

PLANNING

Date: Monday 21 May 2018
Time: 5.30 pm
Venue: Rennes Room - Civic Centre

Members are invited to attend the above meeting to consider the items of business.

If you have an enquiry regarding any items on this agenda, please contact Howard Bassett, Democratic Services Officer (Committees) on 01392 265107.

Entry to the Civic Centre can be gained through the Customer Service Centre, Paris Street.

Membership -

Councillors Sutton (Chair), Lyons (Deputy Chair), Bialyk, Denham, Edwards, Foale, Gottschalk, Harvey, Mrs Henson, Morse, Newby, Prowse and Vizard M

Agenda

Part I: Items suggested for discussion with the press and public present

13 **Update Sheet**

(Pages 3 -
12)

Date of Next Meeting

The next scheduled meeting of the Planning Committee will be held on **Monday 25 June 2018** at 5.30 pm in the Civic Centre.

Find out more about Exeter City Council services by looking at our web site <http://www.exeter.gov.uk>. This will give you the dates of all future Committee meetings and tell you how you can ask a question at a Scrutiny Committee meeting. Alternatively, contact the Democratic Services Officer (Committees) on (01392) 265107 for further information.

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**PLANNING COMMITTEE
21 May 2018**

ADDITIONAL INFORMATION

Correspondence received and matters arising following preparation of the Agenda

Item 5 : Pages 15-34

Ref: 17/1198/FUL

Glenthorne Road

The Duryard Trust has submitted a letter describing what they deem to be missing and inaccurate in the Committee Report. They note that the report makes no mention that the Duryard Trust Trustees own Glenthorne Road, Grafton Road and Clydesdale Road; and that their views and liability are of significance.

The letter also expresses concern about how the increase in traffic is estimated and the probability that this would cause vehicles to meet and reverse on Glenthorne Road. A copy of their letter is attached. The 10 page attachment "Table 2.2 – Probability Calculations" has not been circulated with this Additional Information Sheet. It is available from the Project Manager – Goran Molin.

A letter has been received from the applicant regarding the demand for student accommodation in Exeter (copy attached).

Item 6: Pages 35-44

Ref: 17/1914/FUL

Elizabeth House, Emperor Way

No further update.

Item 7 : Pages 45-56

Ref: 18/0519/FUL

Land at Heavitree Pleasure Grounds

No further update.

Item 8 : Pages 57-62

Ref: 16/0313/FUL

2 Oak Road

Gary Stenning (ECC Housing Development) has been in contact with the neighbour at 4 Oak Road. Their property is for sale and a buyer is in place. The buyer has been informed of the plans for 2 Oak Road.

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Dear Alex,

Student Accommodation Market Demand, Exeter – Glenthorne Road

Many thanks for your invitation for Cushman & Wakefield to provide you with an overview of market demand and supply in Exeter relating to our Glenthorne Road Market Demand Report. As you know, the team is highly experienced in working in Exeter and the summary findings below highlight the need for additional purpose-built accommodation development in the city to meet growing levels of demand and current levels of undersupply.

Accommodation Demand

The University of Exeter was home to 21,625 full-time and sandwich students in 2016/17¹ and is one of the UK's Higher Education success stories over the last decade.

As a research-intensive and internationally-recruiting institution that was accepted into the prestigious Russell Group in 2012, The University of Exeter has grown full-time student numbers by 23% between 2011/12 and 2016/17, above the national average increase of 5% over the same period. Importantly, the University has a younger student population than the national average, with 64% of students aged 20 or under, far above the national average of 51%. This leads to strong demand for purpose-built accommodation.

The University recruits strongly internationally, and has seen 18% growth in non-UK students over the last five years, over double the national rate of increase over the same period. 80% of the student body is now from outside the South West region, far above the 60% of students that study outside of their home region nationally.

Rationale for Growth

Universities in the UK now receive only around one quarter of their income from direct government sources, mainly in the form of grants. The remainder of a university's income is generated from alternative revenue streams, mostly tuition fees. To continue to operate and compete, any university has to cover its running costs. However, in order to invest in research, innovation, or the development or redevelopment of facilities, universities need to generate a surplus.

Considering that one of the main sources of university income, i.e. government funding, is shrinking considerably (some estimates show a £120m downturn in 2016/17) universities across the UK are forced to increase revenue from alternative revenue streams. Tuition fees are the most direct and reliable way for universities to secure the funding they need to operate, invest in innovation and

¹ HESA 2016/17

research, create jobs and boost the economy in the process. The income universities receive from teaching students now plays a vital role in their financial position,

In such an environment, there is growing pressure on universities to attract higher student numbers as they have become a primary source of income and the means for many institutions to cover their operating costs and costs from research. Not only that but the increased competition for student numbers has pushed universities to compete on quality, resulting in many of them investing in state of the art facilities and other amenities to gain a competitive edge. Once again, this comes at a cost and as the government is less and less willing (and able) to help cover it, universities rely more and more on organic streams of revenue such as tuition fees. Being allowed to grow has become needing to grow for universities in the UK.

The removal of Student Number Controls (SNCs) in 2015/16 has meant that quality universities have been able to grow student numbers rapidly. The University of Exeter increased full-time student numbers by 1,110 between 2015/16 and 2016/17, a trend paralleled by other quality institutions in the South West (University of Bristol 1,560, University of Bath 955).² Continued growth at such levels in these locations will significant increase demand for purpose-built beds, especially with the number of UK 18 year olds set to increase by 25% between 2020 and 2030.³

Supply

In 2017/18, Exeter is home to 7,677 purpose-built bed spaces, with University-owned beds representing 38% of total supply. 61% of beds are available through the University (and its on campus partner), with a significant private sector presence providing students with real choice. Recent rental increases have been healthy, and at 3.1% between 2016 and 2017, are above the UK national average. Long lease lengths in the private sector also highlight the popularity of year-round living in Exeter for students living in the city. We anticipate that just over 600 new bed spaces will open in time for the 2018/19 academic year.⁴

Student to bed ratio

The table below outlines the student to bed ratio in Exeter in 2016/17 (latest available HESA data) and the supply of purpose-built bed spaces in 2017/18.

EXETER	2016/17
Total Full time & sandwich students	19,350
<i>Full time</i>	15,785
<i>Sandwich</i>	3,565
From which:	
Deductions from the Pool of students	
Sandwich students from outside the region on placement year	1,030
Students from the region not likely to demand accommodation	955
TOTAL POOL	17,365
Number of beds (universities + private)	7,677
Student:Bed ratio (city wide)	2.3

Source: HESA/Cushman & Wakefield Student Accommodation Tracker 2017/18

² HESA 2016/17

³ Office for National Statistics

⁴ Cushman & Wakefield Student Accommodation Tracker

As can be seen from the table, the current student to bed ratio in Exeter stands at 2.3:1, significantly above Cushman & Wakefield's nationally-observed average ratio of 2.0:1. The inclusion of the c1,900 bed spaces currently approved in the pipeline would only move the ratio to 1.8:1 – in line with the typical ratio seen in a large number of other major markets across the UK (although this does not take into account any University growth that is highly likely to occur in the interim). Markets at such a ratio or below still benefit from high overall levels of occupancy (e.g. 90%+) as more students move out of Houses in Multiple Occupation (HMOs) and experience the benefits of purpose-built stock, coupled with an adjustment of rents to more affordable levels overall. Currently, 9,688 students in Exeter are unable to access purpose-built student accommodation, placing pressure on the local housing market.

Rents

Rents in purpose-built stock in Exeter are amongst the highest in the country (excluding London)⁵ and can be considered indicative of levels of undersupply in the city.



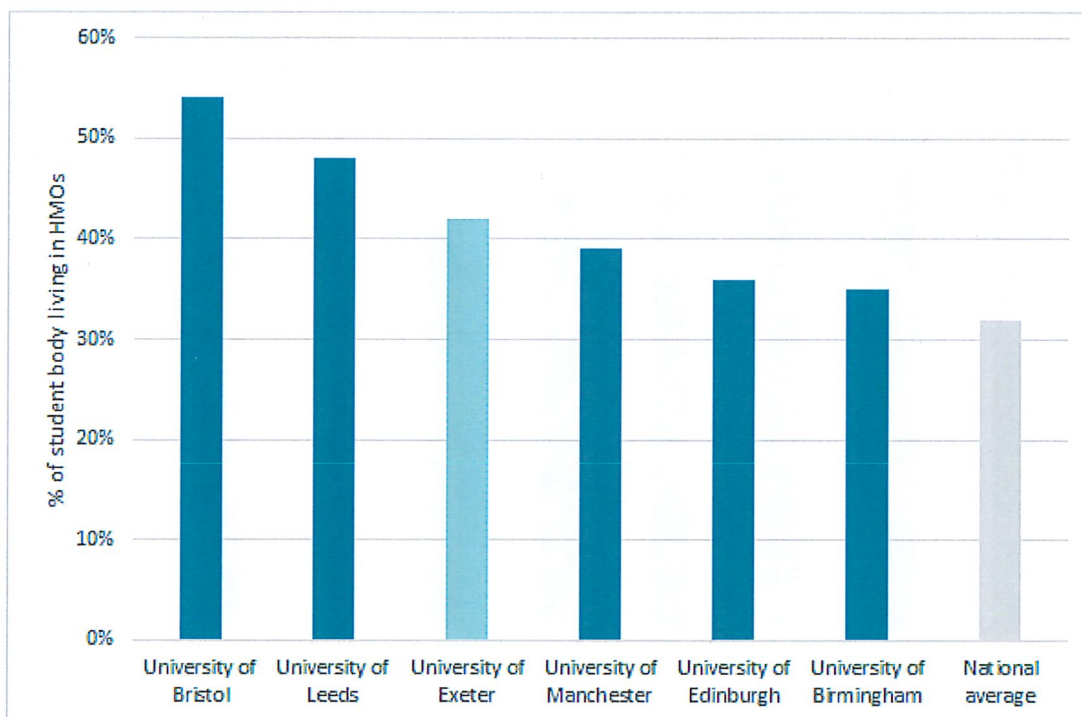
Source: HESA/Cushman & Wakefield Student Accommodation Tracker 2017/18 – private sector only

These high rent levels have the potential to damage the student experience and reduce the appeal of Exeter as a student location. They also act as a disincentive for students to move out of HMOs, reducing the level of housing stock available in the city. Some markets in the UK have experienced a significant increase in the number of purpose-built bed spaces available to students, increasing competition and reducing rent levels. For example, en-suite rents in Newcastle have fallen by 3.2% between 2017 and 2018. Such markets are still benefiting from high levels of occupancy and new developments are being delivered at £110 per week – 11% lower than the market average – increasing both choice and affordability for students. In Cushman & Wakefield's experience nationwide, significant voids are only occurring in developments with a large proportion of studio beds – a niche product with limited overall appeal.

⁵ Overall private sector rents are only supposed in nine other UK locations – all of which are located close to London - Guildford, Kingston, Reading; or are located in historic city centre locations with significant and ongoing land constraints – Oxford, Cambridge, Bath, York; or Brighton, a location with unique planning issues.

Houses in Multiple Occupation

A lack of purpose-built accommodation means that large numbers of students are forced to find accommodation through the private rented sector. The chart below shows UK institutions with the largest proportion of students living in HMOs. As can be seen from the chart, around 42% of all Exeter students currently live in HMOs, far above the national average of 32%. There is, therefore, significant potential to move students out of HMOs to free up housing for the local community and to deliver purpose-built stock that will better support the student experience and good learning and degree outcomes.



Source: HESA 2016/17

Conclusion

In conclusion, Cushman & Wakefield is of the belief that further purpose-built student accommodation development is needed in order to meet growing levels of demand from students and to avoid placing further pressure on the local housing market. There is potential to deliver a significant number of additional bed spaces to meet the desire of today's students for quality purpose-built bed spaces that support the learning and wider student experience. It is likely that popular student markets such as Exeter – that have a clear message about positive employment outcomes – will continue to grow in a market where students continue to gravitate towards institutions of quality.

Yours sincerely

David Feeney

Associate, Student Accommodation Advisory



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Göran Molin
Exeter City Planning Dept.
Civic Centre
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Exeter

17/5/2018

Dear Göran,

Student Accommodation Application 17/1198/FUL

We note within your report, for the forthcoming committee meeting, that you make no mention that the **Duryard Trust Trustees own Glenthorne, Grafton and Clydesdale Roads** and therefore the Trust and Management Committee's view and liability is of significance.

An Officer's Report should be accurate and should include the substance of any objections and other responses received to the consultation.

Your report makes no mention of the reversing of vehicles at the entrance of Glenthorne Road (across the informal pedestrian crossing) or reversing vehicles near to the pedestrian access to Moberly & Birks. This is the fundamental substance of our objection and should be highlighted in your report; **the Duryard Trust believe this proposal will lead to many thousands of reversing manoeuvres annually in close proximity to pedestrians, on the same narrow surface, many using headphones and smartphones.**

We note the report refers to the Safety Audit three times. You fail to state that we concluded this report contains - "some wholly inadequate observations (and assumptions) which do little to address users real and reasonable safety concerns, contained within the brief, including those of the University of Exeter". **The safety auditors/reviewers were asked directly to look at vehicles (existing & projected) meeting head-on on the initial 80 metre section of Glenthorne Road; leading to reversing manoeuvres - they effectively ignored the question in their report.**

It is welcome, in Technical Note 4, that AWP now recognise vehicle conflicts are a relatively common occurrence; however the note simply seems to prove AWP's calculations and results are erroneous.

Technical Note 4 also includes a critical recurring confusion in the number of vehicles and movements -

On multiple occasions throughout the application AWP have concluded that, similarly to Exeter One and Birks, this development will attract 70 additional vehicles daily. **This equates to 140 additional movements** along 200 metres of Glenthorne Road. However table 2.1 shows only 35 vehicles and 70 movements, yet there is no evidence to support this 50% reduction.

AWP have also offered no evidence that cars do pass, in reality, **without reversing** within the green section highlighted in Technical Note 4; and we note this area does nothing to address larger vehicles, which meet in this location.

The December 2017 DCC Highways report states that –

“the proposed development is expected to generate 6 extra vehicle movements per hour, totalling 13 trips per hour with existing traffic movements”

This has been copied from AWP’s December Technical Note 2 –

*“The result of this analysis shows that the proposed development is expected to generate just 6 extra vehicle movements per hour, totalling 13 trips per hour with existing traffic movements. **This equates to one movement every 4.5 minutes**”*

Throughout their documents AWP have mixed the words - vehicles, movements, trips, two-way trips, flows etc. They appear to have confused themselves, as well as others.

In Technical Note 3 (January 2018), **contradicting their previous report and DCC Highways, AWP reaffirmed there will be 20 vehicle movements an hour, on average, “one movement every 3 minutes”** - Technical note 2 (December 2017) states the existing vehicle movements as **“one movement every 8.5 minutes”** - therefore AWP are projecting **13 more vehicle movements an hour** (not 6). Also this January document states -

“Comparing this to previous data captured in March, the level of trips both existing and proposed are unchanged.”

“This means that the total vehicle traffic per hour, on average, on Glenthorne Road would be in the region of 11 trips, or 22 two-way movements, or one movement every 3 minutes.”

Therefore we have a significant issue of there being 30,000-39,000 more vehicle movements (a year) than DCC Highways considered; in addition to the 1 in 10,000 erroneous probability of two vehicles meeting on the narrow section of Glenthorne Road (actually very likely to be greater than 1 in 30). Clearly once credible, and consistent, forecasts are established DCC Highways should be reconsulted.

With regard AWP's greatest probability of vehicles meeting - **Modelling their example suggests, that 1 in 3 vehicles will meet another; significantly higher than the 1 in 28 "greatest probability"** (please see attached data).

AWP's figures 3.1 to 3.3 (also attached) show 83 movements from 28/11/2017 (*"on average just 7 vehicles per hour"*). In these graphics, one can clearly see 7 vehicular conflicts of 14 vehicles; 1 in 6 vehicle movements (using the speed in 2.2). Therefore figures 3.1 to 3.3 simply disprove the formula's adequacy and results. **As previously stated a respected statistician's input is required.**

There seems little point in DCC, or other highway experts, considering this very important safety matter further, until these vehicle numbers and conflicts are robustly corrected and clarified. It should be noted recent AWP pedestrian numbers are also confused/misrepresented.

In light of the significant factual conflicts within the application, summarised above, a deferral is in order - to allow the applicant to clarify which figures they now wish to withdraw and which they can robustly substantiate.

Such a pause may also enable Hines, and the Trust, to reach an agreement on the project as a whole, particularly if the applicant can robustly verify that there are only additional vehicular movements commensurate with a small development of dwellings; or agree a modification of the proposal to the same conclusion.

Yours sincerely,



Michael Wood

On behalf of the Management Committee.

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