SHLAA Update 2013

Final Report

On behalf of **Torbay Council**

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1 Introduction

1.1 Background

1.1.1 This document is produced by Peter Brett Associates (PBA) on behalf of Torbay Council. It is an update of the SHLAA produced for the council in 2007- 2008 and forms part of the evidence base for the emerging Local Plan.

1.1.2 The SHLAA update has been produced using the methodology of the original study issued in September 2008, taking on board the changes in legislation and good practice which have taken place in the period since. Centrally this has been the replacement of PPS3 and the other planning Policy Statements and Guidance with the National Planning Policy Framework (NPPF).

1.1.3 However, the Good Practice Guidance issued by the Department of Communities and Local Government in 2007 remains extant and is the most up to date statement of the view of government on the conduct of SHLAAs.

1.1.4 The study has been produced in conjunction with officers of the council and other stakeholders, including developers and consultants involved in the development industry. It is, however, a report produced by independent consultants.

1.1.5 The introduction of the Localism Act since the last SHLAA was produced has, however, heralded the rise of Neighbourhood Planning and as part of the SHLAA Update, the Community Forums within the Torbay area have been involved in the identification of sites and their assessment.

1.1.6 However, as per the original SHLAA, the Update is an independent review of the existing situation and is a consultants' report that is intended to provide evidence to the Council.

1.1.7 The study has been produced based on the best available information at the time of writing (March 2013), drawing on the professional judgement of those involved.

1.1.8 This document must be considered part of the wider evidence base for the Local plan and cannot be construed as committing the Council to allocate any particular parcel of land for a particular use, nor approve any planning application for development.

1.1.9 This study also specifically follows the requirements for the preparation of a SHLAA. It is not the same as the calculation for the 5 year land supply of housing required by the NPPF (Para 47). The SHLAA is an evidence document to be used by the council in preparing its Development Plan. It does not calculate the council's 5 year land supply figures and should not be construed to do so.

1.1.10 The SHLAA is a document produced at a point in time to inform the Development Plan, the council is required separately to ensure a supply of housing land and may draw on the evidence in the SHLAA to help it do so. However, it is for the council to identify how it will meet the requirement for housing land rather than the SHLAA specifically to do so.

1.2 Relationship with Housing Need

1.2.1 The previous SHLAA was produced at a time when the RSS was emerging and promising to set the housing requirement for the council area. During the time of the previous study the RSS figure for housing delivery within Torbay rose from 10,000 to 20,000 dwellings and then subsided back to 15,000 dwellings.

1.2.2 Subsequently, the Government announced on 27th March 2013 that they would set in motion the process to abolish the Draft RSS for the South West and this has now taken place.

1.2.3 The Local Plan now needs to ensure provision of housing based on an objectively arrived at figure (NPPF para 14) and this figure is considered as part of Requirement Assessment Report which has been produced in parallel with this SHLAA Update.

1.2.4 The SHLAA provides information regarding the deliverability of dwellings within the area and does so based on the merits of sites and locations. It is then for the plan making process to identify which sites might be required to meet the objectively assessed housing target, drawing on sites within the SHLAA.

1.3 Partnership Working

1.3.1 The Strategic Housing Land Availability Assessments Practice Guidance recognises the importance of the local planning authorities working together with key stakeholders to undertake assessments to ensure a joined-up and robust approach. Examples of these include house builders, local property agents, local communities and neighbouring authorities.

1.3.2 Partnerships with key stakeholders have been used to produce the SHLAA Update; work undertaken by Community Forums supported by the Prince's Foundation, as well as discussion with developers have all been taken into account, but the study remains a consultant's report.

Neighbourhood Forums and the Prince's Foundation

1.3.3 Given changes brought in by the Localism Act, which has introduced the neighbourhood planning process, three local Neighbourhood Forums have been established for Torquay, Paignton and Brixham, and these have been considering issues relating to change and future development of their areas. With support from the Princes Foundation, the Neighbourhood Forums within the Torbay area have been involved in the identification of sites and their assessment. Workshops were hosted by the Princes Foundation to consider the sites identified in the SHLAA and the findings fed into the preparation of this document.

Torquay

1.3.4 The Prince's Foundation held a series of workshops in December 2012 to support the Torquay Neighbourhood Forum to prepare a Neighbourhood Plan, the results of which were published in a Workshop Report. This identified sites that had not been identified in the previous SHLAA.

1.3.5 Carrying on from that, on March 14th 2013, a workshop concerning the SHLAA refresh was led by the Prince's Foundation. This was described as the opportunity to influence the SHLAA refresh, and a time to comment on sites, so that local needs and local vision could be ascertained. Sites were discussed by the participants and conclusions were drawn regarding their deliverability.

Brixham with Churston, Galmpton and Broadsands

1.3.6 The Prince's Foundation held two workshops in 2012 to support development of a neighbourhood plan in Brixham and the surrounding Villages; an introductory event in March, and a more detailed follow up in June. They published a Neighbourhood Plan Report that outlined their recommendations.

1.3.7 As with Torquay, they held a SHLAA refresh workshop on the 15th March 2013 for the Neighbourhood to discuss various sites that had been identified through the study and more general points such as how many and what type of housing is needed in the Peninsula.

Paignton

1.3.8 The Prince's Foundation held three workshops with the Paignton Neighbourhood Forum in 2012. These discussed two key issues; the town centre and options for housing growth, particularly in Collaton St Mary. From this they produced a report as companion notes to a presentation given to members of the steering group on the 16th November 2012.

1.3.9 A SHLAA refresh workshop was held in Paignton on the 14th March. At this workshop, the Prince's Foundation facilitated members of the Paignton Neighbourhood Forum in taking a view on the availability and suitability of sites for housing development over the 20-year plan period of the emerging Torbay Local Plan.

Developer's Panel

1.3.10 This study has been produced in conjunction with developers and consultants involved in the development industry. Two workshops were held, which included a panel of developers, landowners and agents active within the Torbay area, and are outlined below:

- Workshop 1. Developer's panel was held on the morning of Wednesday 27th February in The Riviera Centre, Chestnut Avenue, Torquay. The workshop considered the results of initial site work on the suitability and deliverability of sites within the urban area.
- Workshop 2. Developer's panel was held on the morning of Friday 8th March, again in the Riviera Centre, Chestnut Avenue, Torquay. In this instance the workshop considered the suitability and deliverability of possible strategic sites outside the existing urban areas.

1.3.11 These workshops were attended by representatives from:

- Boyer planning
- Bloor Homes
- Cavanna Homes
- Charles Blake Architects
- Colin Ritchie Architects
- Heynes Planning
- Kay Elliot Architects
- Knight Frank
- Linden Homes
- Persimmon Homes
- Rodney and Stuart Howes Partnership
- South Hams District Council
- Strategic Land Partnerships
- Teignbridge District Council
- Tetlow King
- Torbay Development Agency
- Westward Housing

1.3.12 Sites and proposals were discussed with the Developers Panels to consider the likely viability of proposals within the current and future market. Representatives from Teignbridge and South Hams were there as neighbouring authorities.

1.4 Document Format

1.4.1 This document follows the same structure as that of the original SHLAA;

1.4.2 Section 2 describes briefly the methodology used in preparing the document, drawing on the methodology previously adopted for the 2008 SHLAA.

1.4.3 Section 3 provides an update of the housing market position based on discussions with local land agents and developers during two panel meetings and also consultations with individuals at the time of the study.

1.4.4 Section 4 provides the first findings of the study, the stock of sites with planning permission at the time of writing. A summary of these sites are included in **Appendix B**.

1.4.5 Section 5 includes a summary of the assessment of site specific opportunities for housing across the study area. The findings are based on an assessment of identified sites arising from all sources. All of the sites are illustrated on maps in **Appendix A**, indicating the extent of the site and reference number allocated to each site for the purpose of this study.

1.4.6 Those sites which are not considered to be developable for housing within the plan period (2012 – 2032) are listed in **Appendix G**, including the reason for their rejection.

1.4.7 A summary of all sites which are considered to provide potential for housing land within the study period are included in **Appendix C** and a summary of the assessment for each site is included in **Appendix D**.

1.4.8 Section 6 draws all of the previous sections together, along with figures for housing completions in 2012/13.

1.4.9 This provides a summary of the potential delivery of housing within the plan period and as in the 2008 study it is considered that the identified stock of sites may not be sufficient to meet the objectively assessed housing requirement for Torbay. As a result the SHLAA Update is required to consider the opportunities for sites coming forward in Broad Locations and from Windfall.

1.4.10 In the original study a series of Broad Locations were identified and discussed. Many of the sources of housing land supply have now evolved into site specific opportunities, notably within the urban area. These are discussed in Section 5 or have been rejected as a potential source of dwellings.

1.4.11 The remaining Broad Location grouping, which is still to be considered, is that of the locations adjoining and/or outside of settlements. Section 7 concentrates simply on the delivery of dwellings from this potential source and considers the delivery of the Broad Locations as per the 2008 study but also this time considers the specific land parcels and sites within those broad areas which have been promoted for development.

1.4.12 Section 8 assesses the potential for windfall sites to continue to come forward within the plan period and calculates what level of delivery might be reasonably expected to come forward from this source.

1.4.13 Finally, all findings from the study are summarised in Section 9.

2 Study Methodology

2.1 Introduction

2.1.1 The Update draws extensively upon the work undertaken in 2007 and 2008, updating the database that was utilised for that study with new information on the sites previously considered and introducing new sites from a range of sources.

2.1.2 The parameters of the Update remained essentially as per those in the 2008 study and reiterated below.

2.2 Study Extent

2.2.1 As with the original SHLAA, all land within the boundary of Torbay was included within the Update. No land was specifically excluded, though sites which lay outside of the local authority boundary were not considered as part of the Update.

2.3 Time Periods

2.3.1 The emerging Local Plan has a time period of 2012 – 2032 and the SHLAA Update has considered sites in the context of this timescale.

2.3.2 The start date for the Local Plan is already passed and therefore housing delivery to date (since 2012) will be factored in when the council are considering what level of housing to be provided within the remaining plan period.

2.3.3 A base date for the study is required and this will be the 1 April 2013. This also relates to the council's own monitoring period for housing starts and completions. However, the detailed assessment of sites for the annual monitoring will not be completed for a few months following April.

2.3.4 Therefore the figures provided in this document for starts, completions and sites with planning permission are the most up to date available at the time of writing.

2.3.5 It will be for the council to update these figures further once the annual monitoring has been completed so that there is a consistent base date of 1 April 2013.

2.4 Site Size Threshold

2.4.1 As with the original SHLAA, a site size threshold of 6 dwellings or more has been adopted in order to ensure that the study is robust but manageable in terms of both time and budget. A number of these smaller sites have been identified as part of this study and are included in Appendix H. These illustrate a stock of potentially developable sites which may come forward but are not assessed in detail as part of this study. Therefore, they would constitute "windfall" delivery if/when they are developed.

2.5 Source of Sites

2.5.1 All of the sites considered as part of the previous SHLAA were reviewed as part of the Update.

2.5.2 The council also provided information from its records for planning applications which have expired, pending planning applications and pre application discussions (where they were not considered to be confidential) for assessment within the Update. In addition, all land which has been promoted to the council as part of the on-going preparation of the Local Plan was included, as is land which the council own and are currently considering whether to sell.

2.5.3 In parallel with the SHLAA Update the Council commissioned the Prince's Foundation to work with each of the Neighbourhoods within Torbay to help inform the Update and the emerging Neighbourhood Plans. This resulted in a number of additional sites being identified, which were assessed as part of the process.

2.5.4 In total the number of sites which have been included in the SHLAA process rose from 339 in 2008 to a total of 554 in 2013.

2.6 Assessment of Sites

2.6.1 All of the sites within the database from 2008 were reviewed and reconsidered. The council's records for planning applications were interrogated in order to identify those that have been developed since 2008 and these sites rejected from the study.

2.6.2 The remaining sites and new sites identified in 2013 were considered against the three key criteria of:

Availability

2.6.3 In order for a site to be considered deliverable (developed within 5 years) the site should be available now. Alternatively, if there is a reasonable prospect that the site might be available at some point in the future then it might be considered developable (to be developed within 5-20 years).

2.6.4 Many of the sites within the SHLAA database have been promoted by the land owners either through the planning application (and pre-application) process or through the development plan and therefore are considered to be available.

2.6.5 There are a number of sites which have previously had planning approvals for residential development which have now lapsed (or expired). In these instances a view has been taken based on knowledge of landowner intentions where possible and on the period in which the applications lapsed. For those sites that were granted planning permission in the early 2000's and lapsed during 2007/8 it is considered that the sites are unlikely to be deliverable in the near future. This is because the sites had planning permission during the "boom" years and still were not developed. They are therefore considered unlikely to come forward in the near future given the current and continuing market conditions.

2.6.6 Where sites were granted planning permission in the period of 2007/8 but have now lapsed, it is considered likely that the recession rather than landowner intentions would have been a main consideration in the failure to deliver the sites. Therefore, the sites which have recently expired are considered likely to come back, once a stronger market returns.

2.6.7 In parallel with the SHLAA Update the Neighbourhood Forums were involved in the consideration of sites and identification of new opportunities. Several new sites were identified through this process but not always with the clear agreement/support of land owners. In order to be considered a deliverable/developable site the intentions of the land owners in each case have been sought and where it has not been possible to confirm their intentions, the site has been rejected from the SHLAA Update. If at a later date landowners confirm their intentions to promote the land for development, then the sites may be reconsidered as part of the process.

Suitability

2.6.8 The SHLAA Practice Guidance confirms that "A site is suitable for housing development if it offers a suitable location for development and would contribute to the creation of sustainable, mixed communities" (Para 37). It also identified 4 factors to consider in undertaking this assessment:

2.6.9 Physical problems or limitations – this relates to the practical issues of delivering sites such as access constraints, ground conditions and flood risk. An assessment of these factors has been undertaken for all sites and an assessment made as to whether the constraints are present, if they are absolute and preclude development or whether any issues can reasonably (and viably) be overcome.

2.6.10 Potential Impacts – this may include landscape and ecological impacts arising from development and these are considered for all of the sites as part of the SHLAA update.

2.6.11 Environmental conditions – refers to the living conditions for prospective residents of new dwellings.

2.6.12 These first three factors all relate to the physical implications of development and generally are considered to be fixed in terms of the Council's ability to influence the impacts. However, the final factor is that of Policy Restrictions.

2.6.13 Planning policies and community strategies can be amended and altered by the council to reflect priorities such as regeneration and economic development. Therefore, policy constraints are not considered to necessarily preclude the opportunities for development of land where it is possible that the council might (through the local plan) amend those policies.

2.6.14 This might include land which is the subject of employment allocations in a previous plan. If evidence for the emerging plan indicates that there is a surplus of employment land and that certain previously allocated land could be released for other uses (such as housing), then sites which might otherwise be rejected may become suitable for development.

2.6.15 Therefore, the SHLAA Update adopts an approach which specifically identifies those sites that are suitable for development in regard to factors 1, 2 and 3 but are subject to policy restrictions which the council may revise as part of the local plan.

2.6.16 This particular group of sites are summarised in **Appendix E**.

Achievability

2.6.17 An assessment of the local development market was included in the 2008 SHLAA and has been updated as part of this process.

2.6.18 The findings are provided in Section 3, and have been used as the basis for considering the viability of sites put forward to the SHLAA.

2.6.19 As a central element of this, sites and proposals were discussed with a Developer's Panel to consider the likely viability of proposals within the current and future market.

2.7 Estimating the Yield

2.7.1 Where proposals are sufficiently advanced, masterplans and planning proposals have provided a clear indication of the delivery of dwellings on any particular site.

2.7.2 Where this information is not available, a starting point has been the calculation of an indicative yield simply based upon the gross site area. However, this is a very simplistic tool and provides only a starting point for the assessment of site yields.

2.7.3 Professional judgement of the study team has been used to review each site and consider whether the generated housing figure for each site might be appropriate given its characteristics. In each case, the density of surrounding sites and the market for dwellings has been included as part of arriving at a final density for sites.

2.8 Assessing when sites might come forward

2.8.1 It is important that the council ensure a supply of sites across the local plan period of 20 years and as part of the SHLAA the delivery of sites across time periods has been considered.

2.8.2 Where sites have planning permission, it is considered likely that those sites will be deliverable within 5 years. In addition, there will be sites where there are clear developer intentions to bring forward planning permissions in the near future and to commence development within the 5 year period.

2.8.3 Input from the market assessment and developer panels has provided evidence in regard of the likely delivery rate for sites and indicated an average site yield of 25 – 30 dwellings per annum for a site, based on what is likely to be demanded from the market. These average figures have been adopted for sites of 50 – 150 dwellings where it is assumed that there will only be one “outlet” i.e. developer.

2.8.4 For the larger sites, there will be additional “outlets” providing dwellings, but they are likely (due to market competition) to deliver less each per annum that 30 dwellings and this has been factored into the delivery rates of these sites.

2.8.5 For some sites, the delivery of key infrastructure is necessary before they might come forward. Where this is the case, that has been factored in, as has landowner intentions, especially where sites are currently in an alternative use.

3 Market Assessment

3.1 Introduction

3.1.1 A key element in understanding where, how much and what type of housing is likely to come forward in any particular area is the operation of the local housing market. Understanding the economics of the local market is identified as a central component of a SHLAA by the practice guidance and the input of house builders and local property agents is important to this understanding.

3.1.2 Therefore an assessment of the local market conditions was undertaken as part of the 2008 SHLAA and has been reviewed as part of this update. This is in line with advice, as it is not considered necessary, or indeed practical, to undertake a valuation of each and every site.

3.1.3 The market assessment has drawn upon work undertaken by Roger Tym & Partners and Baker Associates as part of the Infrastructure Delivery Study (January 2012) and has been assisted by consultations undertaken during the work with people familiar with the areas and knowledgeable about the operation of the local markets, such as local agents and house builders. This has assisted in building up knowledge of the factors affecting the likelihood of development.

3.1.4 In addition, the assessment has tried to take account of a variety of 'deliverability' factors, particularly in the first five year period, when sites should be demonstrably suitable, available and achievable. These factors include access, ownership, adjacent land uses and economic viability in the light of local market considerations, though exhaustive investigations have not been possible in every instance.

3.2 Background

3.2.1 The local agents and developers who participated in our discussions were:

- Cavanna
- Taylor Wimpey
- Bovis
- Persimmon
- Knight Frank
- Tetlow King
- West Country Housing Association
- Torbay Development Agency Housing and Planning Manager

3.2.2 In addition, a number of local estate agents were contacted via telephone and surveyed on the current market demand and requirements.

3.3 Background Research

3.3.1 Set out below is a selection of schemes currently, or soon to be, on the market:

Table 3.1: Schemes on the Market

Developer/Agent	Scheme/Location	Dwelling Type	Prices
Bradleys	The Bay	Flats	£280,000 (2 bed flat
Linden Homes	South Sands	Houses	£269,950 (3 bed townhouse) £349,950 (4 bed townhouse)
John Couch	Orchard Place	Luxury over 55 houses	£345,000 (2 bed)
	Thatchers View, Middle Lincombe Road	24 Flats (over 60)	£175,000 (1 bed flat)
Jackson Stops and Staff	Casa Blanca	2 luxury 4 bed houses	£1,695,000 (4 bed)
Miller Countryside Cavanna Homes	Evolve, Kingsley Avenue	Flats and houses	£234,995 (4 bed semi) £129,995 (2 bed flat)
Haart	Victoria Parade		£209,950 (2 bed)
Barratt Homes/ Haart	Torre Marine, 30 Richardson Walk	Houses and flats	£199,950 (4 bed) £145,950 (2 bed flats)
Connells	Beechfield View	Flats	£127,995-£139,995 (2 bed)
Haart	Oldway, Paignton	Flats	124,995 (2 bed flat)
Marchand Petit Millwood Homes	Durl Rocks Heights, Brixham	Townhouses and flats	£315,000 (3 bed townhouse) £210,000 (2 bed flat)
Fulfords	Riviera Way Holiday Park, Brixham	Bungalows	£115,995 (2 bed)

3.3.2 One of the schemes, Torre Marine, was included in the 2008 report as it was current at that time as well. It is noted that sales values remain at the same level now as they were then. It is noted that the fact that the site remains available reflects much of what has been indicated by those within the market during this update, that there remains a relatively strong level of demand for the right product. However, the rate of sales is slow, reflecting a lack of market confidence and a lack of available finance, particularly for the first time buyer.

3.3.3 This is reflected in the Land Registry data which suggests that house sales in Torbay have followed a steady decline over the past 10 years with a peak of 448 dwellings in December 2003 and a low of 64 dwellings in January 2009. Since January 2008 sales per month have generally been under 200 units, with higher figures seen only in November and December 2009, September 2011, December 2011 and March 2012. This might be compared to figures generally over 200 and regularly over 300 in the previous 10 years.

3.3.4 Whilst property prices have fluctuated, different house types have followed a very similar pattern, but with the difference in price between the lowest and the highest average price in detached properties compared to other types of circa £100,000. The lowest average price for a detached property was £198,951 in December 2002 and the highest £298,646 in November 2007. Similarly, for semi-detached properties, the difference between highest and lowest is £58,579, for terraced properties it is £49,535 and for flats it is £41,348.

3.3.5 **Table 3.2** sets out what Zoopla estimates (as at April 2012) the average house prices for the three towns.

Table 3.2: Zoopla Estimates for the Average House Prices in Torbay (as at April 2012)

	Ave Property Value	Average Asking Price	No of Properties	Average Price Paid	No of Property Sales	Value Change from 1 year ago
Torquay	£189,427	£248,755	1,122	£186,130	780	+£2,198 (1.17%)
Paignton	£174,139	£200,208	743	£176,015	618	-£3,945 (-2.21%)
Brixham	£202,452	£240,283	388	£200,840	296	+£3.071 (+1.54%)

3.3.6 However, the members of the developer panel who contributed to the SHLAA Update challenged these figures. The figures show that the highest property values are to be found in Brixham. However, the views of those involved in the market are that Brixham actually attracts the lowest values of the three settlements, not the highest.

3.3.7 The panel concluded that the achievable sales values for the three towns might be:

- Torquay £210 per sqft
- Paignton £200 per sqft
- Brixham £190 per sqft

3.3.8 These figures are provided generally by those who are involved in the sale of new dwellings, whilst the Zoopla figures relate to all dwellings and it is considered that the figures are affected by the characteristics of the existing stock and their values rather than any more objective test of values and the local market.

3.3.9 Developers during the panel meetings considered that the market for housing diminishes as you travel south, as accessibility to employment and services in the bay and wider (Notably Newton Abbott and Exeter) falls.

3.3.10 Nationally, average price now in the UK is £162,932 (Jan 2013 Halifax house price index), £17,000 below the figure reported in the 2008 SHLAA (£180,344 June 2008). However, this comes after the house prices fell even further and the January 2013 figure represents a 1.9% increase on the previous three months. Martin Ellis, housing economist at Halifax, commented that. *"Prices were also 1.3% higher than in the same period a year ago, marking the first annual rise for 27 months.*

3.3.11 *"Market activity has also improved with sales in 2012 at their highest for five years. Rising mortgage approval numbers point to further increases in home sales in the coming months. The Funding for Lending scheme has helped lenders to lower interest rates and improve availability in the past few months. This is likely to have been a factor contributing to the pick-up in both home sales and prices.*

3.3.12 *"The outlook for the UK economy and house prices, however, is more unclear than usual. Subdued economic growth and pressures on household finances are expected to constrain housing demand. Overall, we expect continuing broad stability in house prices nationally in 2013."*

3.3.13 Between 2008 and 2012 house prices have seen a fall in the South West of over -5% according to the Halifax house price index. Prices are now at the same level as they were in 2005 with the average price being £ 186,205.

3.3.14 For Torbay the average house price is £183,047 (BBC using Land Registry of England and Wales. Figures for the period July to September 2012 based on the recent sale of 512 units). However evidence demonstrates that property prices vary considerably across the district. The tables below show the recent average sales prices and how they have changed between 2008 and 2012 (source: Home.co.uk Jan 2013).

Table 3.3: Average Selling Price in Torquay 2008 - 2012

	Oct 2008	Oct 2012	Change
Detached	£304,029	£281,372	-7%
Semi	£165,150	£194,053	+18%
Terraced	£163,327	£179,329	+10%
Flat	£141,700	£131,066	-8%
All	£174,831	£181,571	+4%

Table 3.4: Average Selling Price in Paignton 2008 - 2012

	Oct 2008	Oct 2012	Change
Detached	£227,500	£208,750	-8%
Semi	£181,249	£162,395	-10%
Terraced	£130,750	£123,893	-5%
Flat	£92,125	£115,152	+25%
All	£142,800	£141,095	-1%

Table 3.5: Average Selling Price in Brixham 2008 -2012

	Oct 2008	Oct 2012	Change
Detached	£303,200	£291,140	-4%
Semi	£143,875	£156,500	+9%
Terraced	£138,313	£180,143	+30%
Flat	£70,000	£250,000	+257%
All	£193,911	£229,473	+18%

3.3.15 For the housing market to operate effectively it needs a certain level of empty homes to ensure the housing market is dynamic. This ensures that there is enough stock available within the market at any one time and allows for market churn. CLG guidance on Strategic Housing Market Assessments indicates that a vacancy rate of under 3% is considered normal in the housing sector as this allows for transfers and for work on properties to be carried out. Current figures demonstrate that properties for sale represent 3.6% of the stock. This is just above average; however, this is still well within the acceptable margin. It is also useful to consider the Council tax records for vacant properties. This information shows that there are 1,256 properties that have been vacant for more than 6 months and 1,089 short term vacant properties. Again this would provide support for the fact that about 3% of the stock is empty within Torbay. Bringing empty homes back into use has the potential to reduce the number of new homes required to house the population, and we note the Council's objective of bringing back 150 long-term vacant properties per year back into use. However, given that Torbay has a level of vacancy which is within the normal range required to ensure a dynamic housing market, we do not consider that it is necessary to make an allowance for these to be bought back into use. Consequently, it is not recommended that a discount is applied to the overall housing requirement identified for the plan period.

3.3.16 The Census provides some interesting information in relation to the existing housing stock and how this is made up in terms of tenure and size. The table below demonstrates that in proportional terms there has been a decrease in home ownership, both without and particularly with a mortgage or loan since 2001. This 5% decline has been transferred into the private rented sector.

Table 3.6: Housing Tenure in Torbay 2001 – 2011 (source: 2001 and 2011 Census)

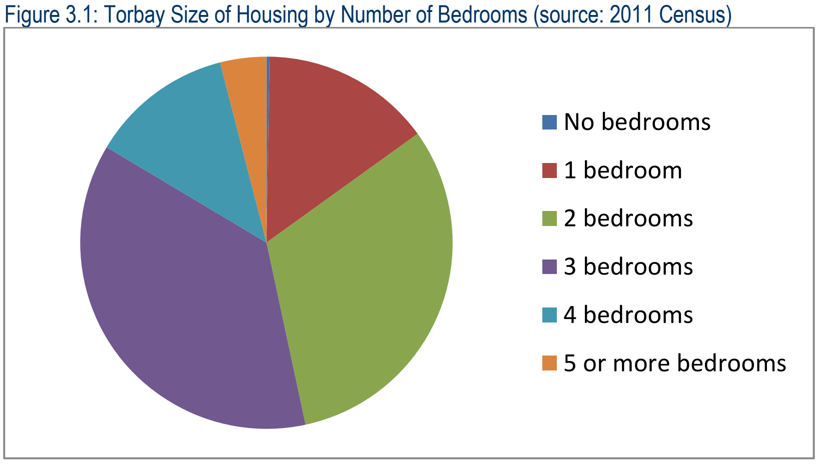
Housing Tenure	2001	2011	Change
Owns outright (%)	37.5	36.4	-1.1
Owns with a mortgage or loan (%)	35.5	30.4	-5.1
Shared ownership (part owned and part rented) (%)	1	0.9	-0.1
Social rented: Rented from council (Local Authority) (%)	1.7	0.9	-0.8
Social rented: Other (%)	6.5	7.2	0.7
Private rented: Private landlord or letting agency (%)	15.1	21.4	6.3
Private rented: Other (%)	1.4	1.8	0.4
Living rent free (%)	1.3	1	-0.3

3.3.17 In terms of household size it is interesting to consider the current properties and the number of bedrooms within Torbay. Unsurprisingly the housing stock is comprised primarily of two and three bedroom properties, although one bedroom properties make up nearly 15%. This is shown in **Table 3.7** and also graphically in **Figure 3.1** overleaf.

Table 3.7: Torbay Size of Housing by Number of Bedrooms (source: 2011 Census)

Bedrooms	Number of Houses (2011)
No bedrooms (studio)	157
1 bedroom	8,729
2 bedrooms	18,626
3 bedrooms	21,802
4 bedrooms	7,334
5 or more bedrooms	2,362
All categories: Number of bedrooms	59,010

Figure 3.1: Torbay Size of Housing by Number of Bedrooms (source: 2011 Census)



3.4 Private Market Housing Trends

3.4.1 As a part of the wider study a survey of local estate agents was undertaken to try to assess the local market conditions for all types of dwellings. Questions about the attractiveness of various dwelling types and locations were posed, as were questions regarding the future demand for dwellings.

3.4.2 It was noticeable that there were very different views from the agents, reflecting in the main the different locations and sectors within which the particular agents work. For instance The Willows in Torquay was identified by some as a high demand area, whilst for others it was specifically low demand. This also reflects another common response from estate agents, that the market remains “patchy”, that is to say variable and with changing trends on an almost weekly basis.

3.4.3 Common across all of the responses was a confirmation that generally the flats market, notably in Torquay, is saturated and that there is little demand for any additional properties in the higher end apartment market.

3.4.4 There remains a market for smaller flats (1 bed up to around £150,000) which are attractive to investors reflecting the low interest rates available elsewhere and the workings of the housing benefits market.

3.4.5 There is also generally a reported demand for cheaper dwellings in need of renovation from small builders and investors as well as first time buyers. However, this latter market continues to be constrained by the lack of available finance which still pertains.

3.4.6 The main area of demand across the surveyed agents was in the modest family homes market where the stamp duty threshold results in a strong market for modest 3 bed homes.

3.4.7 In addition to the general over supply of flats, agents reflected a general lack of demand for specific retirement products. There appears to be little on the market at present but the agents also reported a lack of interest as well. This may reflect the specific nature of this market and that individuals associate these products with particular providers and approach these (such as McCarthy and Stone and Churchill) directly rather than through the more general estate agencies.

3.4.8 The highest demand areas were generally Great Parks Paignton, The Willows, Shiphay, Chelston, Wellswood and central Torquay. As noted one agent suggested that the Willows were a low demand area, although this was not the common view, and house prices reflect buoyant demand for homes here. .

3.4.9 In terms of the market generally since 2008, estate agents considered that it has been fairly stable, lower than the peaks of 2007 but not exhibiting the large swings that were evident in the years before that. There was a general view that the market remains very price sensitive and there is a strong market for dwellings at “the right price” but this tends to be a lower price than sellers might initially anticipate.

3.4.10 There are generally signs of confidence in the market and looking forward the key to an improvement is likely to be the relaxation of lending requirements and an increase in available credit. Locally, agents consider that the opening of the South Devon Link Road will have a positive impact on the local market, with the greatest and earliest benefits being felt in the north of the bay. However, they do perceive that much of this increased interest will be from second home buyers who will be seeking prime properties with sea views and parking.

3.5 Developer Panel

3.5.1 As a part of the SHLAA study two panel meetings were held with a range of developers, architects and agents experienced in the delivery of dwellings within Torbay. These two meetings focused on the sites which have been considered within the SHLAA in order to understand the likely viability of those sites and their delivery within the plan period.

3.5.2 The first meeting focused on sites within the existing urban areas of the bay, whilst the second addressed the greenfield sites and Broad Locations on the periphery of the built up area.

3.5.3 The group included national and regional house builders and developers who are generally involved in new build housing rather than the sale and resale of established stock. In general terms they concurred with the views of the estate agents, that there is a general rise in values from south to north within the bay and that the values in Torquay are generally higher than those in Paignton and then Brixham. They concluded that the figures indicating a higher value in Brixham may be skewed upwards due to the relatively low turn-over of dwellings and be unduly influenced by a small number of high value transactions.

3.5.4 In considering the current market, the lack of available finance for both individuals and business was seen as the key constraint to the market and it was hoped that a general relaxation of lending criteria would see a significant increase in interest as there remains a high level of unmet demand within the area.

3.5.5 Looking forward the opening of the South Devon Link Road will, it was thought, have a positive impact on the local market. However, developers considered that this is likely to be most pronounced in the northern part of the bay and be directly related to the ability of commuters to access higher paid jobs in Newton Abbott and particularly Exeter, while enjoying the benefits of living in Torbay.

3.5.6 Therefore, the developer panel concluded generally that there will be an increasing demand for properties in the bay in the coming years, though it is likely that increasingly the area will be competing with new homes being delivered around Newton Abbott and also Exeter, notably Cranbrook.

3.5.7 For new dwellings on greenfield sites on the edge of the urban areas, the panel were confident that values continue to be such that new build developments will be viable and able to overcome all but the highest abnormal costs of development. There are also a number of regional and national developers promoting such developments (such as Yalberton and White Rock) reflecting a consistent delivery of new dwellings into the marketplace.

3.5.8 The panel did, however, comment on the delivery rate of such dwellings. In the 2008 SHLAA, it was noted that the annual delivery of dwellings up to the boom of 2007 had resulted in rates of 70 dwellings per annum being provided per site. The panel in 2013 were very sceptical that anything like this level of delivery could be achieved now or in the short to medium term.

3.5.9 Analysis of housebuilder delivery rates across the country indicates that annual delivery rates at present are at about the 30 dwellings per annum level for a single outlet on a site. The panel agreed that a level of approximately 25-30 dwellings per annum might be achieved on a greenfield site in Torbay at present.

3.5.10 In the case of a larger site where there might be two or more developers providing dwellings it is considered that each developer (or outlet) will deliver less than this at a diminishing rate depending on the number of outlets.

3.5.11 This restriction of dwellings per annum does not reflect the developer's ability to construct dwellings but the occupier's ability to purchase them. This again reverts to the availability of credit which has been touched on previously.

3.5.12 Within the urban area, however, the panel were more concerned about the actual ability of the market to deliver sites, notably smaller sites and those where there is an existing use.

3.5.13 The credit crunch and recession have meant that a number of the smaller local builders and developers are no longer in the market. Therefore, there are few, if any, developers willing and able to deliver smaller schemes. The larger national and regional developers have overhead costs which mean that smaller schemes of say 10-15 dwellings on urban sites simply are not attractive to them and therefore there simply aren't the mechanisms for these sites to come forward.

3.5.14 In addition the costs of refurbishment, the complexities of such work and the risks associated; along with the lack of credit for purchases simply mean that those sites where there is an established use are unlikely to be viable for conversion within the short term. There will be examples where sites can come forward due to the particular nature of the site or the developer but generally there was much scepticism within the panel that sites would come forward in the near future if they had an employment or hotel use at present.

3.5.15 The panel was also clear that there is a situation in the apartment market that compounds the lack of viability of refurbishment schemes which were so prevalent a few years ago. The panel did however, consider that there remains a strong retirement market for specialist provision of sheltered accommodation and this is at odds with the estate agent view. This probably reflects the demand for new retirement properties and the lack, at present, of second hand stock on the market.

3.5.16 Overall the market view remains that there is an unmet demand for properties in Torbay which is focused at the family home level, reflecting a lack of supply of such in the previous decade but which is frustrated at present by the lack of available finance.

3.5.17 Greenfield sites are considered to be viable even in this current market but the lack of purchasers will restrict supply for the time being as developers manage supply to reflect demand. Within the urban areas brownfield redevelopment will be more difficult in terms of viability and yields per site will be reduced from previous levels as the market for apartments remains saturated.

3.6 Completions

3.6.1 The capacity of the housing market is the total level of housing that can be built, and sold or rented by developers in a specified period. This takes account of the wider restrictions of the planning system that effectively constrain the market, in generally not allowing development in the open countryside, protecting the integrity of established employment and retail areas, protecting landscape, conservation and heritage assets, and directing major new residential and mixed-use development to land allocations on identified sites within and adjacent to Torbay's main settlements.

3.6.2 Past completions are primary evidence of market capacity as it indicates the exact level of housing built by developers. It is therefore a good indication of the level of house completions that can be expected to be replicated in the future, given a similar approach to housing provision, and similar economic circumstances as in the past. It may be that the actual market capacity is higher than indicated by past rates, which may have been affected by limited land release imposed by the planning system. The effects of economic cycles also need to be considered.

3.6.3 The past rates of dwelling completion in Torbay from 1981 to 2011/12 are set out in **Table 3.8.**

Table 3.8: Dwelling Completion Rates 1981 to 2012

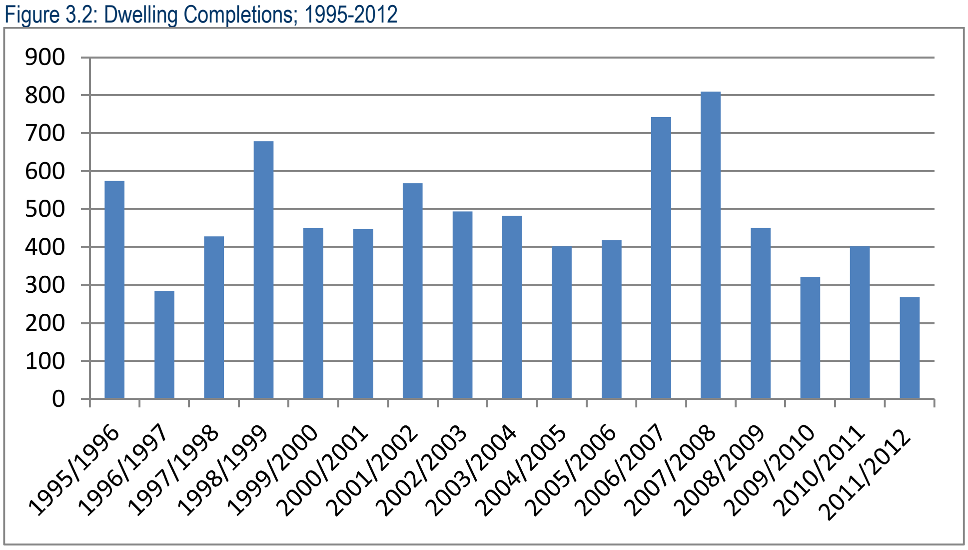
Years	Completions
1981 - 1991	4,340
1991 - 1995	1,418
1995/1996	574
1996/1997	285
1997/1998	428
1998/1999	679
1999/2000	450
2000/2001	447
2001/2002	568
2002/2003	494
2003/2004	482
2004/2005	402
2005/2006	418
2006/2007	743
2007/2008	809
2008/2009	450

2009/2010	322
2010/2011	402
2011/2012	268
Total	13,979
Average	**450**

3.6.4 There have been considerable variations in Torbay's annual dwelling completion rate over these last 31 years. An analysis of completions demonstrates that the highest house building rates of 700 and 800 were completed in 2007 and 2008, a time when there was a high level of apartment developments in Torbay and indeed across the country. Since then completions have fallen in line with the decline in the economy to the all-time low of 268 units in 2011/2012.

3.6.5 These significant differences reflect not only cyclical market variations, but also changing approaches over the years to government policy in funding the delivery of affordable housing, and the effects of recessions and periods of economic buoyancy. This pattern is illustrated in **Figure 3.2**, which shows the cyclical pattern of delivery over the period from 1995.

Figure 3.2: Dwelling Completions; 1995-2012



3.6.6 The graphs shows that (hopefully) 2012 marked a point at which the housing market was at the bottom of a very deep recession, and there is a reasonable argument for suggesting that future delivery rates will recover from this low (and a future peak in about 2020 might be anticipated, although, this could be delayed).

3.6.7 However, across these variations in delivery on an annual basis there is a remarkable consistency of delivery across 5 – 10 year periods as demonstrated in **Table 3.9** overleaf.

Table 3.9: Dwelling Completions by Period, 1981-2012

Year Range	Total	Annual Average
1981-2012	13979	450
1981-1991	4340	434
1991-2012	9639	459
1995-2012	8221	484
2001-2012	5358	487

3.6.8 This illustrates that over these longer term periods a band of between 430 and 480 dwellings per annum have been delivered and when the country emerges from the current downturn, with mortgage lending returning to normal conditions, there is no reason why the housing should not return to past levels of development.

3.6.9 Indeed, there is a good prospect that there will be a surge in development leading to a peak because of the pent-up demand caused by a low level of completion over the past few years. This may be compounded by a Government committed to growth and economic delivery, including a much higher rate of housing development.

3.7 Future Prospects

3.7.1 With the UK economic recovery set to remain fairly modest, the improvement in employment and wages in Torbay is likely to be slow going. This in turn suggests that first time buyers will be slow to return to the market, further reinforcing the view that the housing market will remain sluggish through 2013/14. The most likely outcome is that wages will outpace house price growth over many years, gradually improving affordability over time.

3.7.2 Over the longer-term, the supply side of the housing market in Torbay also needs to respond if affordability is to improve on a sustained basis - the housing stock needs to grow at least as fast as the number of households. A near-term loosening of credit conditions would not solve the problem and could ultimately prove counterproductive. The analysis of past rates of development has shown that in Torbay there is a long-term annual market capacity or demand for about 500 dpa, underpinned by demographics, household formation, net migration, and baseline future employment potential.

3.7.3 Completions over the past 31 years have averaged 450 dpa, and in common with many areas, there is unfulfilled demand that will underpin longer term demand over the Plan period to 2032, which can be met if the planning system releases sufficient land for development, and the lending institutions provide the mortgage finance.

3.7.4 The complicating factor in these unpredictable economic times is that achievable completion levels are limited by local market capacity, and by the inability to include a high proportion of the very significant first-time buyer market. The return of investment activity in the UK residential sector will be an early indicator of a change in market sentiment. Given that constraints on access to debt are likely to continue to suppress demand from the buy to let sector, equity investors are likely to be the first to respond to signals of an impending upturn.

3.7.5 Once the market does turn, first time buyers will re-enter the market, driven by the renewed affordability of owning over renting, with shared ownership schemes in high demand, for those unable to afford to buy outright.

3.7.6 Property experts still expect a flat 2013/14. The Government's rescue package may not have averted recession, but intervention and policy initiatives look set to ease liquidity slowly. This should gradually improve mortgage availability and increase residential market turnover towards levels more usually seen in a downturn, rather than the historic lows of 2008 - 2010. Interest rates have been at 0.5% since March 2009 and there no signs that the Bank of England's Monetary Committee will be increasing rates during 2013/14.

3.7.7 Whilst short-term demand in Torbay has fallen, medium and long-term demand is still considered by the market to be relatively strong. This is underpinned by the acknowledged national housing shortage, arising from a continuing high level of new household formation, combined with record low levels of new housebuilding. In the medium term, the housing land market will continue to be comparatively strong for most house types, whilst housebuilders and private vendors will adjust prices to align with demand.

3.7.8 In the medium term, it is unlikely that many sites will remain unviable because of abnormal development costs or competing land uses. Deliverability of sites depends on landowners accepting these new economic circumstances, and in some circumstances will significantly delay development on large urban extensions, since many agents fear that some landowners have entrenched views of land values.

3.7.9 Most experts consider that within about 4/5 years, a recovery will be under way. In those circumstances, land values will start to recover, and, except in the very low value areas, most abnormal development costs and obligations packages will be able to be absorbed without falling below the value for alternative uses, such as general employment and warehousing land.

3.7.10 Whilst economic viability is currently a significant issue, over the medium/long term there is unlikely to be demand problems for the sites identified by the Council in its SHLAA, or for the potential extension sites. However, there is some note of caution surrounding the question of rates of completion and the rate at which each outlet could deliver the required level of housing provision given that the area effectively operates as a single market area.

3.7.11 The housing market is suffering from the severe economic downturn which is affecting the delivery of housing across the Country, South West, Devon and Torbay. It is not expected that this will recover in the short term; however, there are signals that this will improve in the medium term. Developers are positive about the need for new homes and their ability to deliver them but have expressed a view that average sales rates per outlet have significantly reduced in recent years.

3.7.12 Long term completions data demonstrates that an average of 450-480 homes per year have been delivered within Torbay over the last 31 years, although in some years higher rates have been reached. If these levels are reached within the next 5 years and are then maintained, it would indicate that between 9,000 – 10,000 homes could be delivered by the market over the plan period.

4 Sites under Construction and with Planning Permission

4.1 Introduction

4.1.1 Information on the sites with planning permission within Torbay has been provided by the council and is correct at the time of writing – March 2013. However, the Council will be undertaking its annual monitoring visits to confirm housing starts over the coming weeks and the final and definitive figures for the stock of dwellings as at 1 April 2013 will be made available in due course.

4.1.2 The sites where there is a planning permission for housing development (including those sites where work has commenced) are listed in **Appendix B**.

4.1.3 Sites are divided based on the net number of dwellings to be delivered large sites are those where 6 or more additional dwellings will be provided; small sites are those where 5 or less will be delivered.

4.1.4 Each planning permission is generally limited by condition that it should be delivered within 3 years and this is generally the approach taken by Torbay Council when issuing planning permissions.

4.2 Large sites

4.2.1 Appendix B shows that a total of **1,939 dwellings** have planning permission on large sites, as of March 2013.

4.3 Small sites

4.3.1 Figures provided by the Council indicate that a total of **326 dwellings** had planning permission on small sites (5 and less dwellings) as of March 2012. These are the most up to date figures available at present and so are used in this report. These figures will be updated as part of the annual monitor during 2013.

4.4 Summary

4.4.1 The figures show that a total of **2,265 dwellings** have planning permission for development and these permissions will vary in the length of time within which they can be implemented up to a maximum of 3 years.

4.4.2 For the purposes of the SHLAA, it is not proposed to discount these figures in any way as this is a statement of the level of housing with planning permission at this stage and there will be some which are not delivered, whilst others are granted permission in the near future and are not identified as yet.

5 Site Specific Sources

5.1 Introduction

5.1.1 A total of 554 sites have been identified through the various stages of the SHLAA (In 2008 and 2013) and from a wide range of sources. Each has been mapped and provided with a unique reference number. All sites identified for the update have been given the prefix 13xxx and are therefore identifiable as new to the SHLAA this year. A total of 215 sites are included in this group.

5.1.2 All sites were considered and assessed against the criteria of:

- Available
- Suitable
- Achievable

5.2 Deliverable and Developable Sites

5.2.1 The consultant team identified that a total of 82 sites are within the urban are of Torbay which are considered to be deliverable or developable. The list of these sites is included as **Appendix C** and each site is considered in detail in **Appendix D**.

5.2.2 These sites in total provide **2,562 dwellings**.

5.2.3 For each site, consideration of its particular characteristics, assessment of the local market and owner expectations all combined to provide a likely yield for the site and, in line with the practice guidance, was indicated to be delivered in one of three time periods.

5.3 Sites Constrained by Planning Policies

5.3.1 In addition, a number of sites were identified and assessed to be available and achievable, but do not meet all of the factors required in the SHLAA guidance when considering their suitability. These sites are generally considered to be suitable for development in all practical aspects (physical limitations, impacts of development and environmental considerations) but are contrary to one or more policies of the council which will be subject of review as part of the local plan process, such as the countryside boundary, employment allocations and open space designations.

5.3.2 These sites are listed in **Appendix E** and the detail of each site included in **Appendix F**.

5.3.3 This group of sites provides a potential source of sites which might yield a maximum of **906 dwellings** if it were to consider that the policy restrictions on all of these sites might be lifted. This therefore represents a maximum figure but each site will be considered on its merits and some site might not be delivered, or may be delivered in the next plan period. However, in principle it is considered that all of the sites could potentially be delivered and they are therefore included in this section.

5.4 Rejected Sites

5.4.1 A large number of sites were considered not presently developable, and these were rejected. A full list of these sites is included in **Appendix G**, including the reason for their rejection.

5.5 Sites below the Study Threshold

5.5.1 A further group of sites were identified and assessed to be developable, but were considered to be likely to yield a net number of new dwellings below the study threshold of 6.

5.5.2 A total of 108 sites were concluded to be within this group and these are listed in **Appendix H**. No attempt has been made to assess these sites in detail but they do represent a stock of sites which may come forward and which would be considered as windfall if/when they do.

5.6 Summary

5.6.1 The 82 sites that are considered to be deliverable or developable within the plan period represent a total supply of **2,562 dwellings**.

5.6.2 In addition there's a further **906 dwellings** that could come forward on sites, subject to consideration of the planning policies applicable to those sites.

6 Review of Assessment

6.1 Introduction

6.1.1 The SHLAA Practice Guidance requires that figures for the anticipated level of housing provision from identified sources are presented in order to compare with the housing requirements. At the time of the 2008 SHLAA the housing requirement was being presented in the emerging Regional Spatial Strategy.

6.1.2 During the period when the SHLAA was being prepared the RSS revised the likely housing requirement from an original 10,000 dwellings over 20 years (500 dwellings per annum) to a high of 20,000 dwellings (1,000 dwellings per annum) and down again to 15,000 dwellings (750 dwellings per annum).

6.1.3 However, since this time the coalition government has abolished all RSSs and the NPPF now requires each local authority to objectively assess its housing need.

6.1.4 This assessment of need is presently being considered and the separate Requirement Assessment Report produced in parallel with this SHLAA Update provides a range of figures for the housing requirement over the plan period to 2032. These figures indicate a range of requirement from 9,000 – 12,000 dwellings depending on the assumptions made and the final requirement will be subject to further consideration as part of the development plan process.

6.1.5 It is for the SHLAA to set out what the likely level of dwellings which might be deliverable and developable for the plan period.

6.1.6 **Table 6.1** provides a summary of the analysis of the sites in Torbay as set out in the preceding chapters and in Appendices B – F.

Table 6.1: Summary of the Analysis of Sites in Torbay

Status	Yield
Sites completed 2012/13	350
Sites with planning permission including those under construction	1,939
Sites with planning permission (sites of 5 or less dwellings)	326
Deliverable urban sites	2,562
Sites deliverable but subject to constraints of planning policy	906
Total	**6,083**

6.1.7 The table includes a figure for the completion of dwellings in 2012/13 in order to ensure that a provision is made for the whole plan period of 2012 – 2032.

6.1.8 The figure for completions is an estimate based on local knowledge and is a best estimate at this stage of the actual delivery for this year. The monitoring for April 2013 is on-going at the time of writing and the final figure for the completion of dwellings in this year will be updated by the council once that monitoring has been completed.

6.1.9 In the same way the figures for sites with planning permission on 1 April 2013 (both large and small sites) are an estimate based on the most up to date information and will also be revised once the annual monitoring is completed.

6.1.10 The figures indicate the level of housing that might reasonably be assumed to come forward on sites which have been identified in the SHLAA. The bulk of these sites are considered to be suitable, available and achievable and reflect a stock of dwellings which may come forward during the plan period.

6.1.11 In addition to this there is a further stock of sites which are generally Available and Achievable but may be constrained by certain planning policies, notably the provision of employment land, tourism accommodation or public open space designations. This represents a stock of sites which cannot be relied upon to be deliverable at present but could be brought forward following the review of local plan policies through the development plan process.

6.1.12 The total level of provision indicated by the summation of all of these sources is just over 6,000 dwellings over 20 years.

6.1.13 Given that the total objectively assessed need for dwellings is within the range of 9,600 – 12,300 dwellings, there is a clear requirement for the SHLAA to consider additional sources of housing land supply, which the SHLAA Guidance indicates might be in the form of Broad Locations and Windfall.

7 Broad Locations

7.1 Introduction

7.1.1 In the 2008 SHLAA, a series of Broad Locations were considered both within and around the urban area as locations where housing development might come forward, though specific sites within these areas were not identified or assessed.

7.1.2 The following sections consider each of the Broad locations considered as part of the 2008 SHLAA.

7.2 Increasing Densities within Conservation Areas

7.2.1 The 2008 SHLAA considered the opportunity for sites coming forward within the existing conservation areas of the Lincombes and Warberries. The SHLAA considered that in principle the areas might provide opportunities for infilling. However, the assessment concluded that such development would be likely to have a significant impact on the character of the areas if they were to be promoted strongly and that any limited infilling would be accounted for within a windfall allowance for development.

7.2.2 Therefore, the 2008 SHLAA proposed a zero yield for this source and there is no suggestion that this figure should be amended in the context of the 2013 Update.

7.3 Redevelopment of Holiday Parks

7.3.1 In 2008 a number of holiday parks were promoted for redevelopment by land owners but were still subject of planning policies restricting the loss of holiday accommodation. The assessment concluded that some of the sites might be released in whole or in part through the development plan process, but not all of the sites are likely to come forward.

7.3.2 The sites identified were:

- H1 Pontins Holiday Park, Brixham
- H2 Riveria Bay Holiday Park, Brixham
- H3 Marine Park, Paignton
- H4 Parkland Caravan Park, Paignton
- H5 Beverley Park Holiday Centre, Paignton
- H6 Torquay Holiday Park

7.3.3 Since 2008, two of the sites (H2 and H3) have been subject of planning applications that have been approved for residential development. In both cases these sites have been granted permission on the basis of the investment that this release of land will provide for improvements to the remaining holiday accommodation provision. These two sites are now included within the sites with planning permission as sites T811 (Riviera Bay Brixham) and T706 (Marine Park, Paignton).

7.3.4 At the same time an application for the redevelopment of the now vacant Pontins Holiday Park, Brixham has been refused and appeal dismissed. The site is, however, still being promoted for development and the SHLAA assessment has indicated that the land may come forward for development in the future. However, the reasons for the appeal's dismissal, regarding impact on the AONB and to a lesser extent tourism, still remain to be addressed.

7.3.5 The two holiday parks in Paignton (H4 and H5) are proposed to remain in their existing use (funded further by the release of H3), whilst Torquay Holiday park (referred to as H6 in the 2008 SHLAA) continues to be marketed for development by the land owners and is considered to be a developable site in the longer term.

7.3.6 Therefore, the Broad Location of 2008 has been brought forward as a range of sites and opportunities within this SHLAA and the future of individual sites considered. Therefore, there is no longer a Broad Location provision within the SHLAA Update from this source.

7.4 Holiday Accommodation in Principal Holiday Accommodation Areas

7.4.1 In the same way that Holiday Parks were identified as a Broad Location in the 2008 SHLAA, so too were the PHAA areas. These were locations within the Local Plan which were protected for their use as holiday accommodation but which at the time were subject to increasing pressure for redevelopment. The 2008 SHLAA concluded that a percentage of these sites might be delivered to meet housing need and it has been the case that a number of sites within these areas have since been brought forward for housing. Most notable of this is Warren Road in Torquay, where the redevelopment of former hotels has resulted in a marked improvement in the appearance of the local area.

7.4.2 The 2008 SHLAA included an allowance for the delivery of dwellings within these areas which is now included within the site specific assessments and as such there is no allowance for this Broad Location within the SHLAA Update in order to avoid double counting. In addition, many of the smaller hotels which might be converted are likely to yield less than 5 dwellings and these would also be excluded from the study (though provide a further stock of windfall sites).

7.5 Former Mayor's Vision Sites

7.5.1 The Mayor's Vision was issued by the former mayor in February 2008 and identified 19 sites across the bay as a focus for regeneration. However, since the preparation of that vision the market conditions have changed markedly across the country and the mayor who was instrumental in preparing the vision is no longer in post.

7.5.2 Therefore the context for the vision sites has changed markedly and a number of the locations which were identified in the document are no longer either available for development or viable.

7.5.3 This is not the case for all sites which were identified and some, such as Torbay Harbour (identified as M6 in the 2008 SHLAA) continue to be promoted, though generally not at the density of development that was previously proposed.

7.5.4 Therefore, the sites from the vision which continue to be promoted for development have been included within the SHLAA Update as site specific opportunities. Whilst others have been rejected as no longer being deliverable.

7.6 Council Owned Car Parks

7.6.1 Torbay Council is currently considering the need for and potential sale of car parks across the bay. This process is on-going and there is no resolution of this at present. The current administration has expressed a view that town centre parking should be retained. However, the SHLAA is required to present all potential sources of housing supply; it is clear that there may be some opportunities for the delivery of housing on sites that are currently used as car parks. This will ultimately be a strategic decision for the council and which options are taken up is a Member decision.

7.6.2 There are a few car parks, such as the Brixham Town Centre Car Park, where proposals are sufficiently advanced. In these instances, the sites can be considered a site-specific opportunity and they are included within the initial assessment of individual sites.

7.6.3 However, for the majority of sites decisions regarding the release of these sites are not resolved and therefore the Council has asked that the SHLAA Update consider car parks as a Broad Location, where development might come forward.

7.6.4 Therefore, council owned car parks form a specific set of sites within this document and are listed in **Appendix I**. For each site a summary is presented of the development opportunities if the site were to be made available for development.

7.6.5 An indicative yield for housing is presented for each site and included in the appendix. This demonstrates a total potential delivery of dwellings of 599 from the various car parks which might be realistically assumed to come forward for development, including housing.

7.6.6 The assessment of these sites assumes that the whole of the site may be available for development and that car parking may be lost on these sites. As such the figures represent a maximum amount of housing that might be deliverable from this source and strategic decisions around the requirements for car parking to be retained would impact on this level of delivery. In addition to these sites, there are two other sites (T787 Victoria Square and H1:018 Brixham Town Centre) which are also car parks but where proposals are sufficiently advanced that they are accounted for as deliverable sites earlier in this document. They may provide an additional 74 dwellings equating to a total of 673 dwellings for all car park sites.

7.7 Broad Locations Adjoining and/or Outside of Settlements

7.7.1 The 2008 SHLAA considered all of the land outside of the existing built up area as part of a review of Broad locations. This related to all land adjoining and/or outside existing settlements and sought to identify areas where development might take place.

7.7.2 In order to identify the Broad Locations the SHLAA firstly identified all of the “clear cut designations” as indicated in the Practice Guidance. This included SSSIs, SACs, SPA RAMSAR, RIGS, SAMs, Historic Parks and Gardens.

7.7.3 The analysis also excluded from consideration Cockington Country Park, which is owned by the council but held on a long lease by the Torbay Coast and Countryside Trust. It was therefore considered that this land would not be available for development during the plan period.

7.7.4 All other locations within the Torbay administrative area were then considered as to whether they might have potential for development. This included all land within the AONB and Area of Great Landscape Value (AGLV) as it was considered that these designations did not preclude development in principle subject to consideration of paragraph 115 – 116 of the NPPF. The emerging Local Plan (‘A Landscape for Success’) proposes replacing AGLV with a policy requiring the area’s particular landscape character, as assessed by the Landscape Character Assessment, to be taken into account. This reinforces the view that AGLV designation in the Adopted Torbay Local Plan does not necessarily preclude all development.

7.7.5 A landscape assessment undertaken in conjunction with the SHLAA was then utilised to identify specific locations for further assessment and 16 such locations were defined.

7.7.6 The broad areas were identified and mapped and an indication of the level of housing which might be delivered was calculated based on a figure of 25 dwellings per gross hectare.

7.7.7 Since 2008, sites within the identified Broad Locations have come forward as planning applications and some have been approved. Meanwhile other sites have been promoted for development either through the development plan process, through pre-application discussions, through the Neighbourhood Plan process or through planning applications.

7.7.8 Therefore, in order to take forward the thinking on growth within Torbay, the SHLAA Update has considered all of the Broad Locations as previously but also, within the context of these, specific sites which are identified for development from whatever source.

7.7.9 Therefore, for each of the Broad Locations, the specific sites within those have been assessed and site assessment forms included as **Appendix J**. These indicate how the sites might come forward as individual sites, but equally recommend where there would be benefits in sites being considered together as part of a wider masterplan process.

7.7.10 There are a number of sites that have been promoted for development which lie outside of the Broad Locations, which are also required to be considered.

7.7.11 Individual assessments of each of these sites are also included in **Appendix J**.

7.7.12 The purpose of undertaking these assessments is to provide the council with the evidence to consider which, if any, greenfield sites outside of the existing urban areas should be included within plans for the future.

7.7.13 The Broad Locations are reviewed below:

G1 Torquay Golf Course

7.7.14 The golf course was identified as an area of potential extension to Torquay however the SHLAA acknowledged that the land is owned by the council but subject to a long lease to the golf club which essentially precluded development of the course for the plan period.

7.7.15 This remains the case, though there are suggestions that the club may be seeking to release small parts of the land in order that development can take place which can fund further investment in the club.

7.7.16 This will most likely however be small scale development which may be below the SHLAA threshold of 6 dwellings and given the very early stages of discussions it is not considered appropriate to include any allowance within the SHLAA at present.

7.7.17 This will need to be monitored throughout the Plan period to determine whether part of the golf course could become available to provide a larger number of dwellings.

G2 Scotts Meadow, Torquay

7.7.18 The land was identified as a Broad Location in the 2008 SHLAA and has a history of being promoted for development. However, since 2008 a further application has been approved and the site is now included in Section 4 as a site with planning permission (Ref T747). The land has an extant permission for 155 dwellings. This is below the figure identified in the 2008 SHLAA of 225, which was generated by a simple calculation of site area x 25 dwellings per hectare. The final planning permission is for an area slightly smaller than that included in the SHLAA 8.6ha compared with 9ha. But the development achieved a density of 18 dph compared to the 25dph assumed in the SHLAA, reflecting the constraints of the sloping site and also the extent of open space provided on the southern slopes.

7.7.19 The remaining part of the site (to the west of the area with outline approval for housing) has been promoted to the SHLAA by the developers, who argue that the site could achieve around 240 dwellings (i.e. 85 more than approved at appeal) without intrusion into the grassland habitat on the frontage of the site.

7.7.20 Whilst it may be possible to increase the yield on the site, there is insufficient evidence at this stage that this can be achieved in a satisfactory manner and would require detailed assessment of the proposals outside of the scope of the SHLAA. Therefore, the figures for the SHLAA include for the approved level of housing and if additional dwellings can be achieved these can be included in further iterations and updates of the SHLAA.

G3 Edginswell, Torquay

7.7.21 The location is on the edge of the built up area of Torquay, bounded to the west by the A380, in close proximity to the junction with the South Devon Link Road. To the north offices have been complete since the 2008 SHLAA and are partly occupied.

7.7.22 In the 2008 SHLAA the area was considered as a potential Broad Location and the Local Plan Consultation Draft includes the area as part of the "Torquay Gateway" (Policy SDT4).

7.7.23 The land is understood to be principally in two ownerships. A smaller 4ha site (T817) was promoted to the 2008 SHLAA by the land owners for development, whilst the majority of the land (13230) is known to be owned by an individual living away from Torbay.

7.7.24 Initial discussions with that individual confirm that they are willing to bring the land forward for development, in the context of support from the wider community and the Neighbourhood Plan. The willingness of the owner to bring the land forward will clearly be pivotal to its availability and should be monitored as the plan making process continues.

7.7.25 Overall the land equates to approximately 40ha and it is considered that overall this might deliver 550 dwellings between the two sites.

G4 Stantor Barton

7.7.26 The land at Stantor Barton was considered a Broad Location in the 2008 SHLAA. However, it was discounted from delivering a high level of development due to its environmental and amenity value and this continues to be the case, though the 2008 SHLAA did comment that the land might be considered if there were a lack of supply elsewhere.

7.7.27 The majority of the land within the Broad Location is understood to be in one ownership. There has been no formal approach from the landowner to promote the land through the development process.

7.7.28 A small parcel of land (T707) is located within the wider Broad Location and has been promoted by the landowner. The land is pastureland between Ten Acre Brake and Manscombe Plantation. As such is not in itself constrained by ecological or amenity designations but would need to be considered in the context of these adjacent designations.

7.7.29 Therefore, it is concluded that, at present, the wider Broad Location could not be considered developable due to the uncertainty over the availability of the land. However, a small parcel of land could come forward independently and deliver approximately 50 dwellings. However, if the long term aspiration were to deliver a wider urban extension then the layout of this site should enable future penetration of pedestrians and public transport routes in order to enable the wider area to come forward in a sustainable manner.

G5 Preston Down Road, Paignton

7.7.30 The Broad Location identified in 2008, stretched from the extent of urban area, to the district council boundary on either side of Preston Down Road. The assessment concluded that the location was not suitable for large scale development. However, it did note that some limited extension of the built up area may be suitable.

7.7.31 Three parcels of land have been identified in this location. The first, T831 is over 7.5ha on the north side of the highway. It is considered that this land is not sufficiently large enough to provide for a sustainable extension to the settlement and any development would be likely to have negative impact on the SSSI immediately to the north.

7.7.32 However, two smaller parcels of land, one on either side of Preston Down Road, have been identified to the SHLAA Update by the Council, as landowner. Both parcels of land are approximately 2ha and could potentially provide 50 dwellings each as part of an extension to the existing urban area.

G6 Totnes Road

7.7.33 Land to the north and south of Totnes Road was identified as a Broad Location within the 2008 SHLAA covering a total of 120 hectares of land and potentially delivering a total of 3,000 dwellings.

7.7.34 Ten specific sites have been identified within and around this Broad Location amounting to just over 105ha of land. However, much of this land is within three sites (13219, T741 and T880) which account for over 60ha and which lies mainly outside of the Broad Location identified previously.

7.7.35 The remaining 7 identified sites within the Broad Location occupy approximately 45ha of land and an assessment of the delivery of dwellings from each of these sites indicates a total potential supply of some 830 dwellings (just under 18.5 dwellings per gross hectare).

7.7.36 This level is far below that considered previously as being deliverable from the wider Broad Location and this reflects the amount of land which remains un-promoted for development within this area and also the lack of a masterplan for the whole area which might make best use of the available land.

7.7.37 If there is a need to bring forward development to meet the housing need for the bay, the land around Totnes Road remains a key opportunity site and it is important that the opportunity is maximised in order to achieve the best possible outcome for the location as well as ensuring that opportunities for development are maximised to avoid the need to release land elsewhere. Comprehensive masterplanning of the area will be important in ensuring the delivery of appropriate infrastructure and the phasing of development. In particular, satisfactory treatment of traffic impact on the A385 Totnes Road and sewerage infrastructure are essential to ensure that development can be accommodated.

G7 Yalberton

7.7.38 The Broad location identified in 2008 extended westwards from the A3022 to the Yalberton Valley, but no further.

7.7.39 Within this area there are two sites (T758 and T755) which have planning permission for development of a total of 315 dwellings.

7.7.40 In addition to this 4 sites are promoted which cover the majority of the remaining land within the Broad Location.

7.7.41 These sites are promoted for development and might deliver a further 625 dwellings if it is considered necessary to deliver further housing growth on the west side of Paignton. It should be noted that additional infrastructure master planning would be needed for this further development.

G8 Land West of the A3022

7.7.42 The land parcel stretches from the southern boundary of the White Rock planning application boundary to the northern fringes of Galmpton and is bounded to the east by the A3022.

7.7.43 The land in places slopes to the west, providing views over the Dart Valley estuary, which is an important part of the AONB landscape. Part of the Broad Location was promoted for development as a business park in the mid 1990s. Torbay Borough Council was minded to approve the application, which was called in by the Secretary of State, and following a Public Inquiry in 1996 refused by the incoming Secretary of State in 1997. The principal reason for refusal was the impact of industrial buildings on the AONB. The land is now being promoted for a mix of uses including residential (rather than just a business park), and therefore, if agreed, is highly likely to be available.

7.7.44 In the 2008 SHLAA it was concluded that the whole of the area would not be suitable for development. However, areas at the north and south of the location might be developed and could deliver up to 350 dwellings, subject to detailed analysis. This work has not been undertaken but the position remains that the Broad Location could deliver development subject to landscape issues being satisfactorily addressed.

G9 Broadsands

7.7.45 The land within the Broad Location is owned by the council and there remain no proposals to release the land at present and therefore the site could not be considered to be deliverable at the present time.

7.7.46 Even if the land were to be available it is subject to environmental constraints and flood risk that is likely to preclude significant development, as set out in the 2008 SHLAA.

G10 Land South of Churston

7.7.47 The land is a mixture of uses on the edge of the settlement. The land to the north east of the A3022 (including the golf course) is less constrained in landscape terms than surrounding areas. However, only a single area of land within this Broad Location is promoted for development, the majority is not considered to be available and the location is divorced from local services and facilities. It is therefore considered that there are not opportunities for new development within this Broad Location area.

7.7.48 Within this wider promoted site the Neighbourhood Forum has identified a small parcel of land for development. However, the site is divorced from the wider urban area and therefore not considered to provide a sustainable location for development.

G11 Land North of Brixham

7.7.49 The Broad Location was discounted from delivering large scale development within the 2008 SHLAA and only one specific site within the location has been promoted. The land, on Copythorne Road is within the AONB, but it is considered could deliver a level of housing as part of a rounding off of the settlement.

G12 Monksbridge, Brixham

7.7.50 The location was discounted in the 2008 SHLAA for large scale development given its importance in landscape (AONB) and wildlife terms. Two parcels of land (T704 and T849) are promoted by the land owner for development, both of which are considered to be important in landscape terms for the setting of the settlement and as such are discounted from development.

7.7.51 A third parcel of land (13259) has been identified by the community, fronting Mathill Road, which is effectively screened from wider views by topography and existing boundary hedges. It is not clear if this site is available for development as it has not been promoted by the land owner. However, if it were to be available it is considered that it could provide for 15 – 20 dwellings.

G13 Land South of Brixham

7.7.52 The land identified within the Broad Location is almost entirely within single ownership and the land was promoted to the 2008 SHLAA for development. However, the location is poorly linked to the town centre and wider highway network. Furthermore, it is within the AONB and is part of a historic landscape setting for the town. It is therefore concluded that the Broad Location as a whole continues to be discounted for development and there are no opportunities for small scale developments within this wider area.

G14 Land South of Brixham

7.7.53 The location was discounted as providing a suitable location for significant growth as part of the 2008 SHLAA. Two small parcels of land are promoted within this wider area (T722 and T812) however both are severely constrained by landscape considerations and also highway access to both is difficult to achieve. Therefore, there is not considered to be deliverable land within the Broad Location at present.

G15 Sharkham Point, Brixham

7.7.54 The land identified within the Broad Location is in part occupied by holiday parks where some redevelopment has occurred in order to the viability of the holiday accommodation. It is considered that the site therefore retains no further opportunities for the delivery of dwellings.

G16 Land West of Paignton

7.7.55 The 2008 SHLAA considered the option of providing one single urban extension in order to meet the housing and development requirements of the bay. Land to the west of Paignton, including the Broad Location at Totnes Road was identified as a potential location for such a development.

7.7.56 A single urban extension may have had benefit in terms of the creation of a new community with a full range of new services to meet the needs of the new community. However, it was concluded that a development of this scale in this location would not be deliverable due to the high infrastructure costs associated with any development.

7.7.57 Since 2008 there has been no promotion of a single major urban extension and the reduction in housing targets, from up to 20,000 dwellings, has reduced the need to consider such a significant long term development.

Other Greenfield Locations

7.7.58 In addition to the sites which lie within the identified Broad Locations from the 2008 study. There are also a total of 10 sites that are located on the fringe of the urban area but outside of any of the Broad Locations.

7.7.59 These sites are generally small in scale and may provide opportunities for limited development on the urban edge.

7.7.60 The 10 sites are identified in **Appendix J** and in total might deliver an additional 50-60 dwellings if developed in the manner considered.

7.8 Summary

7.8.1 The review of Broad Locations shows that most of the sites within the urban area identified last time have either disappeared as opportunities or are being brought forward as specific sites. Therefore the yield as Broad Locations is zero.

7.8.2 Council owned car parks have been considered a Broad Location in this SHLAA Update as the council is currently considering opportunities and options for disposal of some of the sites. However, the release of sites and the delivery of dwellings from this source will require further investigation before any or all of these sites can be relied upon.

7.8.3 The major source of new dwellings from Broad Locations will be on the urban fringe and on greenfield sites. The SHLAA Update has assessed the potential delivery of dwellings from specific sites within the Broad Locations, with figures summarised in **Table 7.1.**

Table 7.1: Potential Delivery of Broad Locations

Broad Locations	Initial Identified Yield 2008	Assessed Yield	Revised Site Specific Yield 2013
Conservation Areas	1,500	0	0
Holiday Parks	1,465	1,000	0
Holiday Accommodation	560	280	0
Mayor's Vision Sites	2,300	1,000	0
Land Adjoining Settlements			
Torquay Golf Course, Torquay	950	0	0
Scotts Meadow, Torquay	225	225	155
Edginswell, Torquay	750	750	550
Stantor Barton, Paignton	3,000	0	50
Preston Down Road, Paignton	375	0	100
Totnes Road, Paignton	3,000	3,000	827
Yalberton, Paignton	2,250	1,000	940
Land West A3022, Paignton	1,750	500	350
Broadsands, Paignton	200	0	0
Land South of Churston	1,500	0	0
Land North of Brixham	1,250	0	80
Monksbridge, Brixham	500	0	20
Land West of Brixham	875	0	0
Land South of Brixham	625	0	0
Sharkham Point, Brixham	375	0	0
Land West of Paignton	11,250	0	0
Other Small Greenfield Sites	0	0	56
Car parks			599
Total Provision All Sites	**34,700**	**7,755**	**3,727**

7.8.4 These figures include the sites within these urban extensions that already have planning permission (Land at Scotts Meadow and Yalberton) which were within the Broad Locations as defined in 2008. The car park figures include the assessment of all sites, excluding the two sites (Victoria Square, Paignton and Brixham Town Centre) that are considered to be "developable" within the plan period.

7.8.5 The totals from the Broad Locations are significantly below the figures provided for in the 2008 SHLAA. This generally reflects the lack of land promotion in the period since 2008, along with a reduced expectation of delivery from sites (due to the lack of market demand for flats and apartments) and the reduced density of development which comes with the provision of family housing.

8 Windfall

8.1 Introduction

8.1.1 The 2008 SHLAA included the assessment of windfall provision based on past rates and the importance of windfall delivery to the local market within Torbay.

8.1.2 The assessment drew on the SHLAA Practice Guidance which confirmed that there may be local circumstances where a windfall allowance may be justified and this may be included where the housing land available falls below the required level.

8.1.3 At the time, PPS3 stated that in assessing land supply, no allowance should be made for windfall within the first 10 years of adoption of the relevant Development Plan Document and this was brought forward to the SHLAA practice guidance but did acknowledge that there may be instances where an allowance could be made if there are justifiable local circumstances that prevent specific sites being identified.

8.1.4 The NPPF has replaced PPS3 and now defines Windfall sites as: Sites which have not been specifically identified as available in the Local Plan process. They normally comprise previously-developed sites that have unexpectedly become available

8.1.5 NPPF does not provide any additional advice with regard to windfalls in the context of the SHLAA, but in the context of the calculation of the 5 year land supply the NPPF states that:

8.1.6 Local planning authorities may make an allowance for windfall sites in the five-year supply if they have compelling evidence that such sites have consistently become available in the local area and will continue to provide a reliable source of supply. Any allowance should be realistic having regard to the Strategic Housing Land Availability Assessment, historic windfall delivery rates and expected future trends, and should not include residential gardens. Para 48

8.1.7 Therefore, this does provide some loosening of the approach to windfall provision in general, in that it is explicit that in calculating 5 year land supply a windfall allowance can be applied even within 5 years, if there is evidence to support it.

8.1.8 The 2008 SHLAA reported that windfall provision within the Torbay area traditionally provided a significant percentage of the housing supply. In the period 2000 – 2008 93% of housing completions were from unallocated land.

8.1.9 The SHLAA Update has not specifically attempted to identify small sites (those yielding less than 6 dwellings) as to do so is a potentially endless task. However, even without specifically seeking such sites a total of 101 sites have come forward that are considered might be deliverable in principle but which are not considered to be of a scale to deliver more than 5 dwellings. These sites are therefore not included in the figures for the SHLAA delivery of sites, however, these sites do represent a stock of sites which may come forward in the relative short term and provide further evidence to the potential of windfall.

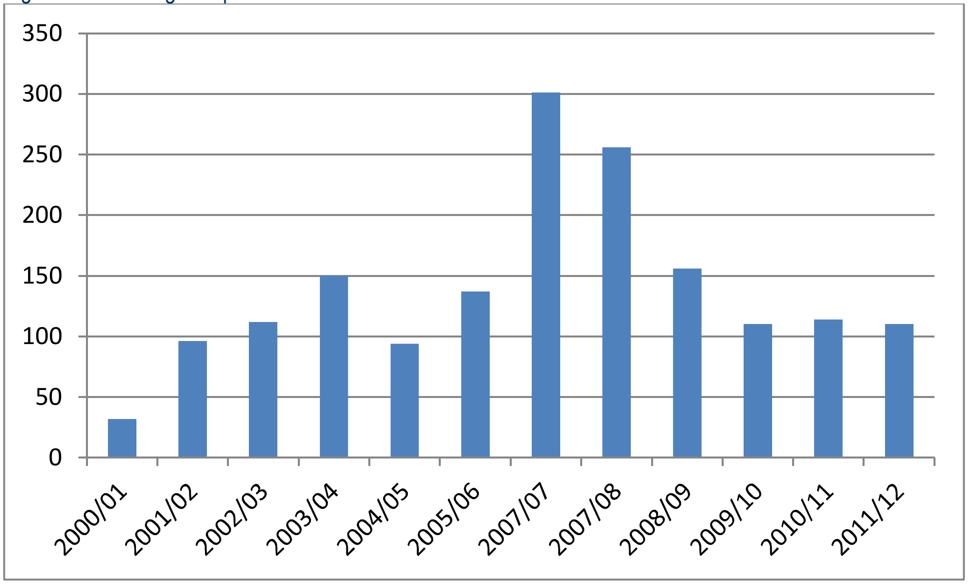
8.1.10 In addition a number of the larger sites considered in the SHLAA have been rejected at this point in time as they are not considered to be available for development at the moment. Some of these sites will no doubt come forward for development in the plan period and will either be included in later iterations of the SHLAA or as Windfall, depending on timing. For the present though, they are not relied upon within the SHLAA and therefore they could only constitute a windfall if they were to be develop din the future.

8.1.11 Therefore it is considered that it would be appropriate to include within the figures for future housing provision a figure for windfall provision to come forward on small sites within the urban area on previously developed land.

8.1.12 In order to arrive at an appropriate estimate of future yield on such sites has been made, along with the characteristics of the settlements in question.

8.1.13 The analysis below is based on figures provided by the Council regarding housing completions from 2000/1 to 2011/12 (which is the last period for which figures are available). The figures are illustrated in a summary graph below.

Figure 8.1: Housing Completions from 2000/1 to 2011/12



8.1.14 The graph shows clearly the very high completion figures in the 2006/7 and 2007/8 which are discussed in detail in the 2008 SHLAA and reflect both a buoyant market but also the calculation of conversions previously not included in the figures.

8.1.15 The figures show a steady rise of completions up to 2007/08 and a drop thereafter to a level of between 100 – 150 dwellings per annum. The total provision of dwellings from small sites over the 12 years is a total of 1,168 dwellings, an average of 139 dwellings per annum. Over the past 5 years the average has been 149 dwellings per annum, whilst over the past 4 years (excluding the very high figures in 2007/08) the average has been 123 dwellings per annum.

8.1.16 It should be noted that the dwelling figures are for previously developed sites only and specifically exclude 'Greenfield windfalls'. There may, in future, be some provision of housing on Greenfield sites. However, it is considered that this provision will be small given the lack of opportunities which are likely to arise.

8.1.17 Future housing provision on small previously developed land (PDL) within settlements will, however, continually come forward and the market will seek to identify opportunities where possible. The planning policy framework will restrict the supply of land outside of settlements and this will increase focus within settlement boundaries.

8.1.18 Based on the analysis of past rates and future expectation an average of 130 dwellings per annum was considered to be robust in the 2008 SHLAA and it remains the view that this remains an appropriate allowance based on the more recent figures.

9 Review of the Assessment

9.1.1 This document is an update of the SHLAA prepared for Torbay Council in 2008. It follows the methodology used in that study and follows the advice of the SHLAA Practice Guidance 2007. It has sought to identify sites within the administrative boundary of Torbay in an inclusive manner and to consider their prospects for development.

9.1.2 The base date for the study is set at 1 April 2013 in order to provide a consistent base for results. However, the annual monitoring has not yet been completed and the figures for completions and planning permissions will be updated once this is completed.

9.1.3 The SHLAA is part of the evidence base for the development plan but is not in itself a policy document. The inclusion of any site within this study does not provide support to any particular scheme or location. Sites are considered based on available information and those identified as having potential are considered to be acceptable as housing sites in principle.

9.1.4 A summary of the findings of this study are presented in the table below:

Table 9.1: Summary of SHLAA Findings

Sources of Housing Potential	2012 2013	2013 2018	2018 2023	2023 2032	Total
Completion 2012/13	350				350
Sites with planning permission including those under construction (6 or more dwellings)		1,939			1,939
Sites with planning permission (5 or less dwellings)		326			326
Developable urban sites		1,206	669	687	2,562
Constrained sites		170	331	405	906
Windfall (5 or less dwellings)		390	650	1,170	2,210
Greenfield Broad Locations				2,658	2,658
Car Parks				599	599
Total Housing	350	4,031	1,650	5,519	11,550
Average per annum	**350**	**806**	**330**	**613**	**578**

9.1.5 It should be noted that the figures provide an illustration of the level of housing provision which might be provided given the assumptions and assessment made in this study. It does not seek to provide a recommendation as to the level of development which might be acceptable.

9.1.6 Sites with planning permissions (including those where work has already commenced) provide the most immediate source of sites which may come forward and these figures are supplemented by identified sites which it is considered may come forward within the context of the current development plan.

9.1.7 In addition to these sites the study has identified a number of sites where, in practical and market terms, the sites could come forward. But the current policy context for sites may prohibit development (the "constrained" sites). It is for the council to consider if these policy objections can be overcome, or for the policy context to change through the development plan process. Therefore, this represents a further stock of sites which might come forward in due course.

9.1.8 It is clear that the level of sites identified from these sources and which meet the tests of being Suitable, Available and Achievable, are not sufficient in total to meet the objectively assessed yield. As a result it is appropriate for the SHLAA to consider alternative sources of housing land provision.

9.1.9 A windfall allowance has been calculated to reflect the number of dwellings which may come forward on small sites throughout the plan period based on past delivery rates and an understanding of the local character of the urban area in the bay. This provides a significant additional supply of dwellings across the plan period but is still likely to be insufficient to meet all of the housing need.

9.1.10 The 2008 SHLAA considered a series of Broad Locations both within and around the urban area. The stock of new sites in Conservation Areas were considered to be delivered through the windfall provision within the SHLAA and this remains the case. Sites within the holiday parks and holiday accommodation areas have become specific sites since 2008 and are included as sites with planning permission or specific site opportunities in this SHLAA, as are the Mayor Vision sites where they continue to be promoted.

9.1.11 The remaining source of housing land is from greenfield sites on the edge of the urban area. The 2008 SHLAA identified 16 Broad Locations and this study has assessed the promoted greenfield sites within the context of these Broad Locations.

9.1.12 The SHLAA Update has only considered those sites which are considered to be available, in that they are known to be promoted for development or discussions with landowners confirm that the land will be made available at some point in the future.

9.1.13 The SHLAA Update therefore does not include housing figures for some of the land within Broad Locations which were considered for development in the 2008 SHLAA. It therefore identifies a lower level of housing for some of the Broad Locations than identified previously. However, if the additional land were to become available, it remains the case that higher levels of delivery might be achieved within these areas.

9.1.14 It is also notable that yields per site and Broad Location have fallen since 2008. This reflects the realities of the market which has shifted away from flats and apartments and towards family homes, with a consequential impact on development densities. This has had an impact on both urban and greenfield sites.

9.1.15 The SHLAA therefore provides an assessment of sites at this point in time and is intended to represent a stock of sites and locations which the council can consider as part of the Local Plan process.