West of England Joint Spatial Plan-Towards the Emerging Spatial Strategy

Urban Living Topic Paper - Maximising the development potential in the urban areas

Introduction

The West of England authorities believe that the most appropriate places to meet the development needs of the future should be within the existing cities and towns; especially on previously developed land. As noted in the Issues and Options document, the four UAs have been undertaking detailed assessment of the potential of existing urban areas to deliver land to meet development needs. The assessments have focused on opportunities within the existing urban areas including Bristol and Weston-Super-Mare as well as examining opportunities within other sizeable urban areas in the West of England.

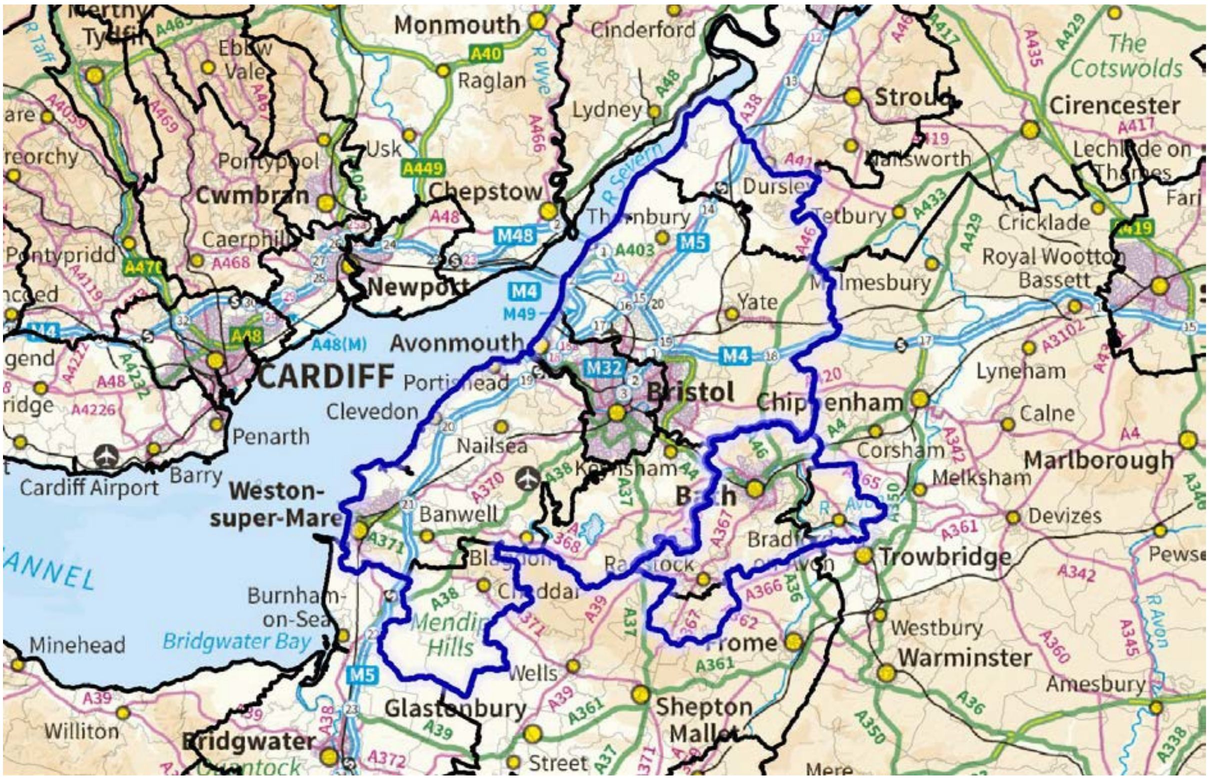
This report provides an update on the work carried out to date to establish the potential of the urban areas of Bristol and the Bristol fringe in South Gloucestershire, Weston-Super-Mare and Bath to deliver additional homes up to 2036.

The paper explains the approach to making the most efficient use of land in these urban areas and how this has been applied in each area. An estimate is set out in the report which indicates the capacity for new homes to be delivered in the city's built up area to 2036.

Assessed housing need

The Wider Bristol Housing Market Area includes the urban area of Bristol (including the communities of the North and East Fringe, the rest of South Gloucestershire, all of North Somerset, the western part of Bath and North East Somerset and small parts of Stroud and Sedgemoor Districts (see figure 1 below). The addendum to the Strategic Housing Market Assessment (July 2016) has identified a housing target covering both the HMA's of at least 105,000 homes, for the period from 2016 to 2036.

Figure 1 W HMAs in the West of England

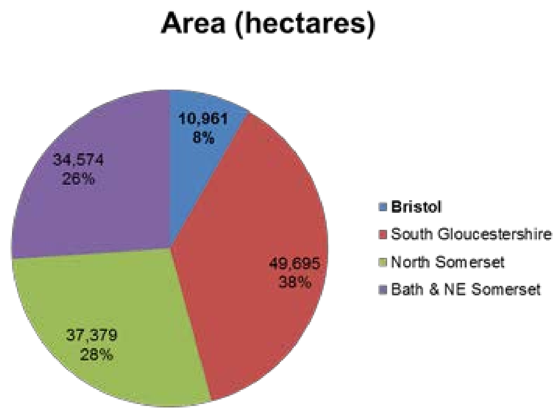


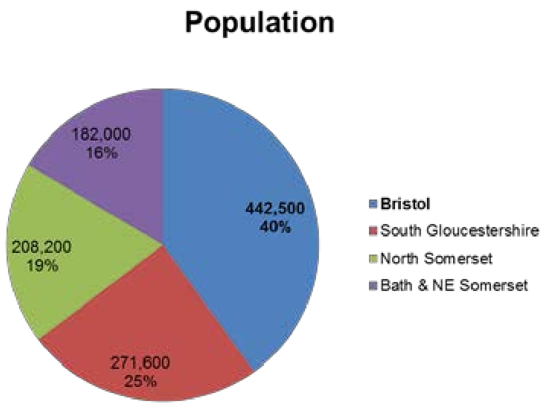
Continued delivery of homes within the urban areas has the potential to contribute substantially to meeting identified needs in the housing market areas.

Bristol City Council

Context

The City of Bristol accounts for 8% of the land area of the West of England whilst containing 40% of the population and existing homes.





The City Council area is mainly built up, with high densities of housing development and a substantial provision of flatted residential development. There are limited areas of open land. Unlike many industrial cities, Bristol does not contain substantial tracts of brownfield land or zones of industrial dereliction which can be considered for housing led regeneration. However, in the last nine years **45% (16,347)** of the new homes delivered in the West of England have been built in the City of Bristol – a rate of 1,800 per annum; see table below:

	Total delivery of homes 2006-2015	*Annual average*
Bristol	**16347**	**1,800**
South Gloucestershire	8129	900
North Somerset	7426	800
Bath and North East Somerset	4350	500

Urban living: approach to efficient use of land in Bristol

The high levels of residential development delivered in Bristol are facilitated by the city's approach of making effective and efficient use of land.

Bristol has a complete up to date local plan coverage for the period to 2026 (Core Strategy, Site Allocations and Development Management Policies; Bristol Central Area Plan adopted 2015). The adopted Bristol Core Strategy includes policies which seek to secure the effective and efficient use of land. These aim to maximise opportunities to re-use previously developed land. A **minimum indicative net density of 50 homes per hectare** is sought. Higher densities of development are sought in and around the city centre; in or close to other centres and along or close to main public transport routes.

Between 2006 and 2015, 96% of all dwellings completed in Bristol were at more than 50 homes per hectare. In the last 10 years the average density of new development on major housing sites has been **100 homes per hectare**; in the city centre development densities averaged over **300 homes per hectare** in the same period. In the same period, 82% of all dwellings completions in Bristol have been for flats.

The policy approaches to securing very efficient use of land have been carried forward into the analysis of potential for new urban sites in Bristol. This is discussed below.

Estimated capacity from Bristol City Council's area

It is estimated that the built up area of the City of Bristol can contribute approximately 32,000 homes (1,615 homes per year). As shown below, this capacity arises from four sources:

Bristol City Council ***Potential source of housing supply 2016 - 2036***	***Capacity***
Existing planning permissions	7055
Existing Local Plan allocations	8464
Unidentified small sites	4800
Urban living potential	12000
Estimated total urban capacity	**32319**

New ’urban living potential’ comprises 12,000 of the capacity for new homes identified above. The approach to estimating the new urban potential in Bristol is explained below.

Urban living potential

As its contribution to the West of England urban living potential assessment, Bristol City Council has undertaken a detailed search for potential development opportunities within the Bristol boundary that do not already benefit from planning permission for residential development, are not allocated and would deliver 10 or more homes. The assessment of urban living potential has had a number of strands:

- A citywide search for potential new brownfield development opportunities;
- Review of land currently reserved for the retention of industrial and warehousing uses;
- Assessment of potential from the conversion or redevelopment of city centre offices which are no longer required for employment uses;
- Review of the potential to increase the capacity of existing Local Plan site allocations;
- Potential for development of any undeveloped land within the urban area.

The urban living potential analysis to date suggests that there continues to be significant capacity for new homes to be delivered within the built up area of Bristol up to 2036. There is potential for 12,000 new homes from new sites that may reasonably be expected to come forward in Bristol over the plan period.

This is shown below:

Source	*Potential homes*
New brownfield opportunities (city reclaimed land)	6800
Land no longer required for industry/warehousing	1500
Re-use/redevelopment of redundant city centre offices	2100
Uplift of existing local plan site allocations	500
Undeveloped urban land	1100
Total	**12000**

South Gloucestershire

The district of South Gloucestershire incorporates the urban areas of the North and East Fringes of Bristol, Thornbury, Yate and Chipping Sodbury. Collectively it is anticipated that development on previously developed land in these areas could contribute to this 12,000 figure by delivering approximately 1,000 new homes from sites of 10 dwellings and above.

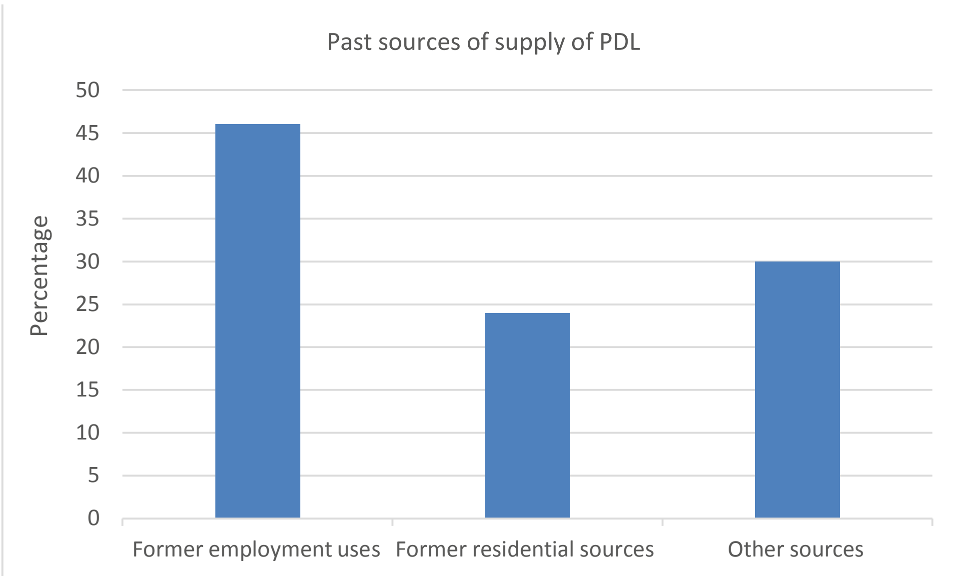
To achieve this outcome a forecasting/ projections based approach has been used. This has assessed whether continued development opportunities exist within urban areas, whether past rates of delivery are capable of being sustained and what sources of supply this land is likely to be generated from, based on the current data sets available.

In applying the projections based approach in accord with paragraph 48 of the NPPF, the objectives have been to:

> ***a) To review past delivery rates of development on previously developed land and sources of that land.***
> ***b) To review potential future rates of development on previously developed land and the sources of that land,***
> ***c) To establish an understanding of what contribution windfall PDL will likely make to overall future completion rates over the next 10-20 years up to 2036 and what type of sites are likely to generate that delivery.***

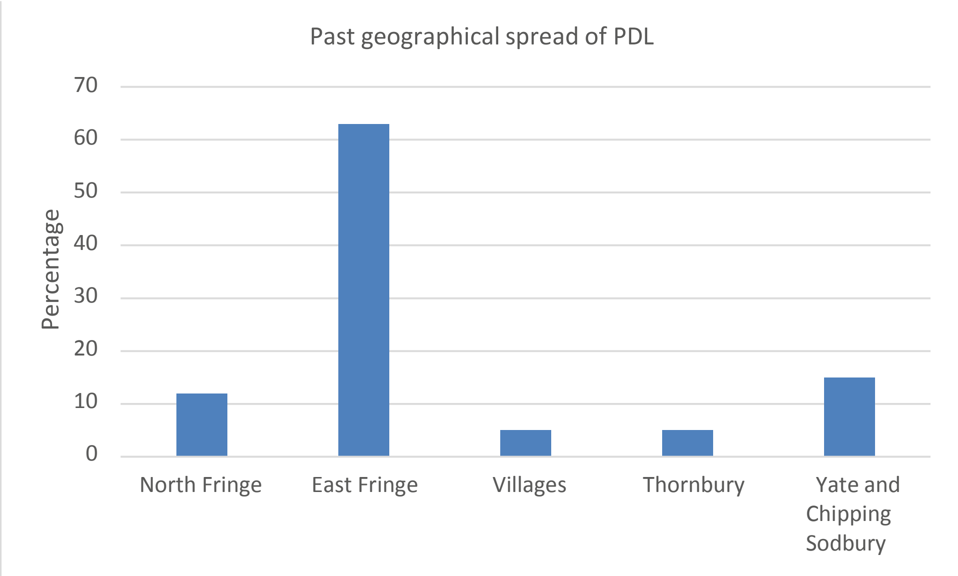
a). Past sources of supply and geographical spread

From the Council's monitoring of residential development over the past two decades it has been possible to make an informed judgement about what might be expected in the future. In the past 20 years almost **3,000** new homes in South Gloucestershire have been built on previously developed large sites (10+ homes**), an average of 150 dwellings per annum**. Almost half **(46%)** of these completions have been from **former "employment uses"**. Former "residential sources" accounted for 24% of completions, and almost a third (30%) of completions were from "other sources".



It has also been possible to identify the main areas where development has occurred, to help identify where development might be expected in the future. Past rates have identified that **63%** of development on previously developed land has occurred within the communities of the **Bristol East Fringe**, with the Communities of the North Fringe, Thornbury, Yate/

Chipping Sodbury and the rest of South Gloucestershire, collectively making up the remaining 37% of development on previously developed land.

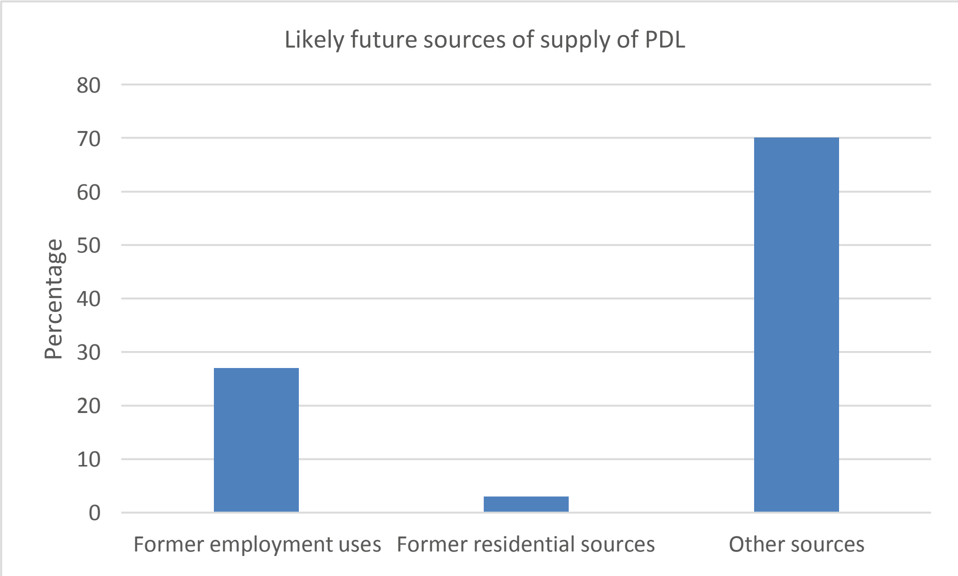


b). Likely future sources of supply and geographical spread

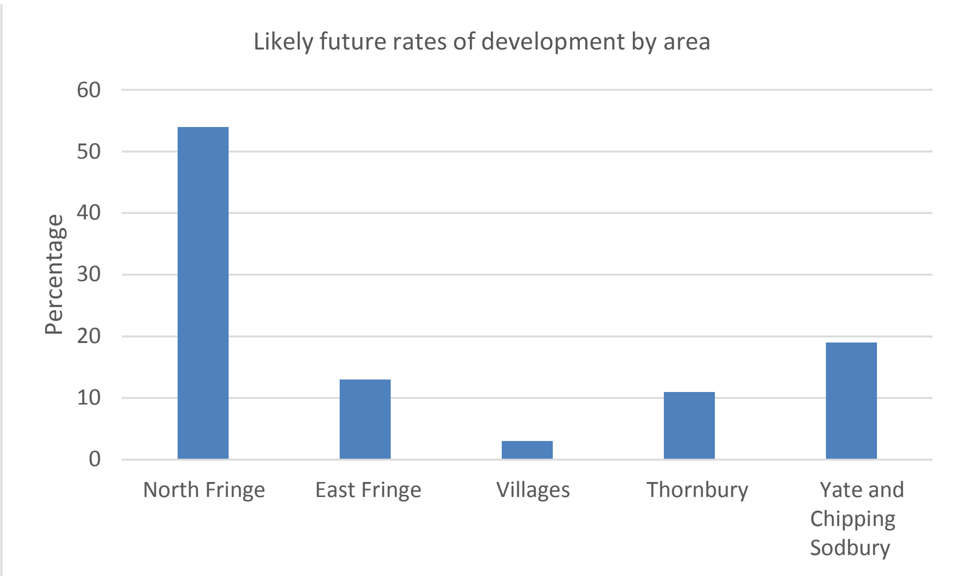
Windfall sites are those not specifically identified as available in the Local Plan process and normally comprise of previously developed sites that have become available. The above analysis has indicated that over the last 20 years windfall sites of over 10 dwellings have resulted in approximately **150 dwellings per** year. To determine the contribution such supply is likely to make in future a variety of data sets have been examined including: new planning permissions granted; current applications pending decisions; sites submitted as part of a call for sites exercise including any subsequent sites submitted as a result of further consultation; and other known sites.

Forecasting analysis indicates that currently there could be potential for at least **1,300 new homes** on a variety of previously developed sites, which based on an annual average could delivery around **65 dwellings per year over the period 2016-2036**. The majority of this supply can be typically divided into the following former land uses:

Source of supply	percentage	Indicative number
Former employment uses; e.g. industrial and storage uses	27	351
Former residential sources, e.g. residential redevelopment sites/garden land	3	39
Other sources, e.g. schools, community buildings, carparks, retail	70	910
Total	100	1,300



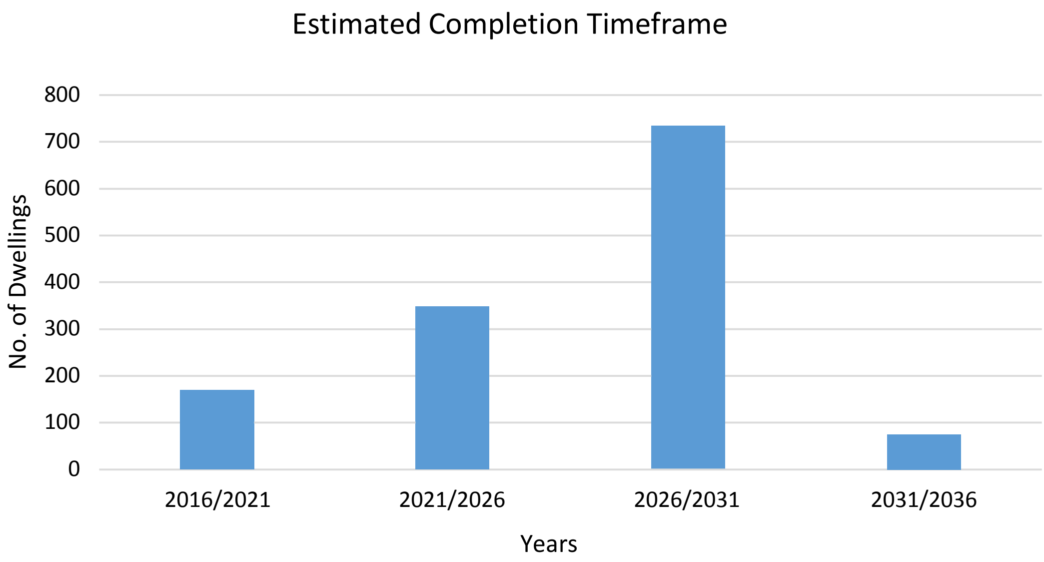
Very little new development is likely to come forward from the redevelopment of existing housing. Whilst in the future windfall sites will continue to provide an important element of housing supply, it is unlikely to provide such large numbers of new homes as in the past, as many of the largest sites, particularly on former employment sites have already been developed.



This analysis indicates that from across the Policy Areas, in future years the **Communities of the Bristol North Fringe** could provide the most significant opportunities for the supply of housing units from urban sites, with **over 50% o**f capacity from current sites falling within this area. This compares with 12% in the past. **Yate and Chipping Sodbury** could provide the second most significant opportunities with **19%** of capacity on sites falling within this area. The **communities of the Bristol East Fringe** area, whilst in the past providing over 60% of capacity is unlikely to provide many medium/large redevelopment opportunities in the future, the majority coming from smaller scale urban redevelopment sites.

From the current known sites it is possible to anticipate the likely time horizon of delivery. Whilst this can only be an estimate of when sites are likely to come forward an attempt has been made to broadly group expected development into five year periods. For this purpose sites that have already got planning permission have been assumed to be complete with the first 5 year period. As regards to the other sites, it is more difficult to forecast when these are likely to be complete so for the purpose of this exercise sites have been randomly "spread" over the remaining 15 years.

It can be seen from the graph below that in the next five years around 200 homes could be expected. The majority of new homes could come forward in the ten year period to 2031 with most of these after 2026 coinciding with the end of the Core Strategy period.



Conclusions

A snap shot assessment of development potential as at April 2016 identified that in the region of 1,300 dwellings are likely to come forward through wind fall sites on previously developed land (See South Gloucestershire SHLAA sites for further details)

Bath and North East Somerset – Bath

Bath is relatively small city with a population of around 90,000 residents. It is distinctive in the range and significance of its environmental assets in particular UNESCO World Heritage Site, has an extensive Conservation Area, is surrounded three sides by the Cotswolds AONB. This severely affects the amount of land available for redevelopment in the City and the nature of development appropriate.

The work on the B&NES Core Strategy entailed an intensive assessment of development opportunities and the B&NES core strategy plans for 5,320 dwellings to be built in Bath before 2029, with 90% of identified sites of 10 or more dwellings being on brownfield land. In light of the fact that Brownfield sites were maximised , some of Bath's housing need had to be met in adjoining settlements and warranted the need to remove land from the Green Belt on the edge of the City. Therefore further opportunities to maximise the urban potential of Bath are extremely limited

City of Bath ***Potential source of housing supply 2016 - 2036***	***Capacity***
Existing planning permissions	4000
Existing Local Plan allocations	1000
Unidentified small sites	400
Estimated existing urban capacity	**5,700**

However, further work has been undertaken as part of the preparation of the JSP. This has entailed a review of land and buildings in Bath in seeking to identify further resources of supply for new housing. These are sites that do not already benefit from planning permission for residential development, are not allocated and would deliver 10 or more homes. This is in addition to the housing supply identified to meet the B&NES Core Strategy planned housing growth in Bath which at 2016 stood at 6,600 dwellings.

Small windfall sites (less than 10 dwellings) are addressed separately which includes an assessment of the likely yield from bringing empty properties back into use. This amounts to around 300 dwellings as shown in the table below.

Source	**Potential homes**
New brownfield sites (not already identified)	**110**
Existing housing estates and garage blocks	**55**
Reappraisal of previously discounted SHLAA sites, including Industrial Sites	**130**
Change of use from offices	**14**
Uplift of existing site allocations capacity	**0**
Total	**309**

North Somerset – Weston-super-Mare

Summary of methodology

The methodology applied in North Somerset to identify potential is based on a review of existing land availability information, consideration of the role and potential of broad locations, and the potential contribution from increased delivery as a result of the greater incentives and interventions to support urban regeneration including greater plan-led intervention.

This assessment is not a Housing and Economic Land Availability Assessment though it draws on the outputs of the 2014 HELAA. It is anticipated that a revised HELAA will be produced in due course to support Local Plan allocations for housing.

The approach taken is therefore targeted at providing a broad understanding of the potential opportunities to increase urban living potential and setting the context for further investigation. This is considered to be a proportionate approach to fit the strategic nature of the JSP.

This approach draws on the latest survey of land opportunities in Weston-Super-Mare and also identifies locations that can be explored further where there may be strategic opportunities for housing e.g. focussed around transport hubs and retail centres.

The sites considered are not currently committed, and therefore, do not form part of the baseline supply (the 66,000 dwellings). These sites were previously identified as having some development potential through the North Somerset 2014 HELAA and the Council will be reviewing this study and all of the sites to inform the plan making process.

The focus for increased urban living potential in WSM will be on the town centre, where there are proposals emerging for regeneration. This is backed by increased involvement from the Homes and Communities Agency that should support the delivery of key sites in the town centre.

Review of the findings

Overall the assessment has identified an increase in urban living potential capacity of 1,850 dwellings at Weston-super-Mare). This comprises the following elements:

- 1,165 dwellings at WSM on specific identified sites from the 2014 HELAA,
- 500 dwellings on broad locations (subject to further investigation);
- 185 additional dwellings delivered through increase policy intervention to encourage urban living[1]

Specific identified sites from the 2014 HELAA

A total potential capacity of 1,165 dwellings at Weston-super-Mare is identified through a review of existing information on land availability. Similarly a potential capacity of 117 is identified from the same source for Clevedon, Nailsea, and Portishead.

[1] Note: this figure is only intended to serve as a scenario to indicate increased provision from small sites over the plan period stimulated by increased intervention to support urban living. It should be subject to further investigation but is expected to be on the lower side of potential.

In the main these sites are large (greater than 10 dwellings). Whilst it is unlikely that all of the identified sites would come forward as allocations, and others not in the list will, it is useful to compare the total with historic annual large site windfalls in the town to provide an overall sense check on the scale of potential.

The **1,165 dwellings** would likely emerge from 2021 onwards, averaging around 78 dwellings per annum (2021 to 2036), with the vast majority being on large sites. This compares with an actual delivery of 2024 dwellings on large sites in the WSM urban area alone between 2006 and 2015, averaging 225 dwellings per year. This shows that the scale of potential at least, is in line with historic large site delivery trends.

The sites considered will go on to be reviewed through a site allocations process in due course. For the purposes of this assessment, there is no suggestion that they would all be progressed however the scale of sites identified, coupled with the historic completions indicates that it would be feasible to secure around **1,000** dwellings up to 2036.

It is recommended that the suitability to accommodate this level of change in the urban area plus any required mitigation and infrastructure investment, is explored through the SA process and other testing.

Broad Locations

A potential dwelling capacity has not been specifically attributed to individual broad locations however the yield could be significant. A notional **500** is included to be subject to further investigation, and a range of broad locations have been identified based on the principle of setting a walkable catchment around centres of activity and through the identification of a range of indicative locations where a strategic approach to delivery could be explored. It is generally expected that such potential would likely be delivered during the later stages of the JSP plan period due to the additional plan making processes required to bring forward such potential and the longer lead-in times. It is recommended that further work to explore such opportunities is considered through the future North Somerset HELAA to support local policy and site allocations in the context of the JSP.

Additional small-site windfall

The greater focus on delivering housing in urban areas has the potential to translate to increased delivery of dwellings on small site windfalls brought forward in accordance with the Development Plan. The position set out in the baseline *Housing Capacity Evidence Paper* (November 2015) is that the prevailing trends are expected to continue. Therefore the additional potential of up to **185 dwellings** (2021 to 2036[2]) can be considered a trend+ but is not assumed within the baseline supply position.

How does the potential capacity from this study relate to the baseline supply position?

The potential identified here is in addition to the housing supply set out in the *Housing Capacity Evidence Paper* (November 2015), though there is likely to be some cross-over in

[2] Allowing the initial 5 years of the plan period to reflect trend recognising that it will take time for policies and other influences to take effect.

their delivery.

Potential increase in urban living capacity across the West of England

In summary, the ongoing review of potential increase in dwellings in the main urban areas across the West of England has indicated that there is potential for the delivery of an additional 14,609 units.

Urban potential source of housing supply 2016 - 2036	Additional dwellings
Bristol	12,000
South Gloucestershire	1,300
North Somerset	1,000
B&NES	309
Estimated total urban potential	**14,609**

The early development of a number of these sites is likely to require prioritised investment and intervention from the public sector. This is the subject of further research and assessment.

Details of the approach to assessing urban living potential are included at **Appendix 1**.

The assessment will form part of the evidence base for the Joint Spatial Plan. It is expected that the assessment will be published alongside the draft Joint Spatial Plan when it is made available for public consultation in the Autumn.

Appendix 1 – Details of urban living potential assessment – Bristol City Council

New brownfield opportunities - city reclaimed land

The citywide search for brownfield sites, dubbed 'city reclaimed land', focused in and around the 47 Local Plan designated town, district and local centres, transport hubs and transport corridors. Existing mapped and photographic information was used to identify areas of underused land or buildings. Other sources of sites in locations across the city were also considered, such as land around local authority high rise housing or sites previously considered for local plan site allocations but not taken forward at the time.

Each of the sites was ascribed a potential capacity for development based on a set of density assumptions (ranging from **65dph** in suburban locations to **200dph** in the city centre). They were then analysed against key constraints (e.g. the presence of listed buildings, high flood risk or the amount of the site likely to be required for infrastructure) to make the capacity assumptions more realistic.

Consideration was given to the likelihood of each site coming forward for residential development. The more likely sites have contributed to the capacity set out in this briefing. Sites that were not considered likely to come forward (e.g. under-utilised land in existing uses such as supermarket car parks) were also recorded but do not contribute to the overall estimated capacity as they were not considered likely to come forward for development over the plan period.

Principal Industrial and Warehousing Areas

The Bristol Local Plans' designated Principal Industrial and Warehousing Areas (PIWAs) were reviewed through a process of site visits. Officers assessed the condition and occupancy of land and buildings to identify whether they were likely to continue to be designated as a PIWA at the next Local Plan review.

Sites identified for potential change from the PIWA designation were ascribed capacities and analysed for constraints following the city reclaimed land method. The sites considered more likely to come forward for development during the plan period have contributed to the identified.

City centre offices

For city centre offices, a different method was used to reflect the fact that the conversion of offices to residential currently benefits from a simplified 'prior approval' regime under the General Permitted Development Order and does not require planning permission. Recent prior approvals were analysed to identify an average density per floor of 100dph. This average density was then applied to the remaining supply of large city centre office buildings considered likely to come forward for conversion by reason of their location, condition and/or occupancy.

Uplift of existing local plan site allocations

Existing local plan site allocations have been reviewed to see if higher density forms of development could be considered. The potential from this source is limited as sites were subject to detailed consideration during local plan preparation. Capacities for the sites were identified through a process of public consultation and examination by a planning inspector. The stated capacities are already subject to the density policies in the Bristol Core Strategy and its approach to making efficient and effective use of land. However, there may be some opportunity on the larger allocations for securing housing numbers higher than identified capacities. An estimate of an additional 500 homes has been made.

A similar review may form part of the urban potential assessments being undertaken by the other unitary authorities.

Undeveloped urban land

There is a limited proportion of undeveloped land in the city which is mainly built up.

The review is ongoing, but an initial desktop assessment of any undeveloped land identified a small number of sites which may not be need to be retained for open uses. These have been initially assessed for their suitability for residential development. These locations have been ascribed capacities and analysed for constraints following the city reclaimed land method.

Viability assessment

The urban living potential assessment is on-going. Consultants have been commissioned to provide information on the viability of sites for residential development. This will assist in determining whether sites considered to have capacity for residential development are likely to prove to be viable development opportunities. This will enable a more detailed determination which sites are likely to contribute to housing deliver over the plan period.

Small unidentified sites

In assessing future capacity for development an allowance is made for deliver from small unidentified sites. These are developments fewer than 10 dwellings and include small conversion schemes. There has been consistent delivery from this source over many years and the trend is expected to continue. 300 homes per year are projected from this source. The estimate was included in the housing figures stated in the Joint Spatial Plan Issues and Options document.

September 2016