Infrastructure Levy (CIL) and where the LPA has co-operated with another LPA.
- 1.2 The report begins with a review of progress on the preparation of planning policy documents as timetabled in the LDS.
- 1.3 The monitoring results are then presented as follows:
 - Policies not being implemented;
 - Housing Completions;
 - Neighbourhood Planning;
 - Community Infrastructure Levy;
 - Duty to Co-operate.
- 1.4 Further statistical information on employment, retail, housing and transport is presented in Appendix One.

2. Progress against the Local Development Scheme

- 2.1 The revised Local Development Scheme (LDS) adopted by the Council in June 2012 came into effect on 25 June 2012 and sets out approximate timetables for the production of planning policy documents between July 2012 and December 2013. Progress against the LDS is set out below.
- 2.2 The following Development Plan Documents (DPDs) and Supplementary Planning Documents (SPDs) are listed in the June LDS:
- **Site Allocations and Development Management DPD**
Issues and Options Consultation was carried out between July and September 2012. The production of a draft document for consultation is slightly behind schedule for meeting the milestone for Dec/Mid February 2013.
 - **Sustainable Transport SPD**
This SPD has been drafted and public consultation has concluded. The proposed LDS timetable for the SPD is draft for consultation October 2012 with adoption by Council January 2013, now expected by March 2013.
 - **Sustainable Construction and Decentralised Energy SPD**
This SPD has not yet commenced. The proposed timetable for the SPD is draft for consultation January 2013 with adoption by Council May 2013.
 - **Developer Contributions/Infrastructure Delivery**
The revised Planning Obligations SPD (now titled) has been subject to public consultation. Adoption is expected in February 2013.
 - **Affordable Housing SPD**
A revised SPD has been drafted and public consultation carried out. The timetable has slipped as the milestone for August 2012 was not met. This was due to changes to the document because of the need to resolve viability issues (see Para 3.1). Adoption is expected in February 2013.

3. Policies not being implemented

- 3.1 Policy CP7 of the adopted Core Strategy requires 35% housing provision on sites of 3 or more dwellings to be made available as affordable housing subject to site and viability constrictions. However, this is not viable in the current economic climate and the City Council have resolved to accept viability arguments to limit to 25% for the next three years and on sites between 3 and 14 dwellings. The policy is being implemented due to the viability caveat. The draft Affordable Housing SPD (October 2012) provides additional guidance on the requirements for affordable housing.

4. Housing Completions

- 4.1 In the last reporting year April 2011 to March 2012 **597** net additional dwellings were completed in Exeter. This is 3 below the target of 600 per annum, and 108 more than was predicted in the Housing Trajectory included in the Annual Monitoring Report 2010-2011⁸ (489 units) which was based on the 2010 Strategic Housing Land Availability Assessment (SHLAA)⁹.
- 4.2 At least 12,000 dwellings are planned to be delivered in Exeter over the plan period 2006 and 2026. The target rate is to have at least 600 homes built per year. As at April 2012 a total of 3,335 dwellings have been completed in the city. This is 28% of the total provision at 30% of the way through the plan period. There has been an under provision of about 44 dwellings per year since the start of the plan period.

Figure 1: Housing completions from the start of the plan period 2006 to present

Year in the plan	Reporting Year	Major Sites	Minor Sites	Annual dwellings completed
1	06-07	772	119	891
2	07-08	398	114	512
3	08-09	274	140	414
4	09-10	310	55	365
5	10-11	505	51	556
6	11-12	536	61	597
				3,335

- 4.3 The shortfalls against targets are largely due to the consequences of the housing market downturn.

5. Neighbourhood Planning

- 5.1 On 25 June 2012, Exeter City Council designated the area comprising the electoral ward of St James as a Neighbourhood Area for the purpose of preparing a Neighbourhood Plan. An application for the designation of Exeter St James Forum as a formal Neighbourhood Forum was later received on 29 June 2012.
- 5.2 Both the 'area' and 'forum' applications were advertised by public notice in the Express & Echo, on the Council's website, and on the Forum website¹⁰. Copies of a notice advertising the application were erected on major routes into or through the area and at other main locations. The notices were maintained for six weeks from the date that the application was first publicised.

⁸ For the Annual Monitoring Report see <http://www.exeter.gov.uk/index.aspx?articleid=4738>

⁹ The 2010 SHLAA is currently being updated <http://www.exeter.gov.uk/index.aspx?articleid=13431>

¹⁰ Exeter St. James Neighbourhood Forum website: <http://www.exeterstjamesforum.org/>

5.3 The Council agreed the application for forum status on 28 August 2012. The Exeter St. James Forum has now completed a consultation on a draft plan and has submitted a proposed Neighbourhood Plan to the Council to publicise.

6. Community Infrastructure Levy

6.1 The Council consulted on a Draft Charging Schedule that set out proposed CIL rates. The consultation period was until 27 April 2012. This was the second of two rounds of consultation. Its content was informed by first round responses between January and February 2012. The Draft Charging Schedule has been submitted for public examination by an independent person before a charge is set and its levy is collected.¹¹

7. Duty to Co-operate

7.1 The duty to cooperate relates to the planning of sustainable development. It applies to strategic matters (defined as having a significant impact upon at least two planning areas) and the preparation of development plan and other local development documents, including activities that can reasonably be considered to support preparation of these documents.

7.2 A Masterplan for the south west of Exeter, the major part of which lies within Teignbridge, has been completed during September 2012. The area within Exeter, south of Alphington, is identified in the Core Strategy as one of the proposed strategic allocations.

7.3 Evidence for seeking financial contributions towards mitigation in accordance with the Habitats Regulations Assessment (HRA) has also been completed jointly with Teignbridge District Council (TDC) and East Devon District Council (EDDC).

7.4 Exeter, East Devon and Teignbridge continue to work jointly on delivering growth in the sub-region. There is much cross-boundary working with East Devon, Teignbridge and Devon County Council on infrastructure planning (for example, green infrastructure, education, community facilities, employment and transport matters). And Exeter and East Devon continue to work on the co-ordination of district energy networks. To further support existing joint working a new officer group has been set up.

¹¹ Exeter City Council's Community Infrastructure Levy (CIL)
<http://www.exeter.gov.uk/index.aspx?articleid=13995>

8. Summary of Monitoring Results

- 8.1 The monitoring information presented in Appendix One is summarised and analysed below. This deals with the period from April 2011 to the end of March 2012 and therefore reflects the impact of the downturn in economic conditions.

Contextual Information

- 8.2 The resident population¹² of Exeter has risen 5.9% from 111,100 in the 2001 census to 117,100 in the 2011 census. For further information on the current social and economic conditions in Exeter and surrounding district's see the Economic Trends Reports produced by the Economy section¹³.

Economic Growth

Employment

- 8.3 Between 2006 and 2012 development of an average of 2.82 hectares of employment land has been completed each year compared to the target rate of 3 hectares a year. This is mainly due to the completion, over the period, of major out of centre office developments at Exeter Business Park, Matford and the University of Exeter. Between 2008 and 2011 the completion rate has been relatively low but has picked up during 2012. The rate is likely to increase again as the economy improves and sites are encouraged to come forward in accordance with the adopted Core Strategy.
- 8.4 The data presented in Appendix One shows losses of employment, which is particularly significant during 2009 to 2011, with mainly offices being lost from Southernhay and large employment sites in Marsh Barton and Sowton. The adoption of Core Strategy policy CP2 which has been in place since February 2012 should help to minimise future losses.

Retail

- 8.5 Vacancies in the City Centre are at 6.96% in the city centre, which is below the 10% target set in the adopted Core Strategy, and is significantly better than the national average of 12.5-14.5%¹⁴. Of the sixteen areas for which vacancies were surveyed in September 2012, 9 were showing the same vacancy rate as contained in the July 2012 vacancy survey and 4 areas were showing fewer vacancies than in July (Fore Street, South Street, High Street and Sidwell Street).
- 8.6 Prime rental values have decreased slightly, although generally they have not changed since 2009 when they fell due to the recession. However Exeter maintains its competitive position and continues to exceed the rental values of Taunton, Torquay and Plymouth. The John Lewis store opened in time for Christmas 2012, and is positive for the city as it will serve as an anchor store and enhance Exeter's regional retail status. Appendix One shows the retail developments since the DTZ Retail Survey in 2008.
- 8.7 The high quality of the public realm and significant investment is likely to have had a positive impact on the ability of the city to withstand the downturn. In the last year, the city centre has seen the completion of a major public realm improvement at

¹² Defined as people who reside in the area for at least 12 months

¹³ Economic Trends Report <http://www.exeter.gov.uk/index.aspx?articleid=994>

¹⁴ As at September 2012, see <http://www.exetercitycentre.blogspot.co.uk/>

London Inn Square, improving the link between Sidwell Street and High Street and reducing pedestrian and vehicle conflict on this busy pedestrian route. Associated work to improve pedestrian facilities in surrounding streets (primarily York Road) has also been completed. Works to Northernhay Gate, improving the pedestrian connection between the city centre and Central Station have been completed. A further scheme to enhance Central Station forecourt will commence in 2013. An improved pedestrian link between Bradninch Place and Rougemont Gardens will also be completed early in 2013. Proposals for the re-design of the public space to the front of Central Library are being developed with implementation expected at the end of 2013. Work continues on creating a shared 'vision' for the city centre, with ambitions to improve the public realm across the city centre. Future potential projects involve improvements to Musgrave Row and Bradninch Place as part of the Cultural Quarter, to Sidwell Street/Paris Street linked to the redevelopment of the Bus Station and to the Clock Tower/ Queen Street junction. The City Council continues to work with Devon County Council to improve pedestrian and cycle facilities across the city. Public realm improvements will continue for Heavitree Fore Street and Cowick Street.

Access to Housing

- 8.8 Between 2006 and 2012 development of an average of 556 dwellings has been completed each year compared to the adopted Core Strategy 2006-2026 target of 600 dwellings a year. Completion rates will be significantly lower in the next few years due to the economic downturn but should increase again as the economy improves and the strategic allocations sites are brought forward.
- 8.9 An assessment of Exeter's 5 year housing land supply for the period April 2013 to 31 March 2018 is attached at Appendix Two. It is based on the current development plan (the adopted Core Strategy 2006 to 2026) dwelling requirement adjusted for historic performance and identifies specific deliverable sites to deliver housing in the first five years. The sites are listed in schedules 1 and 2 in Appendix One: Meeting Housing Needs.

Transport

- 8.10 Exeter suffers from traffic congestion on its radial routes, especially at peak times. However, as a compact city most new development in Exeter provides good accessibility to essential services and to frequent public transport. Major improvements to junction 29 of the M5 have recently been completed, and planning applications are expected early in 2013 for two new rail stations in the city. However, further investment is needed in infrastructure and, for example, rail rolling stock to keep up with the demand generated by the city's relatively healthy economy. The number of Park and Ride spaces has not changed since last year. The number of city centre spaces has decreased from 4,220 last year to 4,161.

Overall Summary

- 8.11 Overall, most of the indicators suggest good progress is being achieved especially those concerned with development. Employment, housing and retail completions are lower than they have been but are not significantly lower considering the current economic downturn. The number of vacant retail units remains lower than the national average. Transport objectives are being met but further substantial transport infrastructure enhancements will be required to enable delivery of the employment and housing land proposals.

Appendix One – Monitoring Data

Employment Development and Supply

Core Strategy Policy CP2 proposes the development of 60 hectares of employment land over the plan period 2006 to 2026. In this context, employment use relates to all 'B' Use Classes. Additional employment land will be brought forward during the plan period as 30,000 square metres of office floorspace in the city centre, 5.5 ha in the Pinhoe area, about 21 ha to the east of the outer bypass (5ha on the fringes of Exeter Business Park in the Hill Barton area and 16 ha south of the A379 in the Newcourt Area) and about 15 ha to the south west of the city, in the Matford Area. Employment sites are currently allocated in the Adopted Local Plan, but will in future be replaced by allocations in the Site Allocations and Development Management Development Plan Document (DPD).

Business Completions

Indicator	Data
Amount of employment development over the plan period	Target: Development of 60 ha of employment land between 2006 and 2026
	2006-07: 1.94 ha 2007-08: 6.92 ha 2008-09: 3.71 ha 2009-10: 0.98 ha 2010-11: 0.40 ha 2011-12: 3.01 ha
	Completions 2006-2012: 16.96 ha which equates to 2.82 hectares a year. Target rate is 3 ha a year.

Figure 1: Gross amount (additions only) of employment by type (hectares)

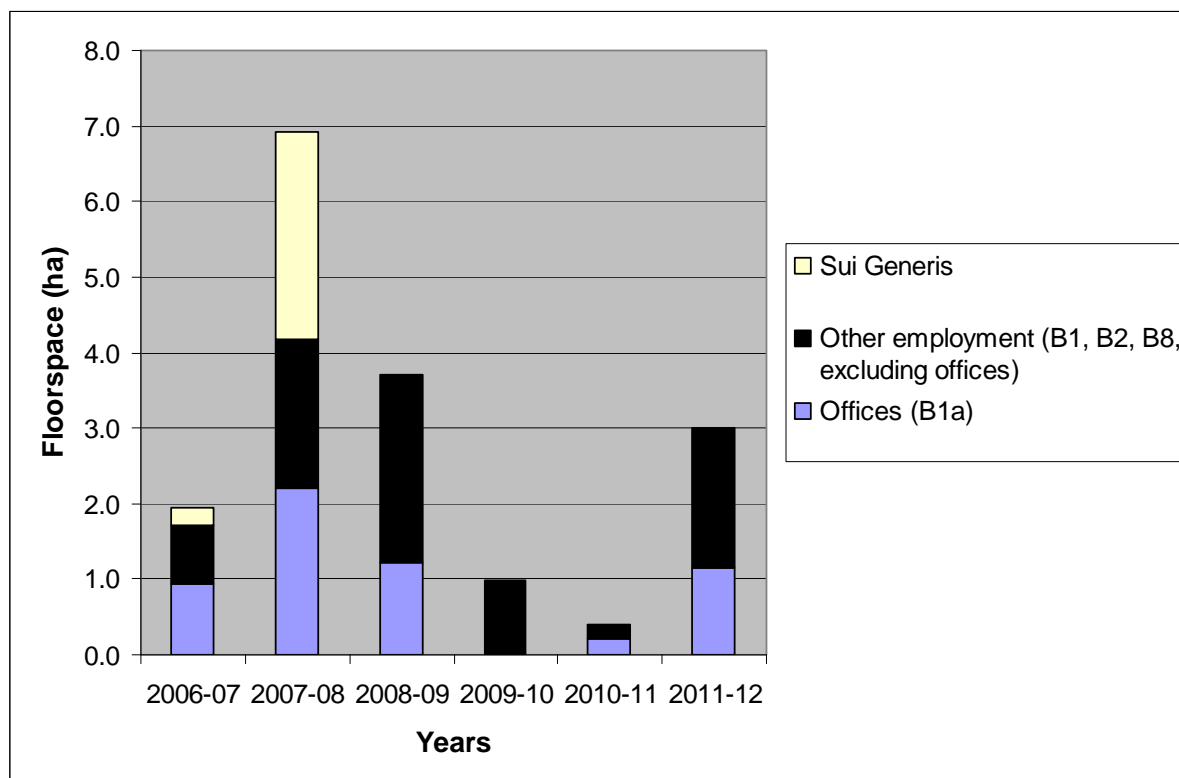


Figure 2: Gross amount (additions only) of employment by type (square metres)

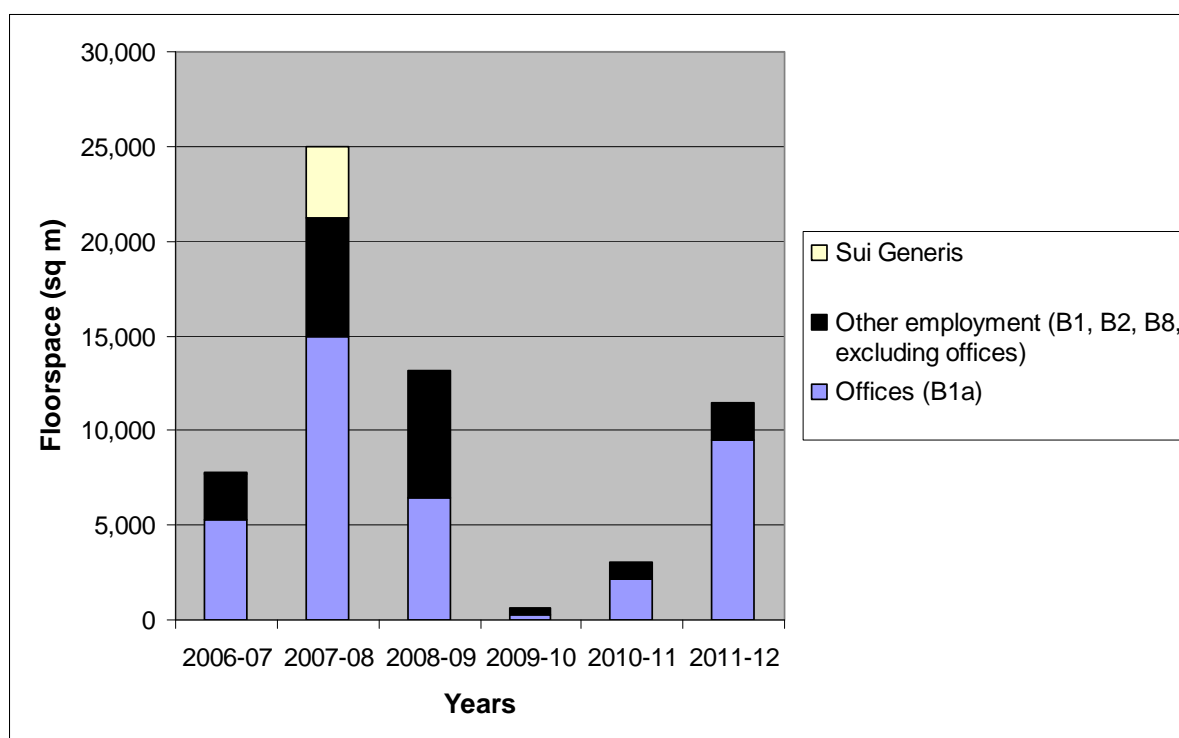


Figure 3: Net amount (including losses) and type of completed employment land (ha)

	Offices (B1a)	B1, B2, B8	Sui Generis	TOTAL
2006-07	0.44	0.24	0.01	0.69
2007-08	1.4	0.6	0.37	2.4
2008-09	0.64	0.68	0	1.32
2009-10	-0.19	0.04	0	-0.15
2010-11	0.18	-0.03	0	0.15
2011-12	0.90	0.08	0	0.98

Figure 4: Net amount (including losses) and type of completed employment floorspace (sq m)

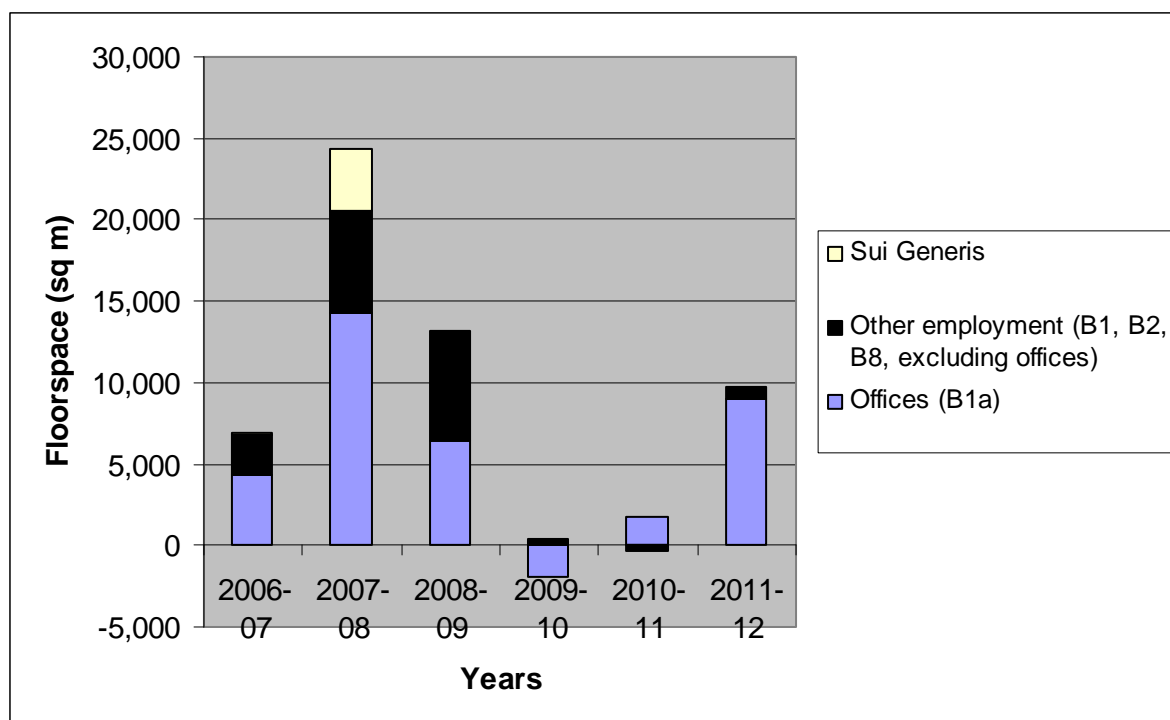


Figure 4a: Net amount and type of completed employment floorspace (sq m) – (figures for the graph above)

	Offices (B1a)	B1, B2, B8	Sui Generis	TOTAL
2006-07	4,356	2,410	143	6,909
2007-08	14,304	6,294	3,764	24,362
2008-09	6,410	6,777	0	13,187
2009-10	-1,896	354	0	-1,542
2010-11	1,768	-294	0	1,474
2011-12	8,989	772	0	9,761

The figures for the net amount (Figure 4) are calculated using the gross (Figure 2) minus those losses in Figure 5 below.

Figure 5: Employment losses by type (sq m)

	Offices (B1a)	B1, B2, B8	Sui Generis	TOTAL
2006-07	900	0	0	900
2007-08	621.6	0	0	621.6
2008-09	0	0	0	0
2009-10	2135.46	0	0	2135.5
2010-11	354.42	1214	0	1568.4
2011-12	499.7	1179.08	0	1678.8

Figure 6: Office development in and out of the city centre (sq m) - additions only (gross)

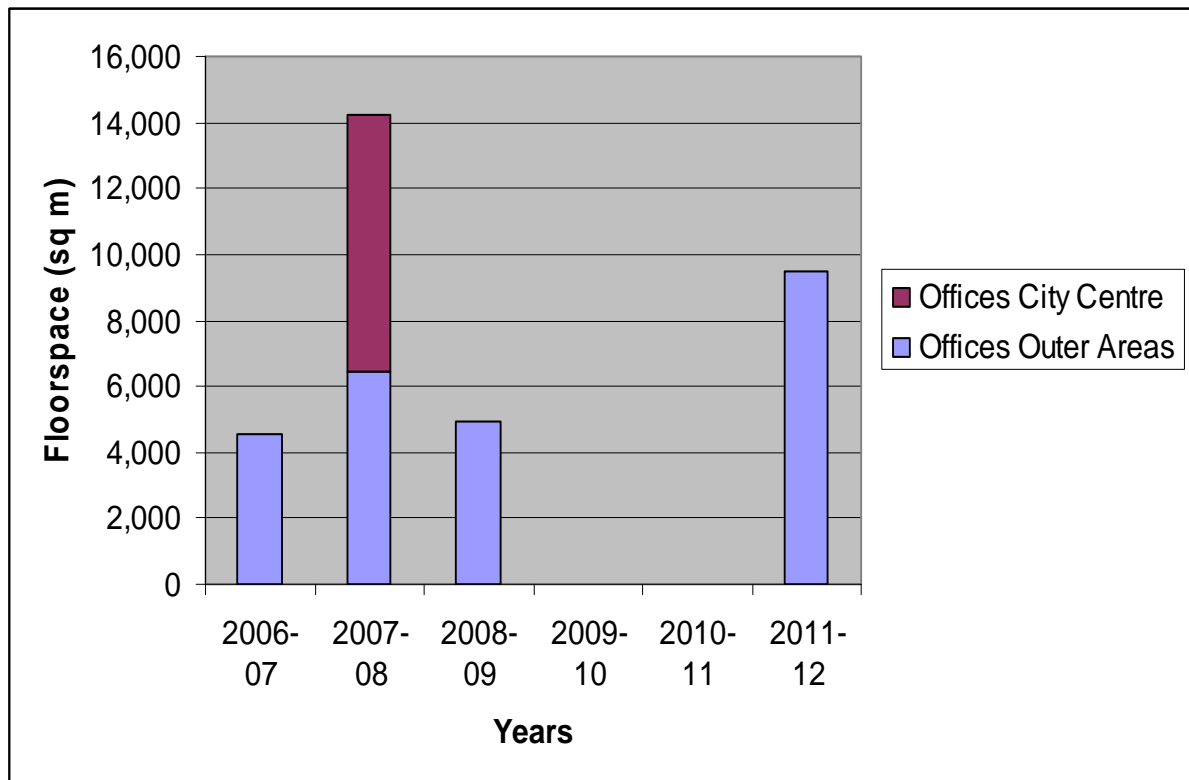
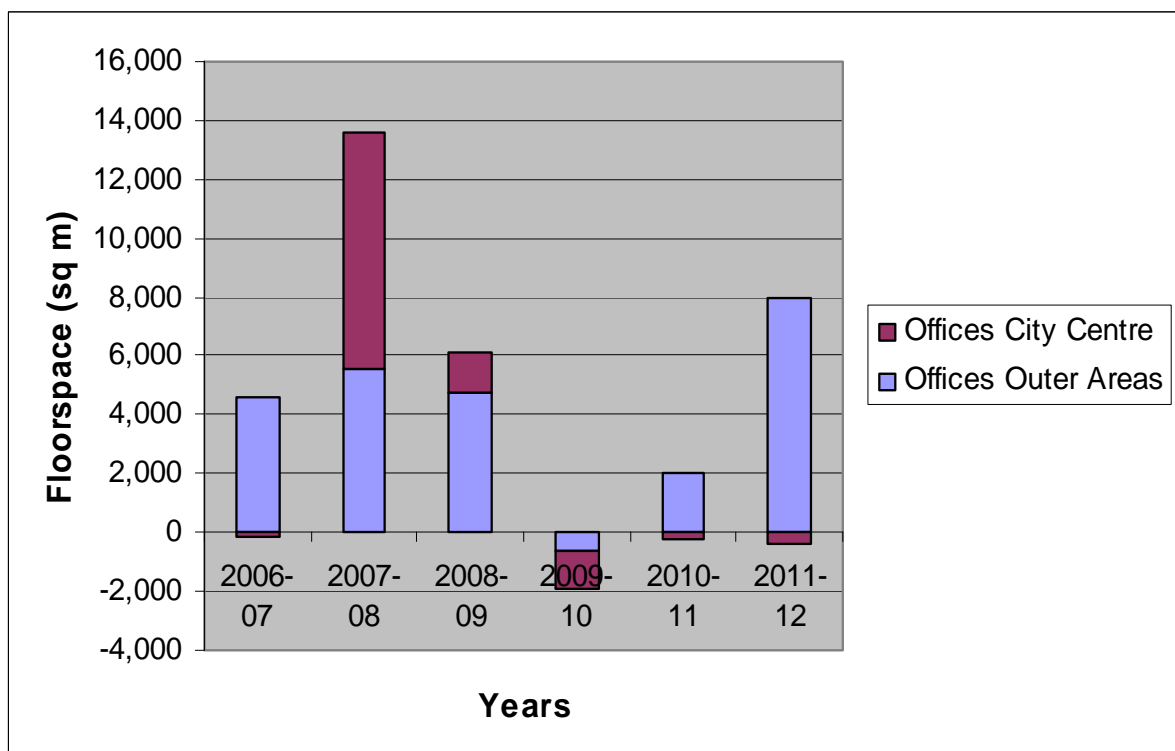


Figure 7: Office development in and out of the city centre (sq m) including losses (net gain)



Employment Land Lost

In order to provide a range of employment sites, particularly for inward investment and limit the need for development on greenfield land, it is vital that existing employment sites, premises and allocations that are viable for continued employment use are safeguarded. This will ensure that job opportunities are maintained and the economic health of the city is protected. The release of viable employment sites or premises to other uses may only be made where their loss would not cause harm to business or employment opportunities, or where their loss would not cause harm to business or employment opportunities, or where there are unacceptable amenity impacts for local residents (see Core Strategy Policy CP2).

The Employment Land Review (ELR) sought to establish where there are employment sites and premises that are no longer required to meet employment needs. In general terms this review concludes that the established employment areas (Southernhay, Matford, Marsh Barton, Pinhoe, Sowton, Exeter Business Park, Pynes Hill and Peninsula Park) are successful and fully occupied.

Figure 8: Amount of employment land (sq m) lost in established employment areas and Local Plan allocations

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Southernhay	none	none	none	-60 B1(a)	-116 B1(a)	none
Matford	none	none	none	none	none	-221.4 B2
Marsh Barton	none	none	none	none	-1214 B8	-438 B1(a)
Sowton	none	none	none	none	none	-906 B8
Exeter Business Park	none	none	none	none	none	none
Pynes Hill	none	none	none	none	none	none
Peninsular Park	none	none	none	none	none	none
Current Local Plan Allocations	none	none	none	none	none	none

Business Commitments

Figure 9: Gross amount and type of employment land (ha) available with planning permission as at 31 March 2012

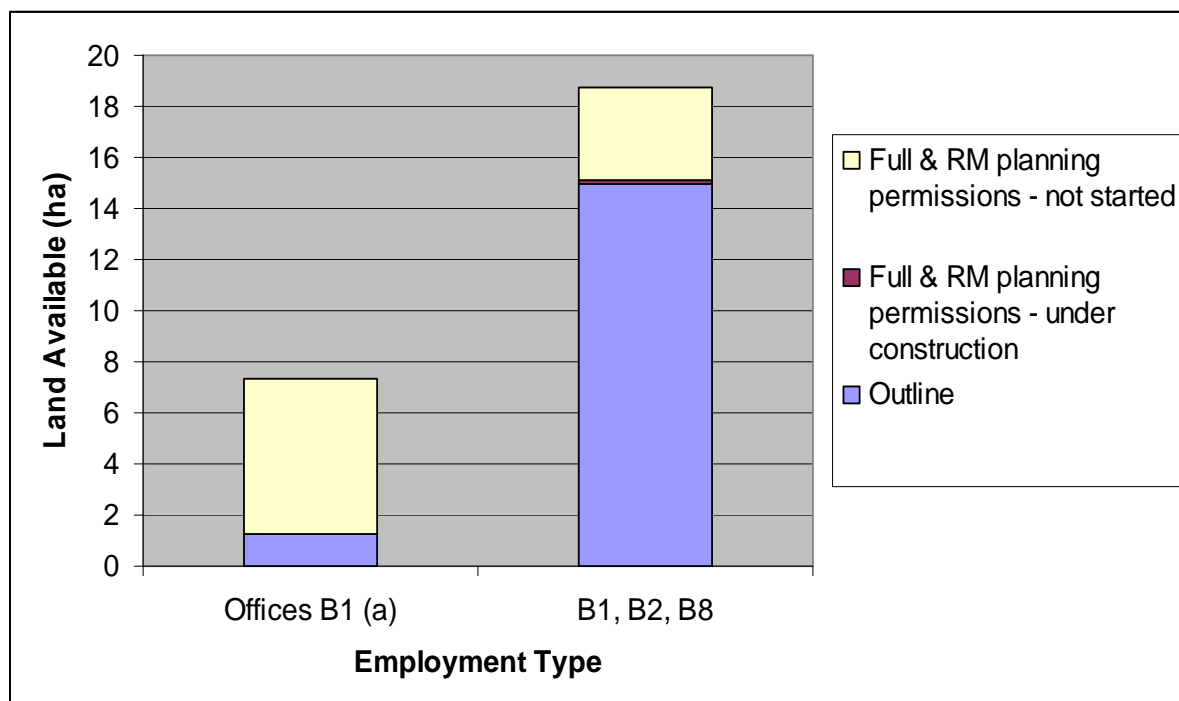


Figure 10: Net amount and type of employment land (ha) available with planning permission as at March 2012

	Outline Planning Permissions	Full & RM planning permissions not started	Full & RM planning permissions - under construction	Total (with planning permission)
Office B1 (a)	1.25	0.08	-0.01	1.32
B1, B2, B8	14.97	3.68	0.11	18.76
Total	16.22	3.76	0.1	20.08

Retail

The Council's Core Strategy policy CP8 seeks to maintain and enhance the vitality and viability of the city centre, by encouraging the provision of 3,000 square metres of convenience floorspace¹⁵ and 37,000 square metres of comparison floorspace¹⁶ in the city centre. This will include up to 30,000 square metres of comparison floorspace in the Bus and Coach Station area, to be developed as part of a mixed-use scheme by around 2016. Out of centre retail will only be considered if there are no suitable sites in¹⁷, or on the edge of¹⁸, the city centre, district centres or local centres¹⁹.

Retail Completions

Indicator	Data
Total amount of retail floorspace (use class A1) within (i) city centre (ii) local and district centres and (iii) the local authority area (over 100 sq metres) over the plan period	<p>Target: Development of 3,000 sq m of net retail convenience floorspace and 37,000 sq m of net retail comparison floorspace between 2006 and 2026²⁰</p> <p><u>City centre</u> 2006-07: None 2007-08: 27,000 (<i>Princesshay</i>) 2008-09: None 2009-10: None 2010-11: None 2011-12: 6,039 (<i>John Lewis</i>)²¹</p> <p><u>LA Area</u> 2006-07: None 2007-08: 2,931 (<i>Wickes, Sowton</i>) 2008-09: 156 (<i>Aldi extension</i>) 2009-10: 3,207 (<i>Toys R Us</i>) 2010-11: 1,491 (<i>Sainsbury's extension</i>) and 929 (<i>Unit 7a, Rydon Lane Retail Park</i>) 2011-12: 1,217 (<i>Morrison's extension</i>) and 2,231 (<i>Waitrose</i>)</p> <p>Completions 2006-2012 (excluding sites identified in DTZ Study 2008):</p> <ul style="list-style-type: none"> ○ Convenience floorspace = 4,939 sq m, which equates to 823 sq m a year. Target rate is 150 sq m a year. ○ Comparison floorspace = 0 sq m, which equates to 0 sq m a year. Target rate is 1,850 sq m a year.

¹⁵ Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionary.

¹⁶ Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.

¹⁷ The city centre is currently defined in the Adopted Local Plan 'City Centre Inset Map' March 2005 and this will be replaced by the Proposals Map, which will outline the city centre in the Site Allocations and Development Management Document (SADM).

¹⁸ Edge of centre, is a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.

¹⁹ The District Centres and Local Centres are listed in Appendix 6 of the Adopted Core Strategy, and will be defined in the Proposals Map in the SADM document.

²⁰ Princesshay, Wickes, Aldi, Toys R Us and Unit 7a, Rydon Lane Retail Park do not contribute to the 40,000 target because the DTZ study of 2008 which informed the Core Strategy on future retail provision had already taken account of the additional floorspace created.

²¹ The reporting year is April to April and does not include developments after April 2012. However, JL has been added.

Figure 11: Net amount of completed retail floorspace (sq m) (excluding developments accounted for in the DTZ retail survey 2008) by area

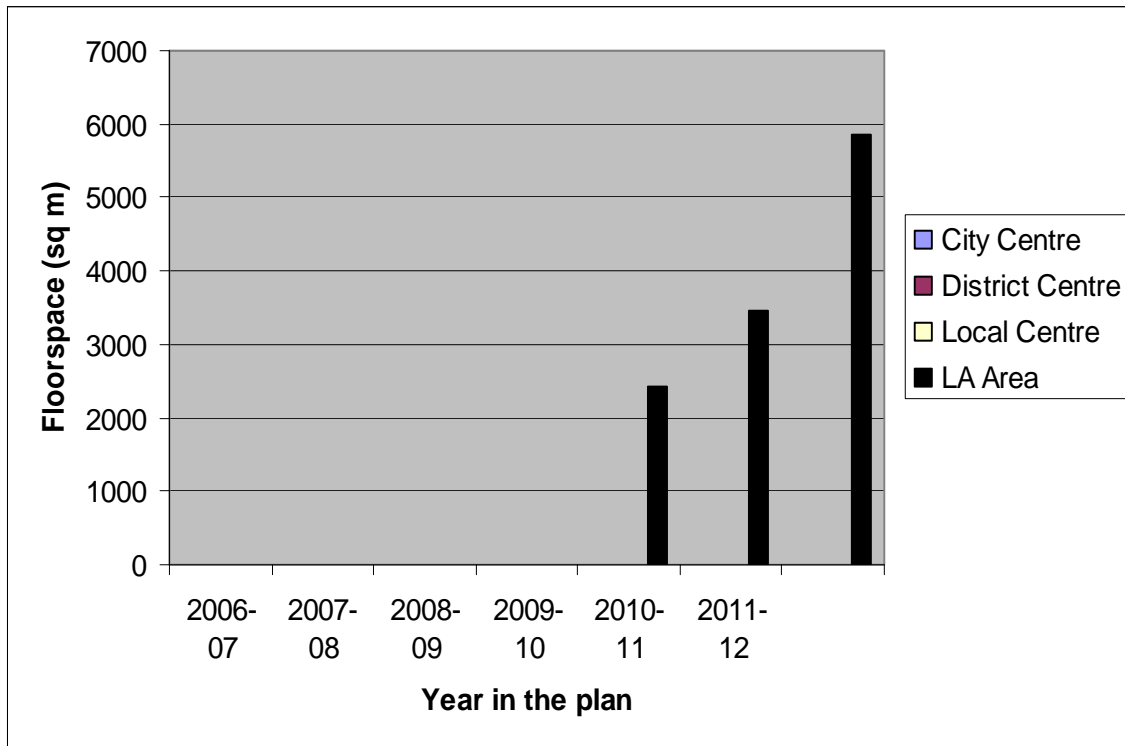
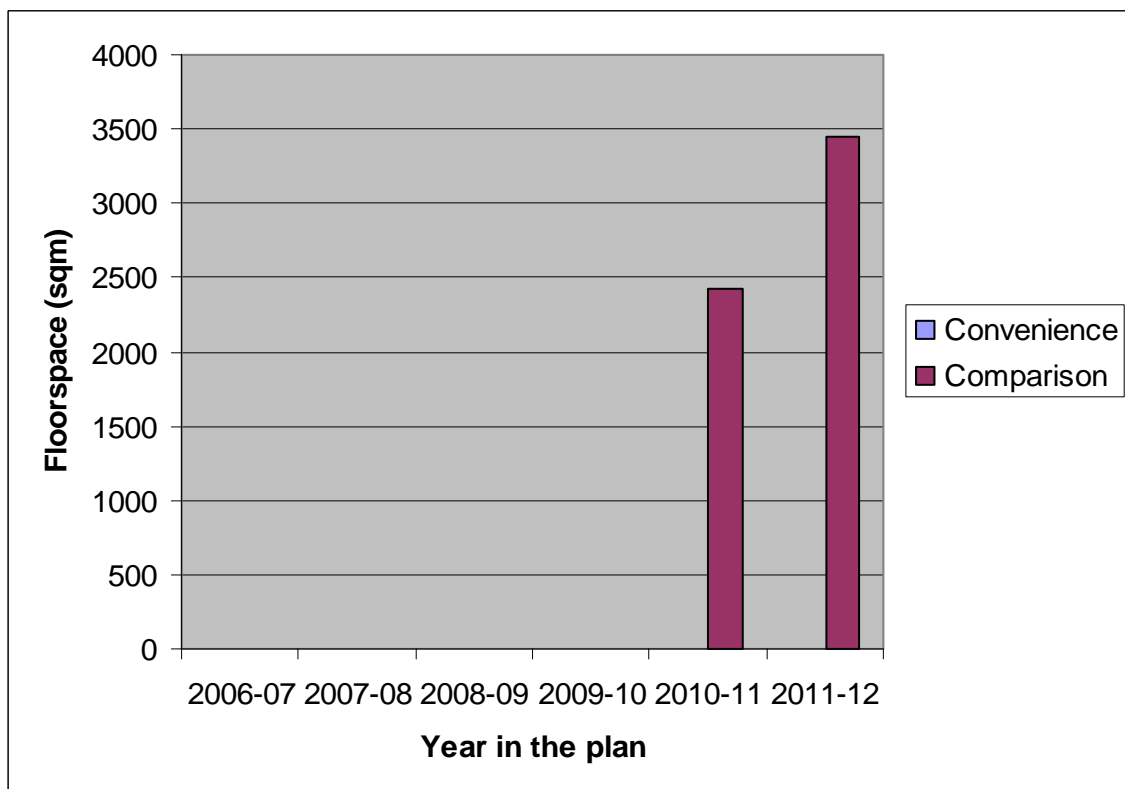


Figure 12: Amount of convenience and comparison floorspace completed per year (excluding developments accounted for in the DTZ retail survey 2008)



*The charts do not include Princesshay because the Core Strategy forecasts after Princesshay, and John Lewis is not included because it was not completed before April 2012 in the reporting year.

Figure 13: Amount of convenience floorspace completed in each area (sq m)

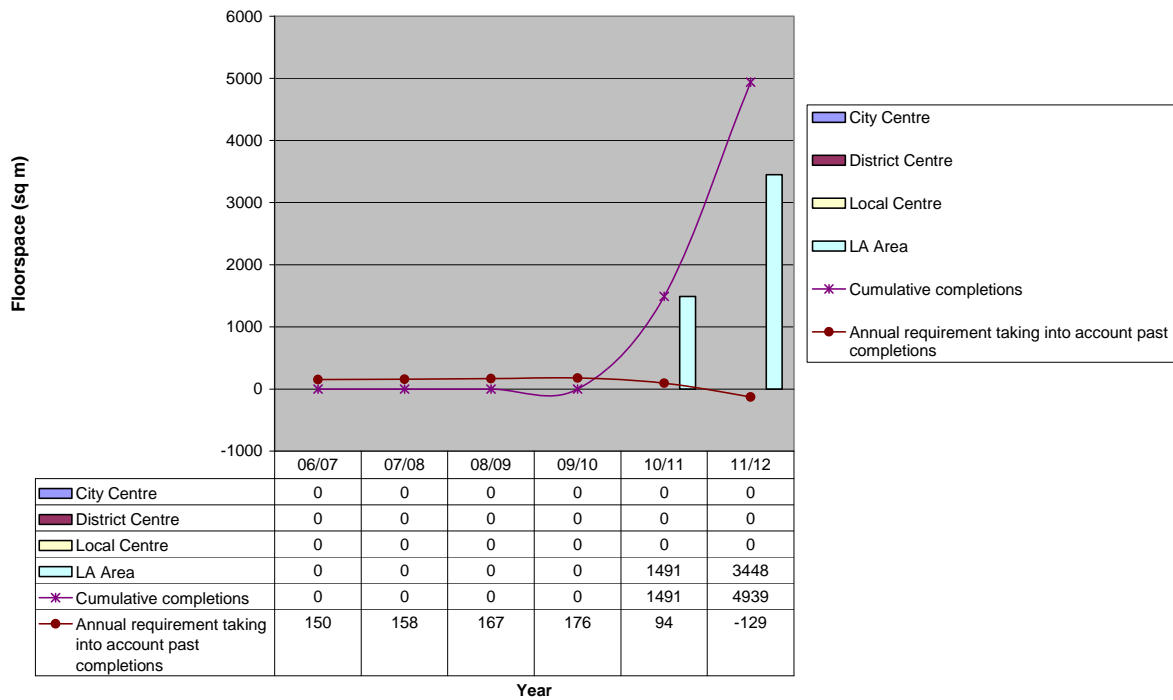
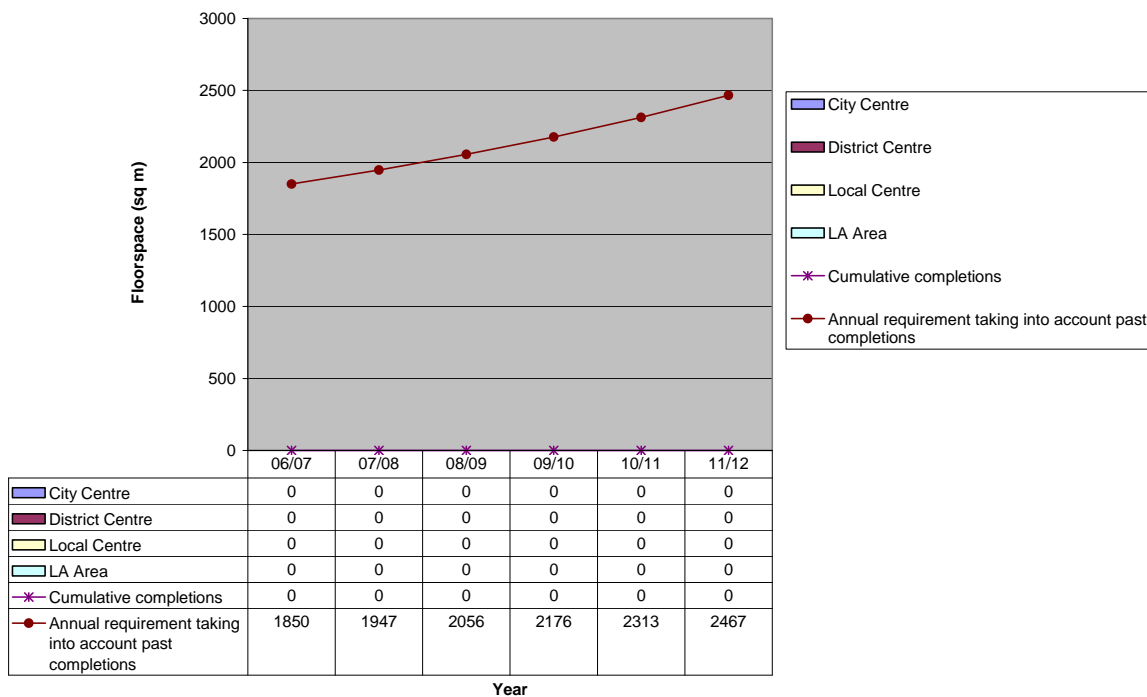


Figure 14: Amount of comparison floorspace completed in each area (sq m)



Indicator	Target	Data
Vacant floorspace in the city centre	The number of vacant units to remain below 10%	2011/12: 6.96% ²²
Rental values for retail	Zone A rent (£ per sq ft per annum in prime area): 2007: Taunton: £140 Torquay: £90 Plymouth: £180 Exeter: £220 2008: Taunton: £140 Torquay: £90 Plymouth: £180 Exeter: £225 2009: Taunton: £120 Torquay: £75 Plymouth: £150 Exeter: £190 2010: Taunton: £120 Torquay: £75 Plymouth: £120 Exeter: £190 2011: Taunton: £115 Torquay: £75 Plymouth: £130 Exeter: £190 2012: Taunton: £115 Torquay: £55 Plymouth: £120 Exeter: £185	

²² Source: City Centre Management Survey of vacant City Centre retail units 3 September 2012, Exeter City Centre Manager John Harvey <http://www.exetercitycentre.blogspot.com/>

Meeting Housing Needs

Housing Completions

The Council's Core Strategy proposes in Policy CP3 that the Council will make provision for at least 12,000 new homes during the period 2006 to 2026. The development strategy focuses a large proportion of these homes in urban extensions to the east and south west of Exeter (Monkerton/Hill Barton, Newcourt and Alphington), in the regeneration areas (Water Lane and Grecian Quarter) and sites identified as suitable²³ within the urban area.

Figure 15: Plan period and housing target

	Adopted	Period of Plan	Housing Provision Required	Annualised Requirement
Core Strategy	February 2012	April 2006 – March 2026	At least 12,000	600

Figure 16: Net additional dwellings completed

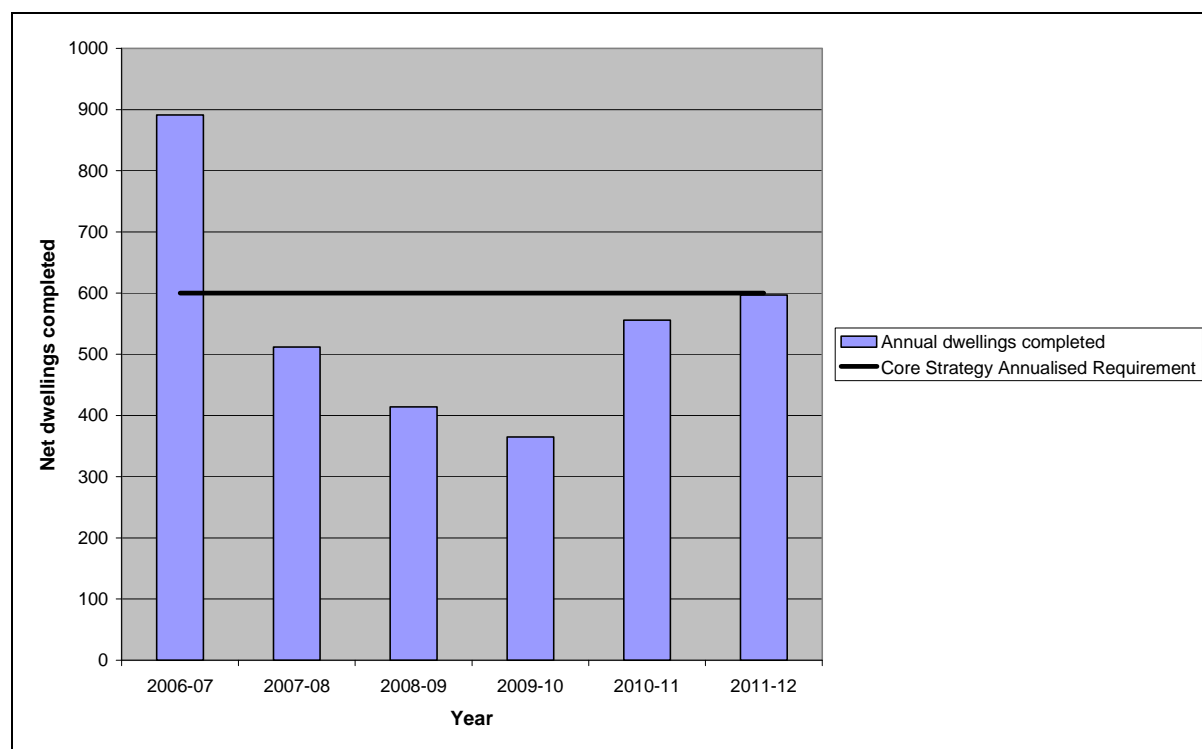


Figure 17: Annual housing completions

2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012
891	512	414	365	556	597

²³ Sites have been identified as 'suitable' through the Strategic Housing Land Availability Assessment (SHLAA) <http://www.exeter.gov.uk/SHLAA>

Figure 18: Cumulative net dwellings completed compared to the cumulative annualised requirement

	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012
Cumulative net housing completions	891	1,403	1,817	2,182	2,738	3,335
Cumulative annualised requirement	600	1,200	1,800	2,400	3,000	3,600
Shortfall / surplus	291	203	17	-218	-262	-265

The housing trajectory included in the Annual Monitoring Report 2010-2011 predicted that 489 net additional dwellings would be completed in 2011-2012. The annual development survey carried out in April 2012 recorded 597 additional dwellings completed between 1 April 2011 and 31 March 2012 (see figure 16). This is only 3 dwellings less than the annual requirement.

Since the start of the plan period, 3,335 net additional dwellings (556 per annum) have been completed in the city; this is an underperformance of 265 dwellings compared to the cumulative annualised strategic requirement (3,600 net additional dwellings) (see Figure 17). However, it is likely that there will be a shortfall against the annualised completion rate in the short-term, until development in the urban extensions (identified as strategic allocations in the Core Strategy) comes forward. There is a longer lead in time for major developments and it was accepted by the Planning Inspector holding the Core Strategy examination that there would be higher build rates towards the later part of the plan period to make up for a lower rate of development in the early years.

Newcourt

The first of three strategic allocations (Newcourt) is under construction, with 373 dwellings complete, and reserved matters applications have been recently approved for the Lower RNSD site, Topsham Road (399 dwellings) and the former ORLN site (233 dwellings). Planning applications for Seabrook Orchards (700 dwellings) and land adjacent to Beech Cottage (16) have been approved subject to the signing of the section 106 agreement.

Monkerton

Outline permission has been approved for Tithebarn Green in Monkerton (350 dwellings) and Land at Sandrook, Gypsy Hill Lane (62 dwellings) subject to the signing of the section 106 agreement. Construction has started at Monkerton on land off Hill Barton Road (133 dwellings).

Other sites

Former St. Loyes, Topsham Rd (193 dwellings) which is not a strategic allocation has also recently received reserved matters approval. This is a positive step towards achieving higher completion figures in the next five years (see Five Year Land Supply).

The Housing Trajectory

The housing trajectory is required to show progress towards this requirement. The Government requires local planning authorities to 'illustrate the expected rate of housing delivery through a housing trajectory for the plan period and set out a housing implementation strategy for the full range of housing describing how they will maintain delivery of a five year supply of housing land to meet their housing target.'²⁴

The housing trajectory is informed by the Draft 2012 SHLAA, which has been produced in consultation with the various agents, developers and landowners responsible for land included in the strategic allocations and includes outstanding planning permissions for housing that include 5 or more dwellings. For each site in the SHLAA a questionnaire was completed with details on whether the site was deliverable, available and achievable, and also with information on any constraints and the expected delivery timetable. The housing trajectory can only ever show a 'snapshot' view of anticipated delivery.

²⁴ Pages 12-13, National Planning Policy Framework (NPPF), March 2012
<http://www.communities.gov.uk/documents/planningandbuilding/pdf/2116950.pdf>

Housing Trajectory

The housing trajectory presented below (columns 1 to 20) relates to the Core Strategy period to 2026 and is based on the 12,000 dwelling target in Policy CP1 (see page 19 of the Core Strategy). Columns 1 to 6 show the completions for 2006/7 to 2011/12. Column 7 shows the anticipated completions for 2012/13, (the schedules that accompany the Five Year Supply calculation that follows explains how these anticipated completions have been determined). The remaining columns set out the projected completions to 2026.

The trajectory is based upon the Draft Exeter Strategic Housing Land Availability Assessment 2012 (SHLAA) which has been updated for the AMR by carrying out a desk-top review and making a number of site visits. The trajectory graph (over the page) suggests an increase in the number of completions over the next five years, and higher completion figures during 2015/16 and 2016/17 as the strategic allocations are brought forward. This predicted pattern of development arises from the SHLAA's methodology, which from necessity takes a simplistic view of completions that is based on five year time periods. It is unlikely to accurately reflect the true pattern of completions over the plan period. This is expected to be much smoother, with less pronounced peaks and troughs.

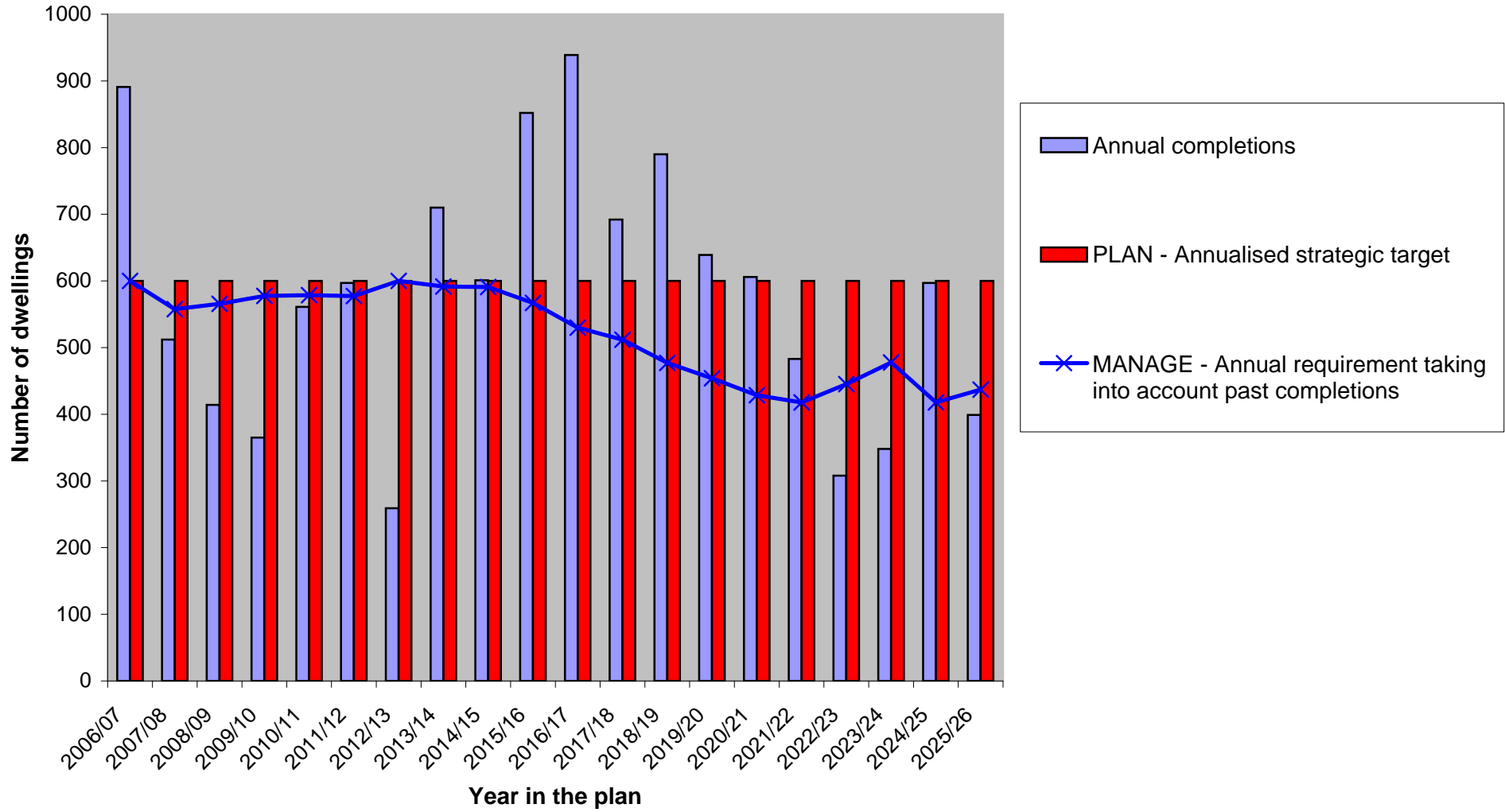
Trajectory (based on Exeter City Council's adopted Core Strategy target of at least 12,000 dwellings)																					
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total
Plan Period	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
Previous completions	891	512	414	365	561	597															
Reporting year completions*							259														
Projected completions (net additions)	Planning permissions							648	421	462	475	331	303	256	256	221	144	38	0	0	3555
	Sites without planning permissions							12	130	340	414	311	437	333	300	212	114	160	307	173	3243
	Broad locations for growth																	100	240	176	516
	Windfalls							50	50	50	50	50	50	50	50	50	50	50	50	50	650
Hectares***								15.8	13.4	18.9	20.9	15.4	17.6	14.2	13.5	10.7	6.8	7.7	13.3	8.9	
Annual completions	891	512	414	365	561	597	259	710	601	852	939	692	790	639	606	483	308	348	597	399	11563
Cumulative completions	891	1403	1817	2182	2743	3340	3599	4309	4910	5762	6701	7393	8183	8822	9428	9911	10219	10567	11164	11563	
PLAN - Annualised strategic target	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	12000
Cumulative annualised strategic target	600	1200	1800	2400	3000	3600	4200	4800	5400	6000	6600	7200	7800	8400	9000	9600	10200	10800	11400	12000	
MONITOR - No. of dwellings built above / below the cumulative annualised strategic target	291	203	17	-218	-257	-260	-601	-491	-490	-238	101	193	383	422	428	311	19	-233	-236	-437	
MANAGE - Annual requirement taking into account past completions	600	558	566	578	579	577	600	592	591	567	530	512	477	454	429	418	445	478	418	437	

* Estimated completions by April 2013 from site visits carried out on 1st, 2nd and 6th November 2012

** Includes sites with planning permission/permission subject to S106 Agt at 1 January 2012, sites without planning permission and broad locations for growth identified in the draft Exeter 2012 SHLAA, plus a windfall rate of 50 per annum.

*** Assumes 45 dph.

Housing Trajectory



The Five Year Land Supply

To help boost the supply of housing, the National Planning Policy Framework (NPPF) requires local planning authorities to identify and update annually a supply of specific deliverable sites sufficient to provide five years worth of housing against their housing requirements with an additional buffer of 5% to ensure choice and competition in the market for land or 20% where there has been a record of persistent under delivery. Without this, even recently adopted planning policies for the supply of housing will be considered out of date (NPPF Para 49¹).

This is the five year housing land supply calculation for Exeter for the period of 1 April 2013 to 31 March 2018.

Methodology

The five year housing land supply calculation set out in this document draws from the (draft) *Exeter 2012 Strategic Housing Land Availability Assessment (SHLAA)*. The calculation takes into account the following sources of land:

- Sites with extant planning permission for housing and planning applications that the Council has resolved to permit subject to the completion of a S106 Agreement, at 1 January 2013; and
- Sites without planning permission that have been submitted for assessment in the 2012 SHLAA.

To be considered deliverable within the five year period, the site has to:

- be available now;
- offer a suitable location for housing development now; and
- have a reasonable prospect of being developed for housing within the next five years.

Regarding sites with planning permission, the Notes and Definitions accompanying the Department of Communities and Local Government's (DCLG) advice note on Housing Flows Reconciliation² allows privately-owned student cluster flats (i.e. self-contained accommodation built for students) to be recorded as dwellings, with each flat equating to one dwelling. Accordingly, Exeter's five year supply calculation takes privately-owned self-contained student accommodation into account.

What is the housing requirement for Exeter?

The basis for calculating a five year supply is the current adopted development plan. In the case of Exeter, this is the *Exeter Core Strategy* adopted February 2012 (2006-2026). The Core Strategy proposes that at least 12,000 dwellings should be built in Exeter between 2006 and 2026. This equates to an average annual requirement of 600 dwellings and a basic five year requirement of 3000 dwellings (5 x 600).

¹ National Planning Policy Framework (NPPF), March 2012

<http://www.communities.gov.uk/documents/planningandbuilding/pdf/2116950.pdf>

²<http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/stockincludingvacants/notesdefinitions/>

Recent appeal decisions taken by the Planning Inspectorate indicate that local authorities should add in any shortfall in provision during the plan period to the 5 year requirement. Based on an annual target of 600 dwellings, 4,200 dwellings should have been completed over the seven years between 2006 and 2013. A shortfall of 601 dwellings (4,200 minus 3,599 dwellings that were actually completed) therefore needs to be added to the 5 year requirement, giving 3,601 dwellings.

The NPPF requires an additional allowance of five per cent to ensure choice and competition in the market for land, or 20% where there has been a record of persistent under delivery (Para 47, NPPF³). Exeter City Council does not have a record of persistent under delivery. 5,166 dwellings were completed in the City between 2001 and 2011. This equates to an average delivery rate of 517 dwellings per year, when the target rate, based on the adopted plan at that time (the Devon Structure Plan), was 447 a year. The Core Strategy was adopted in 2012, since when the target rate of 600 dwellings per year (12,000 dwellings divided by 20 years) has been missed by only 3 dwellings.

5% of 3,601 dwellings equates to 180 dwellings. This gives an overall five year housing land requirement of **3,781** dwellings. The average annual requirement over the five year period is 756 dwellings.

Which sites have the potential to deliver housing in the next five years?

(i) Sites with extant planning permission for housing (including permissions subject to completion of a S106 Agreement)

All sites with extant planning permission for residential development at 1 January 2013 are shown in Schedule 1.

The local authorities comprising the Exeter Housing Market Area (Exeter City Council, East Devon District Council, Mid Devon District Council, Teignbridge District Council and the Dartmoor National Park Authority) have developed a 'model' to determine whether or not, and to what extent, a site with extant planning permission for housing should be included in the five year supply calculation. The model has been endorsed by the SHLAA Panel.

The model requires an extant planning permission to be 'discounted' from the five year supply calculation if the local authority does not consider that it will be implemented. After speaking to the applicants of some larger schemes and consulting with Officers from the Council's Development Management and Housing Enabling Teams, it is considered that 3 extant permissions totalling 232 dwellings will not be implemented and therefore will not contribute to the five year housing land supply (sites 1208, 1211 and 1221).

Of the remaining permissions, the model assumes a standard completion rate to determine a contribution to the five year supply, unless otherwise advised by the developer or in the case of student accommodation and flats when a faster build rate is assumed. Based on this completion rate, it is expected that **2,337** dwellings with extant

³ National Planning Policy Framework (NPPF), March 2012
<http://www.communities.gov.uk/documents/planningandbuilding/pdf/2116950.pdf>

planning permission will be completed during the five year period (see the total for 'Yield Yrs 1-5 in Schedule 1). This figure includes 196 units of self-contained student accommodation (sites 1155, 1164, 1168, 1179, 1181 and 1187) and 1,382 dwellings where the permission is subject to the completion of a S106 Agreement (sites 1032, 1222, 1257-1262).

(ii) Sites without planning permission for housing

Sites without planning permission have been identified through the (draft) 2012 SHLAA. Landowners and agents submitted 107 sites to be assessed in the SHLAA, for their potential to deliver housing. The sites are listed in Schedule 2.

It is concluded that 26 sites are deliverable during the next five years and therefore have the potential to contribute towards the five year housing land supply (sites 2, 3, 5, 9, 18a, 18b, 18c, 20, 23, 34, 39, 40, 41, 42, 44, 61, 62, 66a, 66b, 83, 84, 89, 94, 101, 102 and 105). It is estimated that these sites could yield a total of **1,207** dwellings during the five year period (see the total for 'Yield Yrs 1-5' in Schedule 2).

(iii) Windfall sites

Paragraph 48 of the NPPF allows local planning authorities to include windfall sites in the five year supply if they have compelling evidence that such sites have consistently become available in the local area and will continue to provide a realistic source of supply⁴.

Windfalls have historically comprised a significant proportion of housing completions in Exeter. The Inspector's report into the Core Strategy concludes that there is no reason to suggest that windfalls will not continue to come forward in the same way as in the past. A conservative annual allowance for windfalls of 50 dwellings is therefore made in the 5 year supply calculation (equating to **250** dwellings). This is an average figure based on the total number of completions between 2002 and 2012, minus those on:

- allocated sites;
- residential gardens;
- sites identified in the SHLAA; and
- sites of 5 dwellings or more (as these should technically be accounted for in future SHLAA).

Five Year Supply Calculation

The predicted yields from sources i, ii and iii above generate a potential yield of **3,794** dwellings over the five year period from 1 April 2013. This **exceeds** the five year housing land requirement of 3,781 dwellings by **13** dwellings. It equates to a deliverable housing land supply of **5 years**.

⁴ National Planning Policy Framework (NPPF), March 2012
<http://www.communities.gov.uk/documents/planningandbuilding/pdf/2116950.pdf>

Schedule 1 - Sites with planning permission for housing at 1 January 2013

A	B	C	D		E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y		
Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5	Five Year Supply					Yield yrs 6-10	Five Year Supply					Yield yrs 11-14	Running total	Comments		
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28					
1000	12	Land off Highcroft	Y	6	6						0						0							0	0	Part of larger scheme that has been completed.	
1003	249a	Plot F, Cleve House, Exwick Lane	N	2	2						0						0							0	0	Detailed permission. SHLAA market conditions model.	
1006	262	Former Royal Naval Stores Depot, Topsham Rd	Y	14	14						0						0							0	0		
1007	264	162-163 Fore St	Y	8		1	1	1	5		8						0								0	8	Detailed permission. Owner advises 3 flats will be built over next 3 years.
1013	280	Locks, Ladysmith Rd	N	5			5				5						0								0	13	Permission has been partly implemented. Site is currently for sale. DM advice is that rest is likely to be completed.
1014	1971	Former Texaco/Gaytons Service Station, Western Way	Y	9	9						0						0								0	13	
1015	284	Land adj to 18 & including 29 Lower North St	Y	129	129						0						0								0	13	Student flats.
1017	289	Episcopal Building & York Wing, Dinham Rd	Y	24	24						0						0								0	13	
1024	300	33-35 Culverland Rd	N	12		12					12						0								0	25	Site cleared. SHLAA market conditions model.
1027 A	307a	St Loyes Foundation, Topsham Rd	Y	135		12	25	25	25	25	112	26					26								0	163	Reserved Matters approved & site works underway.
1027 B	307b	Millbrook Village, Topsham Rd	Y	58		12	25	21			58						0								0	221	Reserved matters approved and site works underway.
1028	308a	Lower RNSD site, Topsham Rd	Y	289		12	25	25	25	25	112	50	50	50	27		177								0	510	Reserved matters approved.
1029	308b	Langdon site, Old Rydon Lane	N	47			12	25	10		47						0								0	557	Outline permission granted & S106 signed in 2010. Year of 1st completions is deferred by 2yrs reflecting need to obtain RM approval & undertake site works.
1030	308c	ORLN, Old Rydon Lane	N	233		50	50	50	50	33	233						0								0	790	Reserved matters approved. Build rate based on developer advice.

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28			
1032	311S	Former University of Plymouth, Earl Richards Rd	N	39		12	25	2			39												0	829	Reserved matters approved subject to S106 Agreement
1034	1375	5 Tresillian Gardens, Topsham	N	2		2					2												0	831	Detailed permission. SHLAA market conditions model.
1035	1461	Tip Top, 10 East Wonford Hill	N	1		1					1												0	832	
1037	1565	14 Exe Street	N	6		6					6												0	838	
1040	1611	Land adj to Strathcairn, Sylvan Rd	Y	1				1			1												0	839	Foundations covered.
1041	1619	169 Honiton Rd	N	1		1					1												0	840	Detailed permission. SHLAA market conditions model.
1042	1621	90 South St	N	2		2					2												0	842	Detailed permission. SHLAA market conditions model.
1044	1647	Land at Sivell Place	Y	4	3	1					1												0	843	
1046	1675	Plot 2, Higher Field, Lodge Hill	Y	1	1						0												0	843	
1048	1699	1 Uplands Drive	Y	1	1						0												0	843	
1055	1758	United Reform Church, Church Rd	Y	3			3				3												0	846	Work currently stopped.
1056	1770	19/20 Friernhay St	N	1		1					1												0	847	Detailed permission. SHLAA market conditions model.
1061	1824	Land adj 113 St Katherine's Rd	N	1		1					1												0	848	
1064	1834	1-2 High St, Topsham	N	3		3					3												0	851	Detailed permission. SHLAA market conditions model.
1065	1842	Land at r/o 1 & 2 Globe Court, Topsham	N	1		1					1												0	852	
1066	1844	Greenacre, Denver Rd, Topsham	N	1		1					1												0	853	Detailed permission. SHLAA market conditions model.
1067	1850	Land adj 5 Harrington Lane	N	1		1					1												0	854	Detailed permission. SHLAA market conditions model.
1072	1876	Darley Dale, Alphington St	Y	3	3						0												0	854	

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments	
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28				
1074	1878	Land adj Peterhayes	N	5		5					5							0						0	859	Detailed permission. SHLAA market conditions model.
1075	1881	Land adj to Quarrylands, Little Johns Cross Hill	N	1		1					1							0						0	860	Detailed permission. SHLAA market conditions model.
1078	1891	98 Honiton Rd	N	7		7					7							0						0	867	Detailed permission. SHLAA market conditions model.
1082	332	Former Speedway Garage, 63 Cowick St	N	11			11				11							0						0	878	Pushed back a year as site is currently for sale.
1090	1906	68 Bovemoors Lane	N	7		7					7							0						0	885	Detailed permission. SHLAA market conditions model.
1092	1911	47 Wonford St	Y	1	1						0							0						0	885	Detailed permission. SHLAA market conditions model.
1098	1919	Land to r/0 53 Cowick St	N	1		1					1							0						0	886	Detailed permission. SHLAA market conditions model.
1101	1922	44 Wentworth Gardens	N	1	1						0							0						0	886	Detailed permission. SHLAA market conditions model.
1108	1929	R/o 26-36 Leypark Rd	N	9		9					9							0						0	895	Detailed permission. SHLAA market conditions model.
1111	1933	20 Hanover Rd	N	1		1					1							0						0	896	Detailed permission. SHLAA market conditions model.
1115	1937	Rollestone House, Pennsylvania Rd	N	1		1					1							0						0	897	
1118	1940	13 Lyndhurst Rd	Y	4	4						0							0						0	897	
1120	337	91, 93, 95 & 97 Wonford St	N	9		9					9							0						0	906	Detailed permission. SHLAA market conditions model.
1123	1944	43 East Ave	Y	1	1						0							0						0	906	Detailed permission. SHLAA market conditions model.
1125	1946	Treburtha, Woodwater Lane	N	2		2					2							0						0	908	Detailed permission. SHLAA market conditions model.
1126	1973	Store at end of Spinning Path, Blackboy Rd	N	1		1					1							0						0	909	Detailed permission. SHLAA market conditions model.
1127	1600	Land to south of 57 Union Rd	Y	1	1						0							0						0	909	
1129	1947	Branscombe House, 17 York Rd	Y	6	6						0							0						0	909	
1131	1974	2 Wilcocks Rd	N	1		1					1							0						0	910	Detailed permission. SHLAA market conditions model.
1133	1949	1 Brewery Lane, North St	N	2		2					2							0						0	912	Detailed permission. SHLAA market conditions model.

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28			
1137	322	Whipton Methodist Church, Brookway	N	13		12	1				13						0					0	925	Detailed permission. SHLAA market conditions model.	
1139	1951	Former St Loyes PH, 12-14 Salters Rd	Y	6	6						0						0					0	925	Detailed permission. SHLAA market conditions model.	
1140	1952	12 Baring Crescent	Y	1	1						0						0					0	925		
1141	1955	28 Barnfield Rd	Y	6	1	5					5						0					0	930		
1142	1953	14 Castle St	N	1				1			1						0					0	931	Current shop on a 10 year lease.	
1145	317	Land adj Rennes House, Vaughan Rd	N	21				12	9		21						0					0	952	Likely to be implemented towards end of 5 year period.	
1151	283	58 Main Rd, Pinhoe	N	1					1		1						0					0	953	Outline permission renewed in 2010. SHLAA market conditions model.	
1152	319	Foxhayes Garage, 125 Exwick Rd	N	11		11					11						0					0	964	Detailed permission. SHLAA market conditions model.	
1153	1963	29 Norwich Rd	N	1		1					1						0					0	965	Detailed permission. SHLAA market conditions model.	
1154	1959	Land adj 30 Bridge Rd	N	1		1					1						0					0	966	Detailed permission. SHLAA market conditions model.	
1155	1960	Former Artful Dodger, Red Cow Village	Y	5		5					5						0					0	971	Flats under construction, but unlikely to be completed until next year.	
1158	316	Land west of 48-68 Newport Road	N	10		10					10						0					0	981	Detailed permission. SHLAA market conditions model.	
1160		Apollo Industries/Works, Looe Rd	Y	15	15						0						0					0	981		
1162	1972	Orchard House, Deepdene Park	N	3		3					3						0					0	984	Detailed permission. SHLAA market conditions model.	
1164	318	Halford Wing, Dean Clarke House, Southernhay East	Y	40		12	28				40						0					0	1024	S106 signed. Under construction. Student flats so likely to be completed by Autumn 2014.	
1168	1964	Former Tennis Courts, Bishop Blackall Annexe, Thornton Hill	Y	9		9					9						0					0	1033	Scheme comprises self-contained student flats. Likely to be completed by Autumn 2013.	
1173	2002	1 Tresillian Gardens, Topsham	Y	1	1						0						0					0	1033	Detailed permission. SHLAA market conditions model.	
1177	1968	Victoria Inn, 36 Victoria St	N	1		1					1						0					0	1034	Detailed permission. SHLAA market conditions model.	
1178	1969	R/o 33-35 Southbrook Road	Y	1	1						0						0					0	1034	Detailed permission. SHLAA market conditions model.	

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28			
1179	2015	69-73 Sidwell St	Y	9		9					9							0					0	1043	Self contained student flats.
1180	1992	4 Spicer Road	N	4		4					4							0					0	1047	Detailed permission. SHLAA market conditions model.
1181	325	Townsend Printers, Western Way	Y	131		131					131							0					0	1178	Student flats and studios, planned for completion by Autumn 2013.
1182	1980	10 Honey Lane	N	2		2					2							0					0	1180	Detailed permission. SHLAA market conditions model.
1183	1694	Dinham House, Dinham Rd	Y	1	1						0							0					0	1180	
1184	1695	School House, Dinham Rd	Y	1	1						0							0					0	1180	
1187	1981	74 Queen St	Y	2		2					2							0					0	1182	Student flats
1188	328	Land at Pinhoe Quarry, Harrington Lane	N	380				56	56	112	56	56	56	56	44	268							0	1562	Outline permission granted and section 106 agreement signed January 2012. Build rate & timing advised by developer.
1189	1991	38 Blackboy Rd	N	3		3					3							0					0	1565	Detailed permission. SHLAA market conditions model.
1191	326	Land off Hill Barton Road	N	133		12	25	25	25	25	112	21					21						0	1698	Reserved matters approved. SHLAA market conditions model. Was site 45 in 'sites without planning permission.'
1193	295	8 & 10 Church Rd, Alington	N	12		12					12							0					0	1710	Was site 17 without planning permission. Detailed permission. SHLAA market conditions model.
1194	321	68A Shakespeare Road	Y	25		25					25							0					0	1735	Under construction and likely to complete next year.
1195	1965	Higher Duryard House, Higher Duryard	N	1		1					1							0					0	1736	Detailed permission. SHLAA market conditions model.
1196	1871	40 Magdalen Road	N	1		1					1							0					0	1737	Detailed permission. SHLAA market conditions model.
1199	307c	St Lyses Foundation, Topsham Rd	N	50			12	25	13	50								0					0	1787	Outline Permission includes 50 Extra Care homes which are subject to reserved matters. Site cleared.
1200	1985	Pines, Little Johns Cross Hill	Y	1	1						0							0					0	1787	Detailed permission. SHLAA market conditions model.
1201	1986	1 Baring Crescent	Y	1	1						0							0					0	1787	

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28			
1202	1987	14 Salutary Mount	Y	1	1						0							0					0	1787	
1203	1999	Westwood House, 132 Beacon Lane	N	6		6					6							0					0	1793	Detailed permission. SHLAA market conditions model.
1204	1988	Kilmorie Hall, Pennsylvania Road	Y	6	6						0							0					0	1793	
1205	1989	Old Bakery Studios, Spicer Road	Y	1	1						0							0					0	1793	Detailed permission. SHLAA market conditions model.
1206	1990	Land to west of 29, Holland Road	Y	2	2						0							0					0	1793	
1207	1993	Raleigh Hall, Fore Street, Topsham	Y	1	1						0							0					0	1793	
1208	329	Portland House, Longbrook Street	N	153							0							0					0	1793	Student scheme. Unviable so will not be implemented.
1209	1994	Elmside House	Y	2	2						0							0					0	1793	
1210	327	Open Space, Bennett Square	N	8		8					8							0					0	1801	Detailed permission. SHLAA market conditions model.
1211	330S	Kingfisher House, Western Way	N	69							0							0					0	1801	Student scheme. Unviable so will not be implemented.
1213	1996	Land to east of 16 The Fairway	N	3		3					3							0					0	1804	Detailed permission. SHLAA market conditions model.
1214	1877	3 Ruby Court, Wonford Street	Y	1	1						0							0					0	1804	
1215	1997	Flat 8, 37 New Bridge Street	N	-1		-1					-1							0					0	1803	Detailed permission. Loss of dwelling.
1216	1998	Rollestone Farm, Pennsylvania Road	N	1		1					1							0					0	1804	Detailed permission. SHLAA market conditions model.
1218	334	Ibstock Brick, Harrington Lane	N	233		50	50	50	50	33	233							0					0	2037	Detailed permission. Build rate advised by developer.
1219	335	Dean Clark House	Y	24		24					24							0					0	2061	Detailed permission. Under construction. Build rate advised by developer.
1221	331S	Former Guide Dogs for the Blind Kennels, Exwick Lane	N	10							0							0					0	2061	Was site 4 without planning permission. Has subsequent permission for non-resi use, hence not counted.

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments				
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28							
1222	333S	Seabrook Orchards (formerly land to north of Topsham Road)	N	700							12	50	50	50	162	100	100	100	100	100	500	38					38	2761	Was site 63 without planning permission. Permitted subject to 106 Agreement being signed.
1224	2001	Land adjoining Bate Close, Alphington	N	3		3									3							0					0	2764	Detailed permission. SHLAA market conditions model.
1225	2003	17 Cambridge Street	N	1		1									1							0					0	2765	Detailed permission. SHLAA market conditions model.
1226	2004	12 Queens Terrace	N	1		1									1							0					0	2766	Detailed permission. SHLAA market conditions model.
1227	2005	5 Bystock Terrace	N	1		1									1							0					0	2767	Detailed permission. SHLAA market conditions model.
1228	2006	3 Well Street	N	2		2									2							0					0	2769	Detailed permission. SHLAA market conditions model.
1230	2008	Old Tax Office, Countess Wear Road	N	3	3										0							0					0	2769	Detailed permission. SHLAA market conditions model.
1231	2009	298 Topsham Road	N	1	1										0							0					0	2769	Detailed permission. SHLAA market conditions model.
1232	2010	16 Lower Hill Barton Road	N	1	1										0							0					0	2769	Detailed permission. SHLAA market conditions model.
1234	2012	The Bungalow, Old Rydon Lane	N	1	1										0							0					0	2769	Detailed permission. SHLAA market conditions model.
1235	2013	Land adjacent to 11, Lyncombe Close	N	2		2									2							0					0	2771	Detailed permission. SHLAA market conditions model.
1236	2014	1 Deanery Place	N	1	1										0							0					0	2771	Detailed permission. SHLAA market conditions model.
1237	2016	68 Sidwell Street	N	-1		-1									-1							0					0	2770	Detailed permission. SHLAA market conditions model.
1238	2017	51 Union Rd	N	1		1									1							0					0	2771	
1239	308d	Land n of 483-541 & Seabrook Mews, Topsham Rd	N	110		12	25	25	25	23					110							0					0	2881	Reserved Matters approved and S106 signed.
1240	2018	30-32 Heavitree Rd	N	1		1									1							0					0	2882	Detailed permission. SHLAA market conditions model.
1241	2019	Old Stables, Balls Farm Rd	N	1	1										0							0					0	2882	Detailed permission. SHLAA market conditions model.
1242	2020	1 Baring Crescent	N	1		1									1							0					0	2883	In addition to site 1286. Detailed permission. SHLAA market conditions model.
1243	2021	Magdalen House, 54/56 Magdalen Rd	N	5		5									5							0					0	2888	Detailed permission. SHLAA market conditions model.

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28			
1244	2022	8 & 8b Okehapmton Place	N	4		4					4						0					0	2892	Detailed permission. SHLAA market conditions model.	
1245	2023	Brooklea, Vennybridge	N	1		1					1						0					0	2893	Detailed permission. SHLAA market conditions model.	
1246	2024	1 Wentworth Gardens	N	1		1					1						0					0	2894	Detailed permission. SHLAA market conditions model.	
1247	2025	46-47 Cowick St	N	-1		-1					-1						0					0	2893	Detailed permission. Loss of 1 dwelling. SHLAA market conditions model.	
1248	2026	Magnolia House & Acacia House	N	3		3					3						0					0	2896		
1249	2027	Pilton House, Pilton Lane	N	2		2					2						0					0	2898		
1250	2028	15 Regents Park	N	3		3					3						0					0	2901		
1251	2029	11 Elm Grove Road	N	1	1						0						0					0	2901		
1252	2030	140 Pinhoe Road	N	-1		-1					-1						0					0	2900		
1253	2031	Fairfield Road	Y	1	1						0						0					0	2900		
1254	2032	13 Park Lane	N	1		1					1						0					0	2901		
1255	2033	9 Badon Close	N	1		1					1						0					0	2902		
1256	2034	5-6 Well Street	N	2		2					2						0					0	2904		
1257	340S	Bishops Court Quarry, Apple Lane	N	190		12	62	62	54		190						0					0	3094	Detailed permission subject to signing S106 Agt. Build rate as advised by developer.	

Site Ref.	HPPC Ref.	Address	Units under construction?	Dwgs with permission not yet completed (at 1 Apr 2012)	Predicted completions 2012/13	Five Year Supply					Yield yrs 1 - 5						Yield yrs 6-10						Yield yrs 11-14	Running total	Comments	
						2013/14	2014/15	2015/16	2016/17	2017/18		2018/19	2019/20	2020/21	2021/22	2022/23		2023/24	2024/25	2025/26	2026/27	2027/28				
1258	339S	Former Exeter & Middlemoor Service Station, Rydon Lane	N	14		14					14							0					0	3108	Was Site 54 without planning permission. Detailed permission subject to signing S106 Agt.	
1259	341S	Land adj Beech Cottage, Old Rydon Lane	N	16		16					16							0					0	3124	Was Site 59 without planning permission. Detailed permission subject to signing S106 Agt.	
1260	342S	Mount Wear House	N	11		11					11							0					0	3135	Detailed permission subject to signing S106 Agt.	
1261	343S	Tithebarn Green at Monkerton	N	350			12	50	50	50	162	50	50	50	38			188						0	3485	Was Sites 35 and 37a without planning permission. Outline permission subject to signing S106 Agt. The consent is for a cross-boundary scheme of 930 dwellings., hence the higher build rate, as per the SHLAA methodology.
1262	344S	Land at Sandrock, Gipsy Hill Lane	N	62			12	25	25		62							0						0	3547	Was Site 37b without planning permission. Outline permission subject to signing S106 Agt.
1263	2035	23 Peterborough Rd	N	1		1					1							0						0	3548	
1264	2036	3 Queens Terrace	N	1		1					1							0						0	3549	
1265	2037	26 Monmouth Hill, Topsham	N	1		1					1							0						0	3550	
1266	2038	105 Ladysmith Road	N	1		1					1							0						0	3551	
1267	2039	8 Okehampton Place	N	1		1					1							0						0	3552	
1268	2040	52 Northernhay Street	N	2		2					2							0						0	3554	
1269	2041	Iddisleigh House, 97 Heavitree Rd	N	1		1					1							0						0	3555	
TOTAL				4043	259	648	421	462	475	331	2337	303	256	256	221	144	1180	38	0	0	0	0	0	38	3555	

Schedule 2 - Sites without planning permission for housing at 1 January 2013

Site Ref.	Address	Gross site area (ha)	Min yield	Max yield	Mtd yield	Suitable	Available	Achievable	Five Year Supply					Yield yrs 1 - 5	2018/19	2019/20	2020/21	2021/22	2022/23	Yield yrs 6-10	2023/24	2024/25	2025/26	2026/27	2027/28	Yield yrs 11-15	Running total	Constraints to development /reasons for exclusion	Can constraints be overcome?	Other Comments	
									2013/14	2014/15	2015/16	2016/17	2017/18																		
1	Land south of Exwick Barton Cottages, St Andrews Rd	0.4	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Unsuitable on strategic planning policy grounds.
2	Land off St Andrews Rd	0.35	13	13	13	✓	✓	✓	A	12	1									13							0	13			
3	Exwick Middle School, Higher Exwick Hill	1.24	30	40	35	✓	✓	✓	A		12	23								35							0	48			
4	Guide Dogs for the Blind Kennels, Exwick Hill	0.61	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	48			Site has planning permission. See ref. 1221.
5	Foxhayes First School, Gloucester Rd	0.76	10	15	13	✓	✓	✓	A	12	1									13							0	61			
6	Land at Stoke Road	8.32	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	61			Unsuitable on strategic planning policy grounds.
7	Land adj Exeter St Davids Station, Bonhay Rd/Cowley Bridge Rd	5.9	0	0	0	✓	x	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	61			Discounted as unviable.
8	Harepath, Streatham Rise	0.59	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	61			Site has been developed.
9	Nos. 36-38 Well St	0.09	4	5	5	✓	✓	✓	A	5										5							0	66			
10	Land off Tedburn Rd	0.35	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Unsuitable on strategic planning policy grounds.
11	Land off Hambeer Lane	8.77	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Unsuitable on strategic planning policy grounds.
12	Garages & land, Taunton Close	0.13	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Site is no longer available.
13	Oaklands Riding School & The Rosary, Balls Farm Rd	2.1	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Unsuitable on strategic planning policy grounds.
14	Nos 8 & 10 Church Rd, Alphington	0.13	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			Site has planning permission. See ref. 1193.
15	Land bounded by Sidwell St, Paris St, Belgrave Rd & Summerland St	4	100	100	100	✓	✓	✓												A	0						100	100			
16	Exeter Royal Academy for Deaf Education, Topsham Rd	4.41	0	0	0	✓	x	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	100			Site is no longer available.
17	Isca House, Haven Banks	4.05	200	225	213	✓	✓	✓	A													12	50	50	50	50	212	312			
18a	Land west of Shillingford Rd	0.4	6	9	8	✓	✓	✓	A	8										8							0	320			

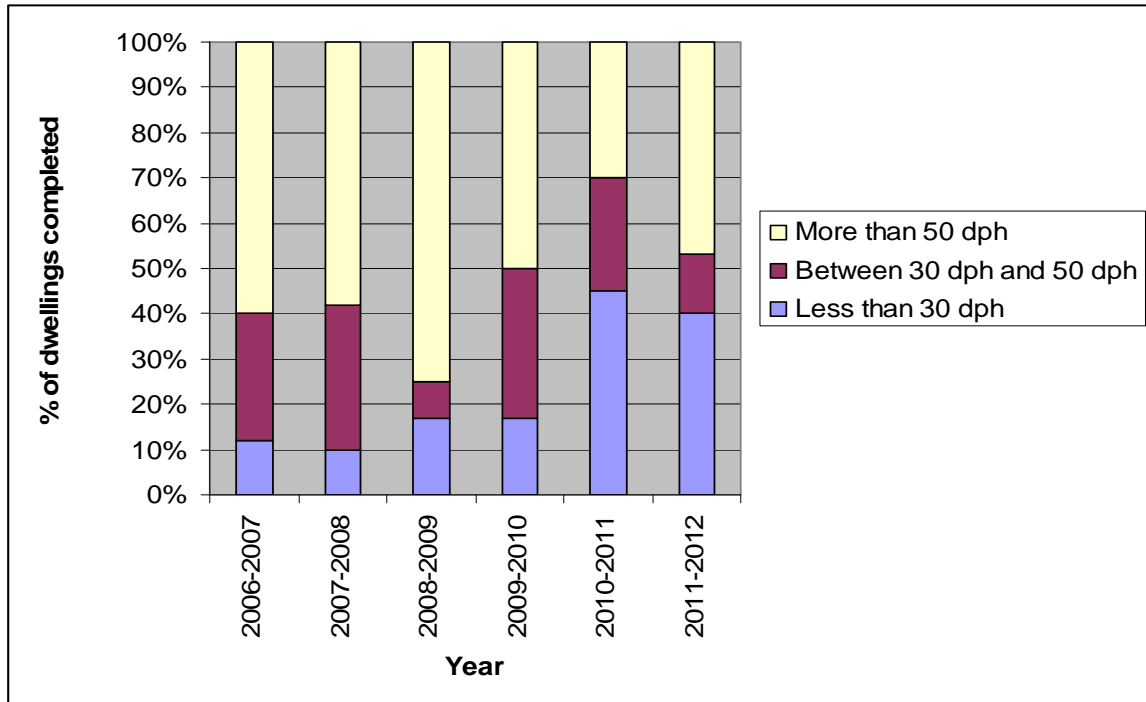
Site Ref.	Address	Gross site area (ha)	Min yield	Max yield	Mid yield	Suitable	Available	Achievable	Five Year Supply															Running total	Constraints to development /reasons for exclusion	Can constraints be overcome?	Other Comments					
									2013/14	2014/15	2015/16	2016/17	2017/18	Yield yrs 1 - 5					Yield yrs 6-10									Yield yrs 11-15				
35	Land north & south of Tithebarn Lane	10.8	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	920			Site has planning permission, See ref. 1261.			
36	Land n & s of Tithebarn Lane	0.26	7	9	8	✓	✓	✓			A								0	8						0	928					
37a	Land east of Pinn Lane	0.92	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	928			Site has planning permission. See ref. 1261.		
37b	Sandroek Nursery, Pinn Lane	1.78	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	928			Site has planning permission. See ref. 1262.		
38	Land south of Gipsy Hill Lane	0.49	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	928			Unsuitable on highways access and compatibility grounds.		
39	Land at Monkerton	17	400	744	572	✓	✓	✓	A		48	100	100	248	100	100	100	24									0	1500			This site is divided physically into 4 areas, so a build out rate based on 4 development areas has been applied.	
40	Land north & south of Harts Lane	3.96	105	105	105	✓	✓	✓	A		12	25	25	62	43												0	1605				
41	Land west of Pilton Lane	2.27	36	36	36	✓	✓	✓	A		12	24		36													0	1641				
42	Land adj Higher Furlong, Hollow Lane	1.3	47	55	51	✓	✓	✓			A		12	12	39												0	1692				
43	Hessary, Hollow Lane	1.36	23	30	27	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1692				
44	Land at Hill Barton Farm	18.8	750	750	750	✓	✓	✓	12	50	50	50	50	212	100	100	100	88	50	438	50	50				100	2442			Application currently being considered by ECC.		
45	Land east of Hill Barton Rd	5	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2442			Site has planning permission. See ref. 1191.	
46	Hill Barton Farm, Hill Barton Rd	0.32	7	7	7	✓	✓	✓	A					0	7												0	2449				
47	Land north of Honiton Rd	3.97	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Site has planning permission for non-residential use.	
48	HMS Pellew, Dryden Rd	0.9	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Site is no longer available.	
49	Council Yard & Clinic, Shakespeare Rd	0.4	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Site has planning permission. See ref. 1194.	
50	St Loyes College, Topsham Rd	7.7	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Site has planning permission. See ref. 1027A&B and 1028.	
51	Land at Aspen Close	0.77	1	2	2	✓	✓	x	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Development considered to be unviable.	
52	Ludwell Gardens, Ludwell Lane	3.39	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Unsuitable on green infrastructure, highways access and compatibility grounds.	
53	Land north of west of England School, Topsham Rd	7.17	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Unsuitable on biodiversity grounds.	
54	Land adj Exeter Arms Hotel, Rydon Lane	0.23	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2449			Site has planning permission subject to S106 Agt. See ref. 1258.	

Site Ref.	Address	Gross site area (ha)	Min yield	Max yield	Mid yield	Suitable	Available	Achievable	Five Year Supply															Running total	Constraints to development /reasons for exclusion	Can constraints be overcome?	Other Comments													
									2013/14	2014/15	2015/16	2016/17	2017/18	Yield yrs 1 - 5					Yield yrs 6-10									Yield yrs 11-15												
75	Land east of Salmonpool Bridge	2.8	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Unsuitable on flood risk grounds.		
76	Marypole Head, Pennsylvania Rd	0.22	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Unsuitable on highways access grounds.		
77	Pinhoe Quarry, Harrington Lane	12	NA	NA	NA	NA	NA	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Site has planning permission. See ref. 1188.		
78	Land adj 2 Hill Cottages, Church Hill	0.2	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Unsuitable on strategic planning policy grounds.		
79	23 Causey Lane	0.2	0	1	1	✓	✓	x	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Development considered to be unviable.		
80	Bayonne, Pinhoe Rd	0.1	6	6	6	✓	✓	x	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Development considered to be unviable.		
81	Vines, Gipsy Lane	0.77	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Unsuitable on green infrastructure grounds.		
82	Clystview, Hollow Lane	0.39	0	0	0	✓	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3136		Unsuitable on green infrastructure grounds.		
83	Land east of Newcourt House, Old Rydon Lane	0.3	14	14	14	✓	✓	✓	A	12	2																									3150				
84	Land north of Wessex Close, Topsham	0.6	8	8	8	✓	✓	✓	A	8																										3158				
85	Five Acres, Exeter Rd, Topsham	4.58	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3158		Unsuitable on strategic planning policy grounds.	
86	Land south of Rushmore Nursery, Newcourt Rd, Topsham	1.45	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3158		Unsuitable on strategic planning policy grounds.	
87	Land opposite Riversmeet House, Riversmeet, Topsham	2.43	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3158		Unsuitable on strategic planning policy grounds.	
88	Land adjoining 6 Exe View Cottages	0.3	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3158		Unsuitable on highways access grounds.	
89	Land off Liffey Rise	0.6	10	15	13	✓	✓	✓		A	12	1																									3171			
90	Land adjoining Exwick Lane	2.5	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3171		Unsuitable on strategic planning policy grounds.	
91	Barley Wood, Barley Lane	18	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3171		Unsuitable on strategic planning policy & biodiversity grounds.	
92	Land west of Barley Lane	5.6	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3171		Unsuitable on strategic planning policy grounds.	
93	Land south of Perridge Close	7.4	0	0	0	x	✓	NA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3171		Unsuitable on strategic planning policy grounds.	
94	Land at Exeter Cricket Ground, Prince of Wales Rd	0.24	10	12	11	✓	✓	✓	A	11																											3182			
95	Land adjoining Exeter Mobility Centre	0.18	7	9	8	✓	✓	✓			A																											3190		Considered achievable in Years 6+ due to highways access constraints.

Housing Density

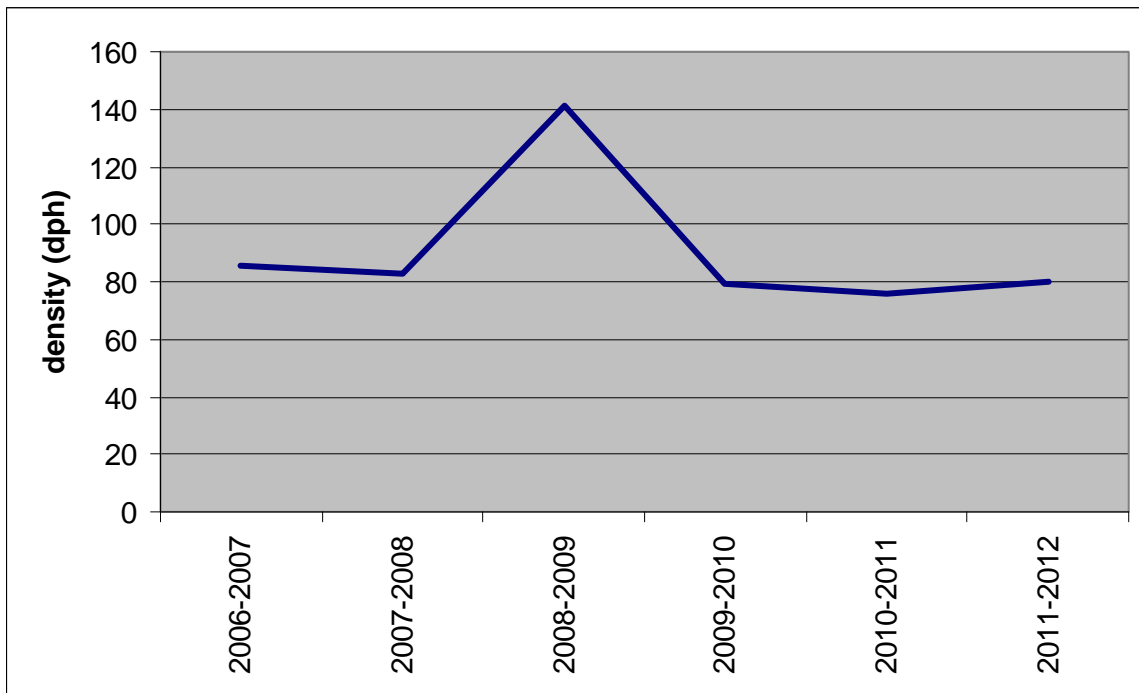
Higher residential densities help to achieve more sustainable forms of development, to reduce the use of 'greenfield' land and to make the best use of the limited amount of land available for development. Core Strategy policy CP4 encourages residential development at the highest appropriate density compatible with the protection of heritage assets, local amenities, the character and quality of the local environment and safety and convenience of the local and trunk road network.

Figure 19: Gross²⁵ density of new housing developments on sites of 9 or more completed dwellings



²⁵ Gross is the whole area of the site, and has not subtracted the areas for roads and open space.

Figure 20: Average gross density of new housing developments (completions) on sites of 9 or more dwellings (in dwellings per hectare, dph)



Over the last six years, high densities have been achieved due to a significant amount of apartments and flats (including student accommodation) being built in the city, and most major completions during 2008-2009 were flats. However, there have also been high densities on residential sites such as Chancel Park (122 dwellings on 1.51 ha = 81 dph) and the former County Ground (84 dwellings on 1.84 ha = 46 dph).

Number of dwellings completed per hectare on strategic allocations

The former Royal Naval Stores Depot (RNSD) is the first part of one of the three strategic allocations to be built out, and has achieved a density of 42 dph on the 373 dwellings (on 8.8 ha gross site) completed so far.

Affordable Housing

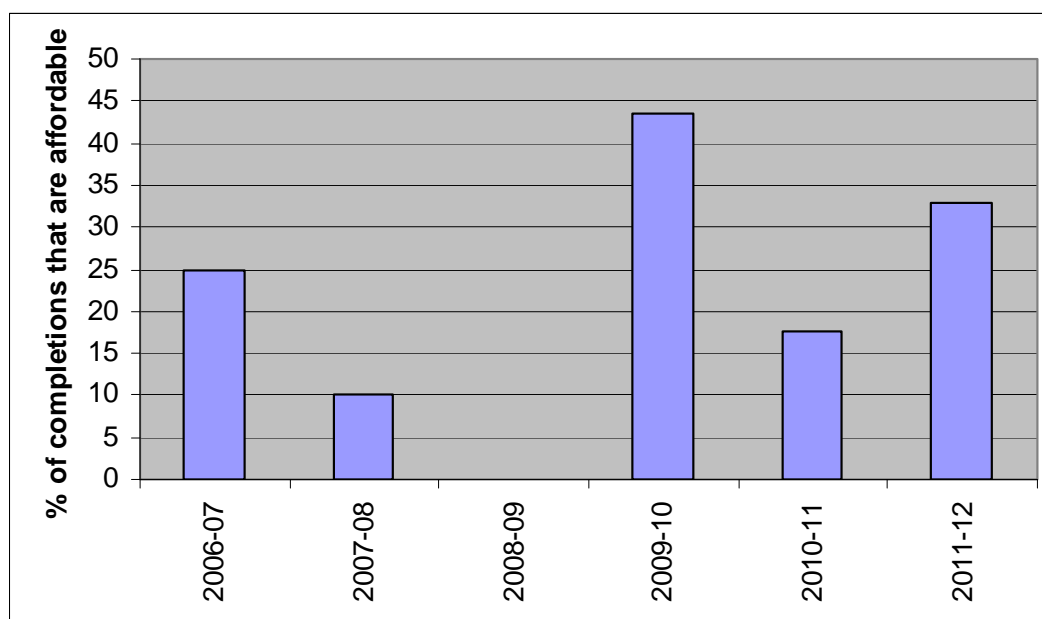
The availability of housing that is affordable and accessible to those in need in Exeter and surrounding area is a major issue. The delivery of affordable housing is also a key national government priority.

House price ratio between average house price and average full-time salary²⁶

	July-Sept 2011	Oct-Dec 2011	Jan-March 2012	April-June 2012
Average house price	£214,900	£197,400	£208,400	£219,100
Median full-time annual earnings (workplace-based)	£25,900	£25,900	£25,900	£25,900
House price to FT salary ratio	8.3	7.6	8.0	8.5

Policy CP7 of the adopted Core Strategy requires 35% housing provision on sites of 3 or more dwellings to be made available as affordable housing subject to site and viability constrictions. However, this is not viable in the current economic climate and the City Council have resolved to accept viability arguments to limit to 25% on sites over 15 units for the next three years. The policy is being implemented due to the viability caveat. The draft Affordable Housing SPD (October 2012) provides additional guidance on the requirements for affordable housing.

Figure 21: Percentage of affordable housing completed on sites over 15 dwellings



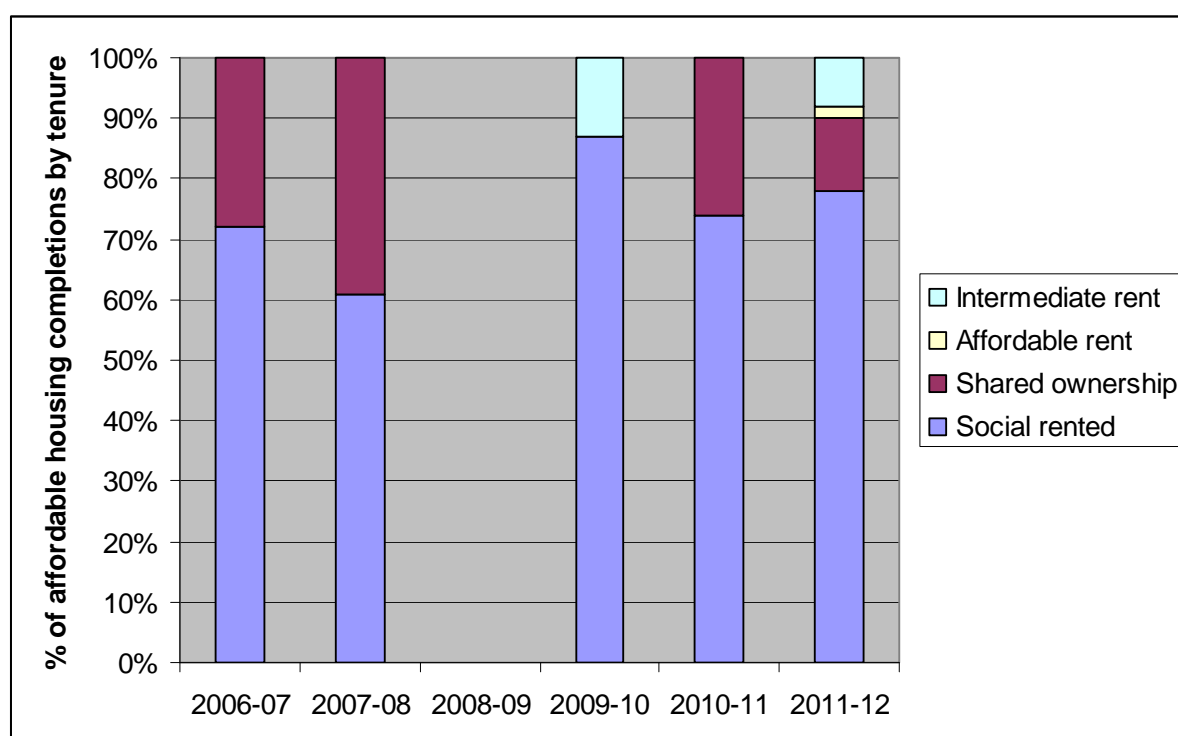
Please note: This chart does not show affordable housing acquired by Exeter City Council's Housing Department from other (not planning agreements) sources and only shows affordable housing from planning agreements. See below table for the total affordable dwellings provided.

²⁶ Land Registry. Also see Economic Trends Report <http://www.exeter.gov.uk/index.aspx?articleid=994>

Number of completions that are affordable

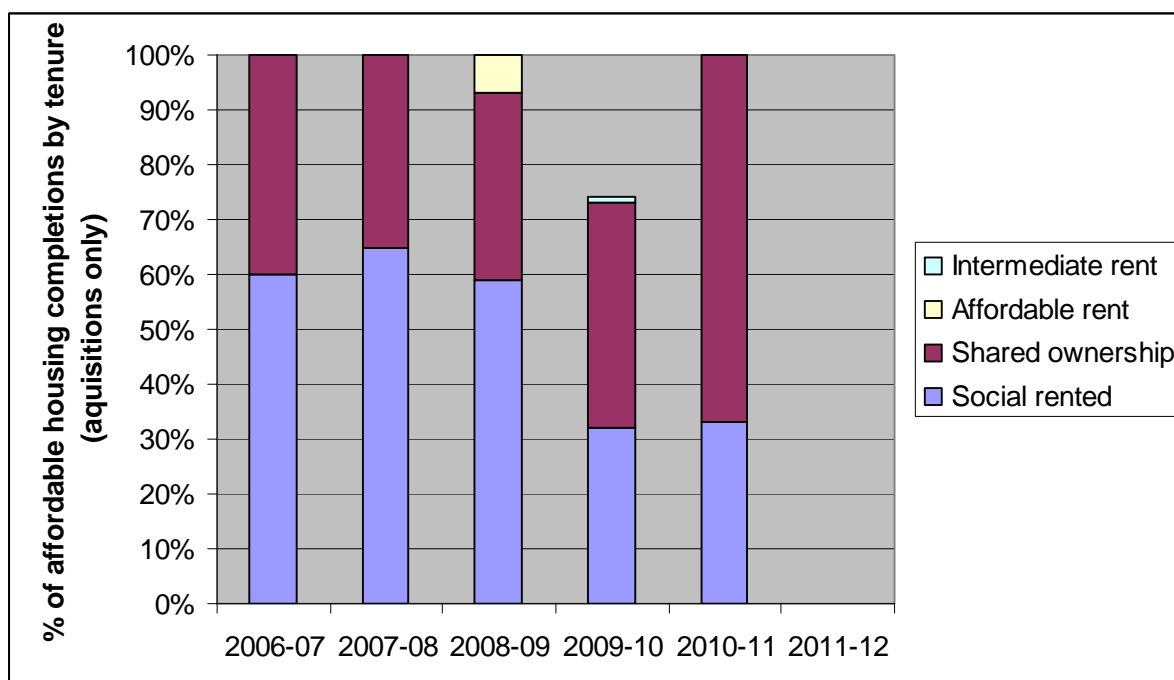
New affordable dwellings from...	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Planning permissions	170	31	0	71	86	170
Acquisitions	30	26	88	74	51	0
Totals	200	57	88	145	137	170

Figure 22: Affordable housing completions by tenure (on sites over 15 dwellings)



Indicator	Target	Data
Vacant residential properties		2007: 1151 2008: 1133 2009: 1375 2010: 1293 2011: 1442 2012: 890 (approx 1.7% of total stock)
Total dwelling stock		2011-2012: 52,931

Figure 23: Affordable housing completions by tenure (acquisitions)



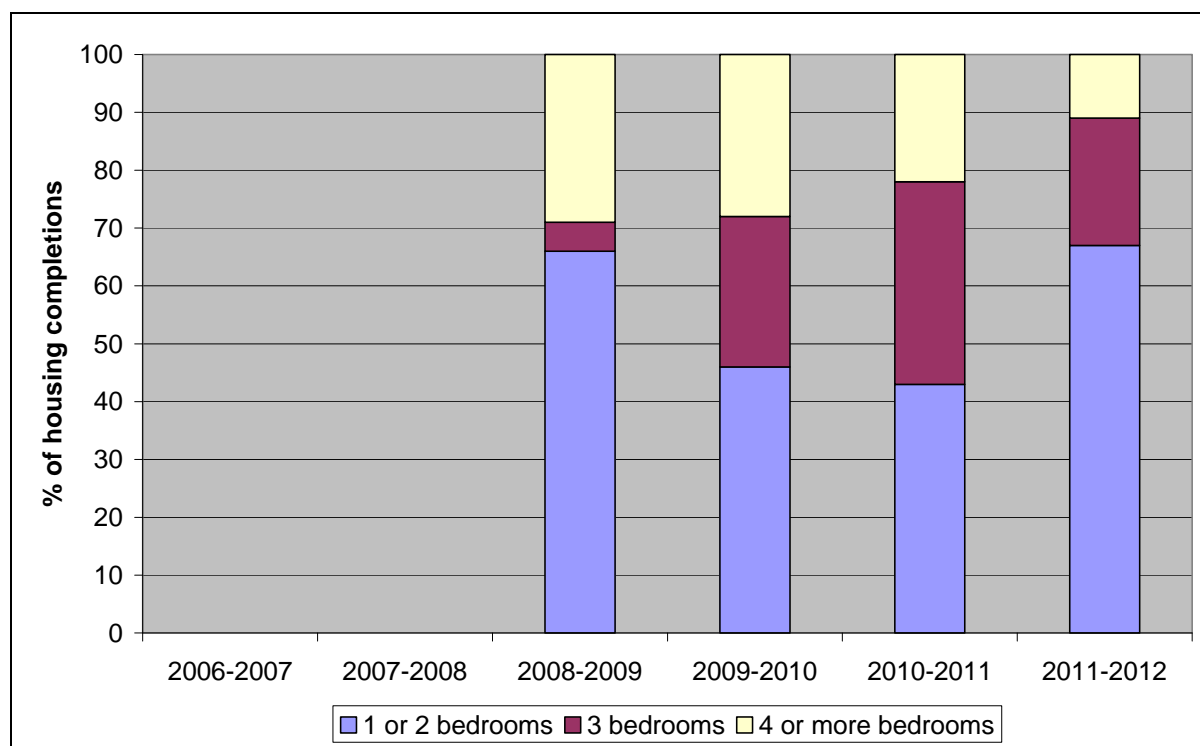
Market Housing Mix

A key element in ensuring that new homes meet local needs is providing homes of the appropriate type, size and affordability. Policy CP5 states that all major developments (10 or more dwellings) should include a mix of housing informed by context, local housing need and the most up to date Housing Market Assessment.

Net Housing Requirements for Exeter City by Housing Type and Size: 2010²⁷

Housing Requirement	Type of Housing		
	Market Housing	Intermediate Housing	Social Rented Housing
Net Requirement			
1 bedroom	32.1%	74.5%	18.9%
2 bedroom	27.9%	25.5%	64.5%
3 bedroom	16.1%	-	9.6%
4+ bedroom	23.9%	-	7.0%
Total	100%	100%	100%

Figure 24: Housing completions by number of bedrooms (all tenures)



Data not available for 2006-2008

²⁷ From the Exeter and Torbay Strategic Housing Market Assessment (SHMA) Update 2010: <http://www.exeter.gov.uk/index.aspx?articleid=10690>

Housing Quality

Building for Life is a methodology for measuring the quality of residential (and mixed use) developments. The assessment criteria were developed by the Commission for Architecture and the Built Environment (CABE) and are used to assess the annual Building for Life awards. Sites are scored when 10 or more dwellings are completed in any given year. In this AMR the sites and number of dwellings (phase) were completed during 1 April 2011 and 31 March 2012. In relation to number of schemes the city has achieved 36% Good or Excellent. In relation to the number of dwellings the city has achieved 17% Good or Excellent.

BFL score (Score out of 20)	Number of BFL sites	Number of dwellings on BFL sites*	Percentage of dwellings in BFL class
16/20 or more (Excellent)	1	18	4
14/20 to 15.5/20 (Good)	3	69	13
10/20 to 13.5/20 (Average)	4	219	43
9.5/20 or less (Poor)	3	208	40
BFL all scores total	11	514	100

*BFL only assesses housing developments with over 10 dwellings completed

Transport

Indicator	Data
Year on year increase in the number of bus passengers	Exeter city services and park and ride service a percentage increase in passengers of 2.1% ²⁸
Park and Ride Provision	Park and Ride on 3 out of 6 corridors into the city. No of spaces: Matford: 500 (plus 200 overflow); Sowton: 588 plus 8 disabled; Honiton Road: 660 plus 10 disabled and Digby: 500.
Number of public city centre car parking spaces	City centre parking spaces: 4,161 (includes 573 NCP parking spaces)

²⁸ Information from Devon County Council, Transport Co-ordination Service



Exeter City Council

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