Exeter City Council

East Gate Delivery Study

September 2025

Contents

Appendices

Report title: East Gate Delivery Study
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For and on behalf of Avison Young (UK) Limited

1. Introduction

1.1 Avison Young has been instructed by Exeter City Council (the Council) to create a Delivery Study to support the allocation of the East Gate area of Exeter in the forthcoming "Exeter Plan".

1.2 This study demonstrates that the East Gate area has the ability to be delivered as a mix of uses having consideration of the ownership, availability, constraints and opportunities that it presents.

1.3 This report discusses the extent of the area sought for allocation and addresses delivery issues for the forthcoming plan period.

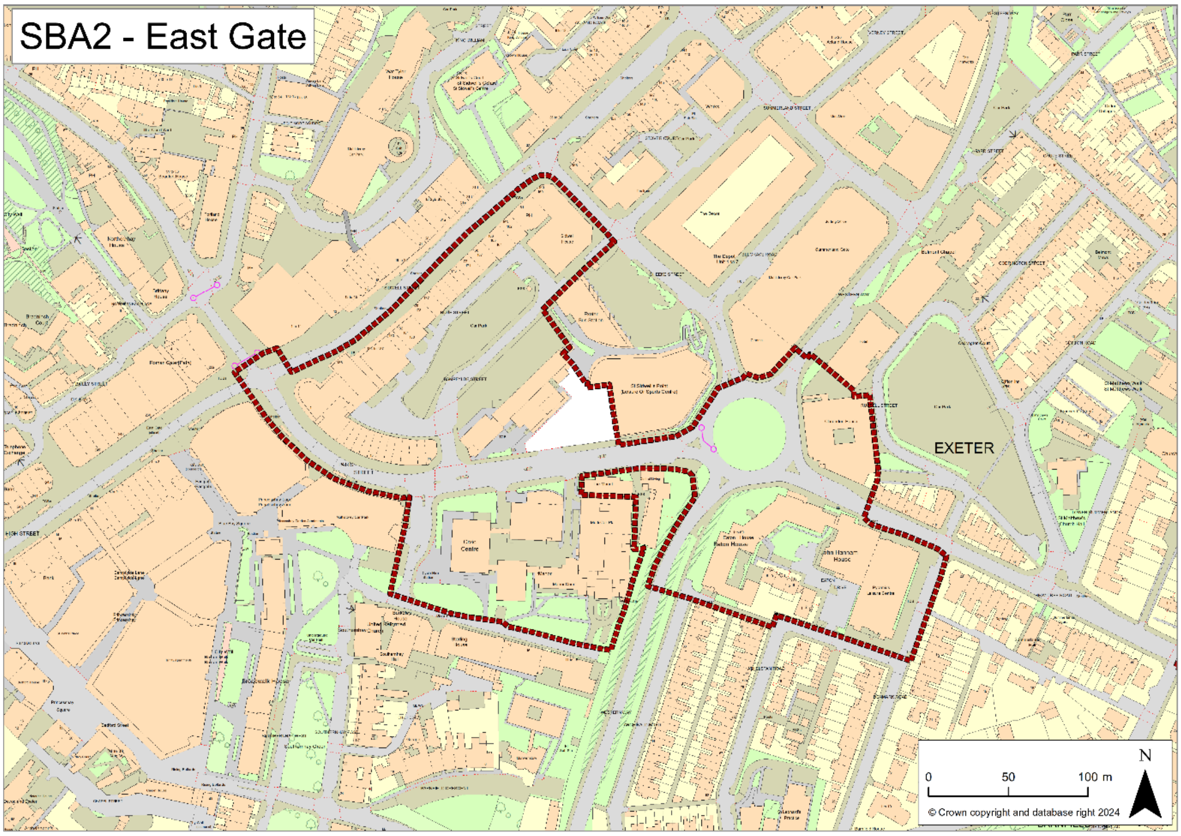
1.4 For the avoidance of doubt, the Council owns land and property within the allocation area, however does not control the full land area. On this basis, this report also supports the allocation of land in third party ownership.

1.5 Where values are considered within this report, please note that this is not, and is not intended to be a formal valuation. This advice is exempt from the current RICS Valuation Global Standards 2019 and as such cannot be regarded or relied upon as a valuation. This advice has not been based on full research of the asset(s). It provides either a guide for feasibility purposes should the asset be placed on the market, or for any current or impending negotiations on price. We would be happy to undertake a formal valuation as instructed, if required, on the basis of a separate instruction.

2. East Gate Allocation Area Description

2.1 The East Gate area concerns c.6 hectares of land in central Exeter, described in the draft Exeter Plan, draft allocation SBA2 as "stretching from Sidwell Street, to Cheeke Street, Paris Street and the end of Heavitree Road" and shown in the draft plan extract shown in Figure 1 below:

Figure 1 - Exeter Plan, Regulation 19 Report Extract, p.141



2.2 The site currently contains a mix of uses in a range of ownerships, while the condition of the existing buildings is varied but generally lower quality. The uses include offices, retail, housing and vacant development land.

2.3 The topography generally falls from north west to south east, while its central location makes it a prime location for urban regeneration and the delivery of a mix of uses.

2.4 Draft policy SBA2 of The Exeter Plan suggests that the East Gate area is allocated for a "mixed use development delivering approximately 609 homes, employment, education/training space and an impressive and memorable city centre gateway. The development must support the achievement of net zero and accord with the Liveable Exeter Principles to deliver a compact and well connected neighbourhood, incorporating the highest standards of design."

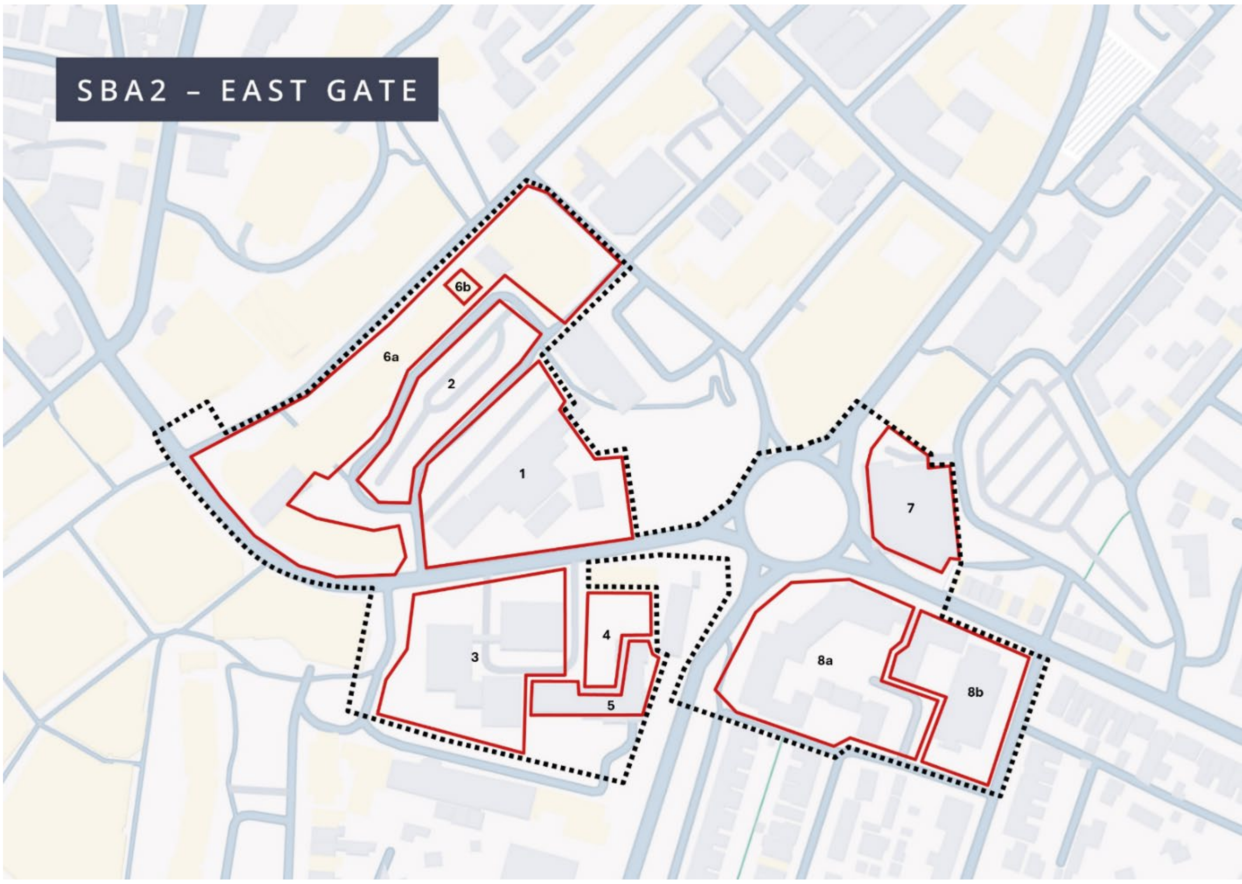
3. Land Ownerships and Conveyancing

3.1 The allocation area extends to c.6 hectares in an irregular shape, with the publicly-adopted highway occupying around half of the area.

3.2 For ease, we have split the site ownerships into a series of specific site names for ease of referencing, as noted below and annotated in Figure 2.

3.3 We note that information relating to Freehold, Long Leasehold and in some cases Leases are drawn from the Land Registry and therefore are correct as far as the information available at the time of writing is correct. We are aware that there are delays in updating records at the Land Registry, therefore some details may not be current.

Figure 2 - Sites Map



Land Ownerships

Site 1: Former Bus Station (DN237079) – Exeter City Council

3.4 The former Bus Station site extends to 0.59 ha which lies as part of the former City Point development site. The former bus station buildings have been demolished with the site now covered by a hard standing. Topographically, the site falls from the north west to the south east.

3.5 The primary frontage is to Paris Street to the south, while the new leisure centre and Exeter Bus Station are to the east. Bampfylde Street and the Bampfylde Street Car Park are to the north of the site, with Paris Street to the south approximately one storey lower than Bampfylde Street to the north.

3.6 The site formed part of the previous comprehensive redevelopment plans under the Crown Estate and Nuveen and is ready to be redeveloped with Exeter City Council acting proactively to de-risk the site and prepare it for delivery.

3.7 The freehold title notes that land tinted pink on the title plan is subject to covenants imposed in March 1989, without specifying the covenant; the Land Registry does not currently hold the title plan online for this title.

3.8 In addition, a covenant benefitting Dunns Motor limited to enter the land tinted brown on the title plan was agreed in 1995; again the title does not provide detail nor is the plan available online.

Site 2: Bampfylde Street Car Park (DN237079) – Exeter City Council

3.9 Site 2 is an Exeter City Council-owned surface car park at grade level, with 88 public bays, covering a site area of 0.24 ha. Access to and from the car park is via Bampfylde Street and Bude Street which currently operate on a one way system.

3.10 The site is surrounded by retail units fronting Paris Street Sidwell Street and Cheeke Street to the south west and north, with the new Exeter Bus Station to the east and the former bus station site to the south west.

3.11 The site is generally level topographically, with a small number of mature trees along the southern boundary.

3.12 An electricity substation is also located at the eastern end of the site, held in a separate leasehold title of DN709897 by Western Power Distribution.

3.13 There are no significant delivery issues with this site by virtue of the Council ownership and recently-demolished former bus station.

Site 3: Civic Centre (DN227846) – Exeter City Council

3.14 The Civic Centre is the current home of Exeter City Council, in a building that extends to c.9,940 sq m over three inter-connected buildings extending between two and six storeys and sat within a site area of 0.65 ha.

3.15 The building, built in 1965 fronts onto Dix's Field to the south and west, as well as Paris Street to the north. Parking is shared in the multi-storey car park (MSCP) to the east alongside Manor Court, located to the east. Exeter City Council also owns the freehold of Manor Court, the MSCP and The Mount, all located to the east of the building.

3.16 The site falls by approximately one storey form south to north east, with an area of open space in the south east of the site, and a series of mature trees located along the southern boundary and mature planting along the northern boundary.

3.17 The title notes that part of the site edged green on the title plan has been removed from the title and registered under a separate title. The land also benefits from easements reserved in the transfer of the 74 Paris Street land, held under title DN603493.

3.18 The title contains a number of restrictive covenants including following the transfer of the land hatched green, the right for a named individual a right of way, without any stationing provisions (parking), under title DN284347. We note this title is not recognised by the Land Registry system.

3.19 The freehold also contains seven leases including The Mount (125 years from 1991) under title DN317212, Manor Court and Dix's Field (125 years from 1991) under title DN317214, Parking spaces at Manor Court (125 years from 1991), two ground floor leases until 2032 until April 2032 (DN227846, DN645254), a cell site on the roof (10 years from November 2017) under title DN692299 as well as parking spaces (10 years from September 2018) under title DN703970.

3.20 While the Council are currently in situ within the Civic Building, alternative locations are being considered and with the Council ownership, there are no significant delivery issues. The Council is currently undertaking feasibility work to support a potential move to another Council-owned property at Senate Court, Southernhay, with a view to moving in early 2027.

Site 4: Princesshay 2/Civic Centre Multi Storey Car Park (DN227846) – Exeter City Council

3.21 Situated to the east of the Civic Centre, south of The Mount and north of the Manor Court, the car park extends to four storeys, including basement and ground levels.

3.22 The car park contains 325 bays, of which 216 are private on weekdays, used by both the Council and Manor Court.

3.23 The location adjacent to the former bus station site and ownership by the Council means there are no significant delivery issues with this site. In addition, there are several alternative car parking options in the city centre.

Site 5: Manor Court (DN317214) – Acorn Property Group

3.24 The Manor Court building is owned by Acorn Property Group through a subsidiary and is currently in use as an office. The building was built in 1990 and extends to a little over 2,925 sq m across four storeys.

3.25 The property is held long leasehold from Exeter City Council's Civic Centre Freehold under title DN227846. Acorn's long leasehold extends to 125 years, expiring in September 2116. The title notes it relates to only the parts noted on the title plan as 1, 2 and 3 are relating to the ground, raised ground, first, second and thirds storeys. The blue line noted as 4 relates to the first, second and third floors only. The blue line noted as 5 relates to the mezzanine level of the car park, first, second and third floors, as well as column supports. The lease contains a charge to a finance company. The lease references under leases DN679094 and DN7554838.

3.26 Acorn (under a subsidiary) also holds long leasehold DN755484 at Manor Court, including ground, first, second and third floors, alongside parking spaces on levels D and E of the adjacent multi-storey car park and has a charge over the property to an overseas investor. This lease notes that it is held under superior leases DN317214 and DN317412. We note that Manor Court is partly built above the multi-storey car park.

3.27 With the site in the ownership of a developer, there are no significant delivery issues with this site; we understand that development options are currently being considered for this site; Indeed, as of September 2025 there is a prior approval application submitted to the Council for the change of use of Manor Court to residential units.

Site 6a: Princesshay Estate (DN234669) – Frasers Group

3.28 Running along the northern edge of the allocation area, Frasers Group has been undertaking a site assembly exercise, taking on the long leasehold estate from the Crown Estate and Nuveen (alongside other assets in central Exeter), as well as new property with the ambition of delivering a comprehensive redevelopment of the secondary retail units along Paris Street and Sidwell Street.

3.29 We note that Exeter City Council owns the freehold of these properties under title number DN237079; under this Freehold and Long Leasehold arrangement, Frasers will require approval from the Freeholder in order to progress any development.

3.30 This head lease contains a charge to a German bank. It also contains a lease for a substation for 99 years, expiring in April 2065.

3.31 Fraser's current ownership extends to 0.65 ha and includes the following properties:

- 1-29 (odd) Paris Street, EX12JB (DN606160) – a long leasehold of 99 years held until December 2108. This lease contains restrictive covenants as imposed by the Freehold title under which the long leasehold operates.
- Sidwell House, 160 Sidwell Street
    - DN364673 – A long lease of 125 years expiring in May 2119, DN376457 – a long lease of 125 years expiring in May 2134.
    - DN606179 – 125 year long lease expiring December 2134 with a charge to a German bank.
    - DN343795 – a long lease of 125 years expiring in May 2119, with a charge to a German bank.
    - We note that records indicate that Sanctuary Housing still own the leasehold of the upper floors of the building under title DN418730 on a 25 year lease which appears to have expired in June 2024. This lease has provisions for rights of crossing and access to a substation.
- 161 Sidwell Street, EX4 6RH (DN701956) – this is an occupational lease that expired in March 2025, containing a charge to a Bank.
- 162-166 Sidwell Street, EX4 6RH (P194309) – this is held on a long lease until September 2055, with a sub lease expiring in February 2026. The lease has a charge over it to a German bank.
- 171-182 Sidwell Street, EX4 6RL (DN606163) – a long lease held for 99 years, expiring in December 2063. This lease contains restrictive covenants as imposed by the Freehold title under which the long leasehold operates.
- 183-187 Sidwell Street, EX4RD (DN606158) – a long lease for 99 years expiring in December 2062. This lease contains restrictive covenants as imposed by the Freehold title under which the long leasehold operates.

- 188 Sidwell Street, EX4 6RD (DN606159) – a long lease of 99 years expiring in September 2061. This lease contains restrictive covenants as imposed by the Freehold title under which the long leasehold operates.

3.32 The Frasers Group long leasehold ownership is located in close proximity to the Bampfylde Street Car Park and former bus station site, both in the ownership of the Council and therefore creating the potential for comprehensive redevelopment of the combined sites alongside other development options.

3.33 Frasers Group has already sought to engage the Council to discuss and potentially partner on the redevelopment of the combined sites, therefore the ownership does not present any significant delivery issues.

<u>Site 6b: 167-168 Sidwell Street, EX4 6RH (DN746000) – Artkof Enterprise Limited</u>

3.34 Sat within the run of retail units fronting Sidwell Street, one property has not been acquired by Frasers Group. The three storey building covers a site area of 0.02 ha and extends to c.353 sq m. The occupier has a 25 lease expiring November 2036.

3.35 The site sits within the long leasehold boundary owned by Frasers Group. We understand that Frasers Group is obtaining a surrender of the lease, however the current lease to 2036 does present a delivery issue, although should be resolved by Frasers Group in the short term.

<u>Site 7: Clarendon House (DN164074) – Darley Street Properties ltd</u>

3.36 Located to the east of the Paris Street/Western Way roundabout 0.25 Ha, the building extends to six storeys plus a basement. The property, constructed in 1965 is let to the Ministry of Public Buildings and Works and the Jobcentre.

3.37 The site slopes down from west to east, with pedestrian access from the west elevation and access to the private car parking and servicing areas from Russell Street to the east.

3.38 The owners of Clarendon House submitted a Screening Opinion in November 2024 (24/1196/SO) to demolish the building and construct 310 student bedspaces, which confirmed that an Environmental Impact Assessment is not required.

3.39 A further application was submitted by the owners in January 2025 for Prior Approval to convert the building to 31 apartments under Permitted Development Rights; a decision on this remains pending.

3.40 A new planning application has now been submitted (25/1082/FUL) for a student scheme of 297 bedspaces including ground floor amenity space.

3.41 The DWP currently occupies a long lease extending to 63 years, expiring in March 2032. We understand that the Department for Work and Pensions, including the Job Centre is currently seeing alternative accommodation within Exeter city centre that would allow the redevelopment of the site.

3.42 The Freehold title contains a clause relating to rights of light and air given by the vendor by license and not as a right to the landowner; this assumes that the subject land and the vendor's adjacent ownership have been in separate ownership for at least 40 years. This is a clause from the original 1984 sale and on this basis, we assume that the 40 years has lapsed.

<u>Site 8a: Eaton House (DN101204) – Guinness Partnership</u>

3.43 Eaton House is an Affordable Housing Retirement Living scheme built in 1984 and run by the Guinness Partnership. The building has 68 apartments which are all of a rented tenure.

3.44 The buildings range from two to four storeys, with areas of private and public open space. Access to the parking area is from Athelstan Road to the rear, with c.30 private parking spaces for residents and the adjacent John Hannam House.

3.45 The site red line extends to 0.65 ha and the eastern part of the site sits lower than the western, indicating a fall in gradient.

3.46 The Freehold title notes that land edged green on the title plan has been removed from this title plan and re-registered under a separate title.

3.47 In addition, the title identifies covenants from the original 1905 transfer, however no record of such covenants is available. A further 1978 covenant relates to the erection of advertising hoardings along the northern boundary, without further detail.

3.48 With the freehold owned by Guinness Partnership, obtaining Vacant Possession for redevelopment is possible, so long as alternative accommodation can be provided to the current residents. It may be that the adjacent Pyramids scheme is delivered as a phase 1, with residents relocated from Eaton House which is then delivered as a phase 2.

<u>Site 8b: John Hannam House and The Pyramids (DN344768) – Guinness Partnership</u>

3.49 Adjacent to Eaton House, John Hannam House is an Affordable Housing Retirement Living scheme built in 1991 and run by the Guinness Partnership. The building has 21 apartments which are all of a rented tenure. Combined, the two land areas extend to 0.3 ha. There is a row of mature trees on the western boundary of the site.

3.50 To the east is the former Pyramids Swimming and Leisure Centre which extended to c. 1,340 sq m and closed in 2022 when the new state of the art St Sidwells Point Swimming Pool was completed nearby. Demolition of the swimming pool building completed in summer 2025 with Guinness Partnership intending to submit a planning application for the development of Affordable Housing on the site. The freehold of this site was disposed by Exeter City Council to Guinness in 2023 with a requirement that it cannot be delivered for student accommodation.

3.51 Guinness' Freehold title notes access rights held by Exeter City Council across parts of the site as edged blue on the title plan, while land edged brown is no longer of significance following a previous register entry was cancelled.

3.52 The title goes on to show restrictive covenants, the first referring to the creation and maintenance of footpaths, presumably linked to the original construction. The second covenant relates to a party wall with a neighbour and the requirement for the owner of the property paying half of the costs towards a party wall. The third relates to proper connection of the development to mains surface water and foul sewer systems. The fourth seeks repair and making good of any damage during construction. We note there is no fifth covenant on the title. The sixth confirms the beneficiary has no obligations over pathways and sewers not within the conveyance. The seventh confirms there is no restriction on the erection or continuance of bill-posting hoarding. The eight confirms that the above covenants apply to successors in title. We note the lease DN320628 as noted as a sub lease within the freehold title no longer exists.

3.53 With Guinness Partnership as owner, there are not hurdles to delivery from a land ownership perspective.

4. Land Uses

4.1 The central location of the site justifies the use of a range of uses, by virtue of the close proximity to employment, retail, amenity, leisure and sustainable transport links, while its accessibility from other parts of Exeter is also strong due to the central location, including direct access to the Bus Station and close proximity to the rear entrance to Exeter Central mainline train station.

4.2 On this basis, we have assessed the sites contained within the allocation area as suitable for the following uses:

<u>Residential</u>

4.3 The central location is ideal for high-density development, generating much-needed homes and Affordable Housing for the people of Exeter.

4.4 The emerging Exeter Plan sets out the city needs to deliver at least 642 new homes per year to meet local needs, equating to at least 12,840 homes over the 20 year plan period. We note the forthcoming Exeter Housing Market Insights Report considers the market position of the city.

4.5 The location suggests that apartment-led development is the most appropriate, being the best way to deliver as many homes as is suitable for the respective site/s.

4.6 Apartments are generally smaller in size when compared to houses but still appeal to a wide range of potential residents, including but not to limited to:

- First time buyers (FTBs) – primarily due to the cost, apartments are often the property type purchased by those entering onto the housing ladder. This can be at a variety of sizes depending on circumstance, budget and demand, and can include those who occupy the flat and rent their spare room.

- Young families – Apartments are also occupied by both young singles and couples who have children, as well as older people with young children. Accessibility and budget are often key constraints to accessing larger property, however given the value dynamic, new central apartments can often have similar values with older, more peripheral houses and as such, families often prefer the larger sizes and access to gardens, etc.

- Private/amateur Investors – While we have seen the number of amateur investors in the market diminish in recent years by virtue of higher stamp duty, etc, there remains a significant number of properties owned as an income-producing asset, sat in portfolios of varying sizes. Given the cost of property ownership, mortgage deposit requirements and the cost of living, the demand from those choosing to or who have no choice but to rent remains high, therefore there remains investor demand for new apartments.

- Older persons – Many apartments are occupied by older people who have either chosen the urban lifestyle, prefer a more compact living environment and/or enjoy the access that the city centre provides. We note Guinness Partnerships' scheme at Eaton House, located within the allocation area demonstrates that this use is appropriate in this location.

  Additionally, they may also have budgetary or accessibility issues, through impaired mobility or limited means to obtain more expensive property.

- Downsizers and Retirees – As the UK population ages, we are seeing an increase in the number of downsizers; people who have owned larger property and once their children have grown up and left home, no longer feel the need to have such a large home to manage, therefore choosing to move to a smaller, more manageable property, often in a central location to enable easy access to available amenities.

4.7 Overall, the key drivers for residential apartment occupation is driven by lower size and/or values – either through choice or necessity – and accessibility to education, employment opportunities, amenities, leisure and transport options.

Build to Rent

4.8 While a well-known tenure in the USA, Multi-Family accommodation, known as Build to Rent (BtR) in the UK is a relatively new sector.

4.9 As a general summary, a BtR scheme is owned and operated by a single landlord, often an investor/investment fund, who then rents individual apartments and provides a management service similar to that of a hotel.

4.10 BtR schemes can be delivered to different specifications ranging from basic to luxury, but generally feature on-site management teams, who also often have a concierge-style role to cater to their residents. These schemes often have a range of on-site extras that can include co-working areas, gyms, parcel delivery services, roof terraces/communal gardens and bookable dining rooms/kitchens.

4.11 While residents are still required to pay their utilities (measured per unit) and Council Tax, items such as high-speed Broadband and access to the on-site services are often part of the package.

4.12 Residents in BtR schemes often comprise:

- Students – Once their first year accommodation in the form of University Halls of Residence/Purpose-Built Student Accommodation is complete, many students must enter the housing market; this can include flats as well as houses depending on their budget, demand of size and location desired, and includes both post-graduate and PHD students as well as undergraduates.

  Foreign students often choose to occupy modern apartments, paying for the full lease length of rent up front where they are unable to produce a UK credit rating.

- Young professionals – Flats are generally seen as entry-level accommodation for those entering the housing market due to the smaller size and lower cost when compared to houses.

  The “young professionals” sector relates to a wide range of occupiers, including those leaving the family home for the first time, those in multi-occupancy flats (i.e. flat share), singles, young couples, University leavers, etc.

- Transient/Fixed contract workers – Those who are in a location for a duration longer than a hotel/aparthotel might cater, but are perhaps employed on a 6 or 12 month contract, for example; some larger BtR operators have national contracts for companies who regularly employ fixed-term workers. Some tenants often own larger property elsewhere in the country, with a BtR unit for mid-week occupation while they are working.

4.13 We consider that the sites located within the allocation area all fit with the parameters sought by BtR investors, being centrally located, within reasonable proximity to transport options, close to amenities and close to a range of employment options. Exeter is a considered a secondary location for the funds, however the city benefits from sufficient economic statistics that supports BtR development, with the recent planning consent at Haven Banks, also known as Water Lane, demonstrating this emerging market in the city.

4.14 Investors tend to offer flexible tenancies, generally with 12 month leases as a starting point and discounts for longer leases, although some will offer shorter leases.

4.15 BtR schemes support those seeking flexible accommodation, either as a stop-gap while a new job starts, or a house purchase completes for example. Professionally managed BtR schemes support the wider Private Rented Sector by offering the option of professionally-managed accommodation which is well-maintained and offers extra services when compared to amateur investors.

Affordable Housing

4.16 Demand for Affordable Housing in Exeter remains high, in line with much of the country.

4.17 Exeter planning policy requires on-site delivery of Affordable units in residential schemes (subject to viability), to be delivered alongside any residential units and generally pepper-potted in order to deliver a mixed and balanced community. Policy CP7 of the Core Strategy (adopted February 2012) requires sites capable of providing three or more additional dwellings to deliver 35% as Affordable Housing of which at least 70% should be Social Rented Dwellings. Considering emerging policy, draft policy H4 of the draft The Exeter Plan states that on greenfield sites, a minimum of 35% of homes are to be provided as Affordable Housing, split 50:50 between Social Rented and Affordable Home Ownership units. For brownfield land, a minimum of 15% of units are to be provided as Affordable Housing (see Table 1), with the same 50:50 split between Social Rented and Affordable Home Ownership.

Table 1 - Affordable Home Ownership Products

Affordable Home Ownership*	Definition
First Homes	Homes sold at 30% - 50% discount to open market values to first time buyers, new homes limited to £250,000 in value (£420,000 in London), buyers must earn under £80,000 (£90,000 in London). On onward sale, the unit must retain the same discount to open market value.
Shared Ownership	A portion of a home (10% - 75%) is purchased, with the outstanding portion retained by a Registered Provider with a rent payable. Shared Ownership units also offer the ability for "staircasing up" the amount of ownership up to and including 100% of the property, with the rent payable to the Registered Provider reducing accordingly. Restrictions apply, including an income of up to £80,000 (£90,00 in London).
Rent to Buy	The property is rented at an intermediate rate (20% discount to open market rent) for a period up to five years, alongside a savings plan put in place for the occupier to build a deposit with the discount in order for them to purchase the property at the end of the period. This product is aimed at middle-income earner first time buyers who are in employment.

*Wales and Scotland-specific options not shown

4.18 There is also the opportunity to use grant-funding from Homes England, for example to deliver in-excess of policy levels of Affordable Housing, up to 100% of a given scheme; in the Chancellor's Spending Review (11th June 2025) the Government has announced the £39bn Affordable Homes Programme, providing funding for Affordable Housing over the next decade. Details relating to application of the funding is yet to be disseminated, however with the previous Homes England grant funding programme ending in 2026, this new round of funding will support the delivery of additional Affordable Housing units, in excess of s.106-required units.

4.19 Two live examples in the city can be seen at the Exmouth Junction scheme, delivered by Eutopia Homes alongside the recent approval by the Council of the Clifton Hill site sale, which will be delivered as 100% Affordable Extra Care, in Affordable Rented tenure.

4.20 There remain challenges with some Housing Associations unable to deliver buildings that trigger the Building Safety Act where the building is in excess of 18m tall of have at least 7 storeys (a legacy of the Grenfell disaster), however this can be overcome by delivering buildings under this threshold, which may be more suitable for some sites.

4.21 We anticipate that the development on the sites within the allocation area are likely to be high-density in nature due to their location, which could help in the delivery of a high number of Affordable Homes. As apartments, these homes provide homes at the smaller end of the scale, supporting the Housing Needs Assessment (Dec 2024) Overall need for Market and Affordable Dwellings, showing over 42% (5,333 dwellings) need for 1 bed and 2 bed dwellings.

Purpose-Built Student Accommodation

4.22 The delivery of Purpose-Built Student Accommodation (PBSA) is a necessary part of the makeup of any major city, providing professionally-managed accommodation specifically developed for students currently enrolled at the local academic institutions.

4.23 The central location of the sites within the allocation area make them prime for PBSA delivery; any scheme is likely to be car-free, with the close proximity to public transport options allowing ease of movement for the tenants. The larger Streatham Campus is only a 20 minute walk from the allocation area, while the St Lukes Campus is just over a five minute walk, meaning both are within easy walking distance.

4.24 Students bring vibrancy and spending power to an area, supporting the central retail, food and beverage establishments locally, while the viability of PBSA schemes in this complex market means they are more likely to be delivered compared with other asset types.

4.25 The Council and University of Exeter have a joint policy of accommodating 75% of university student growth in the city to be delivered either on the University campus, in the city centre or at sustainable locations on major transport corridors. This is also supported by the extension of the Article 4 area to restrict additional Houses in Multiple Occupation (HMO).

Co-Living

4.26 Co-living falls within the BtR sector, providing compact, efficient private space along with communal areas (kitchens, lounges, etc) that are professionally managed and targeted at University leavers and young professionals, but at a lower price point than the larger BtR units.

4.27 With the high cost of entering home ownership and recent rises in rental values too, co-living is also an emerging asset class that is proving popular.

4.28 As with the above sectors, the central location and access to transport links (assuming a co-living scheme would be car-free) are positive, while access to retail, amenity, leisure and employment opportunities are all positive.

4.29 Co-living schemes are a further option to deliver a high density of development to city centre locations, providing a significant number of homes for the people of Exeter. Given the type of accommodation, leases are generally between 6 – 18 months long.

4.30 Exeter has one operational Co-Living scheme called The Gorge on Gladstone Road which opened in 2024, with further schemes planned including at the Mary Arches Car Parks, recently marketed by the Council.

Later Living/Retirement Living

4.31 The UK population is ageing, with an increased number of people living into their later years by medical advancements.

4.32 Later Living can be characterised by schemes ranging from age-restricted housing (generally age 55+) through to supported living with add-on services. Later living is already present within the allocation area, located on the Eaton House scheme, demonstrating the suitability.

4.33 The central location is a strong attribute; access to amenities, leisure and retail is all a positive, while walking distance to public transport options is also good.

4.34 The anticipated higher-density development would also provide appropriate unit types to residents, often downsizing from larger, more suburban accommodation.

4.35 Depending on the owner/operator, schemes could be for sale and/or for rent, providing a range of options, while freeing up larger homes for families.

Care (including Extra Care, Nursing Homes, etc)

4.36 One step on from later living is the care sector; providing residential space with care support where required. This sector ranges from Extra Care (this is one step further from supported living) through to Nursing homes and specialist care, such as dementia care.

4.37 We consider that the majority of the care sector would not select this as the primary location, however there is the possibility of some Extra Care that could work, perhaps as an add-on to retirement living.

4.38 The Infrastructure Delivery Plan alongside discussions with Devon County Council has identified that Exeter needs two additional Extra Care Housing schemes. One development is planned at the forthcoming Water Lane site and a second at the Council's Clifton Hill site, for which approval for the sale was given by the Council in May 2025 to an Affordable Extra Care developer.

Hotel/Aparthotel

4.39 The proximity of the allocation area to local facilities and business supports local spend and in turn the viability and vibrancy of the city centre.

4.40 Being a short walk to a variety of leisure and business options also promotes demand for hotel space in the city centre.

4.41 Hotel schemes often provide active ground floor areas including bars and restaurants, further delivering on vibrancy for the city centre.

4.42 Parking can be accommodated for in other city centre car parks, while being within walking distance to bus and train stations encourages sustainable travel options.

Offices/Employment Space

4.43 Exeter's city centre offers a suitable location for high-density employment uses, mostly in the form of office-led development. The central location of the allocation area offers strong connectivity through sustainable transport mediums, including the location adjacent Bus Station and three stations within walking distance.

4.44 Demand for single-let or HQ buildings does occur in Exeter but is rare, subject to the size of space available. New development will often seek a pre-let of the space in order to de-risk a development, knowing it will be let on completion, with single occupiers being the preferred medium, but the option for multi-let where this is not possible. As such, flexible floor plates that are suitable for single occupancy but also have the capability to be subdivided for multiple occupiers is key.

4.45 Exeter's size means that those who live and work in the city centre benefit from the amenities opportunities seen in the city, while being within close proximity to the Devon countryside as well as the coastline, providing a strong work/life balance, while maintaining road and direct rail connections to Birmingham, Bristol, Cardiff, Cheltenham, Leeds, London, Reading, etc.

4.46 Following the pandemic, the market has experienced a significant down-sizing of occupied office space, where flexible working is embraced and often required as part of peoples contracts when they are newly employed. As such the amount of office take up has reduced across the south west, while there has been an increase in the amount of sub-let and assigned space as occupiers seek to manage their occupied areas and minimise dead space.

4.47 Over the past few years, we have seen a trend whereby the flexibility of home working has been reduced and in-office work is being encouraged and/or enforced as companies seek to maximise their ability to collaborate and create a sense of community together.

Retail

4.48 Retail is the backbone of city centres, acting as a draw to many as well as catering to those who live and work in the centre of Exeter. We anticipate that the ground floor of much of the space within the allocation area will be active, with much of it being in the form of retail space, seeking to maximise the high-footfall location.

4.49 A trend over the preceding 5-10 years has been the move from traditional retail towards food and beverage (F&B) use and high streets have seen a growth in the variety and number of F&B outlets, while many retailers are moving to a more experiential-based high street occupation, mainly due to the prevalence of online shopping.

4.50 The allocation area provides the opportunity not only to deliver a captive audience of residents and occupiers to support the use of the retail provision within the sites, but also to increase the density of people within close proximity to the wider retail provision of Exeter City Centre, thereby increasing their viability.

Social, community and cultural infrastructure including:

4.51 Previous proposals for the City Point site in particular included a large, amphitheatre-style area of public realm for use by the residents of and visitors to the city of Exeter.

4.52 While this scheme was unviable to deliver, the central location presents the opportunity to deliver public open space and potentially area for community and cultural activities.

4.53 Many professionally-managed student, co-living and Build to Rent schemes already offer communal activities for their residents; the allocation offers the potential for this to expand for the wider community.

4.54 We note the University of Exeter's response to the East Gate allocation area which states "In particular, the University welcomes the inclusion of proposals for the Innovation Hub in this area. The Innovation Hub is a strategic priority for the University and is an integral part of the University's commitment to supporting regional businesses and organisations with their climate and environmental action plans towards achieving net zero carbon and beyond. The University looks forward to working with the City Council and other partners towards the success of this project"

Use Summary

4.55 Overall, we assess the sites as most deliverable for residential-led uses, given the demand and values generated. While offices would be suitable given the location, that value to cost ratio is proving challenging in the current market, meaning they are unlikely to be deliverable at the current time.

5. Constraints

Economic Overview

5.1 Global financial markets have been volatile since President Trump rolled out the new American tariff regime, although recent signs the White House is prepared to compromise on the issue have to an extent calmed nerves.

5.2 The situation on global trade, particularly with the US, is fast changing and difficult to predict. However, a trade deal between the UK and the US has been agreed, which will partially reverse some of the increases in tariffs on UK goods.

5.3 Gilt yields have been volatile for several months. At the time of writing, the 10-year Gilt yield stood at 4.53%, although at times this year it has exceeded 4.75%. In addition, the 30 year Gilt yield now stands at 5.4%, having risen from a low point of 0.7% in November 2021.

5.4 The Q1 2025 GDP figures showed the UK economy grew by 0.7% on a quarter-on-quarter comparison, up from 0.1% growth in Q4 2024, in part due to a strong quarterly performance by the services sector and a rise in investment.

5.5 The monthly GDP figures showed output contracted by -0.3% month-on-month in April, down from 0.2% growth in March. This was below the consensus forecast of -0.1%.

5.6 The UK composite Purchasing Managers' Index (PMI) increased to 52.0 in June, compared to 50.3 in May. A reading above 50.0 suggests the commercial side of the economy is growing.

5.7 Retail sales volume decreased by -2.7% on a m-on-m basis in May, although the less volatile three-month growth rate was 0.8%.

5.8 The employment rate remained steady at 75.1% in the three months to April. The unemployment rate edged up to 4.6%, although this is only slightly above the 10-year average of 4.4%.

5.9 CPI inflation stood at 3.4% in May, down from 3.5% in April. Core inflation (which excludes volatile items like fuel and food) eased to 3.5% in May, down from 3.8% the previous month.

5.10 At the August meeting of the Bank of England's Monetary Policy Committee (MPC) the UK Base Rate was reduced to 4.00%.

5.11 In summary, the economic picture remains uncertain with global implications affecting all aspects of the UK economy. Despite this, a further reduction in the Base Rate and at least one more cut expected this year supports the market sentiment of an improving picture.

Property Market

5.12 Rolling UK investment volumes in the year to Q1 2025 totalled £49.1 billion according to MSCI RCA, which is down on the Q4 2024 figure of £52.5 billion, but well below the long-term average of £60.4 billion.

5.13 The MSCI Market Rental Growth Index for offices increased in May by 0.25% on a month-on-month comparison, up from 0.14% in April.

5.14 The MSCI capital value growth index for offices declined by -0.10% month-on-month in May, compared to -0.23% in April.

5.15 The MSCI retail rental growth index saw a marginal rise of 0.02% m-on-m in May, compared to 0.19% in April.

5.16 Retail capital values based on the MSCI index grew by 0.02% month-on-month in May, following a 0.05% rise in April.

5.17 The MSCI industrial rental growth index increased by 0.33% month-on-month in May, compared to 0.29% in April.

5.18 The MSCI capital growth index for industrial grew by 0.25% month-on-month in May, which was up on the 0.21% figure for April.

5.19 The Nationwide House Price Index increased by 2.1% on an annual comparison in June 2025, which is down on May's figure of 3.5%.

5.20 In summary, activity in the property sector remains subdued, with macroeconomic influences one aspect of challenging viability. Despite this, there is an increasing level of finance providers looking ahead to calmer times where development provides the returns required.

Ownerships

5.21 As discussed in section 3 of this report, the sites and properties within the allocation area are under a multitude of ownerships including public, private and charitable sectors.

5.22 Given the irregular shape of the allocation area, existing strategic infrastructure (road network) and scale of the area, there are areas where collaboration between property/landowners could work to ensure consistency of design and delivery. Indeed despite the regular shape, all of the sites have come forward proactively through the plan making process and all are being promoted for development.

5.23 Beyond this, certain parts of the allocation area lie separated from each other, mainly segregated by the main roads and roundabout that facilitate access into and out of the city centre area.

5.24 Despite this, the multiple landowners means that there is a wealth of knowledge and expertise that will be drawn on to deliver high-quality development in a range of uses and designs.

5.25 The allocation of this area allows for policy requirements to be set to ensure that high quality development is provided.

Topography

5.26 The allocation area is generally level along the north west to north east corner, falling substantially by over 10 metres from the highest point to the north, down to the lowest point in the south east corner by the roundabout.

5.27 The topography offers both opportunities and challenges at both a macro and micro level. At the macro level, the topography affects the city skyline and building massing from the front of the site to the rear. Views across the city are important, with Exeter's heritage a key aspect when considering planning applications, especially views of Exeter Cathedral, therefore verified views will be required to ensure that that the buildings have sufficient spaces and tapering.

5.28 The level change also affects accessibility both for able bodied and disabled users. Changes in level must therefore be dealt with either within buildings, i.e. level access at one level with lift and stairwell access to a lower or higher level, or through public realm areas. This can be in the form of balconies and external staircases, with publicly-accessible lifts, or a series of steps and ramps for users to travel from one level to another.

5.29 From a development viability perspective, significant level changes can result in dead space, i.e. space that is either not useable or not lettable/saleable; basements for example. Thoughtful design can ensure that back-of-house areas e.g. plant areas, staff areas, bike storage, post rooms, bin stores, etc can be located in areas without natural light, for example.

5.30 In addition, the level change also provides the opportunity for some area of undercroft parking, without the need to undertake expensive excavation - basement parking can cost in the region of £40,000 per space to deliver.

Affordability

5.31 According to the Office for National Statistics (ONS), in 2024 the median average home in England, at £290,000, cost 7.7 times the median average earnings of a full-time employee (£37,600). Affordability has returned to its pre-pandemic levels after a sharp decrease in affordability.

5.32 Despite this, Exeter continues to struggle with Affordability, have been in the top ten settlements for poor affordability in recent years. Data from the ONS' Housing Affordability in England and Wales: 2024 (released March 2025) shows that Exeter had an affordability ratio of 8.6, ahead of the national average and higher that other south west locations such as West Devon, Mid Devon and Cheltenham.

Heritage

5.33 Exeter's heritage is extensive, established as an important trading town on the banks of the River Exe during the Roman period. The city walls built on the fort wall, rebuilt by Alfred the Great and strengthened by King Athelsan, before the prominent cathedral was completed around 250 years later in c.1400. Rougemont Castle, also known as Exeter Castle was built in 1068. While the city's heritage is a constraint on development, it should also be recognised as an opportunity to enhance and preserve the rich history on which the city has been built.

5.34 Considering the available mapping information including the University of Exeter's special collection, the first available map from 1765 already shows development lining both sides of Paris Street and extending up Sidwell Street, presumably in the form of housing given the suburban nature.

5.35 Exeter was bombed during the war, most infamously in the Baedeker Raid on the night of the 3rd May 1942 which sustained significant damage. Unexploded Ordnance mapping suggests that the western edge of the Former Bus Station site was hit by a 50kg bomb during this raid, while buildings on both sides of Dix's Field sustained damage as a result of the bombing.

5.36 In summary, both sites lie outside of the City Perimeter Wall (itself a Scheduled Ancient Monument) but show signs of development and occupation by 1765. Bombing during the war impacted a significant area of the city, including the subject sites, meaning that the excavation for foundations and underbuild still run the risk of encountering unexploded ordnance, however given both sites have been subsequently developed, this risk is reduced.

5.37 The Exeter Skyline Study and the Views, Heights and Density Study created by Allies and Morrison identifies a series of key views including Exeter Cathedral and Southernhay United Reform Church, to be taken into account for any development.

5.38 We note the southern part of the allocation area is located within the Southernhay and the Friars Conservation Area, while the northwestern part of the site sits within the Area of Archaeological Importance. The allocation area also provides the context for various listed buildings, including at Southernhay, Dix's Field and Heavitree Road.

5.39 Our initial review suggests that the location of the site means that the heritage risk is lower when compared with parts of the city within the City Wall and given the previously-developed nature this century, this further mitigates the level of heritage risk. Through this process we have also considered the information in the Exeter Plan (2021-2041) Heritage Impact Assessment of Potential Development Sites (2024).

Vegetation/Ecology

5.40 The east gate allocation area has little in the way of vegetation, predominantly linked to the developed nature of the brownfield sites.

5.41 This includes low level vegetation on the Paris Street elevation of the former bus station, a series of trees along the Paris Street and Sidwell Street elevations of the Sidwell Street block. The Civic Centre Building benefits from a series of trees on every elevation, extending around the back of Manor Court with an area of open space to the south east of the Civic Building. Eaton House and the former Pyramid Leisure Centre also have a series of mature trees on certain elevations, while the roundabout in the centre of the allocation area contains a series of trees of various size, age and quality together with other vegetation and a swift tower; none of these are anticipated to be significantly affected by development.

5.42 The allocation area does not fall within an Area of Outstanding Natural Beauty (AONB), National Park, Site of Special Scientific Interest (SSSI), Special Area of Conservation, Biosphere Reserve, Nutrient Neutrality Catchment, while neither site contains any Scheduled Ancient Monuments or Listed Buildings.

5.43 The allocation area sits within the impact zone of the Exe Estuary as Special Protection Area and Ramsar site and therefore requires habitat mitigation contributions, while the whole of the allocation area is at low risk of flooding, all falling within Flood Zone 1.

5.44 A review of Exeter's Tree Preservation Order online mapping toll shows that the only trees subject to Tree Preservation Orders are located on the eastern boundary of the former Pyramid Swimming Pool, designated as TPO 682 1 to 4.

Noise and Air Quality

5.45 Being located within the city centre location, noise from passing pedestrian and vehicular traffic, deliveries and the bus station are all constraints on development, however much of this can be mitigated through modern double or triple glazing, mechanical ventilation and air tightness as required under updated Building Regulations.

5.46 The allocation area does fall within an Air Quality Management Area, however the Air Quality Action Plan produced by the Council in 2019 ran for five years until 2024 and does not appear to have been required to be renewed.

5.47 Given the proximity to a high concentration of retail and leisure uses, we anticipate a significant number of deliveries, however with residential uses within the Princesshay development, we assume that all deliveries are required within reasonable hours.

5.48 The adjacent new bus station does operate in antisocial hours, however we consider that the orientation compared with the Former Bus Station site as well as the leisure centre means that most of any new development is shielded from noise, with the exception of the eastern aspect of Block D.

Radon

5.49 Both sites are located within an area where the maximum radon potential is 3-5%; this is the third highest level of 6, with the 6^{th} level being 30%+. As this is above the lowest level, we suggest that the level of Radon is tested prior to any development taking place to understand the level of mitigation required. This is not seen as an issue preventing development, as shown by the scale of residential development already present in the city centre.

6. Opportunities

6.1 The fundamental opportunity of this allocation area is the wide-spread development of a series of co-located sites in the centre of this historic city.

6.2 Within this area, there are sites that are ready to be redeveloped given their position, for example the former bus station, others are coming to the end of their natural life, while others are poor in quality or lack efficiency.

City centre location

6.3 The allocation area is well-located for high density development given the proximity to city centre services, retail, amenities, transport links and employment opportunities. The nearby high street area, John Lewis department store and Princesshay Shopping Centre all provide plenty of retail, leisure, food and beverage options within a short walk.

6.4 With the new Exeter Bus Station to the east, sustainable transport options are on the doorstep; Exeter Central Station is also only a 10 minute walk, while both Exeter St Davids and Exeter St Thomas stations are less than a 20 minute walk each. In addition, the proximity to Heavitree Road and the wider road network allows easy vehicular access to M5 motorway, A30, A38, etc.

6.5 The new St Sidwells Point sports centre located adjacent to the former bus station allows easy access for both exercise and leisure purposes, containing swimming pools, gym, spa, soft play and café. This is a high-quality facility for the people of Exeter and has proved popular since its opening in April 2022.

6.6 The central location also allows for good access to a range of employment opportunities within the city centre. Alongside the considerable amount of retail, leisure, food and beverage options close to the site, central Exeter contains plenty of office accommodation with a cluster in Southernhay, less than a 5 minute walk from the allocation area. This therefore provides plenty of work options for people living in the city centre area.

6.7 Being located so centrally, the allocation area also provides good access to education and training opportunities, including schools, Exeter College and the University of Exeter.

6.8 The access to culture is also strong, with Exeter Cathedral, Exeter Castle and the City Walls all within close proximity. Given the rich history of the city, history and heritage is ever-present, while the Royal Albert Memorial Museum and Art Gallery contains an extensive collection of artefacts.

End of Lifecycle Property

6.9 The existing buildings within the allocation area are of varying forms, ages, conditions and qualities, with a number of buildings potentially unsuitable for modern occupation.

6.10 Older properties tend to have poorer sustainability credentials, resulting in higher energy costs through the increased heating and cooling requirements, often contributed towards by poor air-tightness, insufficient glazing, poor maintenance, etc.

6.11 Ageing buildings tend to attract lower rental/sales values by virtue of the condition, in turn being occupied by tenants with poorer covenant strength. This can lead to a reduction in the investment value of said property as the multiplier is lower (i.e. investment yield is higher). At some point, a decision should be taken by the owner of said buildings, options which include maintenance, refurbishment and redevelopment.

6.12 Each of these opportunities include different capital costs, carbon costs and will impact on the income from the space as well, however from an asset management perspective, a sensible insert of capital can increase the potential rental/sale income.

6.13 Through the due diligence process, there remains the potential for a more comprehensive approach to redevelop the space, covering a larger area footprint in order to achieve a scale of development that delivers efficiencies and improved viability.

Density

6.14 The city centre location of the site and nearby real estate allows for a higher density of development than that which currently occupies some of the space on site, with proposals needing to come forward within the context of the Exeter Density Study and the Exeter Skyline Study, as previously referenced.

6.15 The delivery of a higher density development enables the delivery of a range of unit types, generally towards the smaller end of the scale when considering a residential-led use, providing more homes for people with the same footprint of a lower density development, thereby increasing the efficiency of any given scheme.

6.16 Density can include both the height of any given development (i.e. a greater number of stories over the same footprint delivers a greater amount of space), as well as the site coverage.

6.17 A higher density of development can enable the provision of certain services and enable the viability of complementary space, both through an anticipated higher land value and the provision of a captive audience (i.e. occupants). A larger scheme/s also enables larger developers and investors to consider the opportunity, bringing their expertise, efficiencies of scale and investment to the city.

Critical Mass

6.18 A critical mass of development creates the ability to deliver better and more comprehensive public spaces, while the efficiency generates value.

6.19 Certain developers require a certain scale of development to enable them to engage; this is to enable them to hit their hurdle rates, fulfil their business plan objectives and perhaps to satisfy funding requirements.

6.20 Efficiency is a key driver, with sites with a more regular shape allowing better internal design and a more efficient net to gross internal area (i.e. greater space which generates value). A larger site or collection of sites allows the ability to drive this efficiency, improving value and therefore viability in the currently-challenging world of viability.

City Point – Delivery of the Full Potential

6.21 With the previous planning application submitted by the Crown Estate and Nuveen, the vision was to enhance Exeter city centre's retail and leisure offering. With this scheme not being implemented, it has left the balance of the former City Point site in limbo, creating both a liability for the Council as owner of the former bus station site (security, insurance, Business rates, Health & Safety) as well as not delivering any value to them or the people of Exeter through delivery.

6.22 The Princesshay II scheme was not considered viable upon reaching the point of delivery, however the bus station, Bampfylde Street car park and Sidwell Street sites all present strong redevelopment options which could in turn deliver homes for the people of Exeter and/or employment opportunities as well as a land value to the vendor/s.

6.23 In addition, there is the potential for comprehensive redevelopment across the City Point site which could yield new public realm in addition to a more rational form of development where there is collaboration between the landowners. Any potential collaboration piece could allow for enhanced efficiency in building layout, again driving value as well as reduced competition between sites, making it more investable.

Construction, Occupation and Employment Opportunities

6.24 Within the allocation alone, there is the potential for significant real estate generation that could deliver new homes, hospitality, workplace, community and retail space for the people of Exeter.

6.25 The seven sites identified within the allocation area will result in a significant number of jobs for local people, through design development, engineering, planning, technical consultants and through the actual development and construction phases. Once complete, we anticipate a considerable number of jobs will be created through the new space, including replacement retail space, alongside hospitality jobs, workspace and through the ongoing management of the new buildings.

Biodiversity Net Gain

6.26 Since February 2024, major developments have been required to deliver a 10% net gain in biodiversity; essentially meaning that habitats for wildlife are left in a measurably better state than they were before the development.

6.27 As part of any planning application, a developer must undertake a baseline assessment of the site pre-development to understand the type, amount and quality of habitat on the site and is required to plan and implement enhancements in order to deliver at least a 10% increase once the development is increased.

6.28 Where the sufficient gain cannot be provided on site, the Defra guidance and legislation allows for off-site credits to be purchased by a developer, or a central Government credits as a last resort, with these credits funding other biodiversity enhancement schemes.

6.29 With the urban location of the sites and current development present within the allocation area, we anticipate that the baseline assessment will be low (compared with say, a greenfield development site) based on the visible amount of vegetation, trees and lawned area within the allocation area red line. With a low baseline, achieving a 10% net gain is anticipated to be straight forward, meaning that we expect that the enhancement will be delivered on site, for the benefit of residents, occupiers and visitors to the area once the development is completed.

Active Travel and Public Transport

6.30 With the amount of development that the East Gate allocation area could deliver, we anticipate that transport and accessibility will be key factors, with the potential for enhancing both pedestrian and cycle routes through the allocation area, as discussed in section 10 of this report.

6.31 This could not only include increased permeability from Sidwell Street through to Paris Street but also the link into Princesshay, as well as improved pedestrian and cycle access east towards Heavitree Road and linking south to the Civic Building and Manor Court.

6.32 This improved public realm will enhance use, dwell-time and encourage decision making on reaching the area to be via sustainable transport means.

6.33 The central location will mean that the site is appropriate for low/no car development, meaning opportunities for carbon ambitions, but also reduced space and cost requirements for parking. Discussions with Devon County Council as highway authority has not identified significant ‘highway infrastructure requirements’ as can be the case for more peripheral and greenfield developments.

7. House Types

7.1 The Exeter Plan: Regulation 19 was published on the 12th December 2024 and will “shape the future of Exeter for the next twenty years and will be the basis for how the city continues to evolve and meet the needs of the community”.

7.2 The publication contains a series of draft policies, including policy H15 Housing density and size mix (Strategic policy) which is relevant to house types, proposing:

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.”

7.3 The city centre location is suitable for higher-density homes, by virtue of the surrounding building heights and opportunity for a mix of uses within a location well-served by sustainable transport opportunities.

7.4 This means that the site is more suited to the development of apartments, co-living and student studios or cluster flats, rather than a more traditional two-to-three storey housing product that would be better-suited in a more suburban area. The height and massing opportunities in this location creates the right environment to deliver a higher density of development and therefore a larger number of smaller units, providing a more homes and Affordable Housing to the people of Exeter. Family units are also required in Exeter, but apartments can deliver against this requirement.

7.5 Existing and anticipated policy does not provide indicative unit mixes, however we have engaged a series of estate agents and letting agents operating in Exeter City Centre to gauge the demand profile.

7.6 Considering a for-sale product, estate agents suggest that there is a broad 50:50 mix of demand for one and two bedroom apartments, with some (but limited) interest in studios given their rarity, but very little demand for three bed apartments, driven by the value dynamic of a likely newbuild three bed apartment in the city centre versus a three bed house in a more suburban area, the latter of which may come with a garden, parking, etc and is expected to be better value.

7.7 Turning to the rental market, demand for two beds is marginally higher than 1 beds but the two unit types dominate the overall demand pool. While there is some demand for studios, much of this is being absorbed by the co-living market which typically offers both studio and cluster flat space to the open market.

7.8 Demand for three bed apartments is limited; in the wider Private Rented Sector (PRS) market, occupied mainly by amateur landlords, three bed units are generally occupied by sharers, with small families generally preferring to occupy small housing for similar sale/rental values, albeit in a more peripheral location instead of inner-city apartments.

7.9 Generally, we would anticipate to see a mix of studio, one bed, two bed and occasionally three bed units, depending on current market demands (for sale demand can be different to rental demand, for example).

Affordable Housing Unit Mix

7.10 Affordable Housing unit mix is to be determined by local need, in line with draft policy H4: Affordable Housing (Strategic Policy) of the draft The Exeter Plan, which itself references the latest Exeter Local Housing Needs Assessment, the latest available being published in December 2024.

7.11 In considering the potential unit mix of Affordable Housing units within the allocation area, we have assumed that the majority of units delivered on the site will be one and two bedroom apartments, with lower-density housing-led sites delivering three and four bedroom Affordable Housing units elsewhere within the Exeter City Council area.

7.12 Table 4 is an extract from the Local Housing Needs Assessment, which suggests that of those requiring rented and aspiring to home ownership, 47% of which are seeking one bedroom units, with the balance of 53% are seeking two bedroom units. Of the rented units, the split is more even at 52% one bedroom units and 48% two bedroom units, while the home ownership units are biased towards two bedroom units, with 42% seeking one bedroom units and the balance of 58% seeking two bedroom units.

Table 2 - Extract of Table 42, Exeter Local Housing Needs Assessment, Dec 2024

EXETER	Affordable Housing Need Households unable to afford	Affordable Housing Need Households aspiring to home ownership	Affordable Housing (Households)
1 bedroom	516	498	1,014
2 bedrooms	475	683	1,158
3 bedrooms	731	505	1,236
4+ bedrooms	322	90	412
TOTAL HOUSING NEED	**2,044**	**1,777**	**3,821**

Build to Rent Affordable Unit Mix

7.13 The mix shown in Table 4 is also referred to by draft policy H5: Build to Rent, which requires developers of Build to Rent and Co-Living schemes to deliver 20% of the units as Affordable Private Rent (APR), at discounts of at least 20% to open market rental values. These units will be owned, let and managed by the investor, rather than selling onto a Registered Provided and must be maintained as APR units in perpetuity.

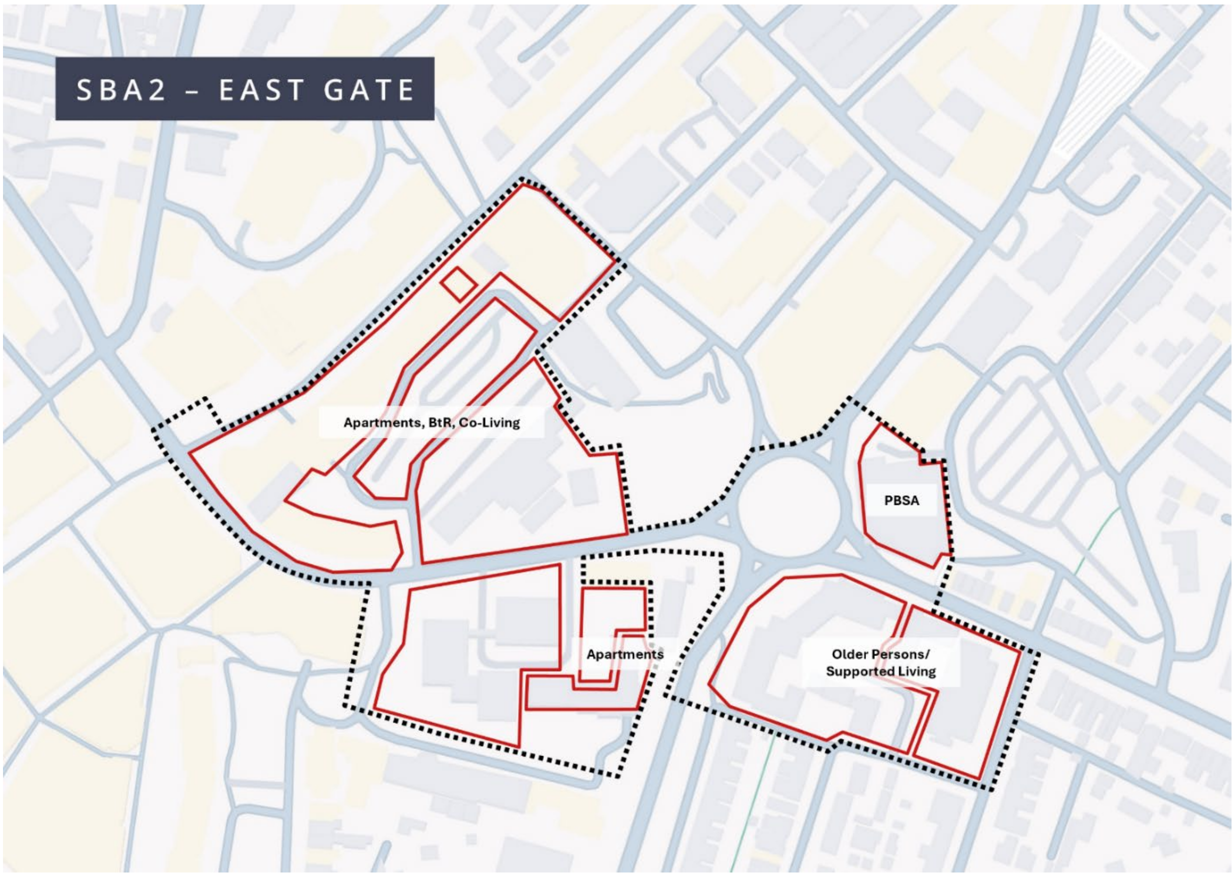
Custom and Self-Build Housing

7.14 Draft policy H7: Custom and Self-Build Housing of the draft The Exeter Plan requires 5% of schemes delivering over 20 dwellings to deliver 5% of the units as custom or self-build, subject to viability. Given the high-density nature of the anticipated schemes, the apartments would be built to “shell and core”, to include electricity, water and waste connections, as well as being given access rights. The draft policy states that a range of sizes should be provided.

Summary

7.15 In summary, there is a variety of potential residential uses which could come forward across according to the main development landholdings, assumed to be PBSA at Clarendon House, Older persons/supported living on the Guinness Land, apartments at Manor Court and a mix of market apartments, BtR and Co-living across the Council and Frasers ownerships as shown in Figure 3:

Figure 3 - Anticipated Uses



8. Phasing

8.1 The East Gate allocation area is a key area of the city centre, visited, used and crossed by a great many people every day. The opportunity for development here is clear, but phasing development in the area is also a key consideration in terms of how residents and visitors interact with the area.

8.2 While concise in land area, there remain multiple ownerships within the allocation area, with some sites co-located that may suit co-ordinated development while others sit distinctly from each other and can be delivered in isolation.

8.3 To an extent, delivery on some sites will be constrained by current occupation by tenants, existing leases and rights granted historically, meaning they are unable to obtain Vacant Possession of the site/s in order to commence construction.

8.4 The type of development will also play into phasing; where multiple land owners are seeking to deliver for-sale residential, for example, it would not be commercially prudent for both developers to deliver their units into the market at the same time as this creates competition with the result of a slow rate of sale; in other words, developers need to be careful to avoid market saturation.

8.5 Macroeconomic factors will play into the phasing strategy, with links to interest rates, demand from home purchasers, appetite for hotel development and funding requirements. Macroeconomics will also impact on scheme viability in terms in terms of labour costs and the cost of materials.

8.6 Comprehensive regeneration will also add a level of complexity to any delivery strategy, where multiple land owners work together to bring forward a wider area; their delivery strategy will need to take into account market forces as well as the process through the combined land ownership.

Anticipated Sequencing

8.7 Acorn is proposing 25 residential units on part of Manor Court through a prior approval application. In addition, the owners of Clarendon House have recently submitted a planning application for redevelopment of the site into 297 Purpose-Built Student Accommodation bedspaces to follow their 2024 Environmental Impact Assessment submission (24/1196/SO) and January 2025 Office-to-Residential Permitted Development application (25/0013/PD). Given their position in planning terms, we anticipate these two sites to come forward first, with Clarendon House intending to start construction in January 2026, with full delivery in 2028/29.

8.8 The Guinness Partnership submitted a Prior Approval application in 2024 for the demolition of the Eaton House site Pyramids former leisure centre site, which subsequently commenced in April 2025, however no further information is available about the site redevelopment or any combination with the adjacent. We consider that the former leisure centre could come forward soon given the demolition, however any development of Eaton House will require considerable resident consultation and is therefore anticipated to be later in the plan period; the former leisure centre site could therefore be considered as a “Phase 1” of any wider development process. The sites are expected to yield 92 units.

8.9 The Council is in the process of considering their exit from the Civic Centre, with next steps being investigated, including the potential to move to another of its existing buildings at Senate Court in 2027. Assuming a relocation is undertaken, a disposal of the building is expected, with options including a Permitted Development conversion from offices to residential or demolition of the building and a fully new redeveloped scheme on the site. Given the relocation, disposal and planning stages required ahead of any new scheme on this site, we expect it to fall towards the middle of the plan period. The site is anticipated to deliver 106 units.

8.10 The former bus station, Council car park and land ownerships along Sidwell Street could be delivered together or separately, given the multiple land ownerships which may in time simplify to the Council and Frasers Group. We understand that Frasers Group is keen to progress to design development on their site, however given the scale, likely mix of uses, existing occupation by Sanctuary Housing within Sidwell House and the need to negotiate with the Council over the long lease, we expect this collection of sites to come forward in the middle of the plan period. The Council ownership will likely need to consider the potential adjacent development on the Frasers Group land, regardless of if they come together in any form of partnership or independently. These sites are expected to deliver 239 units.

8.11 The Civic Centre multi-storey car park will need to address the various leases held over it and the future of both Manor Court and the Civic Building and as such could be delivered at a range of times through the plan period.

Figure 4 - Current Planning Applications

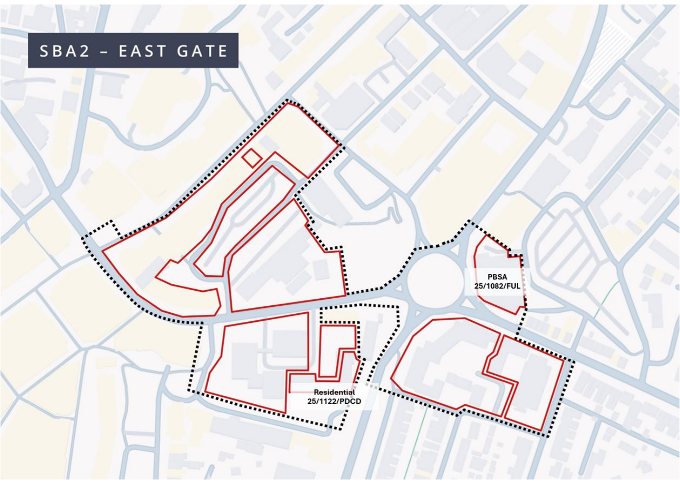
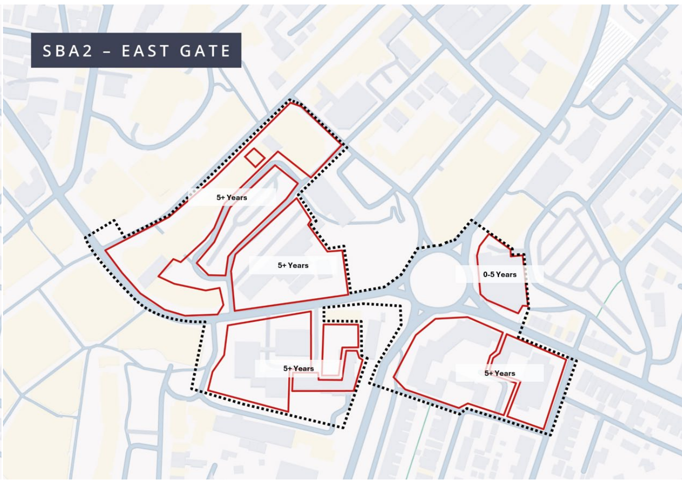


Figure 5 - Major Site Anticipated Plan Period Sequencing



9. Viability

9.1 The viability of any development is a key component of any development opportunity evaluation; it examines a series of factors to determine if the opportunity should be progressed or if an attempt to acquire the land/property should be undertaken. Exeter is a popular city for residents and visitors and attracts interest due to it's employers, university, heritage, location and proximity to both the countryside and coastline.

9.2 Recent history has shown a positive picture of viability for brownfield development with The Gorge and Paternoster House schemes recently completed, Exmouth Junction and St Leonards currently on site, Haven Banks and Water Lane South both with Resolution to Grant planning permission and recent planning application submissions for Clarendon House and Heavitree Road Police Station.

9.3 We consider a series of factors that a developer and investor will be considering through their viability assessment of a site.

Pre-Financial Assessment Considerations

9.4 <u>Use suitability</u> – Considered in depth in section 4 of this report but in summary, the sites within the allocation area would likely be suitable for a range of higher-density uses, including residential options, offices and hotel uses, with elements of ground-floor retail. It is unlikely to be suitable for industrial or light industrial use given the centre location, cost of the land and access for Heavy Goods Vehicles.

9.5 <u>Occupier/resident demand</u> – Absolutely crucial in the assessment given this is the value-generating element of any scheme. Given the central location and level of demand across the residential sector, we think that there is strong sales and rental opportunity for a residential product, be that for sale, Build to Rent, Co-Living, Student accommodation, older persons or Affordable Housing schemes.

9.6 We are aware of some hotel demand, although the funding market remains below that of the pre-covid position and it is therefore very price-sensitive. Demand from occupiers in the offices market remains low, with rental values struggling to justify any new office development.

9.7 <u>Funding</u> – Developers often seek development finance to deliver schemes, enabling the deployment of their capital to be minimised. While this allows schemes at a greater size than the developer may be able or willing to finance, it does inject another level of scrutiny into the process. The development finance company will undertake their own independent review of the market and scheme to assess the suitability and level of risk they are willing to take. Where a location or scheme is deemed too risky, or the demand is unlikely to be there, the funding may opt out of the opportunity or increase the risk and therefore cost on their funding.

9.8 We think that sites within the allocation area present good opportunities subject to a detailed financial modelling exercise; Exeter city centre is a good regional market, with many funders seeing good returns.

9.9 <u>Availability of contractors and subcontractors</u> – The availability of trades is another key component of development delivery, with availability of personnel and potential for price fluctuations critical to the deliverability. Cost overruns and changes to the build schedule can have a material impact on whether a scheme is completed or otherwise, impacting on a developer's income.

9.10 Exeter has a wide functional economic catchment area and benefits from M5 access to trades from Somerset and Bristol where larger contractors can travel from. We anticipate that the number of Tier 1 contractors currently operating in the city is low, however they will likely travel for larger, strategic-level schemes.

9.11 <u>Exit strategy</u> – A developer must have an exit strategy in mind from the outset, both in commercial and residential sectors. For residential, a developer can chose to sell the completed units into the market one by one, alternatively, they could look to partner with a Build to Rent fund or Housing Association with Grant Funding who could forward-fund a scheme, thereby de-risking the sales process for the development providing a saving in terms of finance costs. A third route is to build the scheme, operate it as a rental product and once it is operating well (Stabilised) then sell to an investor with the benefit of proven operation, demand and income, thereby reducing the risk and maximising the value of the asset. This can apply to Build to Rent, Student and Co-Living schemes. Hotels usually have a funding plan in place from the outset, with developer, contractor, operator and investor all lined up from day 1.

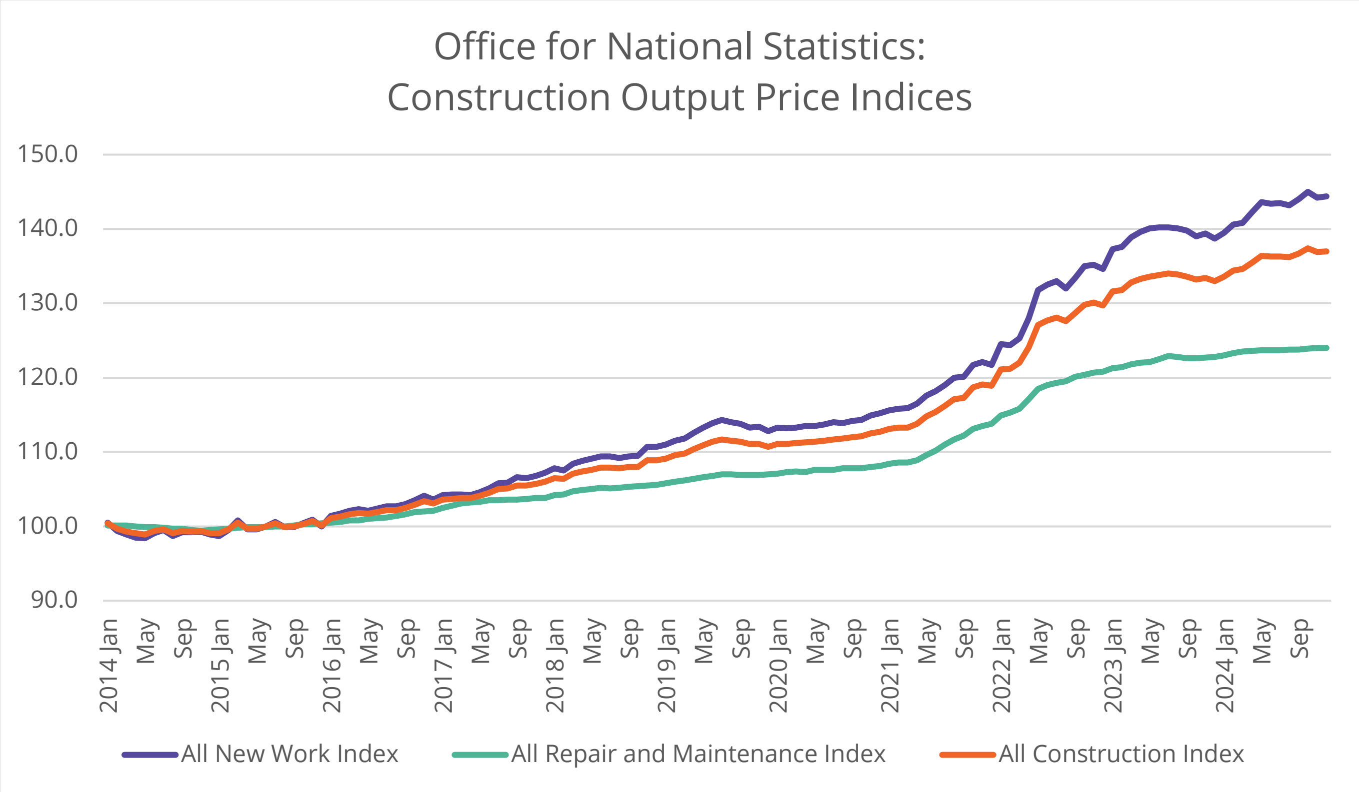
9.12 All of the above options are available to developers in Exeter, however we think it is likely to be sector-dependent on the route chosen, given the relative demand factors between them.

9.13 <u>Value Inflation</u> – Where house prices are growing strongly, a developer may choose to take a risk on an otherwise-marginal development opportunity, banking on value enhancement once the scheme is completed and ready for sale/rent. Given the high levels of inflation recently and the rise in the Bank of England base rate, the number of mortgages has fallen over recent months, although the continued trend in the reduction in the Bank of England Base Rate is anticipated to bring a welcome boost to the home buying market. Another aspect of value is investment yields, i.e. the multiplier on rental income that an investor will buy on the basis of, balanced against other investment asset classes. Again with the base rate and gilt yield rise, there have been better areas to invest than property, which has always been a risky asset class. Yield adjustment is cyclical and we anticipate that yields will fall (creating a higher multiplier) as demand for property increases.

9.14 This yield position adversely affects regional cities like Exeter where development – especially at scale – is already marginal.

9.15 <u>Build cost growth</u> – Both the availability of materials and availability of labour have a material effect on deliverability. With macroeconomic instability attributed to the war in Ukraine and Israel, for example, global shipping routes are disrupted and supplies traversing countries for manufacture are disturbed. Supply and demand of any product will influence price and following the Truss/Kwarteng mini-budget in 2022, rapid inflation was seen in the build cost market, as shown in Figure 6, although we are beginning to see some stabilisation; while positive, we note that it is stabilising a considerably higher rate when compared with five years ago.

Figure 6 - ONS Construction Output Price Indices



9.16 Labour shortage – The shortage of trades is not a new issue in the market, with an undersupply of new entrants despite good take up at Colleges and training centres across the country. The impact of Brexit has also been felt within the construction market, with plenty of European trades people choosing to return home. Partnerships with Exeter College and through programmes like Building Greater Exeter are actively focusing on addressing this issue.

9.17 Biodiversity Net Gain (BNG) – New legislation brought into effect in February 2024 requires all planning applications to be brought forward with a route to deliver at least a 10% net gain in biodiversity; where this not possible on site, there are a series of credits that developers/landowners can purchase in order to achieve this net gain.

9.18 Given the allocation covers an urban area, we consider that achieving 10% net gain is entirely possible on site, given the low baseline score that the site will have, meaning that areas of public open space and green roofs are just two routes. Where this is not possible, the credits provide an alternative.

9.19 Planning – Planning Authorities continue to feel significant pressure following years of under-investment, causing a backlog of applications and therefore a delay in schemes being decided. This presents a timing risk for developers, especially those who buy land unconditionally, i.e. without a planning consent and who have high finance/borrowing costs as any delay increases the amount of value the needs to be spent elsewhere threatening a developers profit line.

9.20 We are seeing the picture improve and recent experience of Exeter's Local Planning Authority team has been positive.

Financial Considerations

9.21 Once the wider considerations have been covered, a financial assessment of the scheme must be undertaken. Table 5 shows a simple residual appraisal, used as the basis of development value by many developers in an infinite range of complexity as well as objectives:

Table 3 - Simple Development Appraisal Format

Gross Development Value	Total sales value; individual flats values or investment value
Less	
Build Costs	Total construction cost, plus abnormals, CIL, s.106 contributions
Finance Costs	Funding costs, i.e. interest payments
Profit Margin	How much margin is needed; overheads + pure profit
Equals	
Residual Land Value	i.e. how much is left to pay for the land

9.22 Gross Development Value (GDV) – The format of GDV will depend on the type of scheme and company/individual undertaking the development, however it is summarised by the income received following completion of construction and a sale. For a for-sale residential scheme, it is the total value of the units (including Affordable Housing revenues); for an investor-led scheme, it is the investment value paid by the investor.

9.23 Construction costs – This includes all build costs associated with the direct build, public open space, supporting infrastructure, s.106 contributions and CIL payments paid out in order to deliver the scheme in accordance with the planning consent. It also includes professional fees (architects, engineers, project managers, etc) associated with obtaining and delivering the scheme, as well a technical reports.

9.24 Profit Margins – A developer's profit margin will flex depending a range of reasons, primarily linked to the level of risk associated with the scheme, this risk can be technical, time or planning status-linked. In addition, while the input is headlined as "profit", this should really be labelled as "gross profit" as part of this goes towards their business overheads, meaning not all of it is net profit.

9.25 Once a site is assessed as suitable for a specific use a viability exercise can be undertaken, usually in parallel with a design team to bring forward an optimum scheme.

10. Transport and infrastructure

10.1 SLR Consulting has undertaken a comprehensive review of transport data which has included:

- High-level movement review for all modes of transport.
- A local highway network review including sustainable transport provision / active mode accessibility.
- Consideration of the location's past, current and potential role within the local mobility network.
- Commentary on parking for cycles, e-mobility, Electric Vehicles (EVs) and Internal Combustion Engine (ICE) vehicles.
- A highway safety review.
- An assessment of the existing transport evidence base relating to the site.
- Consideration of opportunities to embed Vision Led Planning within future development options.

10.2 Given the level of depth, this report is summarised here and included in full at Appendix 1. We note that in it's capacity as Highways Authority, Devon County Council which has input into the Council's

Exeter Housing and Economic Land Availability Assessment (HELAA), November 2024, which saw the allocation area site as achievable.

10.3 Data on pedestrian movements shoes the primacy of the High Street and Sidwell Street pedestrian movement corridor and cycle access routes, while surrounding routes all provide connectivity. The report notes that as identified in the emerging Exeter Plan, there are conflicts within the vicinity of the site including severance caused by the Western Way corridor, including at Paris Street roundabout.

10.4 Access to public transport, local services and facilities is strong by virtue of the central location and situation of the new bus station.

10.5 A review of traffic data shows that the majority of cars are moving at an average speed of 20mph on the roads within the vicinity of the subject sites which is good from a safety perspective. The report also notes that the Council is consulting on a route change on Southernhay Road which may result in a lower traffic movements further north and around the subject sites.

10.6 The report states the highway environment on Paris Street is dominated by carriageway space. Whilst footways are of reasonable width and there is on-street provision for cyclists, traffic flow and speed data does not support the scale of carriageway currently available for motor traffic.

10.7 Dix's Field is narrower and more sinuous than Paris Street, benefiting from traffic calming associated with the Princesshay development. However, there is a mix of signage, road markings and, to some extent, materials.

10.8 The function of Bampfylde Street has changed significantly since the construction of the new Bus Station. The street accommodates public transport vehicles alongside access to the car park. However, provision for cyclists and pedestrians is limited in terms of signage, materials and some relatively wide road crossings.

10.9 Sidwell Street and Cheeke Street are access controlled in terms of general motor vehicle traffic. The principal transport opportunity on these routes is the provision of consistent, high quality routes for pedestrians and cyclists in line with current guidance including LTN1/20 and Manual for Streets.

10.10 In summary, the local highway environment does not play a significant place role and is often overly dominated by provision for motor vehicles despite a significant decline in vehicular demand due to changes in traffic flow within this part of the city centre. We do note the recently approved New Town proposals which address active transport access towards Clarendon House and the Triangle car park. This has ECC and DCC support via the joint Exeter Highways and Traffic Order Committee approval.

10.11 The extensive width of Paris Street lends itself to significant repurposing of current carriageway space for public realm, pedestrian and cycle (compliant with LTN1/20) use, alongside provision for local access by motor vehicles.

10.12 Alongside this, a comprehensive placemaking assessment should be undertaken for Dix's Field, Sidwell Street, Cheeke Street and Bampfylde Street in the interests of improving the quality and consistency of provision for active modes of travel.

10.13 Figure 5 shows the current availability of EV car charging points near to the subject sites which we would anticipate being included within any parking provided by the new development schemes:

Figure 7 - Electric Vehicle Charging Map

10.14 The site represents a key gateway to Exeter city centre. Policy specifies the types of development that are suitable for this central, highly sustainable location; as part of the site's regeneration, it should:

- Prioritise and encourage active and other sustainable modes and the modes of choice for most day-to-day trips by residents and other users.
- Adopt a Vision Led approach to the optimisation of uses onsite, facilities to support sustainable modes, and the assessment of travel demand in line with the requirements of the NPPF.
- Align with the wider aspirations of the authorities in reducing or removing car trips from the city centre.
- Deliver a suite of measures on- and off-site to achieve a public realm which plays a key gateway, place and movement function. This should include delivery of an active travel corridor on Paris Street.

10.15 The lack of significant, traditional highway mitigation to address development impact could be helpfully included here as supporting development viability.

11. Utilities and Power

Electricity

11.1 To support this report, SLR has been commissioned by Avison Young to perform a high level grid feasibility study for the redevelopment of Exeter bus and Coach Station. The purpose of this note is to provide an overview of the local electricity network and the maximum demand capacity available in the area.

11.2 Exeter Bus and Coach Station is located at 50°43'31.34"N, 3°31'29.98"W in Devon, South West England. The transmission network in the area is owned by National Grid Electricity Transmission

(NGET) and operated by the National Energy System Operator (NESO). The distribution network is owned and operated by National Grid Electricity Distribution (NGED) in the South West region.

<u>Connection Profile</u>

11.3 SLR has assessed the local electricity infrastructure around the Exeter Bus and Coach Station and has identified the most economically and technically feasible solution for connecting the site. This note provides a brief overview of the local electricity networks, identifies the likely preferred connection option for the redevelopment, and outlines the maximum available demand in the area.

<u>Local Grid infrastructure</u>

11.4 In England, transmission connections are grid connections at voltages of 275kV or 400kV. Distribution connections are all connections at voltages less than 132kV (132kV, 66kV, 33kV, 11kV).

11.5 Based on the potential demand levels, a connection to the local transmission system has not been considered further. A connection to the distribution network—likely at a voltage of 132 kV, 33 kV, or 11 kV—would be more appropriate.

11.6 This approach would offer several connection options, including line tap connections or connections to Bulk Supply Point (BSP) and Primary Supply Point (PSP) substations, depending on the scale of the project.

11.7 The closest point of connection is the Athelstan Road 33/11 kV Primary Supply Point (PSP). Currently, there is 8 MW of available demand headroom at this location. Athelstan Road is situated approximately 0.3 km southeast of the development site, with an estimated cable route length of 0.5 km. This 8 MW "headroom" is estimated by SLR Consulting to have sufficient power for over 6,000 new homes, while a high-level estimate of the new cabling cost is between £250,000 and £425,000.

11.8 The Athelstan Road substation is connected to the Exeter City Bulk Supply Point (BSP) via a 33 kV circuit. An alternative point of connection in the area is the Haven Road PSP, located approximately 1 km southwest of the redevelopment site. This substation has a demand headroom of 27 MW and is also connected to the Exeter City BSP via a 33 kV circuit. We note that connection to this substation would require crossing the River Exe, increasing complexity and therefore cost.

11.9 A high-level estimate suggests that the available headroom within the Athelsand Road substation is currently in excess of 6,000 homes, based on average UK household electricity use and high-level assumptions relating to renewables and the fact they don't run at full capacity 100% of the time.

Table 4 - Substation Availability and Capacity

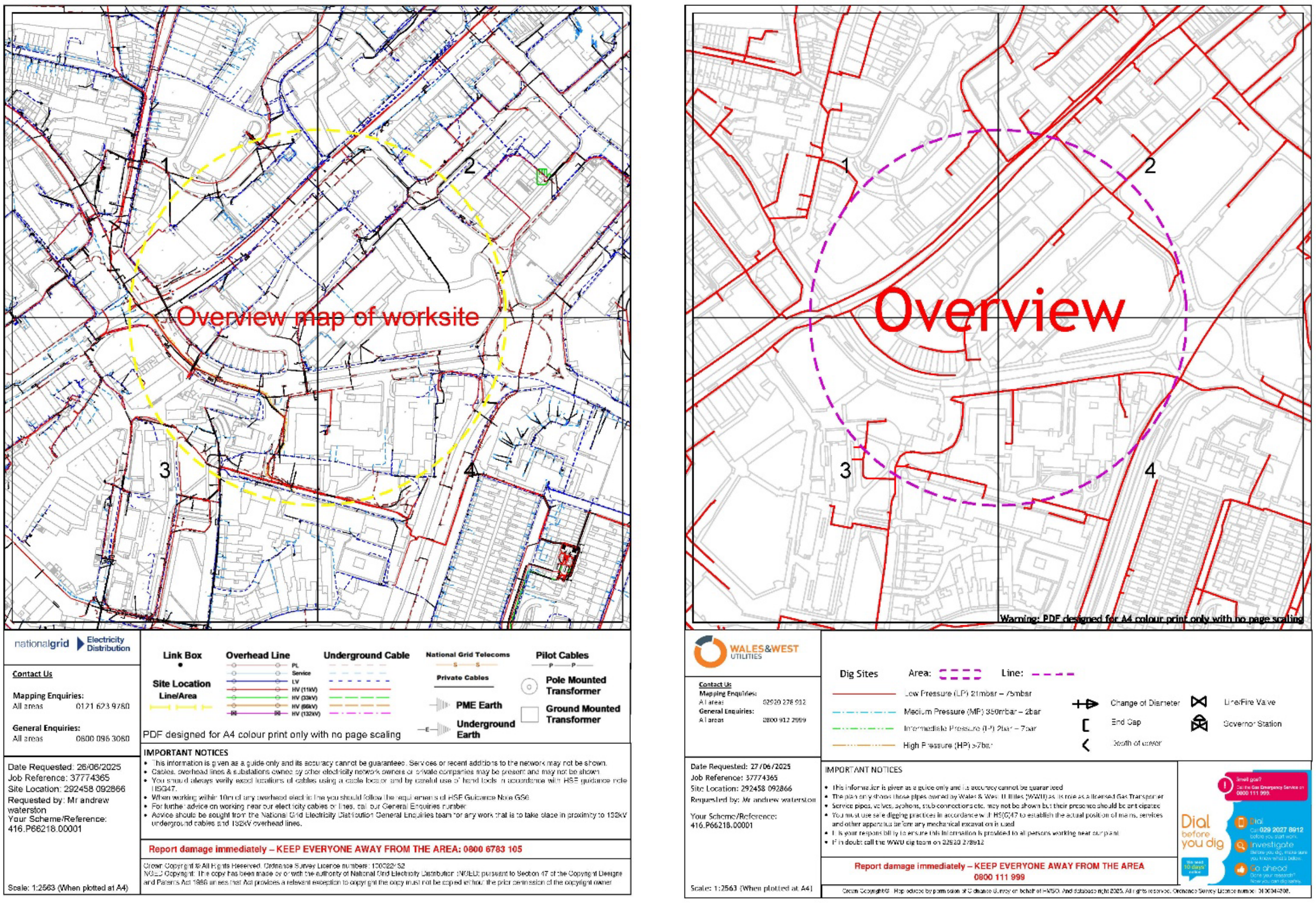
Substation	Distance	Voltage	Demand Headroom
Athelsand Road	0.3km	11kV or 33kV	8 MW
Haven Road	1km	11kV or 33kV	27 MW

Gas

11.10 Limited information is available on gas capacity however, with legislation focusing on sustainable energy generation we anticipate any new schemes here are likely to be led with heat pump or alternative sustainable energy generation. Therefore, the demand on the network would be no higher than it is today.

11.11 Figure 3 shows the general electricity grid layout around the subject site area; a full size version of the plan is shown within Appendix II.

Figure 8 - Electricity and Gas Network Mapping



12. Delivery Mechanisms

12.1 There are a range of options available to the land owners within the East Gate allocation area in order to facilitate the de-risking, design development, planning application, funding and delivery elements of any of the sites.

Self-delivery

12.2 Assuming the landowners possess sufficient experience or are suitably advised, self-delivery allows each landowner the flexibility to deliver a viable scheme that yields them value, likely in excess of the existing use value to justify the time, cost and effort of pursuing a development .

12.3 It would be incumbent on each landowner to create their own professional team to obtain planning consent and secure any necessary funding before selecting a construction team to facilitate the demolition and build process of their site. This is already taking place at Clarendon House which is currently subject to a planning application for purpose built student accommodation.

Disposal

12.4 An alternative is for the landowner to sell the property either with or without a planning consent to a developer or investor, who would use their experience and finance to deliver a scheme.

12.5 Within this route, there remain a number of routes that could be pursued:

Table 5 - Disposal Options

Route	Process	Value and Risk
Sale Unconditional on Planning	A buyer purchases the site/property in its existing form without any planning consent secured.	Lower value given the planning risk and holding costs are footed by the purchaser.
Sale Subject to Planning	A buyer enters into a contract to purchase the site/property and commits to obtaining a planning permission for development of the site. Once a satisfactory consent is obtained, the sale completes.	Higher value as the sale only completes once the site has planning permission, hence the risk is much lower, but the transaction and therefore land value transfer is later as planning is required prior to completion.
Option Agreement	A buyer enters into a contract to potentially buy the site within a given timeframe at a value calculation specified in the contract. They can then apply for planning consent.	Option agreements prevent the land from being sold to a third party for a specific time period, usually allowing for planning permission to be obtained, however depending on the type of agreement, the landowner cannot force the buyer to complete the purchase. Option agreements are more common for greenfield sites and can include discounts to apply to the land value calculation.

Planning Authority-led Framework

12.6 When considering a group of co-located sites with development potential, one option is for the Planning Authority to lead a Framework process alongside the owners/developers of the subject sites to develop a framework plan to discuss building planning, transport and design thinking, including heights, massing, use and general parameters around which the individual site owners can develop their schemes.

12.7 By building a framework, this ensures that what will be significant changes to an area are coherent where the landowners are working collaboratively together on movement, placemaking and character, public realm and infrastructure.

12.8 Where frameworks are in progress, landowners/developers are often required to wait for the adoption of the framework prior to the submission of a planning application for their site/s, which in certain cases can lead to a delay in delivery.

Compulsory Purchase adjoining land

12.9 As a public authority, Exeter City Council has the powers to acquire third party land without the landowners consent for infrastructure delivery, public safety concerns or for regeneration projects through a Compulsory Purchase Order (CPO) where there is a compelling case in the public interest.

12.10 Such acquisitions are governed by the Acquisition of Land Act 1981 and follow strict guidance in the scenarios where they can be applied, the required process the authority must follow and the calculation of compensation payable to the landowner.

12.11 The Council could in theory look to apply this to the former City Point site area, covering the former bus station and properties along Sidwell Street in order to deliver a comprehensive development scheme.

12.12 While this remains an option where land owners are not amenable to bringing forward development, as Frasers Group are actively engaging with the Council, we do not anticipate that the Council will need to use their available powers in this instance.

Joint Venture/Delivery Partnership

12.13 There are a range of partnership options available to the landowners within the East Gate allocation area including Joint Ventures Development Agreements and Promotion Agreements, each with their benefits and hindrances, which can be used to encourage and facilitate development.

12.14 Of particular relevance is the Council ownership of the former bus station and the Frasers Group interest along Sidwell Street, given the anticipated marriage value of a coordinated process, however in this challenging development sector, partnership working is available to all of the landowners as a method of engaging with third parties with greater experience and/or available funding to bring theses sites forward where the landowner is unable or unwilling to.

Development Managers

12.15 An alternative route for the landowners to a formal partnership is to employ a Development Manager, who bring their experience of other development schemes and act in lieu of the landowner in the site analysis, formation of a design team, creation of a viable scheme, obtain planning consent and run the construction process.

12.16 Development Managers are usually third party companies who will take a fee for their services on a time or milestones basis and may agree contractually for a success-based payment on the scheme. They can be used by anyone from individual landowners through to large investment funds as a way of bringing expertise that is not held.

Forward Funding/Forward Commitment

12.17 Development is a complicated and nuanced process, and funding is a critical piece of the puzzle, with the sectoral challenges resulting in increased scrutiny and due diligence at this point in time.

12.18 Alongside planning and cost inflation risk, there are also risks around the sale of the scheme once construction is completed. In order to mitigate this risk, developers can look for an investor to commit to purchasing the scheme once it has been delivered thereby removing this sales risk. Alternatively, the developer can look for an investor to forward-fund the scheme. In this scenario the investor not only commits to purchasing the development once it is delivered, but will also fund the construction of the scheme, usually on a monthly valuations and payments in arrears basis. We note that a coupon (interest rate) is applied to this funding, however, this is usually lower than is available from third party development funding providers.

12.19 This is especially common in Build to Rent schemes which is a significant reason for their rise across the UK given the removal of sale risk for the developer and development funding being provided.

12.20 There remains the opportunity for support from Homes England in the delivery of sites within the allocation area, either through backing for the Council-owned assets, or through the delivery of grant-funded Affordable homes.

13. Conclusion

13.1 The East Gate allocation area is situated in a prime location in central Exeter, well-located for access to employment opportunities, retail, sustainable transport options and the city's prime shopping and leisure destination.

13.2 As a city, Exeter is Devon's capital and not only provides the gateway to the coast but is also the strategic transport link into much of the county as well as Cornwall to the west. It is a city known for its history and heritage as well as it's strong university alongside a range of quality employers.

13.3 The allocation area extends to over 5.5 hectares, clustered around highways acting as a gateway to the city centre. The largest cluster of sites is between the Council's former bus station and Frasers Group's assets along Sidwell Street which could deliver comprehensive regeneration, in turn enhancing cycle routes and pedestrian permeability.

13.4 We are aware that landowners are already looking to pursue development opportunities in this area by virtue of the strong location and allocation of this area would support and encourage other landowners to bring forward schemes that will comprehensively improve this part of the city.

13.5 With the strong location, opportunities and constraints, we consider that the sites are most suited to residential-led development in variety of guises, and given the high-footfall location, think that active ground floors would be a positive inclusion both for occupants of the building and passers-by.

13.6 The topography is a constraint, however good design can mitigate the impact, while ensuring inclusive access to wheelchair users, for example and in some circumstances and provide opportunities for increased density, for example around Clarendon House. The Utility Study showed that there is plenty of available electricity capacity in this location which is positive.

13.7 Given the anticipated density within the allocation area, we think that living uses will likely be delivered in apartment form in for sale, Build to Rent, purpose-built student accommodation and co-living schemes. The student and co-living schemes are likely to be delivered as a mix of cluster flats and studios in line with market demand, while the apartments are likely to be led by a broadly-equal mix of one and two bedroom units, with some studios and three bedroom units.

13.8 Manor Court is currently anticipated to be early in the phasing of development given their recent submission for an office to residential conversion, with Clarendon House to follow after their recent planning application submission. The Civic Centre Building could follow due to the Council's relocation, while we anticipate that the former Pyramid leisure centre could be a similar time, and Eaton Court will be later in the phasing given the existing residents and need for consultation/relocation. The former bus station and Frasers Group ownership along Sidwell Street will likely need a joint approach to delivery given the importance of the site and need for collaboration on access, massing, layout, etc. The form of this collaboration can take many forms through liaison between professional teams through to a full development partnership.

13.9 Viability of the schemes within the allocation area is crucial to bring forward deliverable propositions to deliver new homes and space for the people of Exeter. We acknowledge that the development industry is facing a challenge when it comes to urban development from a demand, risk, cost and funding perspective, therefore dialogue with policy-makers, politicians and the Planning Authority with developers is vital to ensure delivery. The Council is actively pursuing this dialogue positively.

13.10 The allocation area is centred around a significant piece of transport infrastructure in the roundabout and five access roads. This roundabout links the city centre to other parts of the city as well as providing routes for servicing the nearby businesses and providing access to the nearby bus station.

Some of the sites within the allocation area will allow the opportunity to rationalise and improve some of the desire lines within the city as well as improving pedestrian and cycle access through this central location.

13.11 An assessment of utilities shows the availability within the allocation area by virtue of their previously-developed nature, while there is plenty of electricity capacity which is positive.

13.12 Exeter as a city is proud of it’s history and heritage which can be seen throughout the city centre. Bombing during WWII and more recent development mean that historic buildings are absent from the allocation area, however given the historic mapping shows buildings located within this area back to 1765, meaning that any archaeology and heritage assessments will be required through the planning process. Despite this, the allocation area falls outside of the Roman settlement and City Walls, and an assessment of historic mapping does not show any buildings of significance within the boundary.

13.13 The landowners have a series of options available to them in terms of delivery depending on their own available expertise and funding, as well as a series of options open to them for third party input or through a sale of their property. With Exeter as a city in demand from developers, we anticipate that there is a route to delivery for these sites.

13.14 In summary, Exeter is a strong, interesting and attractive city, with the allocation area offering opportunity for a significant positive step-change within this key, central area. This allocation provides the support and framework within which they can be delivered.

13.15 There is a desire from the landowners for delivery, while there are green shoots on the horizon within the sector as we start to see an increased engagement by developers and a general positive sentiment with the Bank of England base rate reducing.

Appendix I

SLR Consulting – Transport Assessment

Transport Data / Preliminary Review

City Point & Eastgate, Exeter

Exeter City Council

Civic Centre, Paris Street, Exeter, EX1 1JN

Prepared by:

SLR Consulting Limited

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SLR Project No.: 416.P66218.00001

26 June 2025

Revision: V1

Making Sustainability Happen

Revision Record

Revision	Date	Prepared By	Checked By	Authorised By
V1	26 June 2025	James McKechnie	Bob Cocker	James McKechnie

Basis of Report

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Table of Contents

1.0 Introduction

1.1 SLR Consulting Ltd ('SLR') has been commissioned by Avison Young on behalf of Exeter City Council to advise on accessibility and transportation matters relating to the proposed redevelopment of the City Point and East Gate sites within Exeter city centre.

1.2 This preliminary report provides:

- A high-level movement review for all modes of transport.
- A local highway network review including sustainable transport provision / active mode accessibility.
- Consideration of the location's past, current and potential role within the local mobility network.
- Commentary on parking for cycles, e-mobility, Electric Vehicles (EVs) and Internal Combustion Engine (ICE) vehicles.
- A highway safety review.
- An assessment of the existing transport evidence base relating to the site.
- Consideration of opportunities to embed Vision Led Planning within future development options.

Development Vision

1.3 The December 2024 National Planning Policy Framework (NPPF) requires development to be brought forward with a Vision Led approach to transport planning matters[1], stepping away from the former Predict and Provide methodology.

1.4 The Vision Led approach is defined in the NPPF[2] as:

'an approach to transport planning based on setting outcomes for a development based on achieving well-designed, sustainable and popular places, and providing the transport solutions to deliver those outcomes as opposed to predicting future demand to provide capacity (often referred to as 'predict and provide').'

1.5 Consistent with this approach, the Council has specified an overarching vision which promotes memorable places, outstanding quality, welcoming neighbourhoods, spaces for people and wildlife, active streets, liveable buildings, and connected culture. Specific to the site, the vision comprises:

- An enhanced approach to the city from the east.
- Reduced traffic and greater provision for public transport, walking and cycling.
- New places to live close to the City Centre and existing neighbourhoods.
- Space for new community facilities within the St Leonards and Newtown neighbourhoods.
- Regeneration opportunities.
- A high quality, compact, well connected, low or zero car new neighbourhood.

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[1] Paragraph 109.

[2] Annex 2: Glossary.

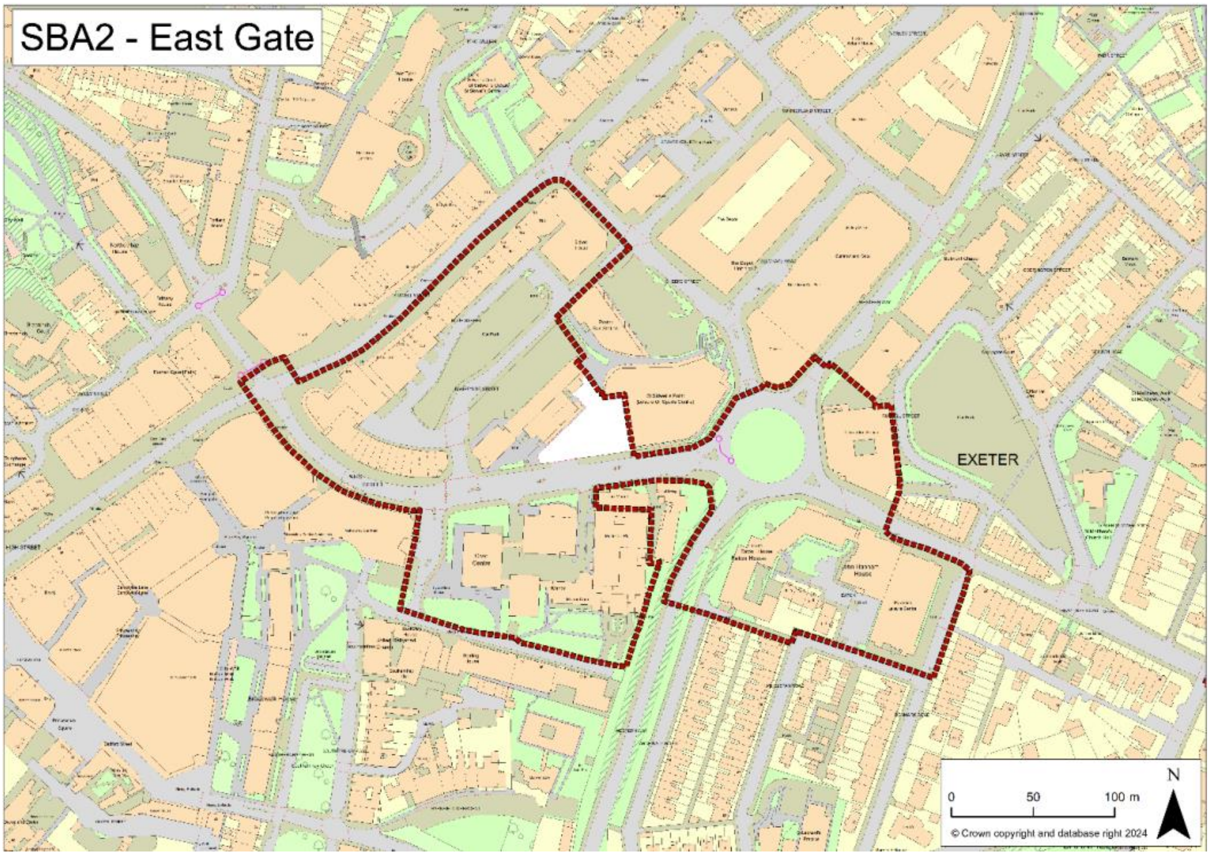
1.6 This is reflected in the aspirations of the emerging Exeter Plan for East Gate including:

- High quality, high density and net zero carbon design that carefully respects and enhances nearby heritage assets, responds to localised surface water flooding and significantly improves the appears of this key gateway to the city centre.
- A mix of new house sizes and types, including affordable housing, that is car free and supported by more sustainable transport measures including car clubs, e-bikes and significant enhancements to pedestrian and cycle routes.
- Financial contributions towards local health and education services, utilities, public transport enhancements along Heavitree Road and city centre highway improvements.

1.7 The emerging Exeter Plan also proposes active travel improvements (STC3) including the creation of *'coherent, direct, safe, comfortable and attractive walking and cycling environments through place-making, enhancements to the public realm, street planting, improved air quality and the reduced dominance of cars'* in locations including Paris Street. Policy STC3 goes on to highlight the need to address severance issues caused by major traffic routes including Western Way and Paris Street roundabout.

1.8 The December 2024 Exeter Plan – Regulation 19 Publication Plan identifies East Gate as a strategic mixed brownfield allocation (SBA2) as shown in **Figure 1.1**

Figure 1.1: East Gate



1.9 East Gate is proposed to deliver a mixed use development including around 609 new homes, employment, education/training space and an impressive and memorable city centre gateway. This will include:

- Public realm that provides space for community and cultural activities.
- Transport infrastructure to deliver a low-car development:
- i. A layout in accordance with active design principles comprising a dense network of active travel routes which link to the existing routes in the area including via improved crossings of Western Way, Paris Street, Heavitree Road and Cheeke Street;

  ii. A layout and design that takes account of the needs of people with disabilities;

  iii. A mobility hub to provide for public transport, active travel and shared mobility;

  iv. Contributions to off-site active travel routes including priority schemes in the Exeter Local Cycling And Walking Infrastructure Plan;

  v. Provision of infrastructure for, and contributions to, public transport;

  vi. Electric vehicle charging points throughout the site; and

  vii. Access arrangements for service and emergency vehicles.

2.0 Movement Review

Pedestrians

2.1 A review of pedestrian access and permeability was undertaken by consultants acting for the developer at the time of the previous application and subsequent consent for the site. However, those assessments were based on guidance, standards, policies and usual practice at the time and do not now align with the City Council's aspirations for the site as set out previously in this report.

2.2 STRAVA© heatmap data is shown in **Figure 2.1**, this highlights the primacy of the High Street / Sidwell Street pedestrian movement corridor, along with significant pedestrian routes including Queen Street, New North Road, Western Way and Heavitree Road. The surrounding street network provides permeability and, to the west, off road routes through Rougemont Park provide connectivity between the High Street and Queen Street.

Figure 2.1: STRAVA © Pedestrian Heatmap

2.3 As noted in the emerging Exeter Plan, there are conflicts within the vicinity of the site including severance caused by the Western Way corridor, including at Paris Street roundabout.

2.4 Enhancement of roads around the site, and their connections into the wider network, will be important as set out in policy, given that the site's walking catchment is extensive as shown in **Figure 2.2**.

Figure 2.2: Walking Isochrone (2km)

People on Bikes

2.5 **Figure 2.3** is an extract from the Exeter Cycle Map for the vicinity of the site.

Figure 2.3: Exeter Cycle Map

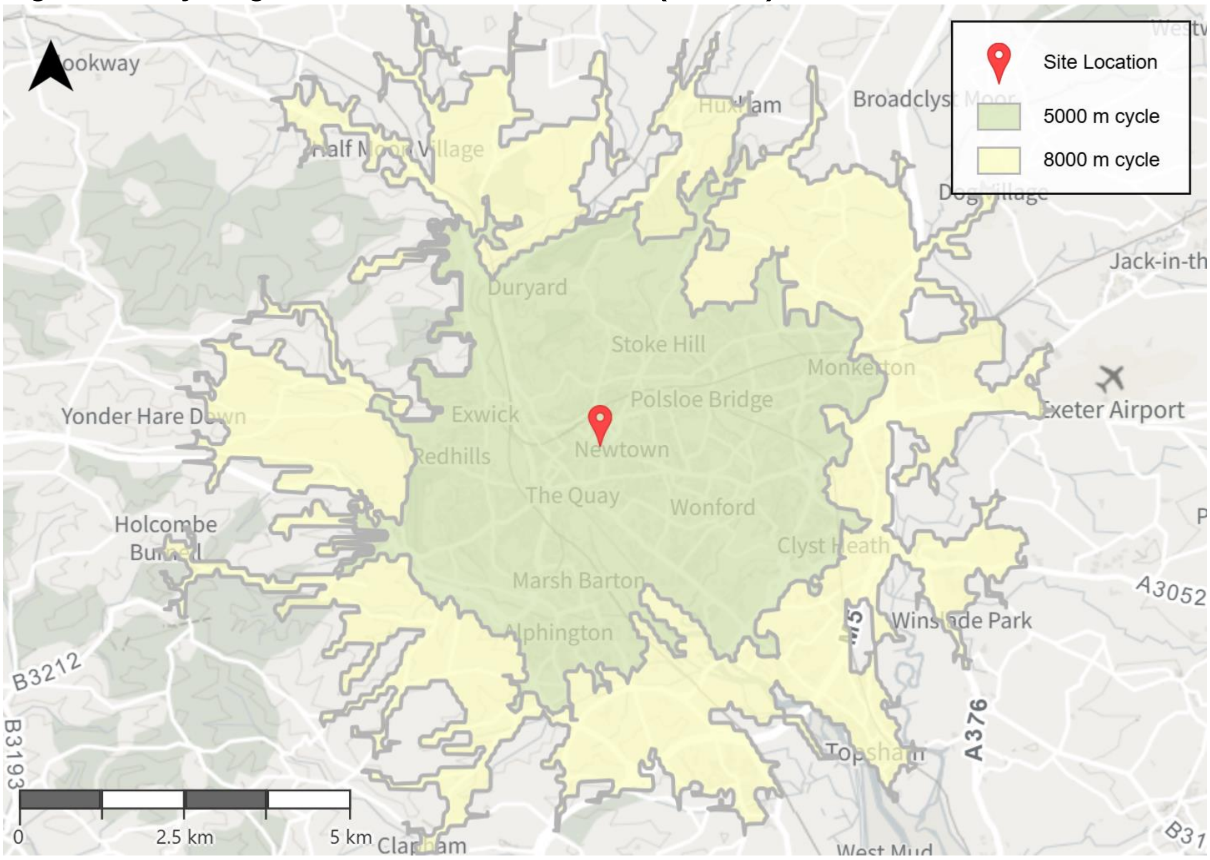
2.6 This indicates the on-road cycle lanes (red) on Paris Street alongside the advisory cycle routes (yellow) across the wider city centre, the signed E3 cycle route, and local cycle parking.

2.7 STRAVA© heatmap data indicates the important role of the High Street / Sidwell Street corridor for cycling, alongside significant use of the signed and advisory network. There is widespread cycle use of roads which do not form part of the network shown on the cycle map, including highly trafficked routes including Western Way, Heavitree Road and New North Road.

Figure 2.4: STRAVA © Cycling Heatmap

2.8 The site should provide local enhancements to facilitate cycling by a range of users, particularly given the very extensive cycle catchments shown in **Figure 2.5**.

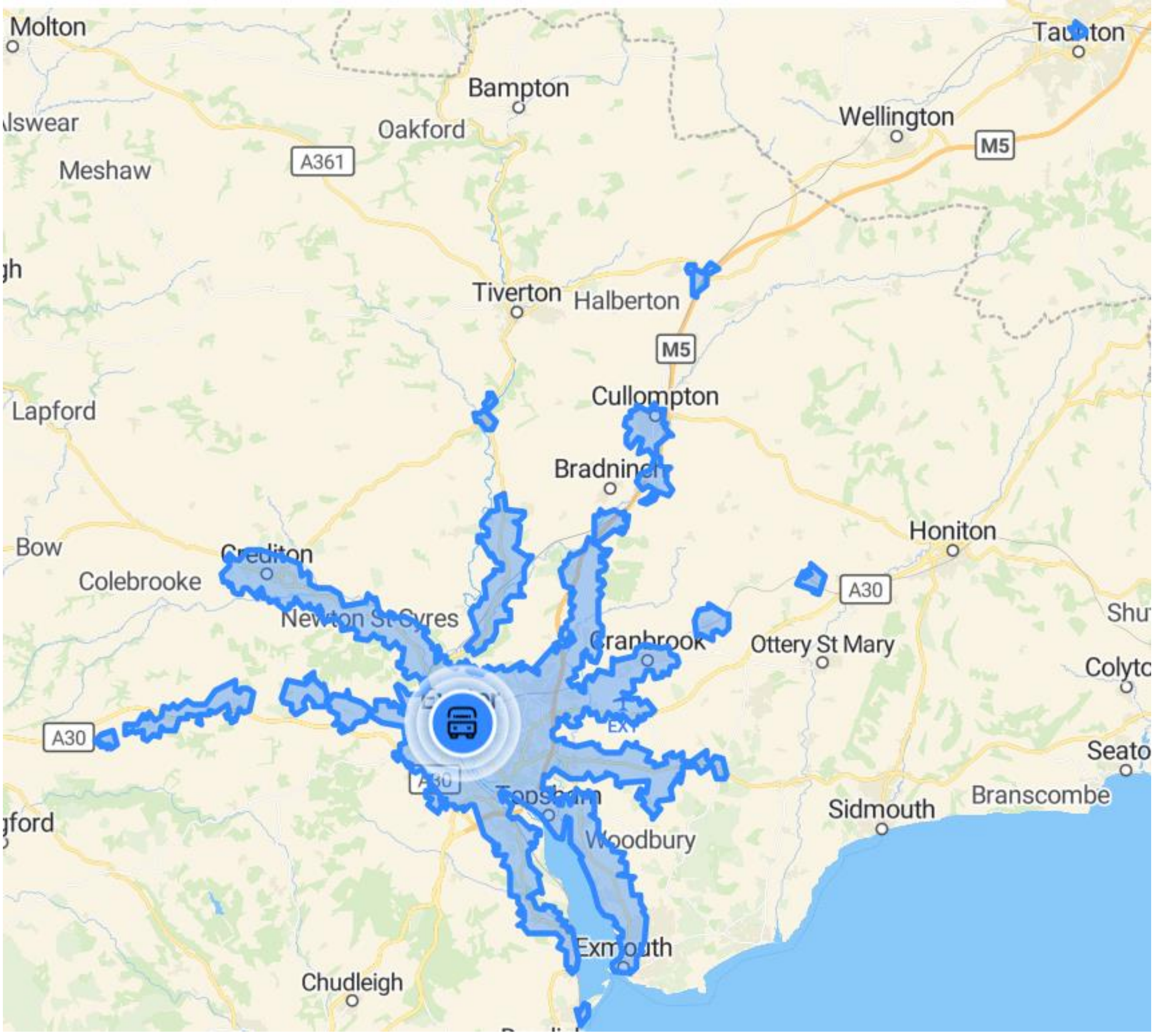
Figure 2.5: Cycling Isochrones – 5km and 8km (5 miles)



Public Transport

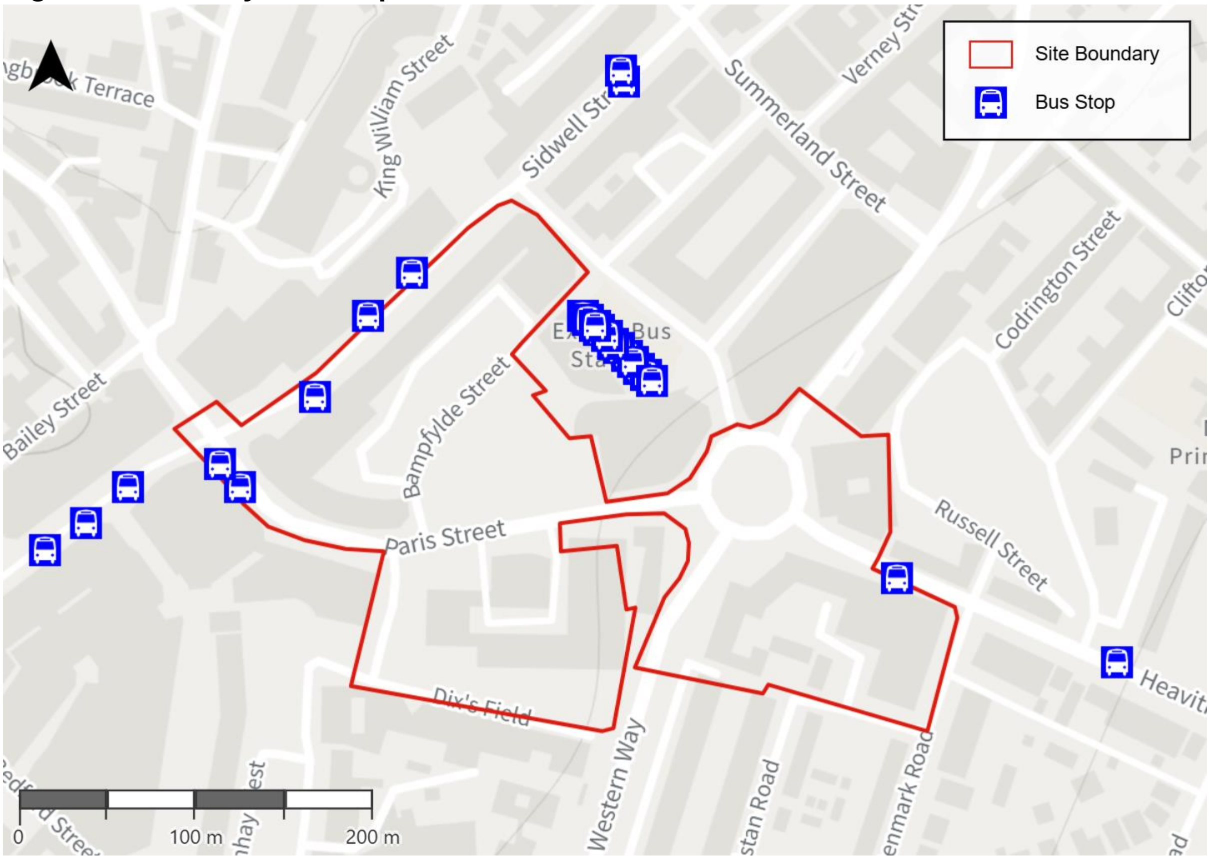
2.9 An indication of the site's accessibility by public transport modes (bus and train) in weekday peak hours is shown in **Figure 2.6**. This indicates that the site can be accessed from the whole of Exeter, a range of local settlements nearby, and from destinations including Taunton, Exmouth and Dawlish Warren.

Figure 2.6: AM Peak 1-Hour Public Transport Accessibility



2.10 Bus provision around the site is extensive given the adjacent Bus Station and proximity to key bus routes on the High Street and Sidwell Street as shown in **Figure 2.7**.

Figure 2.7: Nearby Bus Stops

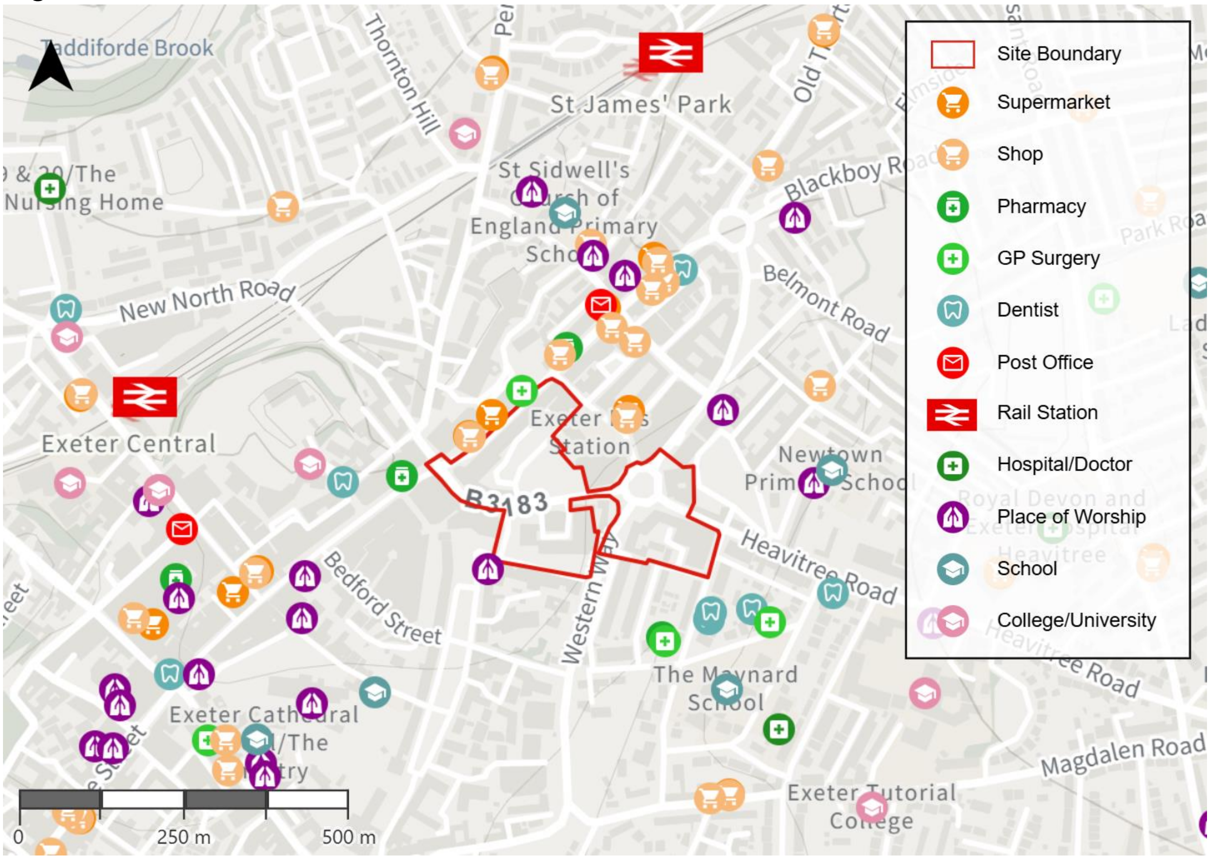


2.11 These bus stops provide widespread, regular bus connections across Exeter and the wider vicinity.

Access to Services and Facilities

2.12 Reflecting the site's central location, it is close to a wide range of services and facilities that are within realistic and convenient walking distance for most people, as shown in **Figure 2.8**.

Figure 2.8: Local Services and Facilities



Wayfinding

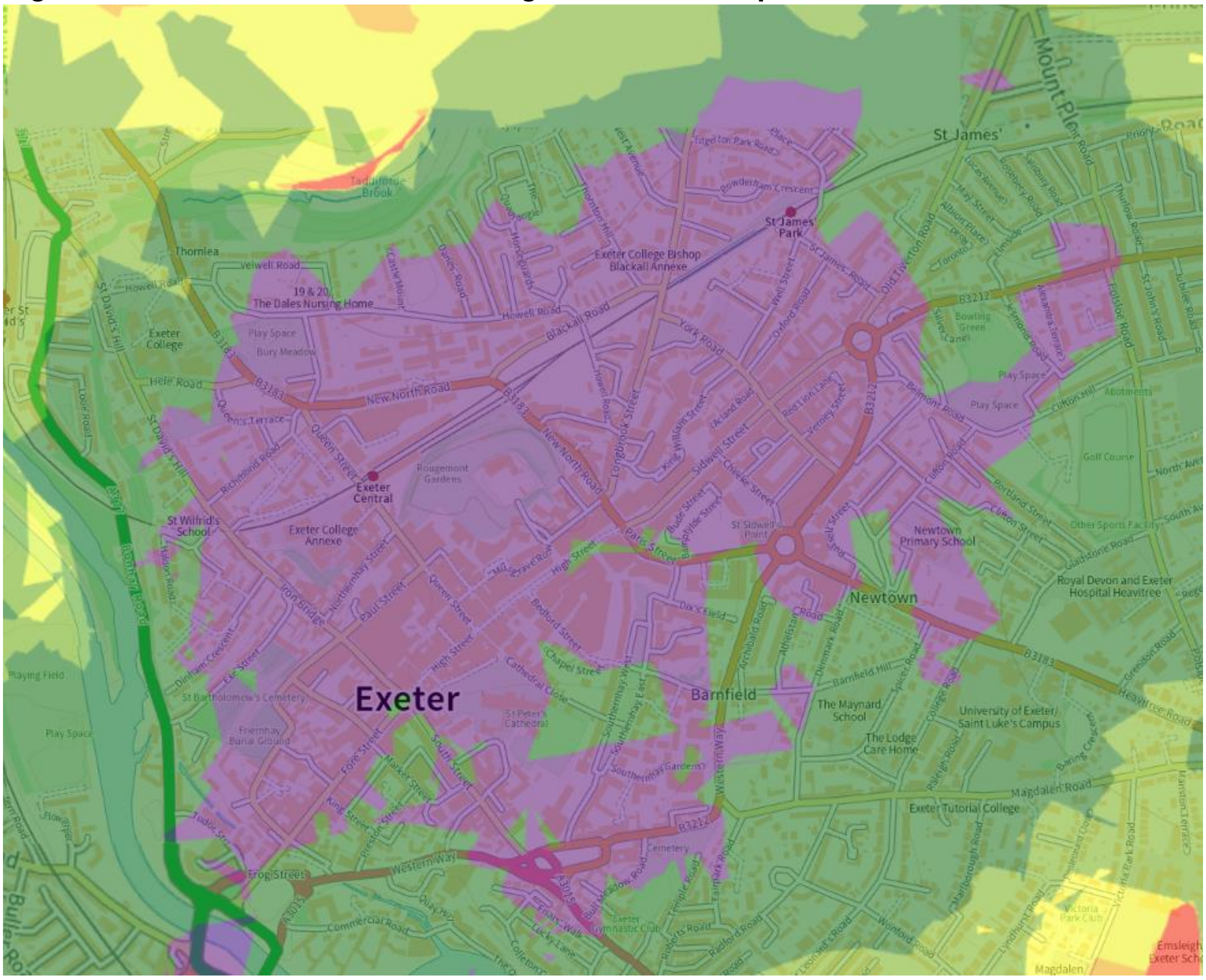
2.13 It will be important to provide consistent and enhanced wayfinding information for active travel and public transport users. Current provision in the city centre includes:

Monolith Wayfinding Posts: Over 20 brightly coloured, map-display "monoliths" central Exeter. These include area maps, point-of-interest listings, and QR codes linking to the Visit Exeter site.

Area Banners & Flags: Banners and flags marking the West Quarter, Cathedral Quarter, and East Gate, using colour-coded visuals to signal transitions between city districts and encourage exploration.

Walkable Neighbourhoods Map: Exeter City Council's interactive web map shows local amenities with catchments, helping pedestrians plan routes through zones based on walkability.

Figure 2.9: Extract from Walkable Neighbourhoods Map



QR-Enabled Content: Monoliths feature QR codes that link to Visit Exeter, offering real-time information and guidance.

Dropped Kerbs & Signage: Pedestrian routes (including the City Centre “Green Circle”) are equipped with dropped kerbs and clear signage, especially at cycle/pedestrian conflict points and junctions.

Cycle Route Network Signage: Key routes are equipped with cycle signage and contraflow lanes.

National Cycle Network & Valley Parks: Signage for National Cycle Network routes and Valley Park links.

3.0 Local Highway Network Review

Network Description

Western Way

3.1 Western Way constitutes both the northern and southern arms of the five-arm Paris Street roundabout junction. It is a two-way, single carriageway aligned in a north–south orientation and has a 30 mph speed limit. South of the Paris Street roundabout, Western Way transitions into Magdalen Street at its southern end.

3.2 Signal-controlled pedestrian crossings, equipped with tactile paving to aid visually impaired users, are located at various points in the vicinity.

3.3 Pedestrian footways are provided on both sides of Western Way, typically ranging from approximately 2 to 4 metres in width, with localised widening in certain areas. A dedicated cycle lane commences at the junction of Western Way and Parr Street, providing a continuous route toward Newtown.

Paris Street

3.4 Paris Street forms the western arm of the five-arm Paris Street roundabout junction at its eastern end and also constitutes the south-eastern arm of the four-arm signalised crossroads formed by New North Road, Sidwell Street, Paris Street, and High Street. The road comprises a two-way single carriageway aligned in an east–west direction and is subject to a 20 mph speed limit.

3.5 The route is provided with street lighting, pedestrian footways, and a dedicated cycle lane along its length. A range of pedestrian crossing facilities is available, including signal-controlled crossings as well as uncontrolled crossings featuring tactile paving and dropped kerbs to enhance accessibility.

Bampfylde Street

3.6 Bampfylde Street functions as a service access road situated immediately north of the site, running between Paris Street and Cheeke Street.

3.7 Continuous footways are provided on both sides of the carriageway, with dropped kerbs and tactile paving at crossing points. Street lighting is installed along the entire route.

3.8 The street directly interfaces with the Exeter Bus Station (new facility opened July 2021), offering on-street level boarding at multiple stands. Following the construction of the bus station, access to and use of Bampfylde Street by private cars has been restricted, with no through access for motor vehicles from its eastern end.

3.9 A surface-level public car park is located on the north side of the road, accessed from the junction with Paris Street.

Dix's Field

3.10 Dix's Field is a two-way single carriageway connecting with Paris Street at a signal-controlled junction at its northern end, and linking into Southernhay East to the south.

3.11 Footways are present on both sides of the road, with crossing points with tactile paving and dropped-kerbs, and a raised crossing linking between the current Civic Centre site and Princesshay.

3.12 Traffic is banned from making a right-turn into Southernhay from Dix's Field, whilst outbound movements are permitted. Midway along the site's western frontage is a signalised junction providing access to the Princesshay delivery area.

Sidwell Street

3.13 Sidwell Street is a two-way single carriageway road with wide footways on both sides, the northern footway being partially under cover for much of the length between the High Street and St Sidwell's Community Centre.

3.14 The road is subject to vehicular access restrictions (buses, cycles and loading only).

Cheeke Street

3.15 Cheeke Street is a two-way single carriageway road with footways on both sides. Vehicular access is southbound only apart from buses which can travel in both directions. Cheeke Street provides access to Belgrave Road and Bampflyde Street, as well as connecting Paris Street roundabout with Sidwell Street to the north.

Traffic Data

Paris Street

3.16 SLR has obtained TomTom speed data for Paris Street covering weekdays in June 2025 to-date[3] for the periods 1000-1200 and 1400-1600[4].

3.17 Data shows that westbound, between Paris Street roundabout and the junction with Dix's Field (Southernhay West), the recorded link speeds were:

- Exiting the roundabout — 20mph mean / 24mph 85th percentile
- Outside St Sidwell's Point — 19mph mean / 24mph 85th percentile
- Outside The Mount — 17mph mean / 23mph 85th percentile
- Outside the Civic Centre — 12mph mean / 21mph 85th percentile
- Adjacent to former bus station exit — 14mph mean / 20mph 85th percentile
- Approach to Bampfylde St junction — 15mph mean / 20mph 85th percentile
- Bampfylde St – Dix's Field — 16mph mean / 19mph 85th percentile
- West of Dix's Field junction — 15mph mean / 19mph 85th percentile
- Adjacent to Car Park — 12mph mean / 17mph 85th percentile

3.18 In a westbound direction mean speeds are at or below 20mph, with 85th percentile design speeds close to or below 20mph, particularly further west of Paris Street roundabout. At and west of the Civic Centre, the effects of decelerating or queuing traffic at the Bampfylde Road signals are apparent in the data.

3.19 The equivalent eastbound speeds are:

- Dix's Field – Bampfylde Street — 15mph mean / 19mph 85th percentile
- East of Bampfylde Street — 18mph mean / 22mph 85th percentile
- West of Civic Centre — 20mph mean / 25mph 85th percentile
- Outside Civic Centre — 22mph mean / 26mph 85th percentile
- Outside The Mount — 22mph mean / 25mph 85th percentile
- Outside St Sidwell's Point — 17mph mean / 12mph 85th percentile

[3] Weekdays 1st-25th June 2025.

[4] Reflecting national guidance on the timing of speed surveys.

- Approach to Paris St roundabout 10mph mean / 17mph 85th percentile

3.20 Eastbound, mean speeds are 22mph or below (and generally at or below 20mph), with 85th percentile speeds of 26mph or less. Speeds peak in the central part of this link, and are slower on the exit from the Dix's Field / Bampfylde Street junctions and on the approach to Paris Street roundabout as would be expected.

3.21 Traffic data from Thursday 17th October 2024[5] indicates the following Passenger Car Unit (PCU) flows on Paris Street during the surveyed network peak hours:

- 0830-0930 86 eastbound / 483 westbound / 569 total
- 1515-1615 202 eastbound / 423 westbound / 625 total

Dix's Field / Southernhay West

3.22 TomTom data for the same time period as referenced above indicates links speeds on Dix's Field / Southernhay West, to the immediate west of the Civic Centre complex, of:

- Northbound 11mph mean / 17mph 85th percentile
- Southbound 12mph mean / 15mph 85th percentile

3.23 Speeds on Dix's Field are generally low, reflecting the reduced speed of traffic turning into the road from Paris Street, the presence of traffic calming (road hump), the relatively short length of this stretch of road and, northbound, traffic approaching or queuing at the signalised junction.

3.24 No recent traffic data is available for Dix's Field. However, 2014 flows have been obtained from the WSP Transport Assessment related to the extant consent for the site[6]:

- Northbound 25 vehicles (AM) / 236 vehicles (PM)
- Southbound 193 vehicles (AM) / 81 vehicles (PM)

3.25 It is understood that the closure of Barnfield Road for outbound vehicles may be under consideration by the Local Highway Authority. Should that occur, the wider network implications of displaced outbound traffic from the Southernhay area should be considered as part of the next stages of assessment.

3.26 The Local Highway Authority has recently consulted on proposed changes to traffic flow as shown in **Figure 3.1**. These should be accounted for in the next stages of assessment in terms of likely implications for traffic flow through the study area.

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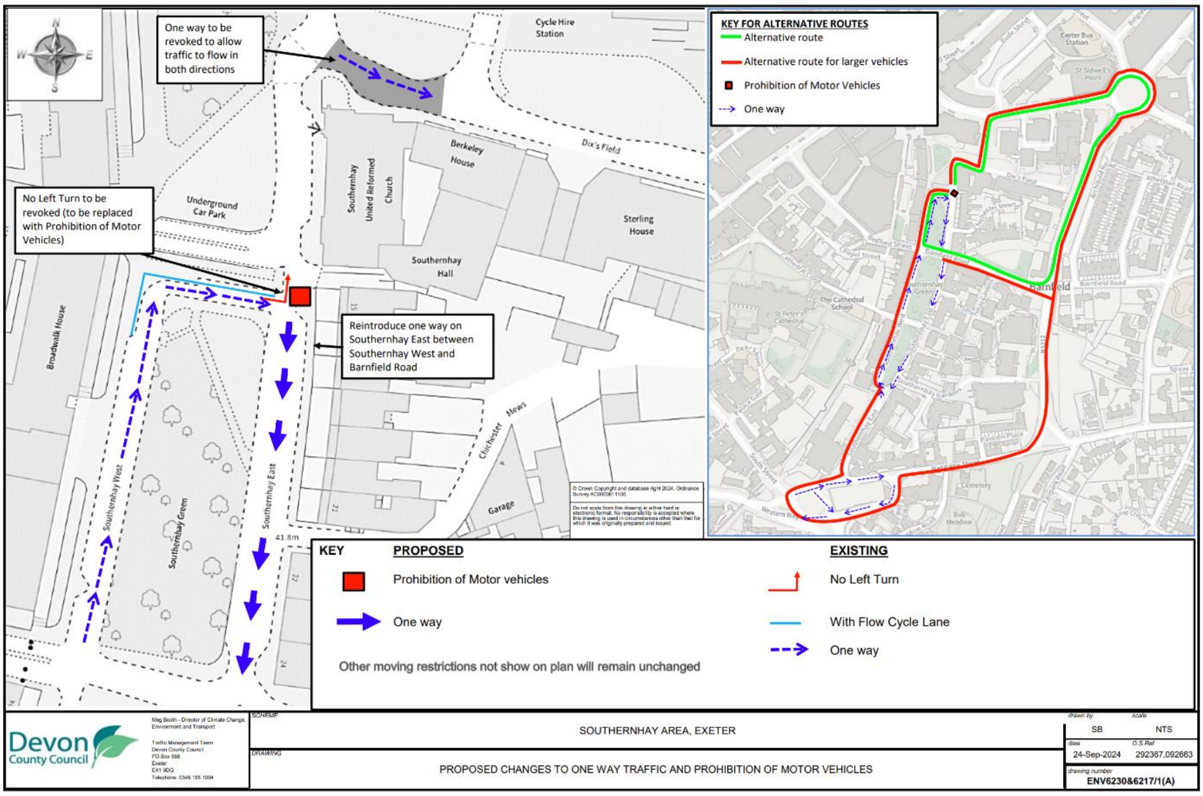
[5] Transport Assessment for Clarendon House by Hydrock now Stantec, 6th December 2024 (28686-HYD-XX-XX-RP-TP-5001).

[6] Princesshay Leisure, Exeter – Transport Assessment, WSP, July 2015.

Figure 3.1: Potential Changes to Traffic Flow



Bampfylde Street

3.27 No recent traffic data is available for Bampfylde Street. However, 2014 flows have been obtained from the WSP Transport Assessment related to the extant consent for the site[7] - these are for the western end of Bampfylde Street but are now more than 10 years old and reflect the previous highway layout:

- Eastbound 46 vehicles (AM) / 106 vehicles (PM)
- Westbound 67 vehicles (AM) / 109 vehicles (PM)

Western Way

3.28 Traffic data from Thursday 17th October 2024[8] indicates the following PCU flows on Western Way north of Paris Street roundabout during the surveyed network peak hours:

- 0830-0930 746 southbound / 543 northbound / 1,289 total
- 1515-1615 612 southbound / 696 northbound / 1,308 total

[7] Princesshay Leisure, Exeter – Transport Assessment, WSP, July 2015.

[8] Transport Assessment for Clarendon House by Hydrock now Stantec, 6th December 2024 (28686-HYD-XX-XX-RP-TP-5001).

3.29 The equivalent flows on Western Way south of Paris Street roundabout were:

- 0830-0930 685 southbound / 660 northbound / 1,345 total
- 1515-1615 558 southbound / 694 northbound / 1,252 total

Heavitree Road

3.30 SLR has reviewed the availability of Department for Transport (DfT) traffic data for the local area. There is one traffic counter[9] in the vicinity, on Heavitree Road close to its junction with Clifton Road. Whilst this is not in the immediate vicinity of the site, it illustrates the level of traffic using that corridor, which connects with the Paris Street roundabout to the east of the site.

3.31 The counter does not provide recent data, with the latest count of Annual Average Daily Traffic (AADT) being from 2009. However, that indicated an average total flow (two-way) of 18,135 vehicles of which 235 (1.3%) were pedal cycles and 929 (5.1%) were buses and coaches.

Sidwell Street

3.32 Recent traffic data is not readily available for Sidwell Street. Reference to 2014 data[10] shows:

- Eastbound 84 vehicles (AM) / 92 vehicles (PM)
- Westbound 49 vehicles (AM) / 52 vehicles (PM)

3.33 Due to access restrictions on Sidwell Street, it is not possible to obtain TomTom speed data for this route.

Cheeke Street

3.34 Recent traffic data is not readily available for Cheeke Street. Reference to 2014 data[11] shows:

- Northbound 244 vehicles (AM) / 250 vehicles (PM)
- Southbound 333 vehicles (AM) / 331 vehicles (PM)

3.35 These figures relate to flows immediately north of Paris Street roundabout. Flows further north on Cheeke Street are considerably lower given the volume of movements to/from Belvedere Road.

[9] Site 966251.

[10] Princesshay Leisure, Exeter – Transport Assessment, WSP, July 2015

[11] Princesshay Leisure, Exeter – Transport Assessment, WSP, July 2015

3.36 Due to access restrictions, only southbound speed data was available from TomTom for Cheeke Street. This shows:

- South of Sidwell St junction 12 mph mean / 22 mph 85th percentile
- Approach to Bampfylde St junction 14 mph mean / 22 mph 85th percentile
- Bampfylde St to Belgrave Road 16mph mean / 20 mph 85th percentile
- South of Belgrave Road 12mph mean / 17mph 85th percentile
- Approach to Paris St roundabout 9mph mean / 17mph 85th percentile

Quality of Highway Environment

3.37 The highway environment on Paris Street is dominated carriageway space. Whilst footways are of reasonable width and there is on-street provision for cyclists, traffic flow and speed data does not support the scale of carriageway currently available for motor traffic.

3.38 Dix's Field is narrower and more sinuous than Paris Street, benefiting from traffic calming associated with the Princesshay development. However, there is a mix of signage, road markings and, to some extent, materials.

3.39 The function of Bampfylde Street has changed significantly since the construction of the new Bus Station. The street accommodates public transport vehicles alongside access to the car park. However, provision for cyclists and pedestrians is limited in terms of signage, materials and some relatively wide road crossings.

3.40 Sidwell Street and Cheeke Street are access controlled in terms of general motor vehicle traffic. The principal transport opportunity on these routes is the provision of consistent, high quality routes for pedestrians and cyclists in line with current guidance including LTN1/20 and Manual for Streets.

3.41 In summary, the local highway environment does not play a significant place role and is often overly dominated by provision for motor vehicles despite a significant decline in vehicular demand due to changes in traffic flow within this part of the city centre.

Potential Future Highway Layout

Managing Traffic Flows

3.42 As noted previously in this report, careful consideration will need to be given to the potential effects of planned changes to traffic movements in the Southernhay area and their consistency with placemaking / gateway objectives in relation to Paris Street and the site more generally.

3.43 The past decades have seen significant changes to traffic flow within Exeter city centre and further consideration should be given to whether or how Paris Street could be repurposed to reduce or remove through-traffic using the Paris Street / High Street / Sidwell Street / New North Road junction.

3.44 Given the nature and availability of alternative routes, this should be carefully considered as part of the next stage of assessment, alongside a Vision Led review of the potential for traffic reduction, modal shift and reassignment.

Benefiting Sustainable Accessibility

3.45 The extensive width of Paris Street lends itself to significant repurposing of current carriageway space for public realm, pedestrian and cycle (compliant with LTN1/20) use, alongside provision for local access by motor vehicles.

3.46 Alongside this, a comprehensive placemaking assessment should be undertaken for Dix's Field, Sidwell Street, Cheeke Street and Bampfylde Street in the interests of improving the quality and consistency of provision for active modes of travel.

4.0 Parking

Bicycles

4.1 Reference has been made to parking standards set out in Exeter City Council's Sustainable Transport Supplementary Planning Document (2013) as set out in **Tables 4.1 & 4.2**.

Table 4.1: Residential Cycle Parking Standards

Table 2 - Cycle parking standards (minimum)

The standards below are cumulative, eg. for retail, cycle parking is required for both staff and customers.

The absence of a use from this table does not mean no cycle parking is required. Applicants should consider likely numbers of residents, staff and visitors, and assess their likely needs by comparison with the following examples.

Land use		**Number of cycles**	**Notes**
Parking for residents			
Houses and flats	1 or 2 bedrooms	1 per dwelling	
	3+ bedrooms	2 per dwelling	
HMOs, bedsits, cluster flats, student accommodation	For first 10 bedrooms	1 per bedroom	
	For 11th bedroom upwards	1 per 2 bedrooms	
Retirement flats (includes staff parking)	For first 4 flats	1 per flat	Assumes lower age limit of 60 or less. Reduce requirement if age limit is higher.
	For subsequent flats	1 per 5 flats (minimum 4 spaces)	
Parking for staff			
General rule	For first 4 full time equivalents (FTEs)	1 per FTE	
	For subsequent staff	1 per 7 FTEs (minimum 4 spaces)	
Example for specific cases -			
Offices	Assume 1 FTE per 12.5m² of office space, and provide cycle parking as above.		
Method of calculation for other uses which include office space	Consider level of staffing likely to be accommodated in the building, eg. medical practice - assume 1 FTE per consulting room, plus 1 FTE per 12.5m² of office space, and provide cycle parking as above.		
Industrial uses	If number of staff is not known, assume 1 FTE per 50m2 of workshop space, plus 12.5m² of office space, and provide cycle parking as above.		
Retail	1 staff cycle space per 350m² of net retail floorspace (minimum 4		

Table 4.2: Non Residential Cycle Parking Standards

	spaces).		
Parking for visitors/customers			
Retail	Food	1 per $350m^2$ of net retail floorspace (minimum 10 spaces)	
	Non-food	1 per $500m^2$ of net retail floorspace (minimum 4 spaces)	
Hotels and conference facilities	Overnight guests	Equal to staff parking, and may be in same secure space	
	Day visitors (conferences etc)	1 per 20 peak period visitors	
Sports facilities		1 per 20 peak period visitors	
Other premises open to the public	eg. other leisure uses, medical practices, food and drink	Same number of spaces as for staff	
Offices and industrial uses not generally open to the public		One or two spaces for ad hoc callers	
Student accommodation		One space per 20 beds (minimum 2 spaces)	
Other residential blocks		One or two spaces for ad hoc callers	
Educational establishments	Consider on an individual basis depending on age and other characteristics of students.		

E-Mobility

4.2 E-bikes accounted for around 1 in 10 new bike sales in the 2023-24 period, with further growth expected as unit prices continue to drop. E-bikes not only extend the distance over which many people will be able to cycle, but also open up cycling for users that may not be willing or able to cycle for physical reasons or due to the nature of their trips (e.g. cycling for work purposes).

4.3 Provision for e-bike charging, and the potential for access to e-bike hire / sharing will form an important part of the site's sustainable mobility offering.

ICE Vehicles

4.4 Whilst it is anticipated that development in this area would either be car-free or very low-car, reference has been made to parking standards set out in Exeter City Council's Sustainable Transport Supplementary Planning Document (2013) as set out in **Tables 4.3 & 4.4**.

Table 4.3: Non-Residential Car Parking Standards

Inside the pedestrian priority zone	
Non-residential	Operational only
Residential	Average of 1.5 spaces per dwelling*
Outside the pedestrian priority zone	
Food retail	1 space per 14 sq m (gross internal area)
Non-food retail	1 space per 20 sq m
Cinemas and conference facilities	1 space per 5 seats
D2 including leisure	1 space per 22 sq m
B1 including offices	1 space per 30 sq m
B2 employment	1 space per 50 sq m
B8 warehousing	1 space per 200 sq m
Hospitals	1 space per 4 staff + 1 space per 3 visitors
Higher and further education	1 space per 2 staff
Stadia	1 space per 15 seats

Table 4.4: Residential Car Parking Standards

Residential	1.5 spaces per dwelling*
*See Residential Design SPD Figure 6.2 for ratio of allocated to unallocated spaces	

EVs

4.5 Noting that the development is unlikely to provide significant onsite parking, should parking be provided, then Building Regulations stipulate the following EV charging requirements:

- Residential developments – active EV charging provision = the lower of the number of parking spaces or the number of dwellings
- Non-residential – where there are more than 10 parking spaces, one space must have active EV charging provision and one fifth of spaces must have passive provision (e.g. cable ducts)

4.6 Exemptions from the above include areas of covered parking / undercrofts, where there is no requirement for active charging but passive cable provision must be installed.

4.7 Other nuances and exceptions include sites where the cost of connection / infrastructure is deemed excessive – e.g. if the average connection cost for each charge point is more than

£3,600 on a new build scheme or provision would cost more than 7% of the total cost for a major renovation project.

4.8 The City Council's Sustainable Transport SPD (6.5.1) *'requires developers to plan for the future installation of charging points for all residential parking, including on-street locations. As a minimum, ducting and potential for easy connection to the electricity network should be provided.50 Workplace, retail, and public parking facilities should also be future-proofed in this way.'* This is also consistent with paragraph 8.8 of the emerging Exeter Plan.

4.9 **Figure 4.1** shows local EV charging locations which would be of use to users of the site. Close to the site, these include:

- 7kW chargers in Summerland Gate car park (4 connectors)
- 7kW chargers in King William Street car park (2 connectors)
- 30kW / 3.5kW chargers on Blackall Road (4 connectors)
- 7kW chargers at Princesshay Car Park (6 connectors)

Figure 4.1: Local EV Charging Provision (ZapMap©)

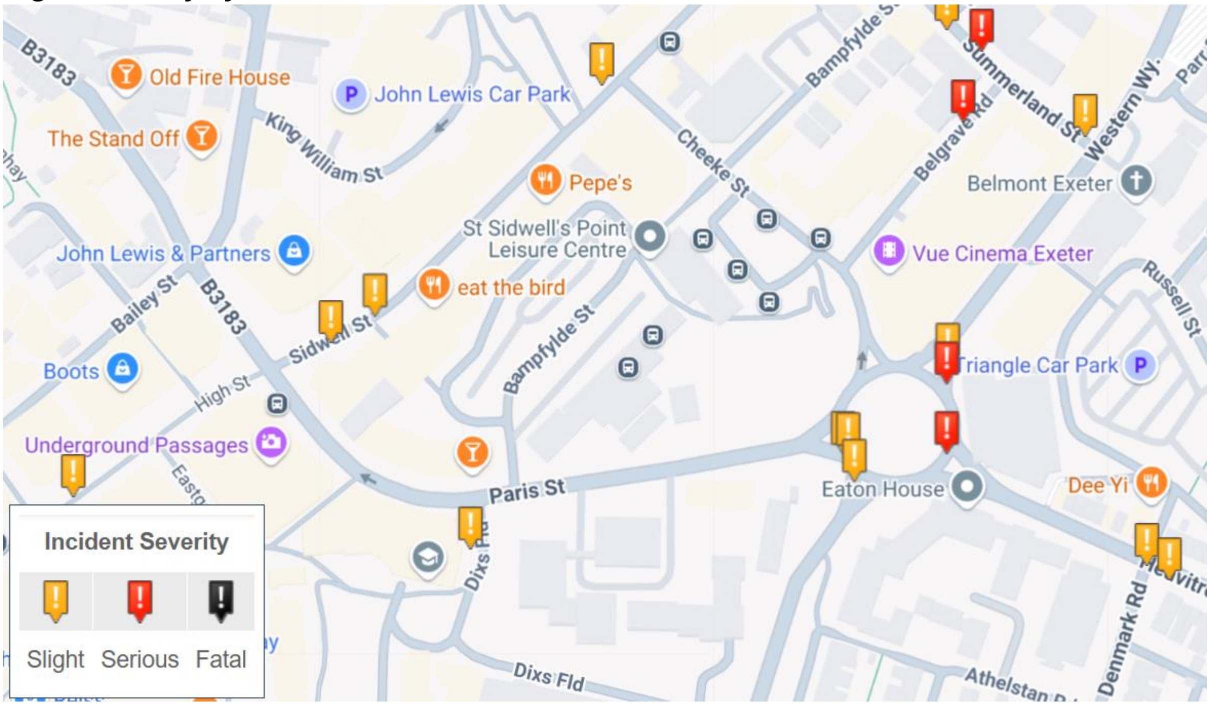
4.10 EV charging provision in the vicinity is not particularly widespread or comprehensive as a proportion of total parking spaces. There is a particular lack of higher-powered charging in nearby.

4.11 Parking provision within the development should address the requirements of local policy and Building Regulations, and it is advisable to account for potential future demand for higher-powered charging as vehicle and charger technologies develop.

5.0 Highway Safety

5.1 Publicly available injury collision records[12] have been examined for the five year period 2019-23, which is the latest timeframe for which such data is available. The recorded incidents are shown in **Figure 5.1**.

Figure 5.1: Injury Collisions 2019-23



5.2 There have been a number of recorded injury accidents ranging from Slight to Serious in severity across the wider local network.

5.3 In respect of roads abutting the site, there has been one Slight injury collision on Dix's Field. This occurred on 27th October 2019 and involved three vehicles, resulting in two casualties.

5.4 Three Slight collisions were recorded on Sidwell Street (two involving pedal cycle casualties and one involving a pedestrian casualty), and two on Heavitree Road close to the junction with Denmark Road (one involving a pedestrian casualty). One collision on Sidwell Street involved a child casualty, and one of the Heavitree Road / Denmark Road junction collisions also involved a child.

5.5 Six collisions, of which two were Serious and four Slight, were recorded on Paris Street roundabout. Three of these resulted in pedal cycle casualties on the Paris Street roundabout[13], two of which were Slight in nature and one Serious. Two collisions (one Serious and one Slight) involved a pedestrian casualty.

[12] CrashMap.

[13] Paris Street / Cheeke Street / Western Way / Heavitree Road.

5.6 There have been no collisions on Paris Street, Bampfylde Street, Cheeke Street or Dix's Field during the review period which involved pedestrian, pedal cyclist or child casualties.

5.7 A full safety assessment should form part of the next stage of transport review work relating to the site.

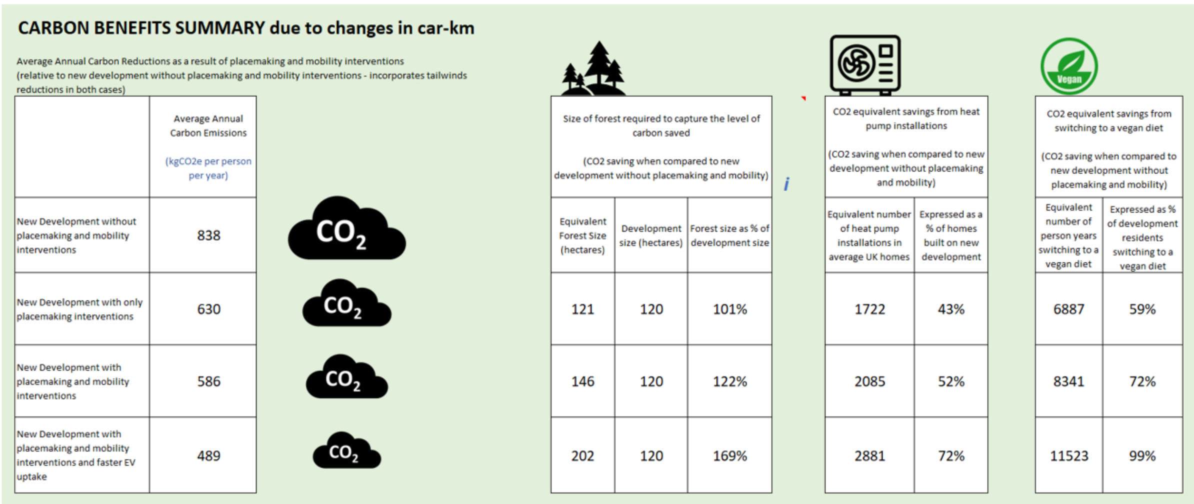
6.0 Comparative Trip Generation

6.1 No evidence appears to be available to quantify the trip generation of the site in its former use including the old Exeter Bus Station. However, that public transport hub was active for almost 60 years and attracted significant pedestrian, car (staff and drop-off / pick-up), bus and coach movements.

6.2 Whilst a direct comparison of the former and potential future trip generation is not possible, the site's future trip generation by all modes should be calculated on a Vision Led first-principles approach, examples of which are shown in **Figures 6.1-6.4**.

Figure 6.1: SLR Vision Led Planning Tool Inputs

Figure 6.2: SLR Vision Led Planning Tool – Carbon Benefits



CARBON BENEFITS SUMMARY due to changes in car-km

Average Annual Carbon Reductions as a result of placemaking and mobility interventions (relative to new development without placemaking and mobility interventions - incorporates tailwinds reductions in both cases)

	Average Annual Carbon Emissions (kgCO2e per person per year)	Size of forest required to capture the level of carbon saved (CO2 saving when compared to new development without placemaking and mobility): Equivalent Forest Size (hectares)	Development size (hectares)	Forest size as % of development size	CO2 equivalent savings from heat pump installations (CO2 saving when compared to new development without placemaking and mobility): Equivalent number of heat pump installations in average UK homes	Expressed as a % of homes built on new development	CO2 equivalent savings from switching to a vegan diet (CO2 saving when compared to new development without placemaking and mobility): Equivalent number of person years switching to a vegan diet	Expressed as % of development residents switching to a vegan diet
New Development without placemaking and mobility interventions	838							
New Development with only placemaking interventions	630	121	120	101%	1722	43%	6887	59%
New Development with placemaking and mobility interventions	586	146	120	122%	2085	52%	8341	72%
New Development with placemaking and mobility interventions and faster EV uptake	489	202	120	169%	2881	72%	11523	99%

Figure 6.3: SLR Vision Led Planning Tool – Health Impacts

HEALTH IMPACTS SUMMARY

	Physical Activity[1]			
	Slow Walking	Brisk Walking	Low intensity cycling (leisure)	Moderate intensity cycling (leisure)
	Age 46+	Age 16-45	Age 46+	Age 16-45
	31 mins mins per day	23 mins mins per day	66 mins mins per day	50 mins mins per day
% of New Development Residents this applies to as a result of placemaking and mobility interventions[2]	10.4%	10.0%	0.4%	0.4%

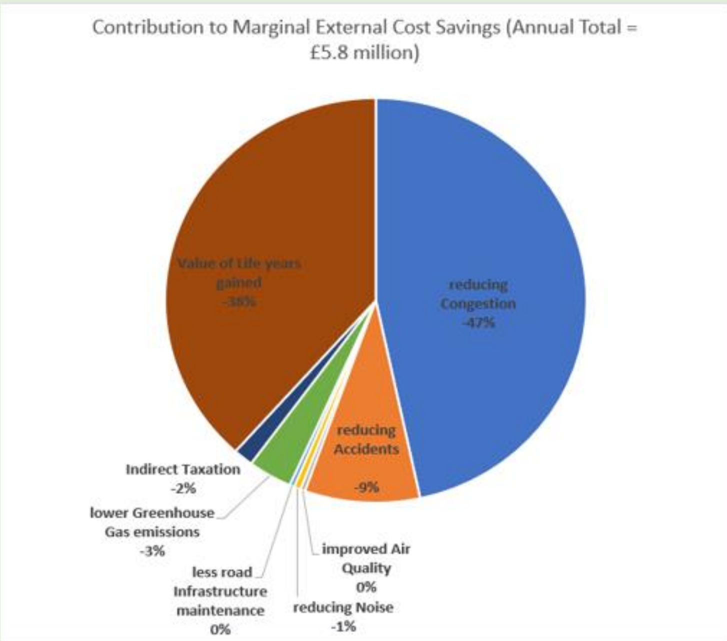
	Risk Reduction (relative to previous activity levels)[3]				Reduction in annual incidence amongst new development residents[4]				TOTAL	Average Annual Cost Savings to the NHS[5] (2024 prices)	Average Annual Value of QALY Gained[6] (2024 prices)
	Slow Walking	Brisk Walking	Low intensity cycling (leisure)	Moderate intensity cycling (leisure)	Slow Walking	Brisk Walking	Low intensity cycling (leisure)	Moderate intensity cycling (leisure)			
Type 2 Diabetes	2%	3%	18%	16%	0.46%	0.11%	0.14%	0.02%	0.72%	£2,260	£37,639
Heart Disease	7%	8%	23%	21%	1.65%	0.07%	0.19%	0.01%	1.92%	£22,627	£102,641
Stroke	8%	9%	22%	20%	1.83%	0.12%	0.19%	0.01%	2.14%	£9,074	£41,328
Breast Cancer	1%	2%	5%	4%	0.30%	0.07%	0.04%	0.01%	0.41%	£8,561	£3,857
Colorectal Cancer	3%	4%	16%	14%	0.81%	0.03%	0.13%	0.00%	0.98%	£8,308	£2,834
Dementia	5%	7%	21%	19%	1.27%	0.01%	0.19%	0.00%	1.47%	£152,465	£223,396
Depression	26%	22%	56%	47%	3.26%	2.72%	0.25%	0.21%	6.44%	£6,699	£103,613
Hip fracture	53%	47%	87%	80%	13.01%	0.00%	0.77%	0.00%	13.78%	£12,746	£38,351
TOTAL										£222,740	£553,658

Figure 6.4: SLR Vision Led Planning Tool – Economic Benefits

ECONOMIC BENEFITS SUMMARY due to changes in car-km

Average Annual Marginal External Cost Savings as a result of placemaking and mobility interventions
(relative to new development without placemaking and mobility interventions) @discounted 2024 prices

reducing **Congestion**	-£2,710,419
reducing **Accidents**	-£514,407
improved **Air Quality**	-£20,080
reducing **Noise**	-£30,711
less **road Infrastructure** maintenance	-£20,496
lower **Greenhouse Gas** emissions	-£196,661
Indirect **Taxation**	-£88,387
Value of Life years gained	-£2,232,216
TOTAL	-£5,813,377



7.0 Existing Evidence Base

Policy & Vision Documents

Liveable Exeter (Exeter Vision 2040)

7.1 A transformational urban regeneration strategy emphasising active travel and high-density development. It sets a target of 50% of trips by walking or cycling, with ambitions to provide high-quality streets and accessible neighbourhoods

Exeter Transport Strategy 2020–2030

7.2 Focuses on sustainable mobility through:

- Creating a coherent cycle/pedestrian network supporting 50% active travel.
- Enhancing bus corridors (e.g., Heavitree Road) and developing park-and-ride and bus priority measures.
- Advancing Devon Metro rail improvements and “turn-up-and-go” interurban buses at 15-minute frequency.

Sustainable Transport SPD (2013)

7.3 Further details Core Strategy and Local Plan policies on walking, cycling, public transport integration, and connectivity.

Exeter City Council Current Local Plan (Transport Chapter)

7.4 Documents walking (e.g., “Green Circle” circular route) and cycling network expansion targets, pedestrian priority in the city centre, and quality cycle parking provision .

Public Transport Infrastructure Delivery

Exeter Bus Station Redevelopment

7.5 The new facility (opened July 2021) replaced the 1964 structure; features include 12 stands, indoor waiting, cycle racks, and level boarding.

Devon Metro

7.6 Urban rail enhancements since 2011 have sought to deliver improved frequency on local lines along with station additions (e.g., Marsh Barton, Newcourt). The programme continues delivering commuter rail upgrades serving areas including Digby/Sowton.

Local Plan Evidence & Planning Applications

Local Plan Transport Evidence

7.7 This includes the Sustainable Transport SPD and Green Infrastructure studies (2009), underpinning policies for modal networks and active travel targets.

Emerging Plan Evidence (Liveable Exeter)

7.8 A comprehensive suite of documents guiding brownfield redevelopment, including transport/mobility technical notes (e.g., Water Lane SPD), emphasising public realm quality and active/inclusive neighbourhoods.

Key Findings & Implications

Strategic Alignment

7.9 All policy tiers advocate for reclaiming streetspace for active and public transport, suppressing private car usage, and enhancing multi-modality.

Infrastructure Investment

7.10 Recent delivery of the bus station and corridor enhancements dovetail with Liveable Exeter and Local Plan aspirations.

Evidence Gaps & Monitoring Needs

7.11 Active Streets trials highlight the need for granular transport data collection and stakeholder engagement as the proposals progress.

Emerging Development Requirements

7.12 Policy documents mandate robust travel plans, infrastructure contributions (CIL/Section 106), and technical assessments for new development at City Point / East Gate sites.

Summary

7.13 The transport evidence base for Exeter city centre robustly supports transformation at City Point and Eastgate, with clear:

- Vision-based policy (Liveable Exeter, Local Plans) prioritising active, public, and sustainable transport;
- Infrastructure delivery (bus station, corridor upgrades, Devon Metro);
- Data-driven recognition of congestion challenges;
- Ongoing experimentation (Active Streets) requiring deeper evidence and public feedback;

- Development management approaches requiring transport assessments aligned with sustainability principles.

8.0 The Site's Past, Present and Future Mobility Roles

Past Use

8.1 The northern part of the site formerly comprised Exeter Bus Station, constructed in the 1960s and operational until the early 2020s. Adjacent to the former Exeter Coach Station, the site was a central hub within the city's public transport network and has now been replaced with the new bus station to the immediate north.

8.2 The Civic Centre was constructed as civic offices in the post-war period and continues to function as such.

8.3 More widely, the area includes retail premises on Sidwell Street and commercial, residential and former leisure premises to the east of Paris Street roundabout and on Paris Street.

Current Use

8.4 As above, the Civic Centre is occupied by Exeter City Council providing office and civic meeting space.

8.5 The former bus station site has now been cleared for redevelopment.

8.6 Aside from the former Pyramids Leisure Centre, which is presently being demolished, the other uses remain.

Potential Future Use

8.7 The site represents a key gateway to Exeter city centre. Policy specifies the types of development that are suitable for this central, highly sustainable location; as part of the site's regeneration, it should:

- Prioritise and encourage active and other sustainable modes and the modes of choice for most day-to-day trips by residents and other users.
- Adopt a Vision Led approach to the optimisation of uses onsite, facilities to support sustainable modes, and the assessment of travel demand in line with the requirements of the NPPF.
- Align with the wider aspirations of the authorities in reducing or removing car trips from the city centre.
- Deliver a suite of measures on- and off-site to achieve a public realm which plays a key gateway, place and movement function. This should include delivery of an active travel corridor on Paris Street.

Figure 8.1: Active Travel Corridor Example

9.0 Embedding A Vision Led Approach

9.1 To embed a Vision-Led approach to the redevelopment of the City Point and Eastgate area in a way that aligns with the NPPF there should be a focus on early, integrative, and outcome-driven planning that prioritises movement, place quality, and community priorities alongside development viability and land use mix.

Integrate Movement as an Enabler, Not a Constraint

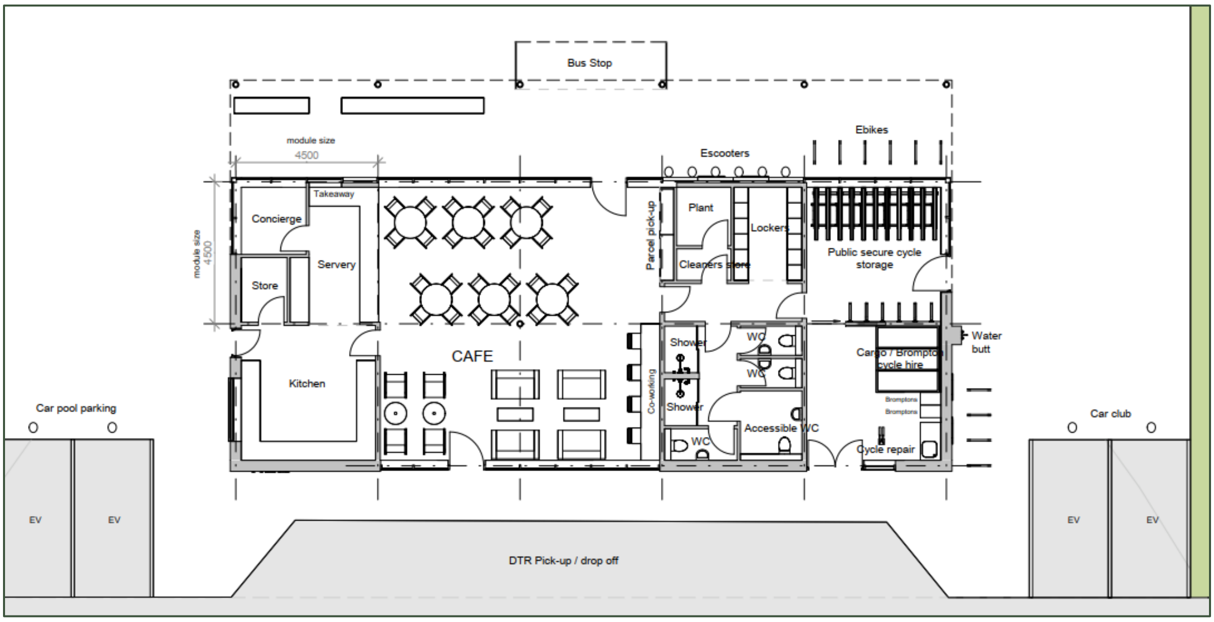
9.2 Movement frameworks should be used to reframe transport planning as a tool for delivering vision-led outcomes including:

- Walkable public realm with active frontages
- Seamless interchanges between bus, rail, and active modes
- Reduced car dominance and improved air quality

9.3 Integration of the new bus station as a part of the gateway, recognising its key role as a primary mobility hub / interchange alongside active travel corridors on Paris Street. There is a key opportunity to expand and complement the role of the Bus Station as a broader mobility hub including measures such as:

- Cycle parking / share / hire including e-bikes
- EV charging / hire / carshare
- Potential café or other community uses

Figure 9.1: Typical Mobility Hub Elements



Design-Led Masterplanning and Transport Planning

9.4 Future Transport Assessments and infrastructure delivery plans for the site should be co-produced with urban designers and architects and should:

- Include street sections and movement priorities aligned to the vision
- Reflect user experience — especially for pedestrians, children, disabled people and cyclists
- Recast Paris Street as a civic street and place rather than a traffic corridor
- Significantly improve pedestrian and cycle provision at Paris Street roundabout

Making Sustainability Happen

Appendix II

Electricity and Gas Network Maps

Contact details

Enquiries

Daniel Rich
0117 988 5332
daniel.rich@avisonyoung.com

Visit us online
avisonyoung.com

Avison Young

St Catherine's Court, Berkeley Place, Bristol BS8 1BQ

Exeter development

SLR has been commissioned by Avison Young to perform a high level grid feasibility study for the redevelopment of Exeter bus and Coach Station. The purpose of this note is to provide an overview of the local electricity network and the maximum demand capacity available in the area.

Exeter Bus and Coach Station is located at 50°43'31.34"N, 3°31'29.98"W in Devon, South West England. The transmission network in the area is owned by National Grid Electricity Transmission (NGET) and operated by the National Energy System Operator (NESO). The distribution network is owned and operated by National Grid Electricity Distribution (NGED) in the South West region.

Connection Profile

SLR has assessed the local electricity infrastructure around the Exeter Bus and Coach Station and has identified the most economically and technically feasible solution for connecting the site. This note provides a brief overview of the local electricity networks, identifies the likely preferred connection option for the redevelopment, and outlines the maximum available demand in the area.

Local Grid infrastructure

In England, transmission connections are grid connections at voltages of 275kV or 400kV. Distribution connections are all connections at voltages less than 132kV (132kV, 66kV, 33kV, 11kV).

Based on the potential demand levels, a connection to the local transmission system has not been considered further. A connection to the distribution network—likely at a voltage of 132 kV, 33 kV, or 11 kV—would be more appropriate.

This approach would offer several connection options, including line tap connections or connections to Bulk Supply Point (BSP) and Primary Supply Point (PSP) substations, depending on the scale of the project.

The closest point of connection is the Athelstan Road 33/11 kV Primary Supply Point (PSP). Currently, there is 8 MW of available demand headroom at this location. Athelstan Road is situated approximately 0.3 km southeast of the development site, with an estimated cable route length of 0.5 km.

The Athelstan Road substation is connected to the Exeter City Bulk Supply Point (BSP) via a 33 kV circuit. An alternative point of connection in the area is the Haven Road PSP, located approximately 1 km southwest of the redevelopment site. This substation has a demand headroom of 27 MW and is also connected to the Exeter City BSP via a 33 kV circuit.

Substation	Distance	Voltage	Demand Headroom
Athelsand Road	0.3 km	11kV or 33kV	8 MW

South West Water

Source for Searches

PNC
,

UNDERGROUND ASSET INFORMATION

PUBLIC DRAINAGE & WATER

Location:	EX1 2JX
Report Reference:	GIS/PY/EX1/22072025/35
Your Reference:	
Date:	22 July 2025
For the Attention of:	ANDREW WATERSTON

Further to your request for information dated 22 July 2025, the Company's apparatus for the above site is shown herewith.
South West Water Limited has made all reasonable efforts to ensure the accuracy of this information, but provides it subject to the following conditions:

• Service pipes and drainage connections may not be shown.

• No liability whatsoever is accepted for any inaccuracies or omissions in the information.

• If no reference is made in the information to any interest or right of the Company on any land, this is not to be taken as conclusive evidence that no such interest or right exists.

These reservations are in addition to any statutory regulations which apply.

Source for Searches - A South West Water Service contactus@sourceforsearches.co.uk 0845 330 3401

ASSETS NOT SHOWN? THEY MAY BE PRIVATE HOMEOWNERS RESPONSABILITY

USEFUL CONTACTS:

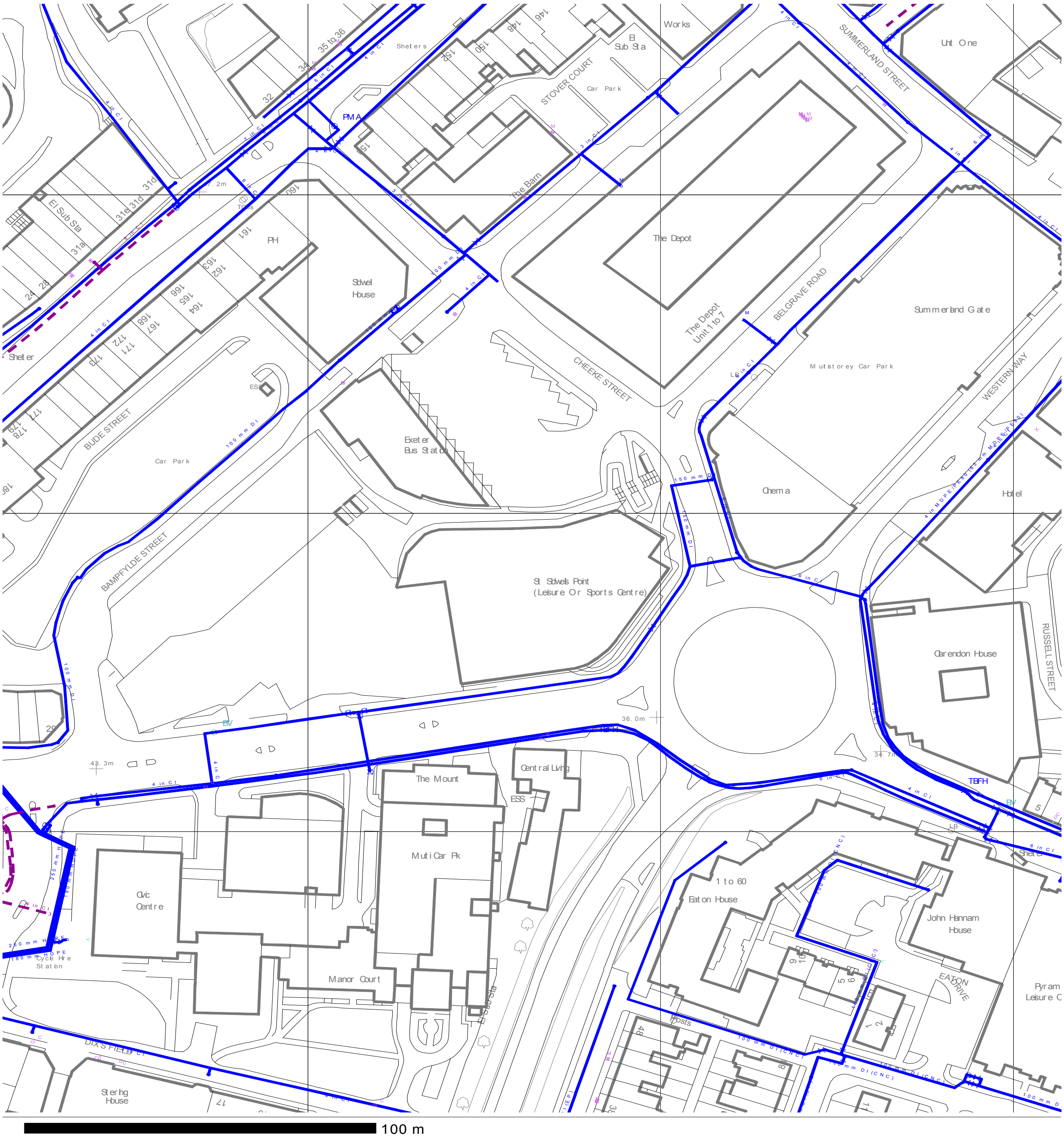
LEAKS / PIPE COLLAPSE	0344 346 2020
NEW CONNECTIONS	0800 083 1821
SOUTH WEST WATER	0344 346 2020

South West Water

The information indicated on this plan is provided only as a guide and no assurance as to its accuracy is given or implied. The Company accepts no liability whatsoever for any error or omission in the information. It should be noted that not all mains, service pipes and other apparatus of the Company in the area of the plan are shown.

WATER

EX1 2JX



Water Pipe Details

- Distribution
- Trunk
- Communication
- Untreated
- Private
- Abandoned

Common Materials

Cast Iron	CI	High Density Polyethylene	HDPE
Spun Iron	SI		
Ductile Iron	DI	Medium Density Polyethylene	MDPE
Steel	ST		
Asbestos Cement	AC	High Pressure Polyethylene	HPPE
Plastic	UPVC		

Water Features

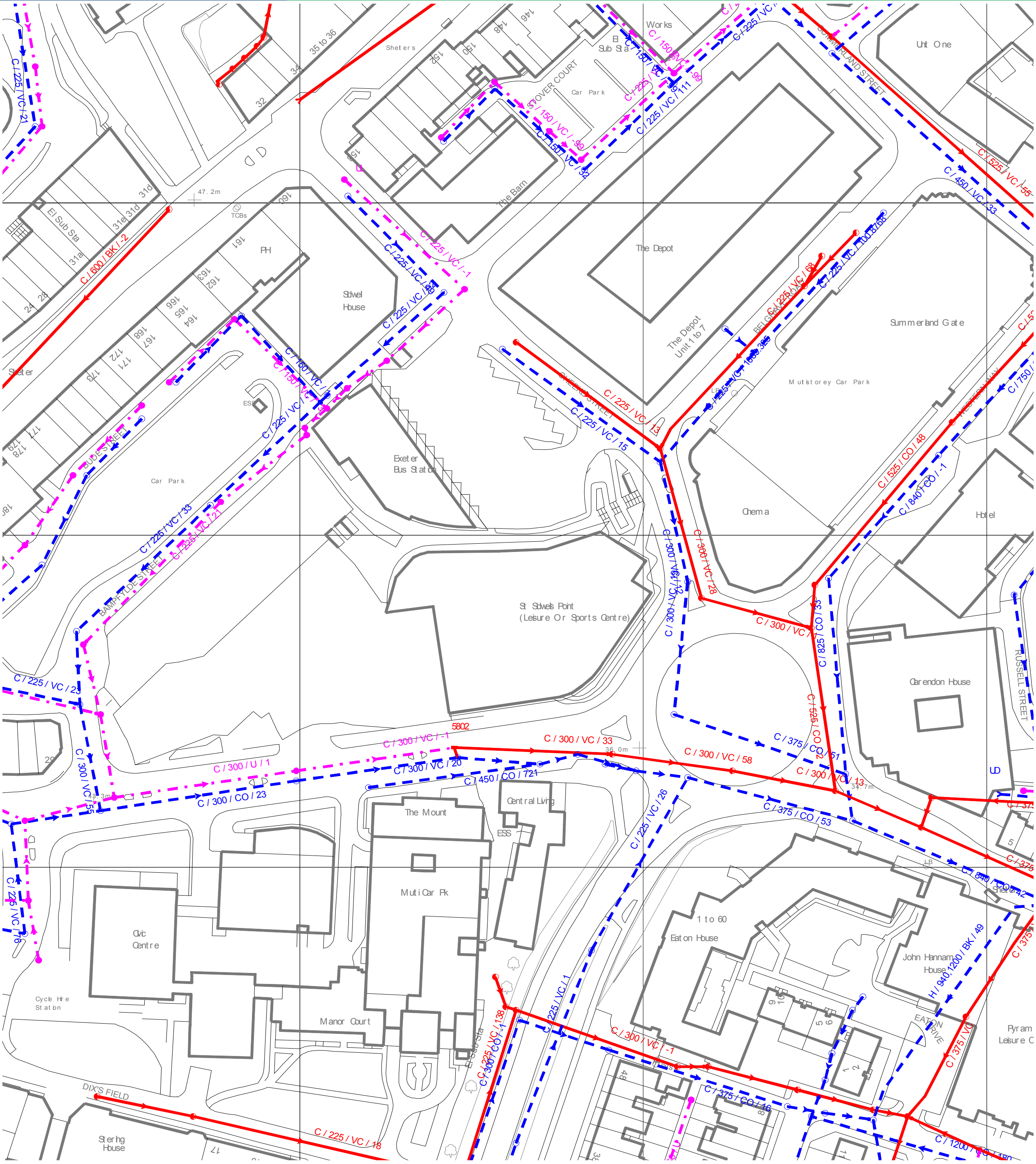
- Washout
- Hydrant
- Washout Hydrant
- Air Valve (Single)
- Air Valve (Double)
- Stop Tap
- Hatchbox
- Pump
- Sluice Valve Open (AC)
- Sluice Valve Closed
- Sluice Valve (CC)
- Stop Tap
- Customer Meter
- Mains Meter
- Relief Valve
- Pressure Reducing Valve
- Pressure Sustaining Valve
- Non Return Valve / Reflux
- Relief Valve

South West Water

The information indicated on this plan is provided only as a guide and no assurance as to its accuracy is given or implied. The Company accepts no liability whatsoever for any error or omission in the information. It should be noted that not all mains, service pipes and other apparatus of the Company in the area of the plan are shown.

DRAINAGE

EX1 2JX



100 m

Sewer Pipe Details

- Public - Foul
- Public - Surface
- Public - Combined
- Public - Treated
- Pumping Main
- Elevated (/EL)
- Unverified
- Abandoned (A)
- Highway

Common Shapes

Circular	C	Barrel	B	U Shaped	US
Rectangular	R	Trapezodial	T	Horseshoe	H
Unknown	U	Egg Shape	E	Oval	OV

Common Materials

Vitrified Clay	VC	Alkathene	AK	Medium Density Polyvinylchloride	MDPE
Pre Cast Concrete	PCO	Asbestos Cement	AC	Unplasticised Polyvinylchloride	UPVC
Concrete	CO	Polyvinylchloride	PVC	Unknown	U

Sewerage Structures

Manhole Foul		Manhole Surface	
Manhole Combined		Manhole Private	
Soakaway	SK	Catchpit	CP
Washout	WO	Hatchbox	HB
Buried	BU	Unable to Locate	UL

REQUIREMENTS AND DEVELOPMENT/TREE PLANTING GUIDAN

South West Water

In accordance with the provisions of Clause 26 of South West Water's Code of Practice, you are advised that in order to maintain adequate future access to the pipeline and to avoid interference with it, it is necessary to ensure that the following guidelines are observed:

1. Buildings And Permanent Structures

Clear working strip:

A clear working strip along the pipe is required between buildings and permanent structures and this must be:-

Pipes up to 150mm diameter	**6.0 metres**
Pipes 151-600mm diameter	**7.0 metres**
Pipes 601mm diameter and over	**9.0 metres**

If a building or permanent structure is planned within these limits please contact our Development Planning team as Build Over consent may be required. Development Planning developerservices@southwestwater.co.uk.

Proximity of buildings:

No buildings or permanent structures should be placed within 3 metres of pipes below 300mm in diameter or within 3.5 metres of pipes of 300mm or over in diameter (distances measured from the centre of the pipe), and in addition, buildings and permanent structures must be constructed so as to ensure that no additional loads are transmitted to the pipe.

(N.B: Pipe sizes refer to the internal diameter / bore of the pipe).

2. Trees And Shrubs

Roots can damage pipelines over time and extensive root systems will limit access to the pipeline in breach of the Company's right to access for repair or replacement. As a rule of thumb, the root spread of a tree is approximately the same as its eventual canopy spread. To help you avoid damage or interference to the pipeline, the Company suggests the following guidelines:

· No large or forest trees should be planted with 7 metres of the pipeline (examples include Oak, Ash, Beech, Douglas Fir, Sitka Spruce etc.)

· Medium to small sized trees should always be planted in such a way as to ensure that the eventual root spread reaches no closer than 1 metre of the pipeline, in practice, if trees are planted a distance of 5 metres away from the pipeline, this should be sufficient.

· Bushes and shrubs should never be planted closer than 2 metres from the pipeline.

· Closer than 2 metres either side of the pipeline may be planted with hedge plants and ground cover only.

· The measurement s and distances set out are for guidance only and there will always be exception, for example: Poplars and Willows, which have a particularly invasive root sys tem. If you are unsure of any individual case, then specialist advice should always be sought prior to planting.

· The guidelines set out above are based on the Company's standard access requirements for its apparatus. If, for engineering reasons, the distances set out need to be varied at particular locations, you will be advised of this before compensation for works is finalised. If you need to know the precise underground location of a new water main / sewer after its installation, please contact any of the Company's local offices, and Company staff will be pleased to mark out the position of the pipeline within your land.

· If the Company finds any infringement of its legal rights of access, or any damage being caused to the pipeline, the Company reserves the right to take appropriate action to ensure that there is no interference with its statutory apparatus.

Requirements to be met by persons carrying out works near to water mains and sewers:

1. The precise position of water mains and sewers must be ascertained by hand digging trial holes after first contacting South West Water, who will give such information as is available regarding the general location of the mains and sewer in the area. No liability is accepted for the accuracy of any information given as to the position or existence of water mains and sewers . In particular, service pipes and drainage connection are not generally shown on mains records, but their presence should be anticipated and precautions taken to avoid damage.
2. Notices of intent must be given to South West Water before any works are carried out in the vicinity, except in cases of emergency when our Operations Centre should be contacted as soon as possible.
3. Unless prior written approval has been obtained, mechanical excavation may not be permitted around, or within, 3 meters of the water main or sewer. Excavation may be necessary by hand.
4. Concrete haunches or surrounds to sewer s must not be disturbed without prior written consent from South West Water.
5. Before backfilling, the mains and sewer s will be inspected and any flaws or damage to the pipe or wrapping, if found, will be repaired by South West Water . All such flaws or damage must be immediately reported to the Company as soon as they are discovered. The carrying out of such repair s by South West Water shall not affect the question of liability, should any damage found to have resulted from the acts of those undertaking the works, their contractors, servants or agents.
6. Approved backfill will be used immediately around or over the ma ins and sewer s to a minimum cover of 300mm and the remainder of the backfill shall be to the appropriate Highways Authority Specification for the Reinstatement of Openings in Highways.
7. Both the existing main or sewer and the new works shall be suitably supported to prevent future settlement and any subsequent damage to equipment.
8. Ground adjacent to concrete thrust blocks supporting the main(s) and sewer(s) must not be disturbed.
9. Adequate support must be given to all water mains and sewers where these are likely to be undermined, and to all trenches in the vicinity of these, during the process of the works.
10. No apparatus shall be laid on or over any land within 300mm measured horizontally from any part of a water main or sewer or other apparatus belonging to the Company. Provided always that this cause shall not prevent any pipe, cable or conducting medium being laid at an angle of between 45 and 90 degrees across the line of the Company's apparatus, with a vertical clearance in excess of 300mm. In exceptional circumstances this clause may be varied or deleted with the prior written consent from South West Water.
11. South West Water must be consulted before any work representing an increased risk to the integrity of the mains or sewers (e.g., piling, using explosives, thrust boring, pipe bursting etc.) is carried out.
12. Facilities for inspecting all work carried out shall be given to South West Water with adequate notice

IN THE EVENT OF A LEAK OR PIPE COLLAPSE PLEASE CONTACT SOUTH WEST WATER IMMEDIATELY ON 0344 346 2020 (24 HOURS)