

AtkinsRéalis



Developing housing scenarios

Exeter City Council

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Final

EXETER PLAN HOUSING & SCHOOL PLACES

Notice

This document and its contents have been prepared and are intended solely as information for Exeter City Council and use in relation to developing housing scenarios that will underpin further assessment of demand for school places as a result of housing delivery over the plan period

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INTRODUCTION

1. Introduction

1.1 Background

Exeter is a compact and densely developed city, serving as the capital of Devon and a key urban centre in the South West. As a constrained urban authority, it faces significant limitations in available land for development, which presents unique challenges for future growth and infrastructure planning. The city is also home to a major university, contributing to a substantial and dynamic student population that influences housing demand, service provision and the character of the city itself. These factors combine to shape Exeter's urban profile and inform the strategic considerations for its future development.

1.2 Exeter's Plan

The emerging Exeter Plan ("EP") sets out Exeter City Council's ("ECC") long term strategy for the delivery of sustainable development in Exeter between 2021 and 2041. It will form the statutory Development Plan and the policies it contains will form the basis of assessment for planning applications submitted over the plan period.

The EP sets out the overall scale of housing delivery and its spatial distribution, primarily through detailed site allocations setting out the number of new homes to be delivered on individual sites.. The strategy focuses on strategic brownfield sites, alongside some greenfield development, which is expected to deliver a mix of homes that includes a significant number of apartments and varied tenures. This flexible and diverse housing approach will have implications for the number and type of school places required. A key principle in ECC's approach to housing delivery is to maintain flexibility throughout the plan period by not prescribing a fixed housing mix in planning policies; instead, this is determined at the planning application stage and will help accommodate the distinct urban challenges described in section 1.1.

This approach means that developers are better able to respond to market conditions and particular housing needs, this inherent flexibility makes planning for the infrastructure needed to support housing growth more challenging. This is particularly the case for planning for school places where the number of children likely to reside in new homes is sensitive to factors including the size and type of properties being delivered. In turn, the likely housing mix (in terms of sizes, types and tenures of homes) that will come forward through the Exeter Plan will be shaped by various factors including the plan's brownfield-focused spatial strategy, the nature of the housing allocations in the plan, the context of the sites being allocated and of the city itself, as well as local housing needs and demography. While there may be various approaches to anticipating the nature of housing delivery over the plan period and the pupil yield it will give rise to, any approach needs to robustly take account of such factors in order to provide a rigorous approach to school place planning.

1.3 The Brief

This report draws on the factors referenced above to develop a clearer understanding of the potential demands for additional school places as a result of housing delivered over the plan period. This report does not question Devon County Council's (DCC) methodology regarding pupil yield ratios¹, rather it presents a range of potential housing scenarios to which DCC's methodology can be applied in order to gain a more comprehensive understanding of the possible education requirements for the plan.

¹ Devon County Council (2021) Education Approach for Developer Contributions

This report draws on the Exeter Plan policy framework, evidence relating to housing delivery and the technical evidence base that supports the EP to identify three possible housing scenarios that can inform a robust approach to planning for education infrastructure through the plan period.

In each scenario, a different approach is taken to anticipating the percentage of homes expected to be of a type that would not be pupil yielding, and then applying this percentage to the total number of homes being planned for over the plan period.

- The first scenario draws from an analysis of housing completions in the first three years of the plan period, assuming delivery through the plan period is reflective of completion data and reporting on housing delivery through the published Authority Monitoring Reports between 2021/22 and 2023/24.
- The second scenario draws from an analysis of Exeter's local housing needs assessment and is reflective of the requirements of draft policies in the housing chapter of the Local Plan.
- The third scenario considers factors including planning consents and pending applications/enquiries, representations made by landowners and developers during the Regulation 19 consultation of the Exeter Plan and insights derived through reviewing key parts of the evidence base.

1.4 Report Structure

To determine a series of housing scenarios that allow the potential range in demand for school places to be understood, the report considers the following issues:

- **Section 2:** The County Council's existing approach to school place planning and housing development
- **Section 3:** Key policies in the Exeter Local Plan
- **Section 4:** Relevant parts of the evidence base
- **Section 5:** Evidence relating to housing delivery
- **Section 6:** Feedback via statutory consultation on the Regulation 19 Plan

The above inputs have been used to determine three housing scenarios that consider different residential mixes and typologies that will influence the number of children who are likely to reside in new homes built over the plan period.



2. Education overview

The Education Act 2011, Childcare Act 2006 and Childcare Act 2016 establish a series of legal duties on Devon County Council (“DCC”) to ensure sufficient mainstream school places are available for all children up to the age of 18. This covers early years provision, primary and secondary education and continued learning between 16 and 18 years. For those with special educational needs, the Children and Families Act 2014 extends this requirement up to the age of 25.

In meeting these statutory requirements, DCC have set out a series of overarching principles in their approach to school place planning²:

- Ensuring that there are sufficient early years, childcare and statutory school age pupil places for every child in Devon
- Where possible, pupils should be able to attend and have a reasonable chance of gaining admission to their local school or early years provider
- To promote sustainable pattern of schools and early years provision and local schools and early years providers for children
- To support parental preference and expand successful and popular schools and early years providers
- To promote diversity and choice and support the most vulnerable learners

Demand for school places is influenced by a range of demographic factors, including birth rates and migration, and parental choice and a key contributor is the demand for new school places arising as a result of new housing development.

The National Planning Policy Framework (“NPPF”) sets out that strategic policies in Local Plans should set out a strategy for the provision of infrastructure, including education³, and that Plans should be clear where there is an expectation that developer contributions will be sought to deliver this infrastructure⁴. In accordance with the NPPF and the Community Infrastructure Levy Regulations⁵ (Reg 122), s106 planning obligations can be used as a mechanism to secure financial contributions towards the delivery of new or expanded schools where such contributions would be:

- Necessary to make the development acceptable in planning terms
- Directly related to the development; and
- Fairly and reasonably related in scale and kind to the development.

Devon County Council’s (“DCC”) Education Approach for Developer Contributions (2021) policy statement sets out that where a need for additional school places is identified as a result of new housing development financial contributions will be sought for:

² Devon County Council (2021) Education Approach to Developer Contributions, Page 10

³ National Planning Policy Framework (2025) Paragraph 20

⁴ NPPF (2025), Paragraph 35

⁵ NPPF (2025), Paragraph 58 and Regulation 122(2) of the CIL Regulations 2010 (as amended)



- Early Years, Primary & Secondary education (4 – 16 years)
- Special Educational Needs (SEN) (0 – 25)
- Post 16 Education
- School transport
- Wider children's services provision (subject to conformity with the statutory tests)

DCC's policy statement sets out that – subject to assessments of existing school capacity - financial contributions will be sought for all developments of **4 or more family homes**, with family homes defined as homes having 2 or more bedrooms. New homes with one bedroom and specialist housing types, such as student accommodation and housing designed for older people, are excluded from calculations on the basis that they're unlikely to have any resident children.

The number of pupils at different stages of education typically residing in new homes has been determined through periodic surveys of completed major housing developments and are set out as follows:

Pupil yields of each typical family dwelling

Age range	Education stage	Pupil yield per dwelling
0 - 1 yrs		0.07
2 – 4 yrs	Early Years	0.11
5 – 11yrs	Primary	0.25
12 – 16yrs	Secondary	0.15
17 – 18yrs	16+	0.06

The policy statement sets out that 2% of the school population requires specific SEN provision, in the main delivered through a local special school.

The policy sets out that when considering school place capacity within urban areas (such as Exeter) regard is given to capacity across all schools. Where a need for expansion is identified as a result of housebuilding, costs per pupil determined for new build and extension in accordance with DfE guidance, BCIS linked and introducing a weighting to reflect the cost of delivery in the South West.

This standards referenced above are directly applied to the housing scenarios presented in **Section 7** to establish the number of pupils that might be expected to be generated over the plan period as a result of new housing developments.



3. The Exeter Plan

The Publication Version of the Local Plan (“Regulation 19”) was published in December 2024. The emerging Local Plan will cover a 20 year period and sets out the long terms spatial strategy, vision and objectives that will shape growth in Exeter as well as the detailed planning policies against which planning applications will be assessed and determined.

The Plan has been developed to reflect the **Exeter Vision 2040**: a vision developed with key partners to drive inclusive, healthy and sustainable change in the City up to 2040. Alongside this Vision, Exeter was granted Garden City status in 2019 and the **Liveable Exeter** initiative was launched with the ambition of ensuring that new development – particularly new homes – contributed to the delivery of the 2040 Vision and the creation of successful, sustainable neighbourhoods in the City. The initiative focuses on eight transformational sites where high quality, sustainable homes would be delivered at scale to create a compact form of development aligned to Garden City principles. The Exeter Plan plays a critical in ensuring that new development is aligned to this vision and guiding principles.

3.1 Overall Housing Requirement

The Local Plan housing target has been determined through the application of the standard method (as of 2024)⁶, which points to a requirement for at least 642 new homes a year to meet identified local need – equivalent to 12,840 homes over a 20-year period.

Draft **Policy H1: Housing requirement** sets out an overall housing target of 13,975 homes to be delivered over the plan period, comprising:

Element of supply	Description	No. homes
Completions	Developments completed in the early years of the Plan (2021 – 2024)	2,311
Commitments	Extant planning permissions yet to be completed	5,289
Allocations	Sites allocated for residential development through the emerging Local Plan	5,369
Windfall	An allowance for housing through the plan period of as-yet unidentified sites	1,006
Total		13,975

On this basis, approximately 54% of the new housing to be provided through the plan period has already been delivered or has a planning permission that could be implemented. For this element of the supply, the composition of new homes – dwelling size, housing typology and tenure – and the location of new homes is all known. As such, the impacts of this new housing on demand for school places has been assessed and, where appropriate, financial contributions towards school expansion and/or new provision secured.

⁶ NPPF (2025) Paragraph 62

For the remaining 6,375 new homes (46% of total supply), those factors are as yet to be determined and will be influenced by factors including the emerging policy environment and market conditions through the plan period.

The housing trajectory anticipates that delivery through the first 5 years of the plan will largely comprise existing commitments and an allowance for some windfall development, while strategic and major residential allocations will account for delivery through the later phases.

3.2 Spatial strategy and housing allocations

The Plan submitted for Regulation 19 sets out a clear urban-focused spatial strategy with housing delivery concentrated predominantly within central Exeter, as illustrated in Figure 3.1 below. This approach proposes a pattern of higher-density developments, particularly within the city centre location and on smaller brownfield sites, where land constraints necessitate compact and efficient design solutions. This Plan – and draft Policy H15 (Housing density and size mix) in particular - is clear that increases in density are fundamental to making efficient use of land and increasing housing supply at sustainable locations, to ensure that development is aligned to other policy ambitions in the Plan and the Liveable Exeter principles.

Draft Policy H2: Housing allocations and windfalls identifies five strategic mixed use brownfield sites (“SBA”) to be the focus for housing growth and a further 33 housing allocations of varying sizes and locations, as outlined below. A full list of site allocations is provided in Appendix B.

Allocation type	Number of sites	Total supply
Strategic Brownfield Allocation	5	3,194
Large-scale residential allocation	5	1,321
Major residential allocation	23	823
Minor residential	5	31
<i>Total</i>	48	5,369

The five SBAs are the focus for the delivery of the majority of new homes through the plan period, accounting for 59.5% of delivery across all housing allocations and 23.2% of overall housing supply. A number of studies have been undertaken to explore the composition of development that might be delivered across these sites and the viability of development, these are outlined below.

Strategic mixed use brownfield sites

Site	Number of homes	Ref on figure below
SBA1: Water Lane	1,861	15
SBA2: East Gate	609	146
SBA3: Red Cow	442	146
SBA4: Exe Bridges Retail Park	201	142



SBA5: South Gate	81	46
Total	3,194	

The remaining 1,006 homes are assumed to be brought forward through windfall developments.

The distribution of site allocations is set out below in **Figure 3.1:**

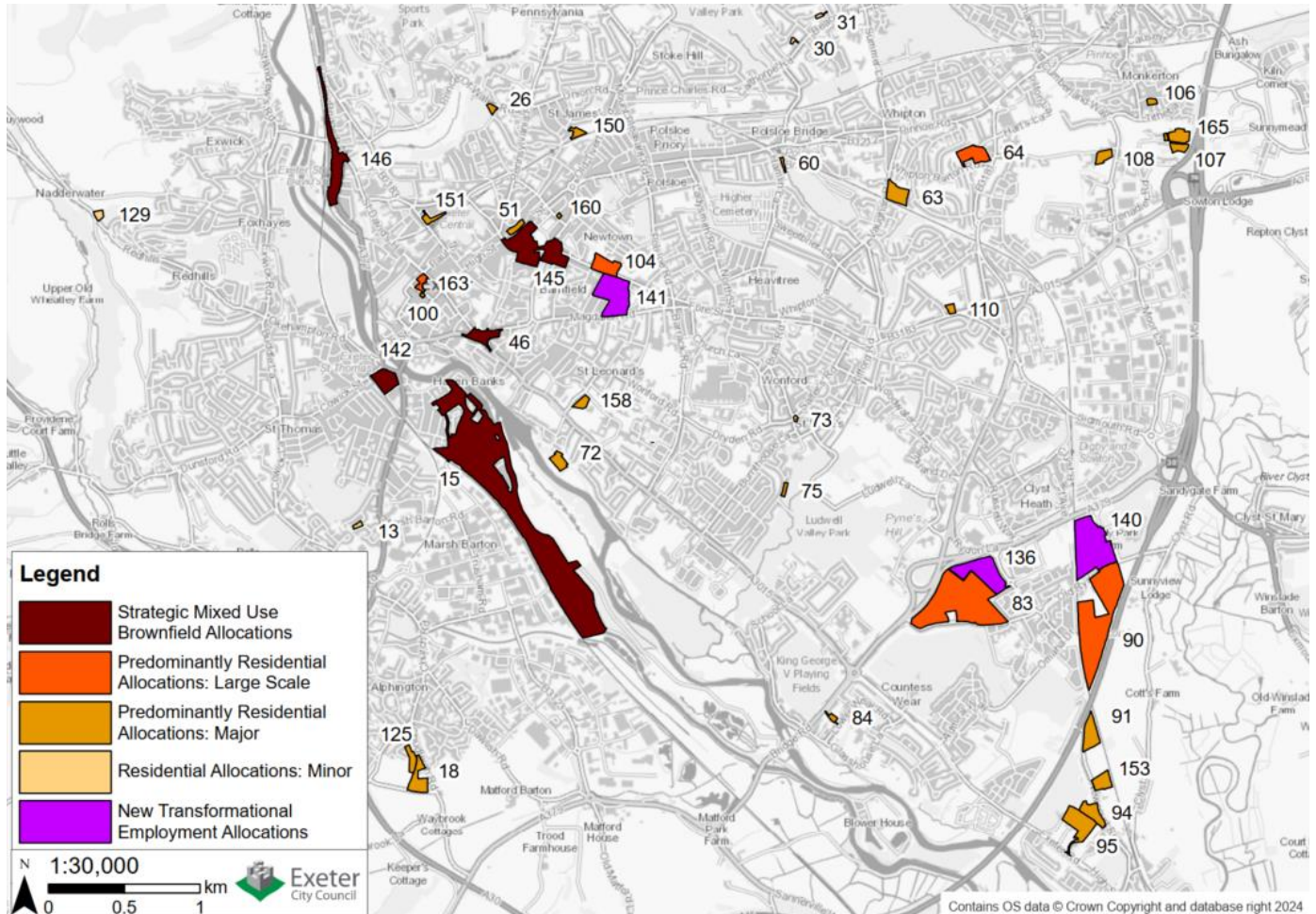


Figure 3-1 - Exeter Reg 19 Site Allocations

3.3 Detailed housing policies

Relevant housing policies that will influence the composition of housing developments and affect the demand for school places as a result of new housing are outlined below.

Housing Density

The spatial strategy supports the redevelopment of brownfield land, in accordance with Policy S1 and Paragraph 4.4. These sites, often constrained by size and location, naturally lend themselves to higher-density residential development, contributing to efficient use of land. The need to build at optimal densities in sustainable locations is clearly set out in draft policy H15.

Mixed-use developments are also encouraged within the strategy, particularly in central and accessible locations. To ensure commercial viability and support active ground-floor uses, these schemes typically require higher residential densities, which in turn favour the delivery of smaller housing units.

Specific housing density proposals are outlined below, following a review of the Exeter Density Study prepared by LDA Design (July 2021).

Housing mix

The spatial strategy supports the delivery of a balanced housing mix that responds to the diverse needs of Exeter's population. In line with Policy S1 (paragraphs 6.1, 6.82), policy H15 and policy D1, new residential developments are expected to provide a range of housing types and bedroom numbers, predominantly including 1, 2, and 3-bedroom homes. Rather than being prescriptive, the policy requires developers to have regard to the Local Housing Needs Assessment to determine an appropriate housing mix.

This approach ensures that housing provision is inclusive and meets the requirements of a broad demographic, including young adults, families, older people, students, and individuals with disabilities. By promoting a varied housing offer, the strategy aims to support long-term sustainability across neighbourhoods.

Specialist housing typologies

The Plan supports a diverse range of housing typologies to meet the varied housing needs of Exeter's population. This includes:

- **Affordable Housing**
Required on developments of 10 or more homes or on sites of 0.5 hectares or more, in line with policy requirements to support inclusive communities.
- **Build to Rent**
High-quality, self-contained homes purpose-built for private sector rent. These may form part of larger multi-tenure developments and contribute to housing choice and tenure diversity.
- **Co-Living Housing**
Designed to foster communal living and social interaction through shared spaces and facilities. Co-living developments are proposed to differ from HMOs in scale and the extent of communal amenities provided.
- **Custom and Self-Build Homes**
Homes commissioned or built by individuals or groups for their own occupation, allowing meaningful input into design and layout. Since 2016, demand has averaged around 20 serviced plots per year.
- **Homes for Older People**
Age-restricted accommodation ranging from general market housing to retirement/sheltered housing, extra care housing, and residential care/nursing homes, offering varying levels of support.
- **Supported Housing**
Accommodation for individuals with support needs, including children in care, young people leaving care, people with disabilities or mental health challenges, victims of domestic abuse, and those transitioning from hostels or refuges. There is a recognised shortage in Exeter in terms of quantity, range, and affordability.
- **Purpose-Built Student Accommodation**
Supports the growing student population of the University of Exeter, which has expanded significantly from 11,170 FTE students in 2006/07 to 27,280 in 2021/22.



- **Gypsy and Traveller Accommodation**

Provision is made to support the wellbeing and traditional lifestyle of Gypsies, Travellers, and Travelling Showpeople, while balancing the interests of the settled community.

- **Residential Conversions and Houses in Multiple Occupation (HMOs)**

The conversion of existing buildings into flats or HMOs can enhance housing supply.

- **Accessible Homes**

With a growing number of residents experiencing long-term illnesses or disabilities, accessible housing is essential to support independent living and reduce the need for relocation due to unsuitable accommodation.

3.4 Other policy considerations: Liveable Water Lane SPD

As the largest EP site allocation and the largest site within the Liveable Exeter initiative, the Water Lane site plays an integral role in shaping housing delivery through the plan period. The Liveable Water Lane SPD (September 2024) is a Development Framework and Design Code for the redevelopment of the Water Lane area, setting out a series of placemaking principles and guidance on issues including housing typology, density and urban design.

The SPD presents a vision for a mixed-use neighbourhood with a housing mix that caters for a broad demographic and responds to local needs. **The SPD specifically references the needs of families, key workers, people with additional needs, young people, students and older people.** The SPD is clear that no single housing typology should dominate and that successful, sustainable development will be contingent on a **varied approach to housing delivery.**

The Design Code sets clear parameters to deliver a distinctive urban context of higher density development at a human-scale⁷, typically comprising **mid-rise flatted developments of between 4 and 6 storeys, punctuated by taller buildings at key locations and some limited areas with townhouses and conventional housing.**

⁷ Liveable Water Lane SPD (2024) Page 65

4. Evidence base

As described in Section 3, the principal policies shaping housing delivery across the plan period are those relating to the expected form of development and how this demonstrates efficient use of land and those requiring that housing mix demonstrably responds to local needs. These issues are explored in detail as part of detailed evidenced base studies commissioned by the City Council to demonstrate that the housing strategy is **positively prepared, justified, effective** and **consistent with national policy**⁸. The key documents and the implications for housing delivery are outlined below:

4.1 Local Housing needs assessment

The NPPF sets out that the overall aim of strategic housing policies should be to meet an area's identified housing need by providing an appropriate mix of housing types for the local community⁹. Specifically, this should include consideration of the size, type and tenure of homes needed by different groups and this should be reflected in planning policy¹⁰.

The **Exeter Local Housing Needs Assessment ("ELHNA")**(Dec 2024)¹¹ identifies overall housing need and provides a detailed breakdown of the needs of specific groups. Housing need is presented on the basis of demographic projections attributed to census data and mid-year estimates, as well as an overall figure for objective need derived via the Government prescribed Standard Method¹². In addition to demographic considerations, the standard method also incorporates a range of factors that includes location, affordability and migration.

Both CLG's 2014 projections and the 2018 population projections indicate a steady reduction in average household size over the plan period coupled with an increase in population from around 130,000 to around 140,000¹³. Within this, young professionals (20-24, 25-29 and 30-34) and people over the age of 75 (75-79, 80-84 and 85+) are the age ranges forecasted to experience the largest growth¹⁴. Household growth is largely attributed to these age cohorts and as a result, the assessment also sets out that household growth will largely comprise single person occupancy and couples without children.

Figure 4-1 - net change in households (by age group) between 2021 and 2041¹⁵

Year	Household Type	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	TOTAL
Change	Single person	+40	+350	-130	-120	-200	+310	+930	+920	+2,100
Change	Couple without children	-10	+320	-70	-90	-300	+200	+990	+410	+1,500
Change	Families with child(ren)	-30	+330	-180	-60	-30	+10	+0	+0	+0
Change	Other households	+0	+250	+20	+50	+0	+60	+100	+80	+600
Change	TOTAL	+0	+1,200	-400	-200	-500	+600	+2,000	+1,400	+4,200

⁸ National Planning Policy Framework ("NPPF")(2024) Paragraph 36

⁹ NPPF (2024) Paragraph 61

¹⁰ NPPF (2024), Paragraph 63

¹¹ [Exeter Local Housing Needs Assessment](#)

¹² NPPF (2024) Paragraph 62 and Planning Practice Guidance

¹³ ELHNA (2024) Paragraphs 4.9 and 4.10

¹⁴ ELHNA (2024) Figures 23 and 24

¹⁵ ELHNA (2024) Figure 26



The biggest driver in changing households is single occupancy for people over 75 (+1850 of the +2100). While there is projected growth in households comprising families with children in the 25-34 age range, this is entirely offset by reductions in older age ranges. This provides evidence that large numbers of homes are unlikely to yield children and thus not generate pupil yield, therefore there is a limited impact on school place requirements.

The LHNA sets out that demographic projections indicate a need for an additional 4,624 new homes over the plan period, whereas the standard method identifies a need for **12,840 new homes** (equivalent to 642 new homes annually) over the same period. The LHNA attributes this difference in part to a large young population living in larger households (i.e. house shares), affordability issues preventing new households from forming and net-migration.

The LHNA further considers an appropriate size of dwellings – accounting for factors including overcrowding (and concealed households), family downsizing and affordability – and presents the following dwelling mix as best reflecting local housing need:

Table 4-1 - Housing need by tenure and no. bedrooms

	Affordable	Market	Total
1 bed	1,106	901	2,007 (15.6%)
2 bed	1,277	2,049	3,326 (25.9%)
3 bed	1,336	4,549	5,884 (45.8%)
4+ bed	436	910	1,346 (10.5%)
Sub-total	3,821	8,409	12,563
C2 dwellings		277	277 (2.2%)
			12,840

(Source: ELHNA 2024, Figure 48)

Other housing typologies

Housing for older people

Understanding the housing needs of older people is a core aspect of understanding local housing need, as set out in the NPPF. While increasingly there is a focus on retrofitting existing homes, there remains a need for a variety of housing products offering different levels of amenity and care for older people. This includes age exclusive housing, housing typologies registered with the Care Quality Commission (e.g. extra care and dementia care) and care homes.

While the Census and Mid-Year Estimates map out the age profile across Exeter, they do not provide the same level of insight on the range of accommodation occupied by older people. The LHNA points to records on housing options for older people collated by the Elderly Accommodation Counsel, who identify that there are currently 7,673 dwellings occupied by people aged 75+ and 1,723 specialist housing units, either with support or care. The LHNA compares a number of academic studies and industry best practice to benchmark a need for additional accommodation up to 2041 and identify that 880 additional specialist housing units will be required to meet the

needs of older people. The report makes a distinction between homes with elements of support, such as retirement living, and those with extra care provision. This equates to 7% of overall housing need.

This is presented below:

Figure 61: Modelled Need for Specialist Older Person Housing in Exeter 2021-2041

Form of Provision	Existing supply	Baseline rate per 1000 persons aged 75+	Benchmark range per 1000 persons aged 75+	Target rate per 1000 persons aged 75+	Gross need in 2041	Housing need 2021-2041
Market Housing	928	87	-	87	1,374	446
Housing with Care	217	20	6-23	20	321	104
Housing with Support	711	67	47-50	67	1,053	342
Affordable Housing	795	75	-	78	1,229	434
Housing with Care	53	5	11.55	8	130	77
Housing with Support	742	70	50	70	1,099	357
TOTAL	1,723	161	-	165	2,603	880
<i>Housing with Care - extra care or enhanced sheltered</i>	<i>270</i>	<i>25</i>	<i>-</i>	<i>28</i>	<i>451</i>	<i>181</i>
<i>Housing with Support - retirement living or sheltered housing</i>	<i>1,453</i>	<i>136</i>	<i>-</i>	<i>137</i>	<i>2,152</i>	<i>699</i>

Co-living

The LHNA identifies co-living as another house type to be considered, but with a small sample size of past delivery only identifies a small increase in co-living accommodation as being required a result of an increase in single young person households and continued affordability challenges. However, delivery evidence indicates that co-living is an emerging trend in Exeter, with The Gorge now operational, other schemes such as Harlequins already permitted, and further significant applications, like the Heavitree Road police station site, currently under consideration.

The demands for a number of other housing typologies are identified, including self-build, service families, essential local workers and accessible housing, though none of these housing products would have direct implications for school demand that would differ from conventional house types.

KEY POINTS

- + Demographic projections point to significant increases in demand for single person households
- + Population growth increases largely attributable to an increase in young professionals (25 – 34) and people over the age of 75, a factor in driving demand for smaller homes and specialist housing types
- + Need identified for approximately 2,007x 1-bedroom properties over the plan period (15.6% of overall need)
- + Need identified for approximately 880 specialist homes for older people, predominantly in supported living environments
- + Modest demand for co-living identified, but this affected by a limited sample size of projects delivered



4.2 Student Housing Needs Assessment

The Student Housing Needs Assessment¹⁶ reviews census data and trends in university student intakes to identify student housing needs and the way in which student numbers can be understood and integrated into overall housing need inline with the NPPF and PPG.

The assessment sets out that students enrolled at the University of Exeter have gradually climbed year-on-year since 2006/06: from 11,170FTE in 2006/07, to 17,354 in 2014/15 and 27,276 in 21/22; a cumulative increase of 14,818 students.

A review of council tax (exemption) records suggest that the student population has a strong geographical focus (86% of exemptions) in the three Wards in closest proximity to the University Campus: **Duryard and St James, Newtown and St Leonards and St Davids**. Exemptions data covers university owned stock, PBSA and households living in private houses.

The assessment highlights that PBSA continues to grow as a housing typology, with 4,433 students recorded as living in communal accommodation in the 2011 Census and 8,129 in 2021; the report speculates that this figure may be higher were it not for the Covid-19 pandemic leading to a significant increase in remote learning¹⁷. Market interest for additional PBSA tends also to be focused in the three Wards referenced above, with some evidence of high demand in the neighbouring Heavitree Ward to the east.

The net impact of student migration in recent years is incorporated within the standard method for objectively assessed housing need and so historic increases in the student population are an inherent component of the overall housing targets set out in the EP. Between 2007/08 and 2017/18, the assessment sets out that growth was equivalent to 750 students per annum¹⁸ and that without growth in PBSA over this period, then over 1,000 additional private dwellings would have been needed to house students¹⁹. This highlights the importance of the continued provision of specialist housing typologies for an increasing student population through the plan period.

KEY POINTS

- + Strong local need with consistent increases in student population c750 students per annum evidenced through census data and annual records of pupils enrolled at University of Exeter
- + Student migration incorporated within the standard method and so housing targets set out in the plan account for increases in student population
- + Around 64% students reside in PBSA, with clustering of new developments in Wards closest to University Campus. Exeter has stated ambitions to increase this proportion of students up to 75%

¹⁶ Opinion Research Services (“ORS”)(2024) Greater Exeter: Student Housing Needs Assessment

¹⁷ ORS (2024) Student Needs Assessment, Paragraph 21

¹⁸ ORS (2024) Student Needs Assessment, Paragraph 25

¹⁹ ORS (2024) Student Needs Assessment, Paragraph 29

4.3 Local Plan Viability Assessment

The Local Plan viability assessment²⁰ tests the viability of a range of housing typologies, including:

- **Residential for sale:** a variety of site sizes and both brownfield and greenfield locations
- **Housing for older persons:** retirement, extra care and care home
- **Built to Rent**
- **Purpose Built Student Accommodation (PBSA)**
- **Co-living** – single person occupancy with shared facilities

Value areas

The Assessment comprises a residual valuation of typical housing types in different locations, in accordance with industry best practice. The assessment identifies three distinct value areas based on land registry data and market transactions: Exeter Central, Exeter Edge, Exeter Outer.

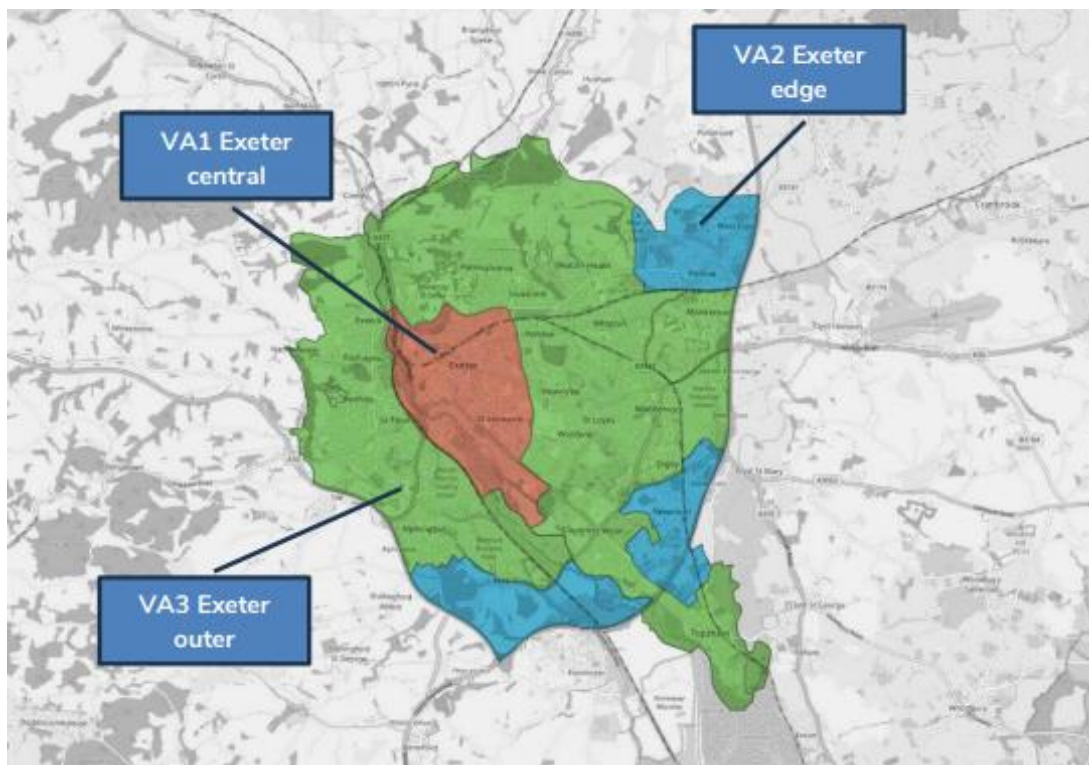


Figure 4-2 - Exeter Value Areas

By reviewing the Local Plan allocations, the assessment sets out that housing delivery will be distributed across the value areas as follows:

- **Value Area 1 (Central)** – 4,028 (75%)
- **Value Area 2 (Edge)** – 311 (6%)
- **Value Area 3 (Outer)** – 1,025 (19%)

Total: 5,364 homes

In broad terms the viability assessment identifies that the highest values for all housing typologies are achievable in Central, followed by the 'pocket' edge locations and then the Exeter Outer. Flatted developments are modelled as the dominant housing typology in Central, but with the exception of a limited number of affordable flats, lower density housing is dominant in Outer and Edge.

- The five Strategic Brownfield Allocations (SBA) identified in the EP are all within **Exeter Central** and the assessment anticipates a range of flats for sale, Built to Rent, co-living and PBSA will be delivered in this area. The assessment identifies challenging viability for small flatted schemes, but medium and large high density flatted schemes, Built to Rent, Co-living and PBSA are all modelled as being viable against a range of benchmark land values. The report highlights that applications for a range of house types continue to progress through the planning system as evidence of the viability position.
- In **Exeter Edge**, there is a strong viability position for lower density greenfield housing developments, even with higher affordable housing requirements.
- In **Exeter Outer**, there is a more mixed viability position, with challenges on small and medium brownfield sites and medium greenfield where AH requirements are triggered. The viability position of larger scale, high density housing schemes is improved where the dwelling mix includes houses alongside flats.

Specialist older person housing (sheltered, extra care and care homes) is mostly identified as being unviable when measured against a range of benchmark land values; mid-sized sheltered accommodation is an outlier and is modelled to be viable.

The report concludes that for the majority of house types are viable across the different areas – and particularly in those areas in which the EP focuses housing growth. The report does identify that the viability of individual schemes can be improved by including housing alongside flats as part of a varied housing mix. While the report does not incorporate detailed site specific costs in the residual valuations, it concludes that the viability position for high density flatted schemes and other housing typologies is such that there is headroom to address site specific abnormal costs. Where site specific abnormal costs are particularly high, the stated expectation is that the benchmark land value would need to reflect this additional cost.

KEY POINTS

- + Medium/high density flatted developments, PBSA and co-living all viable across the Exeter Central area, which contains the SBAs and other major development sites
- + Conventional lower density housing schemes have a strong viability position in the Exeter edge locations, which includes some of the major residential allocations and planning permissions identified in Section 5
- + Specialist older person housing appears unviable relative to a number of benchmark land values and so is a market that may need support if identified needs are to be met

4.4 Density Studies

The Local Plan is supported by a number of detailed evidence base documents that explore the existing urban form, local character and important local views in order to develop a clear and robust understanding of local context and to identify areas for potential development and intensification.

The Exeter Density Study²¹ identifies distinct areas with common housing typologies and building forms and draws on policy and best practice to identify broad areas where increased densities could be achieved. Further detailed studies examine local views²² and provided a more focused assessment of how constraints shape opportunities for higher densities at some of the major site allocations proposed in the draft plan²³. These studies inform the HELAA that supports the Exeter Plan and the site capacities of individual allocations.

Exeter Density Study

The density study identifies historic patterns of development that have contributed to the current urban form across Exeter, including low density suburban development, expansion along radial routes and newer neighbourhoods around local stations. It defines a **city centre area** with examples of mid-rise blocks of flats / student development; an **urban area** of historic neighbourhoods undergoing change with sub-division of large properties and infill; though relatively limited opportunities for significant increases in density; leafy character retained. Variations in character; and **urban fringe**, dominated by post war suburbs, characterised by generous plots; though some change to the east aligned to areas of employment growth.

The study recommends a significant uplift in densities in the City Centre and sets out a series of general principles to shape sustainable growth:

- An increase in the city centre population density to support urban vitality.
- Focus higher densities around public transport and strategic cycle routes.
- Enhanced local centres and linked villages by supporting their vibrancy and distinctiveness.
- Align development with Exeter's carbon neutrality goal for 2030.

In terms of housing typologies, the study states that this model will lead to higher density mixed-use developments being prioritised over townhouses and more typical suburban forms of development. While the City Centre is presented as the focus for the highest densities, a cascading approach is set out across different character areas and growth locations (see Fig 4-3). The report recommends minimum densities of around 150 dwellings per hectare (dph) in the city centre, 120dph at Exeter St Davids Hub and Water Lane and 100dph/80dph at a series of transport nodes and local centres including St James, St Leonards, Heavitree, Whipton and Newcourt.

The study directly informs the spatial strategy presented in the Local Plan and the SBAs and major residential allocations have a strong correlation with the areas identified as suitable for high residential densities. Residential developments at these densities would typically support the delivery of 1, 2, and 3 bedroom apartments, rather than traditional family housing, reflecting a focus on smaller household types.

²¹ LDA Design (2021) Exeter Design Study

²² Allies & Morrison (2024) Views, density and heights study: Stage 1 – Skyline and views report

²³ Allies & Morrison (2024) Views, density and heights study: Stage 2 – Sites report

Views, density and heights study:

The Stage 2 Sites Report considers the constraints identified at Stage 1 (Skyline and Views) and applies them to six key locations within the city centre with the potential for regeneration and major development to inform more detailed guidance on the massing, density and heights that might be feasible. East Gate, South Gate, West Gate and Red Cow are allocated as SBAs in the Exeter Local Plan and further detail on these particular locations is set out below. References to site capacities are indicative and reflective of the level of analysis at this point in time, they have subsequently been refined through the detailed work completed as part of the HELAA.

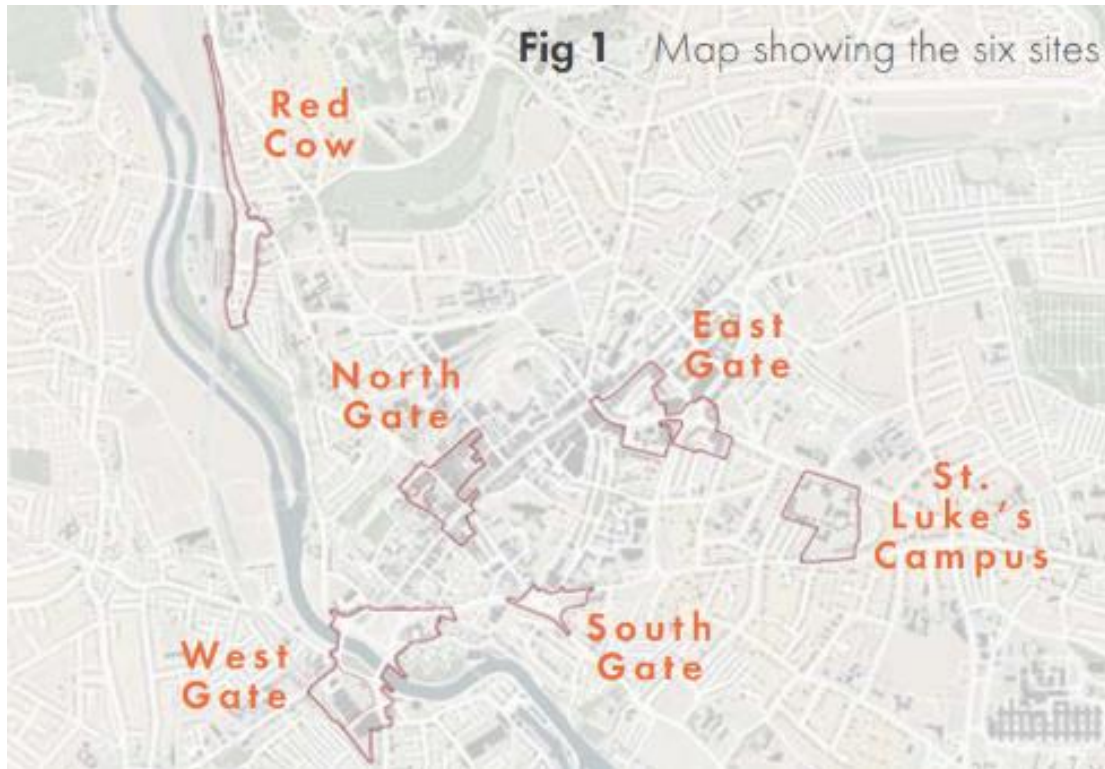


Figure 4-3 - Density Study Growth Areas (Stage 2 Sites Report, page 4)

East Gate

The study anticipated that the site would have capacity for approximately 832 homes, equating to a residential density of 136 dwellings per hectare (dph). This reflects a high-density urban development approach, consistent with the spatial strategy. There is potential for tall buildings of up to 10 storeys on the eastern side of the site. Along Sidwell Street, the frontage could reasonably accommodate buildings of up to 6 storeys, with scope for taller elements rising to 8 storeys to support housing delivery.

Design sensitivity is required along the southern boundary, particularly in relation to the existing context around Denmark Road and Dix's Field. Here, building heights should step down to reflect prevailing scales, and the building line should be set back to preserve the character and amenity of the surrounding environment. For these contextual reasons, the density is slightly below the 150dph benchmark identified in the 2021 Density Study.

South Gate

The study anticipated that the site could deliver approximately 81 homes, equating to a residential density of 54 dph. While significantly below the 150 dph benchmark identified in the Exeter Density Study Analysis 2021 for city centre locations, this medium density approach is shaped by the need to preserve key views of both the Cathedral

and St Leonard's Church, resulting in lower building heights across the site. Despite this, indicate building heights of between 4 and 6 storeys would still point to a compact form of flatted development.

West Gate (focusing on Exe Bridges Retail Park)

The study anticipated that the site could deliver approximately 201 homes, equating to a residential density of 88 dph. Building heights across the site need to balance placemaking principles at a gateway location with the sensitivities of proximity to heritage assets. The site's northern section was identified as having potential for development of up to 6 storeys, with scope for a taller element reaching 8-storeys in appropriate locations. The site's southern section has a sensitive setting being adjacent to the historic station, which means building heights should be limited to 4 storeys, with potential for 5-storeys in selected areas where it can be accommodated without compromising heritage value. In addition, the expectation that ground floor space will be retained for retail use further limits the site's residential capacity. As a mixed-use town centre site, the development is likely to comprise flatted development.

Red Cow

The study anticipated that the site could deliver approximately 455 homes, equating to a residential density of 120 dph. If the southern portion of the site is redeveloped as student accommodation, the overall number of units could increase to a potential total of 484 homes.

There is opportunity for mid-rise development adjacent to the station, with the tallest elements positioned to the north of the existing car park site to minimise visual impact. It is suggested that development within the sites southern section should generally be limited to 6 storeys to preserve views across the river valley. On the eastern edge, building heights should be reduced to 4 storeys to respect the existing 2 storey residential context.

Towards Cowley Bridge Road at the northern end of the site, development should be sensitive to neighbouring communities, with building heights limited to 3–4 storeys to ensure appropriate scale and integration.

The proposed site has the potential to deliver approximately 120 dph, which is below the 150 dph benchmark identified in the Exeter Density Study Analysis 2021 for city centre locations. There is potential to increase this density through the redevelopment of the southern portion of the site as student accommodation. The scale and nature of this type of development, combined with the likely introduction of purpose-built student housing, further reduces the potential for delivering family homes.

Summary

It can be concluded that while these city centre sites fall below the minimum housing density benchmark of 150 dph set out in the Exeter Density Study Analysis 2021, they are capable of delivering a higher density of development consistent with the ambition to focus housing delivery around strategic, brownfield locations. The densities and capacities identified reflect site-specific constraints, including height restrictions to preserve key views and the inclusion of ground-floor retail provision and are a robust starting point for further testing at the planning application stage.

Of the five strategic mixed-use brownfield sites identified under Policy H2, which contribute the majority of expected housing delivery, the development capacity of four is considered in the Stage 2 density study. This analysis demonstrates that if development is to represent an efficient use of land that it will comprise flatted developments and alternative forms of housing, including student housing and co-living models, which are more compatible with the urban context. Additionally, factors including the need to integrate complimentary uses, typically at ground-floor level in mixed-use blocks, will likely be a limiting factor in the delivery of traditional family housing. Collectively, these issues will shape the pattern of development throughout the principal site allocations, contributing to the delivery of an inherently urban and more diverse housing mix. This pattern of development and the housing types delivered will generate a more limited demand for new school places relative to typical family housing.



KEY POINTS

- + A clear spatial strategy is established through the Exeter Density Study that identifies areas suitable for regeneration and intensification having considered their the prevailing character and sustainability of locations
- + Capacities and built forms are tested to reflect contextual factors and demonstrate that the strategy is sound and that delivery is feasible.
- + High density flatted developments will be the dominant building form in order to make the most efficient use of land
- + Detailed studies assume alternative housing typologies, such as PBSA and co-living, that are well suited to building at higher densities



5. Housing Delivery

While the studies assessed above forecast how housing delivery might respond to particular housing needs and contextual factors, reviewing housing completion data, recent planning permissions and current planning enquiries provides valuable insight around current day market demands and the type of housing actively being pursued by developers across Exeter.

5.1.1 Completions

The housing supply set out in the Local Plan includes 2,311 homes already completed through the earlier years of the plan period. The Exeter Planning Policy Team have carried out a more detailed analysis of the composition of housing developments completed in this period, as presented below:

Year	House size						
	1 bed	2 bed	3 bed	4 bed	5+bed	Total	Overall total
2021-22	48	134	192	120	35	529	1502
2022-23	32	105	139	118	19	413	
2023-24	67	172	168	135	18	560	
Total completions	147	411	499	373	72		
% of overall total	9.7%	27.4%	33.2%	25%	5%		

The analysis identifies that **9.7% of conventional housing** (use class C3) delivered over the initial 3-year period of the Exeter Plan was 1-bedroom housing that would not generate any need for additional school places. Importantly, if specialist housing typologies, including purpose built student accommodation (PBSA) and older people's housing, are included then the proportion homes that would not yield additional school pupils jumps to **36% of the total residential accommodation completed in this timeframe**

5.1.2 Planning applications

A review of major planning permissions over the early years of the plan period and pending applications has been carried out to understand the housing mix and housing typologies being proposed in different parts of the City. The Local Plan housing supply includes 5,289 homes that already have planning permission. Published AMRs identify 3,575 new homes being consented between 2021 and 2024; increasing to 4,562 new homes if PBSA is included – a major contribution equating to an additional 28% housing.

Information pertaining to planning permissions, planning applications and, in some cases, pending pre-application enquiries are presented using the same breakdown of housing allocations included in draft Policy H2.

Strategic mixed use brownfield sites

Site	Status	Details
Water Lane	23/1007/OUT Resolution to grant pending s106	4x development scenarios presented in ES – all a combination of residential dwellings, student housing and non-residential uses:

		Scenario 1: up to 920 dwellings & 250 student beds Scenario 2: up to 900 dwellings & 290 student beds Scenario 3: up to 980 dwellings & 250 student beds Scenario 4: up to 950 dwellings & 290 student beds Building heights parameter plan indicates heights of between 5 and 8 storeys across the site, typically with non-residential ground floor uses and flats above. The development will be a high-density flatted scheme with a variety of house types.
	22/1145/FUL Planning permission granted	239 flats (Build to Rent) and 184 co-living bedspaces. 132x 1 beds (55%), 75% with co-living studios
East Gate: Clarendon House	Pre-App enquiry	<i>Clarendon House is located at the junction of Heavitree Road and Western Way and forms part of the East Gate Strategic Site Allocation (SBA2). It is anticipated that Clarendon House will comprise 125 homes of the 609 homes to be allocated at East Gate (20.5%).</i> <i>A pre-application enquiry for a major development comprising 300 bedspaces of PBSA is currently pending in a development of up to 10 storeys. While this does not indicate the City Council's support for an alternative housing typology on the site, it nevertheless a strong indicator of developer aspiration.</i>

KEY POINTS

- + High density flatted developments are already coming forward in the SBAs and this will lead to the delivery of a high number of studio and 1-bedroom flats that do not generate additional demand for school places. The current permission at Water Lane includes 75% 1-bed properties as built-to-rent and self-contained studios proposed as co-living accommodation.
- + There is a clear demand for PBSA in these locations, evidenced through the outline permission (pending s106) at Water Lane and initial pre-application discussions around development at East Gate. This will further reduce the demand for school places as a result of major developments in the SBAs.

Predominantly residential sites: Large Scale

Site	Status	Details
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Old Rydon Lane (Sandy Lane Farm)	23/1532/OUT Planning permission granted	Up to 158 new homes Part of a much larger development adjacent to Newcourt station. Illustrative masterplan states 81x 1 and 2 bed flats (51%). In the absence of a more detailed breakdown this is assumed to reflect the below scheme at St Bridget Nurseries and be 28x 1 bed (18%) and 53x 2 bed (33%).
St Bridget Nurseries	23/1320/OUT Allowed at Appeal	Up to 350 dwellings (net density of approx 40dph) 62x 1 bed units (17.7%)
Heavitree Road Police Station	25/0676/FUL Pending consideration	Application pending for major co-Living and PBSA development comprising: 414x co-living units and 399x PBSA bedspaces
Mary Arches	25/0781/FUL Pending consideration	Demolition of multi-storey car park and delivery of a co-living development comprising 309x self-contained studios and ancillary facilities/amenities for residents

KEY POINTS

- + Clear demand for alternative housing typologies in city centre locations, specifically PBSA and Co-living, which are likely to lead to a significant reduction in demand for school places
- + Large greenfield developments delivering conventional housing (use class C3) with 1-bed flats as part of a varied mix of dwellings equivalent to 18%. This represents an increase in the proportion of 1-bed flats relative to completions in the early years of the Plan.
- + Building heights and densities broadly consistent with those identified in the evidence base studies

Predominantly residential sites: major

Site	Status	Details
Land off Newcourt Road, Topsham	24/1425/FUL Pending consideration	23x residential units, including 4x 1 bed (17%)
Station Masters House, New North Road	24/0870/FUL Pending consideration	6-storey block comprising 11x units, all 2 bed+



Topsham Golf Academy	24/0785/FUL Pending consideration	54x houses as part of a phased greenfield development adjacent to the University of Exeter Sportsground. All homes are all 2 bed+
Exeter Squash Club	See representations	Ambitions for development of self-contained studio accommodation
Summerland St	EQ	Redevelopment of former nightclub and garage site. Initial discussions around delivery of major co-living or PBSA scheme.

KEY POINTS

- + Smaller major developments identified across greenfield and brownfield sites and this distinction influences housing mix and typology
- + Greenfield/suburban sites more likely to be conventional housing with a tendency for lower levels of 1-bedroom units and a higher proportion of family homes than those in more clearly urban areas
- + However, there remains clear evidence of studio and 1-bedroom units delivered as part of housing mix

Other non-allocated sites

Site	Status	Details
Land at Barley Lane	25/0957/OUT Pending consideration	Greenfield development of up to 65 new homes. No mix identified at outline application stage.
26-28 Longbrook Street	25/0318/FUL Pending consideration	108x self-contained studios (PBSA) Brownfield redevelopment in city centre location close to junction of Longbrook Street and Paris Street (B3183). Follows similar permission on the same site (17/0750/FUL).
Wonford Inn, 17 Wonford Street	25/0228/FUL Refused 24/0266/FUL Refused	9x flats (ALL 2 BEDS) 16x flats (6x 1 bed, 10x 2 bed) Refused for loss of comm facilities & overdevelopment



Clifton Hill Sports Centre	25/0069/MP	<i>Initial pre-application discussion around the provision of 71 units of extra care housing at site of former sports centre</i>
Exmouth Junction: Old Coal Yard	23/1425/FUL Pending consideration	Major redevelopment site NE of City Centre. Part of wider Exmouth Junction Site
Exmouth Junction: Gateway Site, Prince Charles Road	23/0736/FUL Planning permission granted	92 units proposed, of which 49x 1 bed (53%) 53 units proposed, of which 27x 1 bed (51%)
Stoke Hill	23/1380/OUT Refused	Greenfield development in North Exeter 85x units, of which 65x 1 or 2 bed flats (76%)
Land south of Blakeslee Drive	23/0584/OUT Planning permission granted	50x homes 5x 1 bed (10%) Forms part of Core Strategy allocation (the Royal Navy Store Depot) subject to outline planning permission 02/1402/OUT; redevelopment completed in 2019. This plot was identified as a new primary school, which is no longer required.
Land at Summerland Street	23/0490/FUL Planning permission granted	City Centre location. 145x bed-space co-living development in a 6-storey block
Paternoster House, North Street	23/0326/FUL Planning permission granted	City Centre location close to Guildhall Shopping Centre. Brownfield development that converts and extends existing building 28 apartments, 6x 1 bed (21.4%)
Pendragon Road	22/0511/OUT Pending consideration Planning permission granted	Greenfield housing development in West Exeter Up to 100 homes All 2 bed +

KEY POINTS

- + Variety in housing mix with clear distinction in locations where flatted developments and housing are focused



- + Higher proportions of 1-bed units in city centre locations, across large scale and smaller scale major housing developments
- + Higher density co-living and PBSA developments focused in city centre locations

5.1.3 Regulation 19 Consultation

The Publication Draft Local Plan (Regulation 19) was subject to statutory consultation between December 2024 and February 2025. Consultation responses have been reviewed relating to the overall spatial strategy, housing policies and the principal site allocations advanced in the Local Plan. While the detail below does not necessarily reflect the City Council's position, it is instructive in understanding the scale and type of development that landowners and developers are most likely to pursue.

Spatial Strategy

Only eight comments were directly attributed to the spatial strategy. Representations were generally supportive of the spatial strategy and endorsed the Liveable Exeter principles (SP2), particularly the pursuit of higher densities and building heights in sustainable locations. More explicit support for a variety of housing types, particularly student accommodation, was raised by respondents. Some concern was raised about the viability of development in the principal locations for development identified in the Plan, with reference to recent planning applications in the area. Comments suggested that the allocation of more greenfield housing sites is required as part of the mix.

Policy H2: Housing allocations and windfalls (strategic policy)

Water Lane (Site 15)

A number of the key sites within the Water Lane SBA are already subject to planning applications and this may have contributed to a limited response on the largest SBA advanced in the plan. National Grid, a major landowner in the SBA, submitted general support for the draft policy, noting that the city centre location would likely attract young professionals and students, but not necessarily families

East Gate (Site 145)

The East Gate SBA policy was supported by a number of landowners with endorsement for the focus on brownfield redevelopment. Several responses advocated that references to site capacities should be **expressed as minimums** so that proposals for higher densities and building heights could be explored at the planning application stage. This includes major landowners such as the Guinness Partnership. The clear expectation was that developments would comprise flats, but responses also emphasised the need for the SBA to cater for a **variety of housing types, explicitly PBSA, co-living and Build to Rent**.

Exe Bridges Retail Park (Site 142)

Representations set out that the site is performing an important town centre function and that while development to secure an uplift in residential units later in the plan period could be achieved, the policy should not undermine the retail function. This points to a mixed-use flattened development.

Red Cow (Site 146)

The Red Cow SBA was supported by the University of Exeter, a major landowner in the area. They noted the presence of some existing PBSA and requested an explicit reference to the opportunity for **additional student housing in this area**. Other private landowners submitted comments support the policy ambition to **optimise density, noting the opportunity for a significant increase in homes**.

South Gate (Site 46)

Comments were received that the plan for the site could be more ambitious; presumably with higher housing numbers being delivered.



Heavitree Police Station (Site 104)

Representations submitted by the developer request a flexible allocations that sets the **target of 350 homes as a minimum that may be exceeded, particularly if other housing typologies are provided. Explicit support is requested for PBSA and Co-Living.** A previous application on the site for these uses was refused, but an application for 399 single occupancy PBSA studios and 414x Co-Living units is currently pending (25/0676/FUL).

Mary Arches Multi-Storey and Surface Car Park (Site 163)

Comments submitted on St Mary Arches suggest that the **capacity of 154 homes should be expressed as a minimum** and that explicit support should be provided for **Co-Living** as an appropriate housing typology

Rougemont Switching Centre (Site 151)

Representations on behalf of landowners were supportive, outlining that known constraints on the site could be addressed. It was highlighted that existing utilities infrastructure across the site will be surplus to requirements later in the plan period and that a larger developable area will be available as a result. **As such, the stated capacity should be increased to reflect a minimum of 100+ apartments or 300+ student rooms.**

Land at Exeter Squash Club (Site 26)

Representations submitted by the freeholder are supportive of the residential allocation and reference emerging proposals to deliver a replacement squash club alongside **40+ self-contained studios** – comparable to development on land opposite at the Cricket Club (which provided 159 student bedspaces in a series of blocks up to 5-storeys).

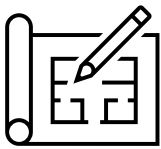
KEY POINTS

- + Broad support for spatial strategy predicated on redevelopment of brownfield sites in sustainable locations
- + Greenfield housing still has a role as part of overall mix
- + High density flatted developments – capacities as minimums to be subject of detailed design
- + Flexibility in housing typologies with clear demand for PBSA and co-living
- + A combination of higher densities and variety in housing typologies will likely lead to increased delivery of smaller units on allocated development sites
- + Sites referenced above account for a considerable proportion of overall housing delivery (3,832 – 71% of the overall supply via allocation) and will have a significant bearing on demand for school places. It is clear that higher density flatted development and specialist housing types will form a significant part of housing supply – reducing the number of new homes that will yield new school aged children.



6. Housing scenarios

The above sections detail a range of factors that will influence the scale, location and type of housing that is expected to come forward over the plan period. All of these factors will influence the dynamic between housing delivery and demand for additional school places and, specifically, the number of homes anticipated to yield additional school-aged children. The principal themes, trends and conclusions from each aspect of the analysis are presented below and have been used to identify three distinct scenarios for the composition of housing development over the plan period.



Spatial Strategy and policy environment

- The Exeter Plan sets out a clear vision, objectives and a spatial strategy that is focused on delivery within urban Exeter, prioritising brownfield redevelopment and a pattern of development that is heavily predicated on building at higher densities to make the most efficient use of land. This will naturally lead to a predominance of flatted developments and a higher proportion of 1-bedroom homes than has been delivered in early versions of the Plan and in recent years.
- The Plan explicitly supports the delivery of a range of housing products, including student accommodation, older people's housing, built to rent and co-living. These housing types will contribute no – or very limited – demand for new school places.



Evidence base – density

- The spatial strategy is informed by a series of density and character studies that identify areas suitable for regeneration and intensification having considered their prevailing character and sustainability. Further, the broad development capacities and built forms achievable at strategic allocations have been tested to reflect contextual factors and demonstrate that delivery is feasible. This has informed the HELAA, the capacities of individual site allocations in the Exeter Plan and sets a platform for a more detailed assessment through the development management process.



Evidence base – housing need and viability

- The changing demographics of Exeter highlight increases in single person households, with particular growth in the numbers of young professionals and people over the age of 75. This is increasing the demand for smaller homes and specialist housing types.
- Need is identified for approximately 2,007 1x bedroom properties over the plan period – equivalent to 15.6% of overall housing need. An additional need is identified for approximately 880 specialist homes for older people with on-site access to varying levels of support and care.
- The small sample size of recently completed co-living developments means it is difficult to make strong inferences around the strength of demand, but this may emerge as a more popular housing typology over the plan period.
- Census data and student rolls indicate a steady increase in the student population equivalent to 750 students per annum over an extended period of time. This is driving demand for purpose built student accommodation in those wards closest to the

University Campus. The University has a stated ambition of increasing the proportion of students residing in PBSA up to 75% over the plan period.

- Around 75% of the proposed housing allocations are located in the Exeter Central area for viability testing. In this area, higher density flatted developments, PBSA and co-living/build to rent products are viable against a variety of typical benchmark land values. Suburban housing and family homes tend to be more viable in fringe locations. Viability can be improved by providing variety of housing types.



Consultation responses

- Broad support for a spatial strategy predicated on the redevelopment of brownfield sites in sustainable locations.
- Flexibility sought in the type of housing to be provided, with developers/landowners setting out clear support for PBSA and co-living/build to rent products
- Site capacities should be acknowledged as minimums that may be exceeded subject to detailed design development. This view was particularly evident across the largest residential site allocations
- These views demonstrate an ambition to maximise housing numbers through the provision of higher density developments.



Housing delivery

- Planning permissions and pending pre-applications enquiries demonstrate a significant number of 1-bedroom flats, PBSA and co-living studios as part of high density flatted developments in the SBAs and other city centre locations. This will limit the proportion of new homes expected to house school-aged children.
- Building heights and densities being achieved are broadly consistent with those identified within the evidence base studies and subsequent work exploring site capacities in the HELAA.
- While greenfield developments with large numbers of family homes continue to be delivered on the urban fringe, recent planning permissions demonstrate higher proportions of 1-bedroom properties than have been identified as part of completions in the early years of the plan period.
- Smaller sites contribute a more varied mix of housing products that is influenced by their immediate context. Demand exists for PBSA and other specialist housing types on an ad-hoc basis where there sites are in close proximity to particular university facilities or other amenities that might attract a particular demographic.

In applying these factors to housing delivery to understand the likely number of school aged children, reference is made to the overall housing target expressed in the Plan and also to the **total number of homes** to be delivered via **housing allocations and windfalls**. This distinction is made on the basis that housing completions and planning permissions will have already secured necessary investment in additional school places through their planning consents where a need has been identified. The total number of new homes to be provided over the plan period is **13,975**, while the number to be delivered via housing allocations (5,369) and windfall sites (1,006) amount to **6,375 homes**.



Scenario 1: Completions-led

This scenario assumes that delivery through the plan period is reflective of completion data set out in section 5 and reporting on housing delivery through the published Authority Monitoring Reports between 2021/22 and 2023/24.

The City Council's analysis identifies 1,502 dwellings completed between 2021/2022 and 2023/24 and that the housing mix of completed developments included 147x 1-bedroom homes, equivalent to 9.8% of overall supply. The AMRs identify the completion of 1,368x student bedspaces in PBSA over this period. Applying a ratio of 2.4 student bedspaces to a single dwelling²⁴ equates PBSA delivery to 570 dwellings over this three year period. In addition, the AMR 2023/24 identifies the completion of 133x co-living units in the form of studio flats, which the Exeter Plan is clear are counted on a 1:1 basis. No co-living completions are identified in earlier years, though there is evidence of planning permission being granted for a larger number of co-living developments.

Overall housing supply between 2021/22 and 2023/24: 2,142 dwellings

- 1,502 dwellings including 147x 1-bedrooms – 6.9% overall supply
- 1,368 PBSA student bedspaces, equivalent to 570 dwellings – 26.6% overall supply
- 133 co-living studios – 6.2% overall supply

Of the housing completions in this period, 850 homes (39.7%) would not be pupil generating. As such, only 60.3% of overall supply should be considered family homes to which pupil yields should be applied to understand the demand for additional school places

Estimated pupil yield

Total supply over plan period = 13,975 and therefore the number of homes estimated to have 2+ bedrooms in this scenario would be: 8,427 homes. Applying these proportions to the number of homes expected to be delivered on allocated (5,369) or windfall sites (1,006) equates to **3,844 new homes** with 2+ bedrooms

Education stage	Pupils per dwelling	Total pupil yield -full housing supply	Total pupil yield - Allocations & Windfalls
Early years 2.-4yrs	0.11	927	423
Primary 5-11yrs	0.25	2,107	961
Secondary 12-16 yrs	0.15	1,264	577
16+	0.06	506	231

²⁴ Housing Delivery Test Rulebook (December 2024): [Housing Delivery Test measurement rule book - GOV.UK](#)



Scenario 2: Needs assessment

This scenario assumes that delivery is aligned to the specific needs identified through the LHNA. While this would reflect the requirements of draft policies in the housing chapter of the Local Plan, it is acknowledged that housing needs are dynamic and that specific needs will be subject to change through the plan period.

On the basis of the City Council's evidence base, the following factors would be the key determinants of the number of family homes being delivered through the plan period.

- **Dwelling Mix** – the LHNA identifies an overall need for 2,007x 1-bedroom properties over the plan period. This equates to 15.6% of overall housing need. This proportion has been applied to the overall housing target set out in the plan.
- **Student housing and PBSA** – the student needs assessment highlights that the university population has grown at a rate of 750 students per year over an extended period. The City Council's AMRs state that 64% of students live in PBSA, which equates to 480 additional students residing in PBSA every year. Applying the Housing Delivery Test rulebook ratio of 2.4 student bedspaces to 1 conventional dwelling is equivalent to 200 dwellings per year (28.6%)
- **Co-living** – no explicit need for co-living is identified although it is acknowledged that increases in the number of young professionals is one of the biggest demographic trends in the city. This is considered further in scenario 3 with reference to planning permissions and pending applications/enquiries.
- **Specialist older person's accommodation** – the LHNA identifies that 44 units of specialist accommodation for older people is required annually to meet needs over the plan period (6.3%)

Cumulatively, the expected number of 1-bedroom homes and specialist accommodation for students and older people would equate to 50.5% of overall housing supply (7,057 homes). As such, in a scenario that is most closely aligned with identified housing needs, 6,918 new homes over the plan period would have 2+ bedrooms and it can be assumed that 3,156 of these homes would be delivered within allocated and windfall housing sites.

Education stage	Pupils per dwelling	Total pupil yield -full housing supply	Total pupil yield - Allocations & Windfalls
Early years 2.-4yrs	0.11	761	347
Primary 5-11yrs	0.25	1,730	789
Secondary 12-16 yrs	0.15	1,038	473
16+	0.06	415	189



Scenario 3: Market demand led

This scenario considers factors including planning consents and pending applications/enquiries, representations made by landowners and developers during the Regulation 19 consultation of the Exeter Plan and insights derived through reviewing key parts of the evidence base. It provides a greater focus on locational factors and site characteristics that will influence the scale and type of delivery anticipated and distinguishes between the different categories of housing allocations.

Strategic Brownfield Allocations (SBA) – total capacity 3,194 homes:

The SBAs are located within the city centre and immediate fringe and are expected to accommodate the highest density developments. The Local Plan viability review demonstrates that this is a credible strategy and that higher density development is deliverable, with the viability position improved by delivering a mix of housing types and forms. Planning permissions and pending applications at Water Lane and the emerging scheme at Clarendon House bear out that this is achievable. The SBAs are proximate to Exeter University and it is noted that the University have ambitions to increase the proportion of students residing in PBSA to 75% and that Article 4 Directions will limit the number of students living in HMO house shares within the existing housing stock. Representations received during the Regulation 19 consultation argue that capacities should be presented as clear minimums.

The following assumptions are made around delivery:

- **Dwelling mix:** 25% of delivery assumed to be 1-bed to account for focus on higher density developments. Limited sample size within SBAs, but review of wider planning permissions demonstrates higher proportion of 1-beds in the city centre
- **Student housing and PBSA:** 30% of delivery assumed to be PBSA to reflect ambitions to increase the proportion of the student population residing in PBSA to 70% and with this additional supply focused in the SBAs and large residential site allocations
- **Co-living:** Assumed to equate to 10% of delivery. The LHNA does not seek to quantify a need figure for co-living as it is an emerging housing product, but planning permissions, enquiries and representations highlight that this typology is most likely to be focused in SBAs and larger brownfield allocations
- **Specialist older person's accommodation:** 2% - as described below, the large and major residential site allocations provide very limited opportunity for the delivery of this house type and, while the viability position is acknowledged as challenging, the SBAs provide the better opportunity for specialist provision as part of a varied housing mix across the largest development sites.

Collectively, these assumptions mean that **67%** of new housing within the SBAs would be in the form of housing types that would **not** yield additional pupils.

Large scale residential sites – total capacity 1,321 homes:

Large residential allocations have very different characteristics, but the four largest sites either have planning permissions or pending applications that provide insights to their likely composition. Greenfield housing sites at Old Rydon Lane and St Bridget Nurseries (707 new homes) have consent for schemes focusing on conventional family homes, but with their illustrative masterplans still suggesting delivery of around 18% of dwellings as 1-bedroom homes. Conversely, pending planning applications and landowner representations demonstrate strong demand for co-living and PBSA at the Heavitree Road Police Station & Mary Arches sites (504 new homes – or equivalent bedspaces). Whipton Community Hospital is in a more suburban context, but with evidence of small flatted



developments locally. The viability assessment indicates that conventional family housing is likely the more viable housing product in suburban locations.

- **Dwelling mix:** 18% 1-bedroomed properties is assumed to reflect the consented mix at Old Rydon Lane and St Bridget Nurseries
- **PBSA / Co-living:** The delivery of Heavitree Road Police Station and Mary Arches as PBSA/Co-living would equate to 38% of housing supply across the large residential allocations
- **Specialist older person's accommodation** - Assumed that these sites provide no specialist older person's housing on the basis of existing permissions and enquiries. While the lower benchmark land value of the Whipton Community Hospital might make this a viable proposition, there is no indication at this stage that this is under consideration

These assumptions mean that **56%** of housing across the large residential allocations would come forward in the form of housing types that would **not** yield additional pupils.

Major residential sites – total capacity 823 homes

The major site allocations are more numerous and contain variety in their capacities and distribution across the city. Planning permissions, pending applications and landowner representations all point to similar variety in delivery, with a combination of flatted developments and family housing. While there is some evidence that specialist housing typologies will be pursued, where there is a link to University sports facilities, for example, these housing types are likely to be focused on sites where higher capacities can be achieved.

- **Dwelling mix:** 10% assumed as 1-bedroom dwellings to reflect a more suburban form of development across these allocations
- **PBSA / co-living:** While not a focus for PBSA, 10% delivery is assumed to acknowledge Regulation 19 representations and pending planning applications
- **Specialist older person's accommodation:** 0%

These assumptions mean that **20%** of housing across the major residential allocations would come forward in the form of housing types that would **not** yield additional pupils.

Minor residential sites – total capacity 31 homes

The minor sites have a very modest overall capacity in the context of overall supply. Their immediate setting suggests that either family housing or small flatted schemes would be achievable. It is assumed that the sites are all developed as conventional family housing.

Windfall sites – total capacity 1,006 homes:

Windfall housing developments, by their nature, are unknown and so it isn't possible to draw inferences related to site location or characteristics. The following assumptions are made:

- **Dwelling mix:** 15.6% - Proportion of 1-bedroom dwellings to reflect that identified in the LHNA
- **PBSA / co-living:** 5% - A limited proportion is expected on the basis that delivery of these house types is likely to be focused on major brownfield sites that are already known by the council having been identified through the planmaking process and/or promoted by landowners.



- **Specialist older person's accommodation:** 5% - On the basis of a clearly identified need that isn't expressly addressed through allocations

These assumptions would mean that **25.6%** of new housing across windfall sites would come forward in the form of housing types that would **not** yield additional pupils

Education stage	Pupils per dwelling	Pupil yield per allocations type	Total pupil yield – Allocations & Windfalls
Early years	0.11	SBA: 116	338
2.-4yrs		Large sites: 64	
		Major sites: 72	
		Minor sites: 3	
		Windfall: 82	
Primary	0.25	SBA: 264	768
5-11yrs		Large sites: 145	
		Major sites: 165	
		Minor sites: 8	
		Windfall: 187	
Secondary	0.15	SBA: 158	461
12-16 yrs		Large sites: 187	
		Major sites: 99	
		Minor sites: 5	
		Windfall: 112	
16+	0.06	SBA: 63	184
		Large sites: 35	
		Major sites: 40	
		Minor sites: 2	
		Windfall: 45	



7. Conclusion

The Exeter Plan establishes a clear vision and spatial framework for the delivery of new homes over the plan period. The strategy stems from the Liveable Exeter principles and places a strong emphasis on a brownfield-led housing strategy that consolidates the delivery of new homes within urban Exeter. A focus on strategic brownfield allocations will heavily influence housing typologies, with a significant proportion of delivery being in the form of flatted developments. The strong presence of Exeter University and continued expansion of the student population will continue to drive demand for purpose built student accommodation, as is evidenced by recent planning permissions and enquiries. In addition, existing datasets and demographic projections identify an increasing number of older people in the City that will generate need for specialist accommodation. These factors all influence the relationship between housebuilding and demand for new school places and should be considered as part of forecasting that considers the likely need for new and expanded education provision in the period up to 2041.

Having considered the trends identified in technical evidence base studies, the housing mix delivered through completions and planning permissions and Regulation 19 representations made by developers, this report sets out three potential housing scenarios that highlight the amount of housing that would not contribute additional demand for school places. By applying DCC's adopted pupil yields to the anticipated proportion of family homes in each scenario, the resulting demands for additional school places are presented.

Housing scenario	Proportion of new homes <u>not</u> creating demand for school places	Anticipated pupil yield			
		Early Years	Primary	Secondary	16+
Scenario 1:	39.7%	423	961	577	231
Scenario 2:	50.5%	347	789	473	189
Scenario 3:	51.8%	338	768	461	184

While the composition of housing developments over the plan period will be shaped by a range of factors affecting market dynamics, it is considered that Scenario 3 is the most robust scenario as a result of better reflecting the locational characteristics of the proposed site allocations.

It is important to caveat that this report presents a high-level analysis projecting how the scale and type of housing might generate demand for school places over a 20-year period in order to inform school place planning. It does not make any assessment of the sufficiency of provision within existing schools. The particular impacts of individual residential development should continue to be assessed at the application stage when a more detailed assessment can be made of the additional demands relative to existing capacity within affected pupil planning areas.



APPENDICES

Appendix A. Reg 19 Policy Review

A.1.1.1 Policy review and commentary

This section summarises the relevant ambitions and policies in the Regulation 19 Local Plan that will influence housing delivery and demand for school places

Policy / Paragraph	Details	Analysis
3.5 (The Exeter Vision 2040 and Liveable Exeter)	Alongside the Vision 2040, in 2019 the City Council launched Liveable Exeter. Liveable Exeter will help deliver the Exeter Vision 2040 and this Plan. It is a bold initiative to build new homes in the city in high quality developments and to transform brownfield land, strengthen existing communities and create new neighbourhoods. A series of Liveable Exeter principles will guide the largest developments to ensure they are of the highest quality. The principles are included in this Plan (Policy S2: Liveable Exeter Principles).	The delivery of a large number of homes across smaller sites often results in higher residential densities, which typically favour apartments. This form of development is suited to urban contexts and commonly comprises 1–2-bedroom homes, aligning with demand from smaller households and supporting efficient land use.
4.4 (Spatial strategy: An explanation)	This spatial strategy has been reviewed to ensure that it reflects the Exeter Vision 2040 and the City Council's priorities. The main change from the strategy in the Core Strategy is to move away from one of the main components of the previous approach – the provision of large, greenfield urban extensions on the edge of the city. These urban extensions have now largely been built out and there is very limited capacity for additional development on the edges of the city.	This strategy supports the redevelopment of brownfield sites, which are often smaller in scale and located within established urban areas. Due to their size and location, these sites typically lend themselves to higher density development, favouring apartments, often with 1–2 bedrooms.
S1 (Spatial Strategy (Strategic Policy))	The spatial strategy will deliver on the Exeter Vision 2040 and the city's ambitions for net zero, climate change adaptation and resilience, high quality development, health and wellbeing, the vitality of the city centre, the natural environment, heritage and cultural diversity. The City Council will work with partner authorities and other stakeholders to deliver these ambitions.	The spatial strategy supports the redevelopment of brownfield sites, which are typically smaller in scale and located within established urban areas. These sites often result in higher density development, favouring apartments, particularly 1–2 bedrooms, which are well-suited to compact footprints. In addition, the strategy encourages mixed-use development, which integrates residential,



	The spatial strategy for delivering development in Exeter has 15 elements: 1. Providing good quality homes of a variety of types in the city to meet Exeter's various needs; 2. Working with neighbouring Councils to ensure that the employment needs of the wider functional economic area are met; 3. Enabling traditional and new forms of employment provision in the city, developing the transformational sectors and supporting improvements to education and skills to ensure employment needs are met; 4. Focusing the majority of development on strategic brownfield sites, particularly in locations close to the city centre to support its ongoing vitality and access to public transport hubs; 5. Enabling the development of smaller brownfield sites as they become available; 6. Considering <u>modest</u> greenfield development as a supplement to the overall focus on brownfield sites; 7. Providing high quality, mixed use development at optimal densities appropriate to the characteristics, heritage and function of the local area to minimise the need to travel and maximise walking, cycling and public transport; 8. Locating development near enough to key services and facilities to allow residents to meet most of their daily needs easily on foot or inclusive equivalent; 9. Protecting the landscape value of the sensitive hills which provide the vital setting of the city; 10. Protecting and enhancing biodiversity throughout the city and improving the ecological value of the River Exe, its estuary and wildlife networks;	commercial, and community uses. Mixed-use schemes often require higher residential densities to ensure the viability of ground-floor commercial uses, again favouring smaller units such as apartments. This approach promotes efficient land use, supports economic activity, and contributes to the creation of vibrant, walkable neighbourhoods.
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	11. Conserving, enhancing and improving access to, and interpretation of, Exeter's outstanding historic environment; 12. Steering development to avoid areas of higher flood risk where possible and managing residual flood risk as appropriate; 13. Enabling development in locations which link effectively to the Valley Parks as vital green infrastructure whilst ensuring their protection and enhancement; 14. Reflecting local identities, providing for diverse neighbourhoods and delivering high quality public realm and community spaces to grow the city's cultural offer and drive regeneration; and 15. Delivering the range of infrastructure and services needed in a timely manner to support high quality development and our communities.	
4.10 (Liveable Exeter principles)	It is important to increase the population living in the central areas of the city and encourage people who may have left Exeter to return to live in a variety of new homes including apartments. Homes will be built within vibrant neighbourhoods that are walkable, have cafes, shops, community uses and workplaces and easy access to nature and green infrastructure.	The city centre is characterised by high-density development, reflecting its role as a hub for employment, services, and transport. This environment is particularly attractive to young professionals and young families, who are more likely to seek 1–2 bedroom homes suited to apartment living. The compact nature of city centre sites supports this typology, enabling efficient land use and contributing to vibrant, walkable neighbourhoods.
4.11 (Liveable Exeter principles)	It is vital to make the best use of brownfield land in the city by optimising density to support the significant increase in new and affordable homes and infrastructure we need. This will often mean developing at densities above those of the surrounding area. A design-led approach to optimising density is advocated which should be based on an evaluation of the site's attributes, its surrounding context and capacity for growth and the most appropriate development form. The highest densities should be located in the most accessible and sustainable locations close to the city centre,	This paragraph shows support for the redevelopment of brownfield sites, which are typically smaller in scale and located within established urban areas. These sites often lend themselves to higher density development, which typically favours apartments of 1–2 bedrooms. In addition, planning policy actively supports higher-density development, recognising its role in maximising land efficiency, supporting sustainable transport, and contributing to housing supply in well-connected locations.

	public transport and a high-quality walking and cycling network.	
4.15 (Liveable Exeter principles)	Whilst some of these sites form an integral part of the spatial strategy and are allocated in the Exeter Plan, Liveable Exeter is not just a series of sites but a growth and city-making initiative governed by six principles which have been drawn from the Exeter Vision 2040 and national Garden City principles. In adopting the Liveable Exeter principles, we aim to strengthen and reinvigorate existing communities and repurpose and transform other parts of the city which need to change. Collectively the Liveable Exeter principles will achieve the following: • Development proposals which make the best use of brownfield land and build at optimal densities. All developments should look to optimise their development footprint, accommodating access, servicing and parking in the most efficient ways possible; • New development that contributes positively to an area's character and identity, creating or reinforcing local distinctiveness; • New development that supports a thriving city centre and district and local centres, ensuring that for local trips, active travel becomes the most convenient option, and for longer trips, public transport becomes more viable. People-friendly, human-scale streets should be a joy to walk and wheel along and incorporate high quality design, materials, improved air quality and overlooking from surrounding buildings; • Developments that adopt innovative approaches to mixing land uses and delivering a high-quality public realm. Where possible, different land uses should be combined, with residential above businesses and community uses commonplace; and • High quality buildings which support the health and wellbeing of their occupants and are responsive to the changing way we live, work and spend our leisure time. Public spaces and private communal areas will be safe, accessible, inviting and well used, without the fear of crime. Individual homes should provide	High density development is actively sought, with a clear emphasis on maximising housing delivery and land efficiency. This is particularly relevant for brownfield sites, which are often smaller and well-located, naturally lending themselves to higher density schemes that typically favour 1–2 bedroom apartments. There is also a strategic push toward mixed-use development, which integrates residential, commercial, and community uses. These schemes often require higher residential densities to ensure the viability of ground-floor businesses, again favouring smaller units such as apartments.

	sufficient comfort, natural light, privacy and quiet.	
S2: Liveable Exeter Principles	The delivery of strategic, mixed use brownfield developments will be supported. Strategic mixed use brownfield development proposals must be accompanied by a masterplan or design code which includes a vision and planning/design framework to guide the comprehensive development of the wider site area. All strategic mixed use brownfield development proposals must demonstrate how each of the following Liveable Exeter principles and requirements will be achieved. Principle 1: Memorable places. Development will: • Contribute positively to an area's character and identity, creating local distinctiveness and reinforcing its role within the city; • Respond positively to local topography, open spaces and waterways and maximise views to Exeter's natural and built landmarks and features; • Make efficient use of land so Exeter remains compact and walkable; • Enable sustainable transport for access to the city centre, district and local centres, employment areas, the River Exe and the Valley Parks; and • Contribute to the varied and innovative social, economic and cultural offering in the city. Principle 2: Outstanding quality. Development will: • Build at optimal density, incorporating the highest appropriate densities in the most accessible and sustainable locations; • Incorporate innovative solutions for buildings, transport provision, energy, sustainable waste	Policy S2 supports the redevelopment of brownfield sites, which are often smaller in scale and located within the urban area. These sites are particularly suited to mixed-use development, combining residential, commercial, and community functions. To ensure the viability of mixed-use schemes, particularly the commercial elements, higher residential densities are often required. This typically results in a housing mix that favours apartments, especially 1–2 bedrooms. Furthermore, planning policy encourages high-density development in sustainable locations, such as those with good access to employment, services, and public transport. This approach supports compact, walkable communities and contributes to the efficient use of land.

	management and other infrastructure to achieve our ambitions for a net zero city by 2030; • Enhance Exeter's natural, built and historic environments, particularly at gateway and arrival points, main routes into the city, city centre, the Ship Canal and Basin, the River Exe and the Valley Parks; • Provide innovative and exciting education, research, skills, work and leisure destinations in prominent and accessible locations; and • Ensure neighbourhoods function effectively in the long term by incorporating stewardship measures which provide for the effective management and maintenance of the public realm, communal private spaces and environmental assets. Principle 3: Welcoming neighbourhoods. Development will: • Provide a variety of high quality, affordable, market and specialist homes catering for local needs; • Support a wide range of accessible, local jobs and education and skills provision to link employment and learning; • Enable accessible, thriving city, district and local centres and create new centres where appropriate, delivering local shops, open spaces, community, education and health facilities that foster a sense of community; • Provide safe, healthy, accessible and inclusive streets, public spaces and areas for play which are people-friendly, human in scale, well managed and cared for; and • Phase delivery to ensure important infrastructure and facilities are provided early on. Principle 4: Liveable buildings. Development will:	
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	• Be adaptable and resilient to the effects of climate change; • Respond flexibly to changing demands and lifestyles; • Include beautiful buildings which complement local character using high quality designs and materials; • Ensure buildings are energy efficient, adopt a fabric-first approach and apply high performance standards such as Passivhaus and whole-life carbon assessment; • Provide homes that are predominantly dual aspect ensuring high levels of natural daylight and ventilation; and • Be arranged and designed to maximise internal air quality. Principle 5: Active streets. Development will: • Incorporate active travel and passive surveillance measures at the outset of development design; • Incorporate the Healthy Streets design approach, where appropriate; • Make direct connections to the active travel network and key destinations; • Reallocate road space to maximise active travel, public transport, shared mobility and the provision of attractive public spaces through seating and planting; and • Maximise parking and storage for cycling, provide infrastructure to support electric vehicles and bicycles and minimise parking for private cars. Principle 6: Spaces for people and wildlife. Development will: • Deliver multifunctional green infrastructure to provide benefits for people and nature, create greener, healthier places and support a more	
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	productive economy, whilst also enhancing and improving access to the historic environment; • Provide and enhance networks and connections to existing green infrastructure networks and spaces, including the Valley Parks, Green Circle and waterways; • Maximise opportunities for landscaping, planting and trees using tools such as the Urban Greening Factor; • Promote vitality and inclusivity by providing safe, accessible and attractive places for play, recreation, food growing and socialising outdoors; and • Ensure that space, buildings and infrastructure are created specifically with opportunities to deliver a thriving nature-rich city. Principle 7: Connected Culture. Development will: • Use cultural enhancements and provision to improve development quality; • Support local economic growth by providing flexible space for creative industries; • Create resilient, adaptable, networked communities and successful centres that support civic pride and express local identity; • Support high quality cultural placemaking projects in the public realm and community facilities to achieve exemplary social value and environmental quality; • Safeguard, promote access to, and reflect, cultural heritage in local placemaking; and • Harness Exeter's rich heritage, local identities and creative talent through civic participation in culture and by supporting 'meanwhile uses'.	
CC1: Net zero Exeter	The City Council has an ambition for the city to be net zero by 2030.	High density development in sustainable locations, particularly those with good access



(Strategic policy)	Development proposals will be required to demonstrate how they will support the achievement of net zero through each of the following: a. Considering location, urban form, density and place-specific solutions; b. Minimising the need to travel and maximising walking, wheeling, cycling and public transport; c. Applying a fabric first approach to maximise energy efficiency; d. Maximising renewable and low carbon energy generation; e. Minimising operational and embodied carbon emissions; f. Applying the principles of the circular economy; g. Utilising SuDS and other nature-based solutions to deliver flood risk management; and h. Providing green infrastructure, biodiversity net gain and landscape-led schemes. All major development proposals will be required to submit a Net Zero Statement setting out how the development will address each of the requirements of the policy.	to employment, education, services, and public transport are supported. Considering both the location and density of new developments, means the strategy aims to minimise the need to travel, reduce car dependency, and support more sustainable patterns of movement. This approach contributes to the creation of compact, walkable communities.
Chapter 6 (Homes: Vision)	A healthy and inclusive city Addressing Exeter's housing need links to the aim in the 2040 vision of creating a healthy and inclusive city. Enabling our communities to access the homes they need will help to promote both physical and mental health, provide safety, security and reduce inequalities. A liveable and connected city addressing Exeter's housing needs links to the aim in the 2040 vision of being a liveable and connected city. Providing new homes close to jobs, services and facilities will help to provide high quality neighbourhoods and create inclusive communities.	The vision encompasses the delivery of new homes in locations where they are most needed, particularly close to employment centres. This approach supports sustainable living by reducing the need to travel, encouraging walking, cycling, and the use of public transport.

	A leading sustainable city addressing Exeter's housing needs links to the aim in the 2040 vision of becoming a leading sustainable city. Helping our communities to access the homes they need, in locations close to jobs, services and facilities will bring environmental, social and economic benefits to the city.	
6.1 (Homes – Introduction)	Housing is a big issue, not just in terms of the number of homes needed but also relating to their quality; experiences during the Covid-19 pandemic underlined just how much we need good quality housing. The Exeter Plan helps to address the shortage of affordable homes in the city and provide the good quality accommodation we all need. Young adults, families, older people, those with disabilities, essential local workers, care leavers, students and Gypsies and Travellers all have specific housing needs which we need to meet.	It is essential that homes are provided to meet the needs of diverse population groups, ensuring inclusive and equitable access to housing. This includes: Young adults, who may seek smaller, affordable homes close to employment and amenities. Families, requiring larger homes with access to schools, green space, and community facilities. Older people, who benefit from age-appropriate housing such as retirement living, extra care, or accessible homes. Individuals with disabilities, for whom accessible and adaptable housing is essential to support independent living. Students, who require purpose-built accommodation near educational institutions and transport links. Delivering a range of housing typologies across suitable locations ensures that Exeter's housing stock reflects the varied needs of its residents, supporting sustainable communities and long-term resilience.
6.19 (Affordable Housing)	When applying the target percentages in the policy, the affordable housing requirement may not equate to a whole number of homes. In order to make up the balance, a financial contribution will be sought to provide part of an affordable home based on a methodology to be published on the City Council's website, with costs updated annually. Contributions will be used by the City Council for the provision of affordable housing in Exeter.	This encourages the optimisation of development sites, ensuring that land is used efficiently to meet housing needs. Where the number of dwellings proposed is not considered optimal, higher-density development will be considered to maximise capacity and align with strategic housing delivery objectives.

	In line with Policy H15, the City Council will negotiate development at a higher density where it considers that the number of dwellings proposed for the site is not optimal. This may increase the affordable housing requirement. When applying the tenure percentages in the policy, calculations will be rounded to the nearest whole number.	This approach supports compact urban growth and contributes to the creation of sustainable, well-connected communities.
6.81 (Housing density and size mix)	For Exeter to accommodate its housing requirement, every development involving new homes must make the most efficient use of land. This means optimising the density of housing development so that it is appropriate for the site and surrounding area taking into account constraints such as heritage assets, local amenities and the character of the area and any on-site requirements such as public open space and active travel measures that are needed to ensure that development is of a high quality. The 2021 Exeter Density Study and the 2024 Exeter Views, Density and Heights Study indicate the densities that the City Council will expect new housing developments to achieve.	The most efficient use of land is sought, to ensure that housing density is optimised across development sites. This means carefully assessing each site's capacity and context to maximise housing delivery while maintaining design quality and respecting local character.
6.82 (Housing density and size mix)	The housing density of a development is linked to the number of bedrooms provided within each new home. It is important that new housing development includes a mix of house sizes to help meet local needs. The 2024 LHNA indicates that market and affordable homes of all sizes will be needed in Exeter to 2041, but particularly two and three bedroomed properties and significant numbers of one bedroomed homes. Family housing should not be omitted from new developments due to a concentration on densities and the range of proposed house sizes must support the creation or maintenance of mixed communities.	New developments must include a balanced mix of housing types and bedroom sizes to meet the needs of a diverse population. This includes the provision of one, two and three bedroom homes, ensuring accommodation is available for a range of household types, including individuals, couples, and families. Delivering a varied housing mix supports inclusive communities and aligns with strategic objectives to address local housing demand.

H15: Housing density and size mix (Strategic policy)	Development proposals for new homes will optimise density and incorporate a mix of housing sizes, taking into account: a. Local need, as evidenced by the City Council's latest Local Housing Needs Assessment; b. Local context; c. The proposed tenure mix of the development; and d. The mix of housing sizes in the locality.	This policy requires development incorporates a balanced mix of housing sizes and achieves an optimised density.
8.9 (The City Centre)	Looking forward, it will be vital to widen the way the city centre is used. It will need to provide liveable spaces which are attractive and people-friendly, so that the whole community wants to spend time there. It will need to be effectively connected to the rest of the city and its neighbourhoods so that people can travel there easily. It will need to be the cultural heart of the city, building on local identity and providing appropriate venues and public spaces to enable culture to flourish. It will need to celebrate the historic environment and local character through the provision of high quality buildings and public spaces, ensuring that heritage assets, their settings and historic streetscapes are conserved and enhanced. It will need to incorporate more green space and enhance places for nature. It will need to diversify, so that the whole community wants to spend time there and so that it can respond to future change. And finally, it will need to provide more homes and jobs in order to create a genuinely liveable neighbourhood. Because we recognise the importance of this issue, one of the key strands of the spatial strategy is to focus development in areas close to the city centre.	A growing demand for housing within sustainable locations, such as Exeter City Centre mean that an increased provision of housing in the city centre will be essential to support growth and the vision of the Local Plan. This approach facilitates the delivery of higher density housing on brownfield sites that have been configured to maximise spatial efficiency. This location offers sustainable living by reducing the need to travel, encouraging walking, cycling, and the use of public transport.
13.9 (Design Principles)	In order to accommodate our housing needs, there is an expectation that development is undertaken at optimal density. Considerable care must be given to the design of these	Housing development should be delivered at an optimal density to promote efficient land use and support sustainable urban growth, while

	schemes to ensure that they are not overbearing in nature, particularly where the built form of surrounding areas are of lower density. The Viewpoints, Density and Heights Study should be referred to in preparing proposals for development. Development should also be in line with Healthy Streets design principles.	carefully considering the character and sensitivities of existing surrounding areas. Optimal density will mean compact urban growth on brown field sites to support the Local Plans city centre residential allocations.
D1 Design Principles	To promote high quality design and placemaking, development proposals will be supported where they: a. Create high quality, distinctive places through the provision of a compatible mix of uses; b. Integrate measures appropriately to address climate change mitigation and adaptation; c. Provide a layout and built form that makes efficient use of the site and complements the surrounding area and buildings through appropriate densities, massing and building heights; d. Are sympathetic to local character, distinctiveness and identity; e. Respect the historic environment and retain and refurbish existing buildings of high townscape and historic value, enhancing their setting wherever possible; f. Reinstate former street patterns; g. Provide high quality public realm and landscape design, making appropriate provision for public art and cultural activity as an integral part of the proposal; h. Adopt contemporary and innovative design solutions; i. Include high quality architectural composition, detailing and materials which reflect local distinctiveness; j. Retain existing trees and vegetation of significant ecological and amenity value and provide additional native and climate change	Appropriate densities, massing, and building heights are required to ensure that from a design perspective developments are contextually responsive, visually coherent, and aligned with strategic planning objectives. It is essential to ensure that the proposed brownfield residential developments, which constitute the majority of residential allocations, can effectively integrated into the urban area. This will directly influence the suitability of housing typologies and the number of bedrooms that can be accommodated within each proposal.

	resilient planting throughout the development and in all new streets; k. Are designed to be inclusive for all groups; l. Adopt a comprehensive response to existing site constraints, utilities and infrastructure provision; and m. Consider all extraction systems and refuse facilities during the design phase of development so that they are well integrated into the proposal. All development must take into account any relevant guidance outlined in any adopted design-related Supplementary Planning Document and/or design code.	
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Appendix B. Site Allocations

Site Location	Site capacity	Density Zone	Plan ref
Strategic Brownfield Allocations			
Water Lane	1,861		15
East Gate	609		145
Red Cow	442		146
Exe Bridges Retail Park	201		142
South Gate	81		46
Large Scale Residential			
Land at Old Rydon Lane	357		90
St Bridget Nurseries	350		83
Heavitree Road Police Station	350		104
Mary Arches Multi-Storey & Surface Car Park	154		163
Whipton Community Hospital	110		64
Major sites			
Rougemont Switching Centre	86		151
Newcourt Road, Topsham	69		91
Land adj. Silverlands	67		18
Lane west of Newcourt Road	56		94
Land at Topsham Golf Academy	54		95
Land at Exeter Squash Club	48		26
Land at Victoria Street	47		150
12-31 Sidwell Street	45		51
Land east of Newcourt Road	45		153
Belle Isle Depot	40		72
Clifford Close	33		63
Gypsy Hill Hotel	28		165
Unit 1 Nightclub, Summerland Street	28		160
Land behind 66 Chudleigh Road	27		125
Chestnut Avenue	24		75
East of Pinn Lane	24		106
Land at Matford Lane 2	21		158
Hessary, Hollow Lane	17		108
Fever and Boutique, 12 Mary Arches Street	15		100
Land south of Gypsy Hill Lane	14		107
Land at Hamlin Lane	13		60
Garages at Lower Wear Road	12		84
88 Honiton Road	10		110
Minor Sites			
Newberry Car Breakers	8		129
Lancelot Road	7		31
Lane read of Beacon Lane Shops	6		30
Land at Taunton Close	5		13
91-97 Wonford Street	5		73
Windfall sites			
Total capacity of 1,006			



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