Kings Norton Planning Framework
Supporting Document 12

Evidence Base and Issues

Birmingham City Council

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16th July 2009

Contents

1. The Need for a Planning Framework for Kings Norton 3 Estates

1.1 Birmingham City Council is working in partnership with Kings Norton New Deal for Communities to enable the sustainable regeneration of a residential area known as the 3 Estates, Kings Norton. The 3 Estates are Hawkesley, Pool Farm and Primrose and these areas have been subject to a number of interventions of varying scales over the years:

- There has been piecemeal development by Housing Associations;
- The Estate Action Programme saw the demolition and remodelling of the most unpopular housing stock on the Pool Farm Estate in the 1990s;
- In 2001 the 3 Estates were selected for inclusion in the Government's New Deal for Communities programme and an allocation of £50m was awarded to facilitate regeneration over a ten year period – this has seen an enhanced Decent Homes programme funded in Hawkesley and an extensive environmental works programme across the 3 Estates overall.
- Alongside this, some 1,175 properties have been purchased by tenants under the 'Right to Buy' initiative.

1.2 Despite these interventions, the breadth and quality of tenure, the overall environment and connections and residents' access to amenities and good quality services, employment and training is still unsatisfactory and there is much potential to improve the 3 Estates' image.

1.3 Recognising that a holistic and co-ordinated approach was required, the partners commissioned a Development Study (2005), undertaken by John Thompson and Partners, which built on ideas contributed by residents through community masterplanning events in 1999 and 2001.

1.4 Residents of the estates were consulted on options ranging from minimal interventions to a radical approach. The most radical "Big Change" option involving the demolition of up to 1,500 homes and their replacement with 2,225 new homes for rent, shared ownership and private sale was the favoured option.

1.5 Since completion of the Development Study, a review has been undertaken of the implications to the City if it were to be implemented. This work identified concerns in respect of the Housing Department's Housing Revenue Account, the loss of around 200 affordable dwellings and concerns over the proposed timescales for redevelopment.

1.6 After further extensive work by the Housing Department and Kings Norton New Deal, four scenarios were developed and public consultation undertaken, with the result being that a refined "Big Change" option was adopted. A detailed planning framework and implementation strategy is now required in order to implement the "Big Change" vision.

2. Kings Norton 3 Estates Strategy and Policy Review

2.1 National Planning Policy

PPS1 – Delivering Sustainable Development (2005)

2.1.1 PPS1 outlines the objectives of the planning system and the importance of sustainable development. It establishes that it should make the most efficient use of land and resources and reduce the need to travel wherever possible. Development is directed towards existing urban areas, particularly towards sites well served by facilities, infrastructure and public transport. The system encourages the reuse or redevelopment of previously developed land to help preserve green field sites.

2.1.2 In delivering sustainable development and communities, PPS1 states that the planning system should promote urban regeneration to improve communities, facilities, the quality of urban environments and linkages between different uses through the creation of vibrant spaces in which people wish to be. This should involve raising densities on suitable brownfield sites where the most efficient use of land can be achieved through high quality design.

2.1.3 In terms of policy delivery PPS1 states that Development plans should:

- pursue sustainable development in an integrated manner promoting outcomes in which environmental economic and social objectives are achieved together over time;
- contribute to global sustainability by addressing the causes and potential impact of climate change through policies that reduce energy use emissions. Promote the development of renewable energy;
- take a spatial planning approach that brings together and integrates policies for the development and use of land with other policies and programme, which influence the nature of places and how they function;
- promote high quality design in terms of function and impact over the lifetime of the development;
- contain clear comprehensive and inclusive access policies that consider people's diverse needs and aim to breakdown unnecessary barriers and exclusions to benefit the entire community; and
- ensure that communities are able to contribute to ideas about how the vision can be achieved.

PPS1 Supplement – Planning and Climate Change (2007)

2.1.4 The PPS1 supplement establishes how planning should contribute to reducing emissions and stabilising climate change. The key objectives of the document are:

- make a full contribution to delivering the Government's Climate Change Programme and energy policies, and in doing so contribute to global sustainability;
- provide for the homes, jobs, services and infrastructure needed by communities, and renew and shape the places where they live and work, secure the highest viable resource and energy efficiency and reduction in emissions;
- deliver patterns of urban growth and sustainable rural developments that help secure the fullest possible use of sustainable transport for moving freight, public transport, cycling and walking; and, which overall, reduce the need to travel, especially by car;
- secure new development and shape places that minimise vulnerability, and provide resilience, to climate change; and in ways that are consistent with social cohesion and inclusion;
- conserve and enhance biodiversity, recognising that the distribution of habitats and species will be affected by climate change;
- reflect the development needs and interests of communities and enable them to contribute effectively to tackling climate change; and
- respond to the concerns of business and encourage competitiveness and technological innovation in mitigating and adapting to climate change.

PPG2 – Green Belts (1995)

2.1.5 The West Midlands Green Belt forms the southern boundary to the three estates. PPG2 establishes the extent of Green Belts and explains their purposes. It describes how Green Belts are designated and their land safeguarded. It sets out the Green Belt land-use objectives and the presumption against inappropriate development in the Green Belt. The objectives of PPG2 include:

- providing opportunities for access to the countryside for the urban population;
- providing opportunities for outdoor sport and recreation near urban areas;
- retaining attractive landscapes near to where people live;
- improving damaged and derelict land around towns;
- securing nature conservation interest; and
- retaining land in agricultural and related uses.

PPS3 – Housing (2006)

2.1.6 PPS3 sets the national planning framework for delivering the Government's housing objectives and the Government's goal of ensuring that everyone has the opportunity to live in a decent home, which they can afford in a community where they want to live. In order to achieve this strategic objective the Government is seeking to:

- achieve a wide choice of high quality homes, both affordable and market housing, to address the requirements of the community;
- widen opportunities for home ownership and ensure high quality housing for those who cannot afford market housing, in particular those who are vulnerable or in need;
- improve affordability across the housing market, including by increasing the supply of housing; and
- create sustainable, inclusive, mixed communities in all areas, both urban and rural.

2.1.7 The document aims to ensure a more responsive system for delivery at the local level. The objectives aim to ensure a suitable supply of affordable and market housing in sustainable locations (well served by public transport, community infrastructure and utilising previously developed land) and built to a high standard.

PPS6 – Planning for Town Centres (2005)

2.1.8 PPS6 establishes the key objective for town centres as being to promote their vitality and viability by planning for the growth and development of existing centres; and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, that are accessible to all.

2.1.9 Other objectives supporting this include:

- enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups;
- supporting efficient, competitive and innovative retail, leisure, tourism and other sectors;
- improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport;
- remedying deficiencies in provision in areas with poor access to facilities; and
- encouraging investment to regenerate deprived areas.

2.1.10 PPS6 continues the 'town centre first' approach applied under PPG6 and establishes a sequential assessment, need and impact assessment for considering sites in edge of centre locations and out of centre locations. Proposals for significant retail development in the 3 Estates will need to be supported by a retail assessment.

PPS9 - Biodiversity and Geological Conservation (2005)

2.1.11 PPS9 sets out planning policies on protection of biodiversity and geological conservation through the planning system. It sets out the Government's broad aim that planning, construction, development and regeneration should have minimal impacts on biodiversity and enhance it wherever possible.

2.1.12 PPS9 advocates a strategic approach to the conservation and enhancement of biodiversity and geology and recognise the contribution that individual sites and areas make to conserve these resources. Furthermore, policies should promote opportunities for the incorporation of biodiversity and geological features within the design of development.

PPS10 – Planning for Sustainable Waste Management (2205)

2.1.13 PPS10 establishes the Government's objectives for sustainable waste management. It states that positive planning has an important role in delivering sustainable waste management through the development of appropriate strategies for growth, regeneration and the prudent use of resources; as well as by providing sufficient opportunities for new waste management facilities of the right type, in the right place and at the right time.

PPG13 – Transport (2000)

2.1.14 PPG13 promotes more sustainable transport choices for people and for freight by seeking to ensure that jobs, shops, education, health, and leisure facilities are accessible by public transport, walking, and cycling.

2.1.15 It also aims to reduce the need to travel, especially by car. This objective can be fulfilled by locating a broad range of uses in close proximity to each other. For example, focus major generators of travel demand in town centres, or near to major public transport interchanges. In design terms it encourages priority to people over ease of traffic movement.

PPG17 – Planning for Open Space, Sport and Recreation (2002)

2.1.16 PPG17 encourages the creation of local networks of high quality and well managed and maintained open spaces, sports and recreational facilities. The objectives include

- promoting social inclusion and community cohesion through well planned and maintained open spaces, good quality sports and recreational facilities;
- promoting health and well being through open spaces, sports and recreational facilities;
- promoting more sustainable development by ensuring that open space, sports and recreational facilities are easily accessible by walking and cycling and that more heavily used/intensive facilities are planned for locations well served by public transport.

2.1.17 PPG17 requires a robust assessment of open space needs and provision, which will inform open space strategies for the area and allow for the setting of local standards that an authority is aiming to achieve. The guidance also establishes how existing provision is to be safeguarded.

PPS22 – Renewable Energy (2004)

2.1.18 PPS22 encourages the development of renewable energy facilities including small-scale facilities as part of larger mixed-use developments. The document states that local planning authorities may include policies in local development documents that require a percentage of the energy to be used in new residential, commercial or industrial developments to come from on-site renewable energy developments. Such policies should ensure that requirement to generate on-site renewable energy is only applied to developments where the installation of renewable energy generation equipment is viable given the type of development proposed, its location, and design. Additionally, policy should not be framed in such a way as to place an undue burden on developers.

PPG24 – Planning and Noise (1994)

2.1.19 PPG24 guides local authorities in England on the use of their planning powers to minimize the adverse impact of noise. It outlines the considerations to be taken into account in determining planning applications both for noise-sensitive developments and for those activities which generate noise. It explains the concept of noise exposure categories for residential development and recommends appropriate levels for exposure to different sources of noise.

2.1.20 PPG24 also advises on the use of conditions to minimize the impact of noise. Six annexes contain noise exposure categories for dwellings, explain noise levels, give detailed guidance on the assessment of noise from different sources, gives examples of planning conditions, specify noise limits, and advise on insulation of buildings against external noise.

PPS25 – Development and Flood Risk (2006)

2.1.21 PPS25 sets out Government policy on development and flood risk. It aims are to ensure that flood risk is taken into account at all stages in the planning process to avoid inappropriate development in areas at risk of flooding, and to direct development away from areas of highest risk. Where new development is, exceptionally, necessary in such areas, policy aims to make it safe, without increasing flood risk elsewhere, and, where possible, reducing flood risk overall.

2.1.22 A practice guide to PPS25 was issued in 2008 and provides guidelines on how to implement development and flood risk policies by the land use planning system.

2.2 Development Plan Policy

2.2.1 The Development Plan for the 3 estates comprises the adopted West Midlands Regional Spatial Strategy (RSS) and the adopted Birmingham Unitary Development Plan (UDP). This section reviews the policies within the Development Plan pertinent to the 3 estates, as well as considering all relevant emerging planning guidance contained within the West Midlands Regional Spatial Strategy Phase 2 Revision and the Birmingham Local Development Framework (LDF).

West Midlands Regional Spatial Strategy (January 2008)

2.2.2 This document comprises the adopted RSS (2004) and the Phase 1 revision (Black Country, which was adopted in 2008. The policies contained within the document are intended to guide development up to 2021. The strategic objectives relevant to the three estates are:

- to make the Major Urban Areas of the West Midlands increasingly attractive places where people want to live, work and invest;
- to create a joined-up multi-centred regional structure where all areas/centres have distinct roles to play;
- to retain the Green Belt, but to allow an adjustment of boundaries where this is necessary to support urban regeneration;
- to support the cities and towns of the Region to meet their local and sub-regional development needs;
- to support the diversification and modernisation of the Region's economy while ensuring that opportunities for growth are linked to meeting needs and reducing social exclusion;
- to ensure the quality of the environment is conserved and enhanced across all parts of the Region;
- to improve significantly the Region's transport systems; and
- to promote Birmingham as a world city.

2.2.2 The RSS seeks to achieve an urban renaissance of the major urban areas (including Birmingham). Policy UR1 establishes how urban renaissance will be implemented by local authorities, regional agencies and partnerships, which include:

- restructuring land use and transport networks to create employment growth, new residential environments, improved environmental quality, integrate transport and join up centres;
- undertaking environmental improvements;
- maximising the use of the existing housing and business stock where economically and socially viable;
- raising the quality of urban design, architecture and public art and spaces; and
- increasing accessibility particularly for those currently disadvantaged in accessing jobs.

2.2.3 Policy UR4 establishes how communities can be involved in all parts of the regeneration process and how social infrastructure can be delivered in the most appropriate locations. The policy encourages local authorities to co-ordinate land use and investment decisions of providers with improved service delivery to:

- ensure that new social infrastructure is developed in or on the edge of an appropriate level of existing centre and is accessible by all modes by potential users;
- co-ordinate decisions on schools investment and the provision of new facilities with residential renewal;

- provide a range of educational facilities and services across all tiers to promote urban renaissance;
- facilitate the modernisation of local health services, informed by partnership working with Primary Care Trusts on local delivery plans and addressing inequalities in health;
- provide support for a range of business development and education and training services, targeted at linking local people and businesses to economic opportunities, including Education Action Zones;
- concentrate development and investment in areas where there is the greatest need; and
- support the creation of new quality residential environments in areas of opportunity and encourage the creation of safer neighbourhoods.

2.2.5 The RSS sets out proposals for achieving 'Communities for the future' within chapter six. The most relevant policies are summarised below.

2.2.6 Policy CF1 (Housing within the Major Urban Areas) is designed to deliver urban regeneration that will deliver sustainable and attractive communities where all groups in the community have access to good quality housing.

2.2.7 Policy CF3 (Level and Distribution of New Housing Development) states that the Birmingham LDF should make provision for at least 50,600 additional dwellings net of demolitions. This figure is significantly higher in the emerging RSS.

2.2.8 Policy CF4 (Phasing of new development) stipulates that levels of new house building across the Region will be phased to ensure that there is, overall, an increasing level of housing provision in the period up to 2016. Priority will be given to increasing development within the West Midlands conurbation early in the plan period to retain progress on urban renaissance with development in the rest of the Region increasing at a slower rate.

2.2.9 Policy CF5 (The re-use of land and buildings for housing) affords priority to the development of brownfield land and the re-use of existing buildings, in sustainable locations, before allocations on greenfield land are released for development. Local Planning Authorities through their LDDs should manage the release of sites to meet the trajectories of house building required under Policies CF3 and CF4. Additionally, the policy states that local planning authorities should seek to contribute to the achievement of a regional minimum target for development on previously developed land of 85%.

2.2.10 Policy CF6 (Making efficient use of land) states that local authorities should set out density policies in their development plans specific to their areas to reflect local circumstances and the findings of the housing market assessment.

2.2.11 Policy CF7 (Delivering affordable housing) states that local authorities should keep under review the need for affordable housing in their area, based on local or sub-regional housing market and housing needs assessments, using a broadly consistent approach as advised by government policy and the Regional Housing Executive. Both social rented and intermediate housing should contribute to meeting needs, dependent on the particular requirements and market circumstances of an area.

Opportunities should be sought within the existing housing stock where this would help the creation of mixed communities as well as through new build.

2.2.12 Policy PA10 (Tourism and Culture) supports the further development and success of the canal network.

2.2.13 Policy PA13 (Out of Centre Retail) defers the policy framework for out of centre retail proposals to LDF's.

2.2.14 Policy UR4 (Greenery, Urban Spaces and Public Spaces) requires local authorities to develop strategies for the provision of open space based on robust audits of existing provision in line with PPG17. It encourages adequate provision of accessible high quality urban green space with an emphasis on:

- improved accessibility and community safety;
- increasing the overall stock of urban trees;
- significantly improving the overall quality of public space;
- enhancing the setting of local residential neighbourhoods in built up areas; and
- maintaining and enhancing sports, playing fields and recreation grounds.

Birmingham UDP (October 2005)

2.2.15 The Birmingham UDP contains policies that guide development within the city up to 2011 or until the adoption of the LDF Core Strategy and other Development Plan Documents. The policies particular to the 3 estates are set out below.

2.2.16 Policy HR21 (Housing Regeneration -paragraphs 5.15 – 5.19) covers the entire site. Paragraph 20.29 encourages the improvement of housing conditions and local employment opportunities. A regeneration strategy will address current issues on the estates. On the Pool Farm Estate a Joint Venture initiative with public and private investment is being implemented in response to current problems. This involves the release of land and a comprehensive strategy for improving housing and environmental conditions.

2.2.17 The land to the south and east of the site forms the Birmingham Green Belt. The UDP establishes the functions of the Green Belt at paragraph 3.41, including to check unrestricted sprawl of the built up area and to assist in urban regeneration by encouraging the recycling of derelict and other urban land.

2.2.18 Paragraph 3.14E (sustainable development) establishes the design principles for achieving sustainable development in Birmingham, which include:

- layouts should minimize reliance on the private car and encourage public transport, walking and cycling;
- the re-use of buildings wherever possible;
- the use environmentally friendly materials where appropriate;
- maximizing the use of natural heat and light and contribute to local diversity through design and orientation of buildings and landscaping;
- higher densities should be considered where they do not conflict with other plan policies;
- minimizing the consumption of water through water saving devices and practices; and
- buildings should be long-life and flexible for adaption where appropriate.

2.2.19 Paragraph 3.25 (Listed buildings) requires that any development affecting a listed building should preserve or enhance its character.

2.2.20 Paragraph 3.34 (Canals) recognizes that canals are a major focus for regeneration and adjacent development should enhance the canal setting. The 3 estates has a linear open space designation running through the site along the length of the canal corridor.

2.2.21 Paragraph 3.37 (Nature Conservation Area) states that development which may destroy or adversely affect any Site of Special Scientific Interest, Local Nature Reserve or Site of Importance for Nature Conservation identified in the UDP or subsequently identified will not normally be allowed.

2.2.22 Paragraph 3.47 (Open Space) establishes the city's policy towards the provision of open space, which seeks to continue to develop an integrated and linked network of open space complemented by a system of interlinked walkways utilizing canal networks. Proposals that adversely affect open space will not be allowed. The UDP establishes a standard provision by which the adequacy of provision is tested – 2 hectares of open space per 1,000 population. The playing field provision standard is 1.2 hectares per 1,000 population. Children's play area is expected within 400 metres safe walking distance of all dwellings. The provision of specific sports and leisure facilities are based on an identified demand, which is informed by the council's open space and sports pitch strategy.

2.2.23 A strategic cycle route dissects the site and runs south down the canal corridor.

2.2.24 Paragraph 3.71 (Water and Drainage) requires that development will be expected to take account of any effects they might have water and drainage and to consider water minimisation techniques to conserve water. It is understood that the three estates is within flood zone one. The more recent PPS25 guidance will require a flood risk assessment in support of planning applications for development plots over one hectare in size.

2.2.25 The UDP categorizes employment land into several sub sets with all the employment land within the 3 estates being classed as 'other urban' employment land. Paragraph 4.21 requires a minimum of two years supply of other urban employment land.

2.2.26 In relation to the location of new housing development the UDP expects a minimum of 82% of all new dwellings to be provided on previously developed sites (paragraph 5.25B). The total requirement for new housing (1991 – 2011) is 46,500 dwellings with a significant amount being provided by redevelopment through clearance.

2.2.27 Paragraph 5.37 (Affordable Housing) states that in order to meet the city's overall requirement 35% affordable housing provision is required on sites over one hectare. However, this policy has been superseded by PPS3.

West Midlands RSS Phase 2 Revision – Preferred Option (2007)

2.2.28 This document partially revises the adopted RSS and when adopted will guide development within the region up to 2026. The document maintains the objective of achieving urban renaissance with the most relevant change affecting the three estates area being the new housing requirements for Birmingham.

2.2.29 The three estates is situated within the central housing market area as shown in the RSS with its south boundary abutting the southern housing market area. The spatial strategy directs growth towards Birmingham and other major urban areas. Outside of the MUA's growth is directed to 'settlements of significant development', which in the case of Worcestershire focuses on Worcester City and Redditch.

2.2.30 Policy CF1 (Housing within the Major Urban Areas) establishes the need to maximize new housing development within the West Midlands conurbation and requires public and private sector bodies to work together to:

- significantly improve the quality of the existing housing stock both through enhanced renovation programmes and increased rates of development;
- increase the scale and range of new housing development opportunities in appropriate locations guided by the Regional Housing Strategy and local and sub-regional housing strategies;
- create and protect well served and attractive urban communities within which more people will wish to live and invest, through the provision of appropriate housing types, tenures and densities; and
- ensure appropriate affordable housing.

2.2.31 The RSS suggests a target of 50,600 net additional dwellings to be provided within Birmingham up to 2026. A priority towards provision within the West Midlands conurbation is established in Policy CF4.

2.2.32 The RSS establishes affordable housing requirements based upon housing market areas. Policy CF7 establishes a minimum gross annual provision of 3,800 dwellings in the central housing market area.

2.2.32 Policy PA6A (employment Land Provision) establishes the requirement for a rolling five year reservoir of 130 hectares within Birmingham with an indicative long term requirement of 390 hectares.

Birmingham LDF Core Strategy Issues and Options (2008)

2.2.33 The LDF Core Strategy is at an early stage in its preparation, however, the document sets out a number of objectives that the city wishes to achieve during the plan period, which include:

- to promote Birmingham's national and international role as a global city;
- to create a more sustainable city that minimizes its carbon footprint and waste while allowing the city to grow;
- to develop Birmingham as a city of vibrant urban villages, a safer, diverse and inclusive city with quality local environments;
- to meet the emerging RSS requirements for housing as a minimum, and to secure a significant increase in the city's population, towards 1.1 million;
- to create a prosperous, successful economy, with benefits felt by all;
- to provide high quality transportation links throughout the city and encourage the use of public transport; and
- to encourage better health and well being through the provision of new and existing sports, leisure, and heritage assets linked to good quality public open space throughout the city.

2.2.34 The Core Strategy outlines options for the document to support. Each option recognises the three estates area as a housing regeneration area on the proposals map. Option one assumes 50,000 new dwellings are provided. Option two assumes between 55,000 and 60,000 new dwellings are provided, which includes a sustainable urban neighbourhood development to the north-west of the three estates. Option three assumes up to 65,000 new dwellings, which assume Green Belt release on land south of Maypole and land south of Longbridge.

2.3 Supplementary Planning Guidance (SPG) / Documents (SPD)

Draft Playing Pitch Strategy SPG (2005)

2.3.1 This document seeks to ensure an appropriate distribution and provision of good quality playing pitches and that the quantity of outdoor sports provision reflects the aim of working towards the standard of 1.2 hectares of formal playing pitches per 1,000 population and exceeds this where there is an identified need for additional pitches.

2.3.2 The strategy will be used as evidence of need for sports pitch provision and identify such provision as a priority for monies associated with planning obligations, including Section 106. Its aims and objectives include:

- ensuring adequate financial provision is made for the long term maintenance and development of pitch sites;
- improving the quality and capacity of existing outdoor sports facilities;
- contributing to the development of Flourishing Neighbourhoods by encouraging the provision of high quality facilities serving local needs;
- improving the health and well being of residents;
- addressing personal safety issues and reduce opportunities for anti social and criminal behaviour;
- providing children and young people with improved sports opportunities during out of school hours; and
- increasing the demand for and participation in outdoor sports.

Public Open Space in New Residential Development SPD (2007)

2.3.3 The SPD gives clear guidance to prospective developers on the requirements for public open space. It explains and expands on existing policy contained in the adopted Birmingham Plan.

2.3.4 The policy requirement for open space will apply to all new residential development of twenty or more dwellings in Birmingham. There are exceptions where the policy does not apply e.g. sheltered housing where no children's play would be sought.

2.3.5 The SPD establishes that where practical to do so, the public open space requirement will be provided on site. It also recognises that there are certain circumstances where it may be preferable for all, or part, of the public open space requirement to be provided as an off-site monetary contribution.

2.3.6 In relation to large scale redevelopments the SPD states that the key aim is to achieve a good quality environment overall coupled with a good housing stock. Provision of good quality public open space is an essential part of this. As a general principle, on large sites, where there is insufficient public open space, redevelopment proposals will be expected to include new public open space to serve the development in line with the UDP standard. Where a site is being redeveloped with more than the existing number of dwellings new public open space to serve the extra dwellings will be required. Redevelopment does allow the opportunity for poorly located open space and children's play facilities to be sited more appropriately. The overall amount and the quality of open space is an important factor for consideration on redevelopment sites.

2.3.7 The design and layout of open space should reflect the guidance contained in 'places for living' SPG, which is summarised below.

Places for All and Places for Living SPG's (2001)

2.3.8 This document established broad design principles for creating places for all and include the following relevant objectives:

- creating diversity by creating or building within places that have an accessible choice of closely mixed complementary activities;
- moving around easily, i.e. places should be linked up with short, direct public routes overlooked by frontages;
- safe places, private spaces, i.e. places must be safe and attractive with a clear division between public and private space;
- building for the future, i.e. buildings and spaces should be adaptable to enhance their long term viability and built so they harm the environment as little as possible;
- build on local character, i.e. development must consider the context and exploit and strengthen the characteristics that make an area special.

2.3.9 Places for Living is aimed to be both inspiring and positive in encouraging quality residential proposals. In addition to the above principles it encourages places not estates, i.e. successful developments must address wider issues than simply building houses and create distinctive places that offer a choice of housing and complementary activities nearby.

2.4 Other Relevant Documentation and Studies

3 Estates Retail Assessment Update (CBRE 2008)

2.4.1 This study updates the initial 2006 retail study which assessed the need for convenience foodstore retail development in the three estates area. The study also takes forward the findings of the 2003 Birmingham local centres study, which identified a gap in foodstore provision in this area.

2.4.2 In qualitative terms the study concludes that the foodstore offer is very limited in the three estates area with the nearest major foodstores being some distance away. Therefore, provision continues to be inadequate to meet all but the most basic shopping needs and qualitative need remains clear.

2.4.3 In quantitative terms the study considers three alternative market share scenarios and concludes that a full price foodstore of between 4,000 sq m to 4,500 sq m gross (approximately 2,000 sq m net convenience floorspace) can be supported between 2013 and 2018. This scenario assumes a market share improvement of 7% to accommodate the new foodstore.

2.4.4 Importantly, the study assumes a new population (increase from net additional homes) is only 1,250 people. Additionally, it does not take into account the likely increase in average spending power brought about by the influx of 'wealth' through higher private home ownership.

2.4.5 The study also concludes that the qualitative benefits associated with a full price store are significantly higher than any other format.

2.4.6 The study considers the foodstore development and the sequential test set out in PPS6. The study concludes that there are no suitable sites within existing centres and that attention should be drawn toward a site, which is more accessible and serves the needs of the 3 estates in a sustainable manner. It reiterates that land fronting Redditch Road could represent a suitable location.

Kings Norton 3 Estates Development Study (JTP 2005)

2.4.7 This study was commissioned by Birmingham City Council and the Kings Norton 3 Estates Community Development Trust and identifies a preferred approach to regeneration for the 3 Estates area.

2.4.8 The Development Study involved analysis of existing estate in order to agree upon both the positive and negative aspects of life in the 3 Estates and also to begin to see the opportunities for improvement which these offered. The underlying aims of the Community Development Trust (CDT) where expressed as the following seven key points:

- to provide greater housing choice and quality;
- to provide a better quality environment;
- to improve amenities and service delivery;
- to improve access to employment and training;
- to provide easier social and physical access and linkages;
- to provide closer integration with Kings Norton; and
- to improve the 3 Estate's image.

2.4.9 The study identified the range of development opportunities which regeneration might offer, and how these could be fitted into the physical framework upon which regeneration would be built. This involved a review of the existing housing stock and consideration of the enhanced services and facilities which could be provided as part of the regeneration process.

2.4.10 Four alternative approaches were devised and were tested. Approach 4, which proposed the greatest amount of redevelopment, came closest to fulfilling the vision. All of the options might be viable in some form, although those which proposed more redevelopment had the greatest potential for accessing external sources of funding and as a consequence would offer the greatest potential for success. The approach which received the greatest level of local approval was approach Four.

2.4.11 The key features of the Preferred Approach were:

- the phased demolition of up to 1,500 of the worst condition and least popular homes and the redevelopment of their sites to create up to 2,200 new affordable homes for sale, rent and shared ownership and private sale;
- at least 1,175 remaining Birmingham City Council owned homes brought up to Decent Homes standard;
- creation of a significant new public open space facing onto the Redditch Road and leading visitors down towards the heart of a revitalised Study Area;
- a cluster of extended community facilities based around a new or improved Kings Norton High School, offering lifelong learning opportunities, enhanced

sports and leisure facilities and health and welfare service provision for the whole community;

- a new supermarket (20,000 – 40,000 sq ft gross) and associated mixed uses on a site adjacent to the Redditch Road;
- a joint emergency services Community Safety Centre to enhance community safety and provide education and employment opportunities;
- new residential development and environmental improvements along the Birmingham and Worcester canal to create an attractive amenity for everyone in the area;
- safer and more attractive pedestrian and cycle paths along a network of green routes; and
- environmental improvements to existing residential areas.

2.4.12 The Development Study identified a number of implementation steps that need to be undertaken, which included identifying a project sponsor, the preparation of a masterplan and the appointment of a Developer and Housing Association to take the redevelopment forward. The study recommended that a further round of consultation is held with the local community and all key stakeholders to obtain final approval before the establishment of the Delivery Vehicle and implementation of the redevelopment works.

2.4.13 The study recommended the Delivery Vehicle should be a Trust style body representing an amalgam of the City Council, representatives of the NDC, community members and other relevant stakeholders. The Trust would play a key role in the development of a Special Purpose Vehicle involving the preferred private development company and the Registered Social Landlord and would be responsible for progressing the redevelopment proposed in the masterplan. The study also envisaged that the Trust could take responsibility for the environmental management of the 3 Estates and more importantly that it should be formed in such a way as to be self-sustaining into the future for the long-term benefit of the whole community and the fulfilment of the CDT's Vision.

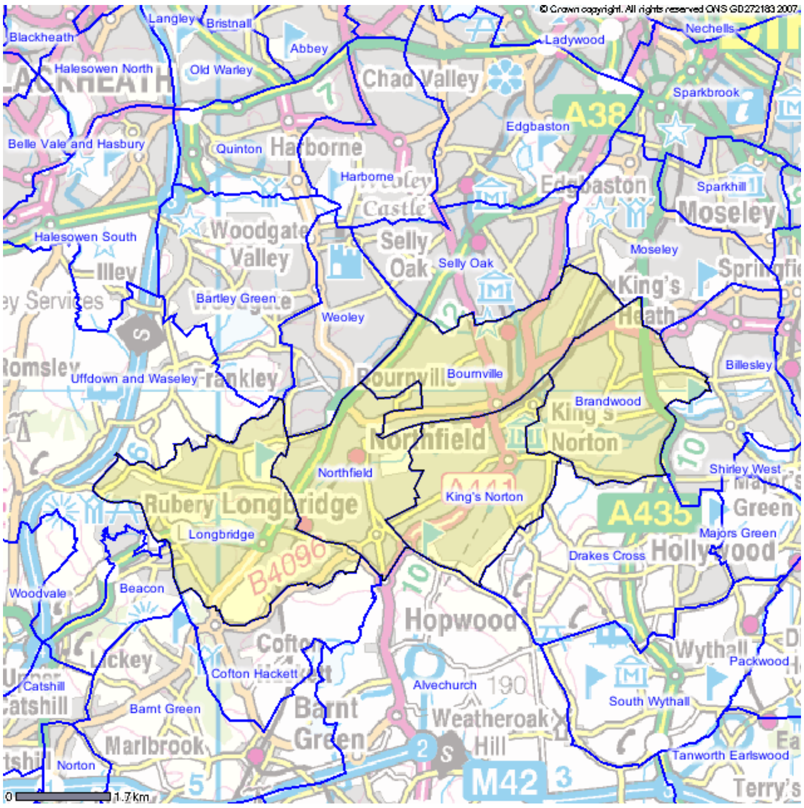
3. Kings Norton 3 Estates Socio Economic and Housing Supply Analysis

3.1 Geographic Basis for Analysis

3.1.1 The following section offers a socio-economic and housing supply analysis for the Kings Norton 3 Estates. The study area is benchmarked against its wider market catchment area, Birmingham and the West Midlands. These are defined as being:

- The **Kings Norton 3 Estates New Deal for Communities Area:** The Office for National Statistics has built up a statistical area for the 3 Estates New Deal for Communities Area utilising the best fitting output areas;
- The **Market Catchment Area** for the Kings Norton 3 Estates has been defined by DTZ with reference to ward based migration and travel to work patterns from 2001 Census. It includes the five wards of Kings Norton, Bournville, Brandwood, Longbridge and Northfield (see Figure 3.1)[1];
- **Birmingham** refers to the Birmingham Local Authority administrative area;
- **The West Midlands** region refers to Herefordshire, Shropshire, Staffordshire, Warwickshire, West Midlands and Worcestershire.

Figure 3.1 Kings Norton 3 Estates Market Catchment Area



[1] As such, the catchment area forms a smaller "sub area" of the South West Birmingham HMA, and the inclusion of Bournville within the catchment means the borders are not entirely contiguous

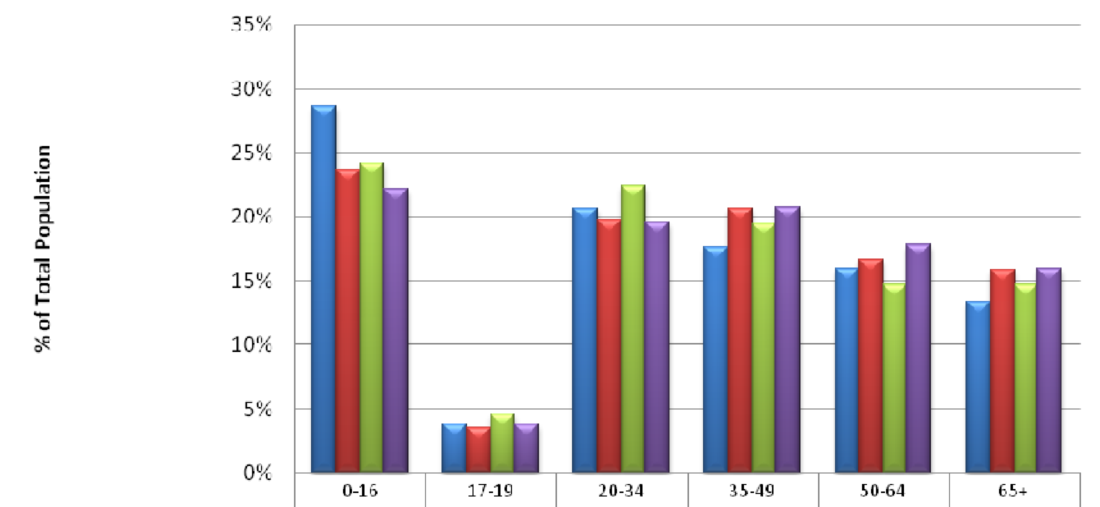
3.1.2 Analysis at four geographical levels allows for key indicators from the Kings Norton 3 Estates to be compared with local and regional benchmarks.

3.1.3 All the data referred to in this section of the report is tabulated in Appendix B.

3.2 Population and Age Structure

3.2.1 The total population of the Kings Norton 3 Estates according to the Census in 2001 was 9,685 in 2001.

Figure 3.2 Total Population by Age, 2001



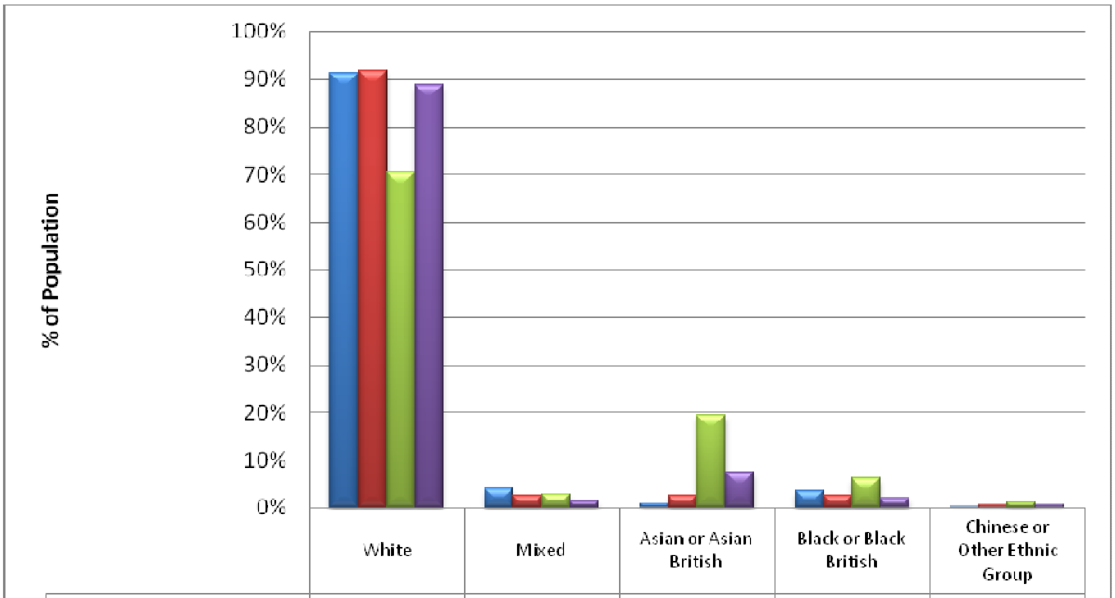
	0-16	17-19	20-34	35-49	50-64	65+
Kings Norton 3 Estates	28.7%	3.8%	20.6%	17.6%	15.9%	13.4%
Kings Norton Catchment Area	23.7%	3.5%	19.7%	20.7%	16.6%	15.8%
Birmingham	24.2%	4.6%	22.4%	19.5%	14.7%	14.7%
West Midlands	22.1%	3.8%	19.6%	20.7%	17.8%	16.0%

Source: ONS, 2001

3.2.2 Figure 3.2 shows population by age and reveals a younger than average population in the Kings Norton 3 Estates, with almost 29% of the population under 16 compared to around 24% in the Kings Norton Catchement Area and in Birmingham as a whole. Conversley there are notably fewer adults in the core family raising age group of 35-49, which may be a reflection of family households relocating outside the 3 Estates when looking to step up the housing ladder.

3.2.3 The 3 Estates is much more similar to the Kings Norton Catchement Area in terms of representation of the 50-64 age group, which may be a reflection of the higher popularity of the 3 Estates when members of this age group were forming households in the early 1960s and onwards.

Figure 3.3 Population by Ethnicity, 2001



	White	Mixed	Asian or Asian British	Black or Black British	Chinese or Other Ethnic Group
Kings Norton 3 Estates	91.3%	4.1%	0.8%	3.5%	0.2%
Kings Norton Catchment Area	91.7%	2.5%	2.6%	2.6%	0.6%
Birmingham	70.4%	2.9%	19.5%	6.1%	1.1%
West Midlands	88.7%	1.4%	7.3%	2.0%	0.6%

Source: ONS, 2001

3.2.4 The Kings Norton Three Estates has a predominately white population (91.3%), which is comparable with the wider catchment area (91.7%), but much higher than that for Birmingham (70.4%), and notably higher than the West Midlands (88.7%).

3.2.5 Whilst of similar proportions, the composition of the Black and Minority Ethnic (BME) groups varies between the 3 Estates and the wider Catchment Area. The principle minority ethnic group in the 3 Estates is “mixed” (4.5%), closely followed by Black / Black British (3.5%), with the other minority groups between them only forming 1% of the population. In contrast, in the Catchment Area the BME profile is evenly split between Mixed, Asian/Asian British, and Black/Black British.

3.3 Economic Activity and Occupational Structure

3.3.1 For the purpose of this analysis, the definition of ‘economic activity’ has followed that provided by the Office of National Statistics, and includes those in full-time and part-time employment, self employed, unemployed and full-time students. Economic inactivity includes those who are retired, other students, looking after home/family, permanently sick or disabled and any others.

3.3.2 The statistics show a notable contrast between the Kings Norton 3 Estates and the wider market catchment area:

- a lower economic activity rate of 58.2%, against a rate of 65.3% for the wider catchment area;
- a lower proportion of full-time and self-employed (34% and 3.7% respectively) than the wider catchment area, and indeed the regional benchmarks;

- a higher rate (7.3% than the catchment area level of 5.2%) of unemployed (those classed as unemployed but actively looking for work).

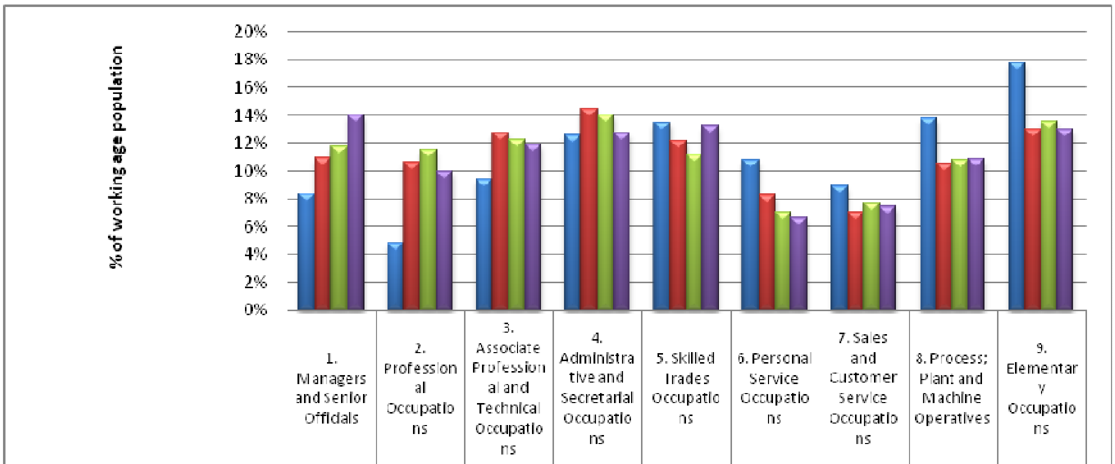
Figure 3.4 Economic Activity

	Full-time	Part-time	Self Employed	Unemployed	Full-time	Retired	Student	Looking after home/family	Permanently sick/disabled	Other
Kings Norton 3 Estates	34.0%	11.2%	3.7%	7.3%	2.0%	11.9%	3.2%	10.7%	9.9%	6.0%
Kings Norton Catchment Area	41.5%	11.5%	5.2%	5.0%	2.1%	13.6%	3.7%	6.5%	6.7%	3.6%
Birmingham	35.7%	9.9%	5.4%	5.6%	3.0%	12.1%	7.4%	7.9%	7.9%	5.1%
West Midlands	40.3%	11.9%	7.4%	3.8%	2.5%	13.9%	4.6%	6.5%	5.7%	3.4%

Source: ONS, 2001

3.3.3 The remaining 42.8% of the working age population of the 3 Estates are classed as economically inactive. Figure 3.4 shows that there is a higher level of those looking after home/family (10.7%) and permanently sick or disabled (9.9%). This indicates a high level of benefit dependency with the Kings Norton 3 Estates.

Figure 3.5 Occupational Profile, 2001



	1. Managers and Senior Officials	2. Professional Occupations	3. Associate Professional and Technical Occupations	4. Administrative and Secretarial Occupations	5. Skilled Trades Occupations	6. Personal Service Occupations	7. Sales and Customer Service Occupations	8. Process; Plant and Machine Operatives	9. Elementary Occupations
Kings Norton 3 Estates	8.4%	4.9%	9.4%	12.5%	13.4%	10.8%	8.9%	13.8%	17.8%
Kings Norton Market Catchment	11.0%	10.7%	12.8%	14.5%	12.2%	8.3%	7.1%	10.6%	13.0%
Birmingham	11.8%	11.6%	12.3%	14.1%	11.2%	7.1%	7.7%	10.8%	13.6%
West Midlands	14.0%	10.0%	12.0%	12.7%	13.3%	6.7%	7.4%	10.9%	13.0%

Source: ONS, 2001

3.3.4 Figure 3.5 shows that the Kings Norton 3 Estates has lower than average levels of higher level occupations (such as managers, professionals and associates), with only 22.7% of the working age population in these three areas (compared with the market catchment proportion of 34.4%). In comparison, the Kings Norton 3 Estates is over represented in personal service, sales and customer service, plant and machine operators and elementary work. These occupations account for 51.4% of the workforce in Kings Norton, compared to 39% in the market catchment and in Birmingham.

3.4 Educational Provision and Attainment

3.4.1 Kings Norton falls within Birmingham Local Education Authority (LEA). This analysis focuses on Birmingham schools serving the Kings Norton ward, and those secondary schools that are attended by 50 or more pupils who are resident in the Kings Norton ward. Those schools located within the 3 Estates are shown in italics.

3.4.2 There are seven primary schools and two secondary schools in the Kings Norton ward, in addition to one specific nursery pre-school. It should be noted that there are a number of private nurseries that operate within Kings Norton.

Figure 3.6 Education Provision in Kings Norton Ward

Name of School	Number on Roll	Ages Provided For
Kings Norton Nursery School	31	3-5
Fairway Junior and Infant School	81	4-11
Hawkesley CE Junior and Infant School	*304*	*3-11*
Kings Norton Junior and Infant School	418	5-11
*Primrose Hill Junior and Infant School**	*182*	*3-11*
St John Fisher's RC Junior and Infant School	194	4-11
St Paul's RC Junior and Infant School	*202*	*3-11*
Wychall Farm Junior and Infant School	233	3-11
Kings Norton High School	*422*	*11-16*
St Thomas Aquinas RC School**	1221	11-18

* Has special needs provision

** Special focus on maths and computing

3.4.3 In addition to the ten schools listed in figure 3.6, there are also five secondary schools that serve a sizeable number of Kings Norton residents.

3.4.4 There would appear to be a lack of substantial secondary school provision for the ward, which may indicate the number of secondary schools outside the ward that receive residents of Kings Norton (shown in Figure 3.7).

Figure 3.7 Secondary provision outside the Kings Norton Ward

Name of School	*Number on Roll*	*Ages provided for*	*Special Focus*
Baverstock Foundation School and Specialist Sports College	1300	11-18	Sports
Kings Norton Boys School	743	11-18	Science
Kings Norton Girls School	937	11-18	Language
Turves Green Girls School	705	11-16	Technology
Turves Green Boys School	638	11-16	Technology

3.4.5 These schools tend to provide education beyond the required age of 16 (with the exception of Turves Green Boys and Girls), and offer a wide range of special focus. While they may focus on one specialism, for example science, language or technology, they are still required to follow the national curriculum.

3.4.6 To assess the academic achievements of schools in Kings Norton it is necessary to examine the results of various tests carried out at key education milestones. For primary schools, the results of Key Stage 2 exams are analysed (these are taken at the end of year 6, usually before a pupil enters secondary school). Here the percentage of pupils achieving level 4 (taken to be the average result expected for an 11 year old), is compared.

Figure 3.8 Primary Achievements in Kings Norton

	% achieving KS2 level 4 or above in English and Maths			*% difference 2006-08*
School Name	**2006**	**2007**	**2008**	
Fairway Junior and Infant School	37%	50%	78%	111%
Hawkesley CE Junior and Infant School	*46%*	*57%*	*42%*	*- 9%*
Kings Norton Junior and Infant School	91%	95%	77%	-15%
*Primrose Hill Junior and Infant School**	*44%*	*35%*	*21%*	*-52%*
St John Fisher's RC Junior and Infant School	93%	84%	97%	4.3%
St Paul's RC Junior and Infant School	*72%*	*71%*	*68%*	*-5.6%*
Wychall Farm Junior and Infant School	62%	58%	59%	-4.8%

3.4.7 Figure 3.8 shows a spread in the proportion of pupils achieving Key Stage 2 level 4 or above. The most improved results occurred at Fairway Junior and Infant School, which has seen an 111% increase in the proportion of pupils achieving level 4. However, the school with the highest percentage of those achieving level 4 or above is at St John Fisher's RC Junior and Infant School. The school with the fewest number achieving Key Stage 2 level 4 is Primrose Hill Junior and Infant School, with only 21% of pupils reaching this level.

3.4.8 The average across Birmingham of pupils achieving level 4 in English and Maths was 78% in 2008 (compared with an average of 80% across England). This suggests that only two schools within the area are achieving this benchmark level or higher (Fairway and St John Fisher's). However, table 3.9 does show that there is a great deal of volatility with these results and as such should be treated cautiously.

3.4.9 For an assessment of Secondary achievement, the average points achieved at GCSE level (usually taken aged 16) were examined. The points gained reflect the grades awarded, with the higher the points the higher the grade. For example, an A* (the highest grade possible at GCSE) would correspond to 58 points, while a G (the lowest grade) would achieve 16.

Figure 3.9 Secondary Achievements in and serving Kings Norton

	Students Average Point Score			*% difference 2006-08*
School Name	**2006**	**2007**	**2008**	
Kings Norton High	*286.2*	*296.6*	*386.8*	*35.2%*
St Thomas Aquinas RC	367.0	363.8	416.7	13.5%
Baverstock Foundation School and Specialist Sports College	326.4	336.6	346.5	6.2%
Kings Norton Boys School	370.0	420.2	418.7	13.2%
Kings Norton Girls School	562.5	582.0	432.0	-23.0%
Turves Green Girls School	373.5	419.8	496.8	33.0%
Turves Green Boys School	341.4	367.8	324.6	-4.9%

3.4.10 Table 3.9 shows that the greatest improvement in student's average point score was at Kings Norton High School, where there has been an increase of over 35% in the average point score in the period 2006-08.

3.4.11 The highest average point score is achieved by pupils at Turves Green Girls School (496.8), which is much higher than the lowest average point score achieved at Turves Green Boys School (324.6).

3.4.12 The average point score for Birmingham was 409.7 (England with a score of 390) in 2007/08. Table 3.9 shows that three schools in the area – Kings Norton High, Baverstock School and Turves Green Boys School are below the city wide average. Although, as with the primary achievements, there does appear to be a great deal of volatility year on year, and the figures should be treated with care.

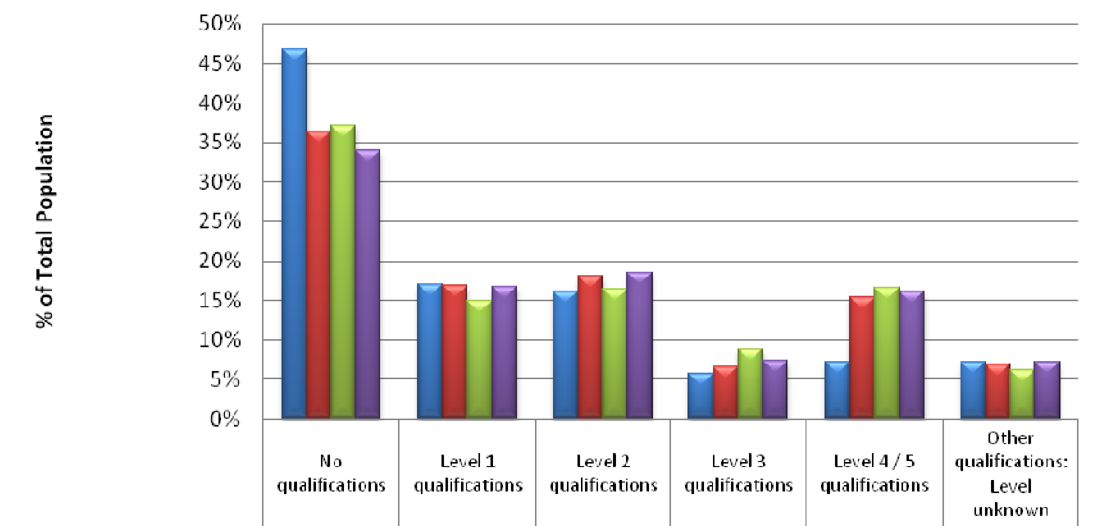
3.5 Qualifications of the Workforce

3.5.1 To assess the qualifications of the workforce (those of working age), the various qualifications are broken down into levels. These are:

- No qualification: no formal academic or vocational qualification;
- Level 1: 1 'O' level pass, 1 x GCSE/CSE any grade, Foundation GNVQ;

- Level 2: 5 'O' level passes, 5+ GCSE (grades A – C), 5+ CSE (grade 1), School Certificate, 1 'A'/'AS' level, NVQ level 2, Intermediate GNVQ;
- Level 3: 2+ 'A' levels, 4+ 'AS' levels. Higher School certificate, NVQ level 3, Advanced GNVQ;
- Level 4/5: First Degree, Higher degree, NVQ levels 4/5, HNC, HND, Qualified Teacher/Medical Doctor/Dentist/Nurse/Midwife/Health Visitor;
- Other Qualifications/level unknown: Others qualifications (such as City and Guilds, RSA/OCR, BTEC/Edexcel and so on).

Figure 3.11 Qualifications, 2001



	No qualifications	Level 1 qualifications	Level 2 qualifications	Level 3 qualifications	Level 4 / 5 qualifications	Other qualifications: Level unknown
Kings Norton 3 Estates	46.7%	17.0%	16.1%	5.7%	7.2%	7.2%
Kings Norton Catchment	36.3%	16.8%	18.0%	6.6%	15.3%	6.9%
Birmingham	37.1%	15.0%	16.4%	8.9%	16.6%	6.1%
West Midlands	34.0%	16.7%	18.5%	7.4%	16.2%	7.2%

Source: ONS, 2001

3.5.2 There are notable disparities with the local catchment, wider city and region benchmarks:

- almost half (46.7%) of the working age population of the Kings Norton 3 Estates have no formal qualifications, 10 percentage points above the average for the defined Catchment area (36.3%) and almost 13 percentage points above the regional average (34%);
- there is also an under representation of residents with higher level qualifications (those at level 4/5), with only 7.2% of people holding a first degree or equivalent compared to 15.3% in the wider catchment and 16.2% in the West Midlands region.

3.6 Migration and Travel to Work Patterns

3.6.1 Household and travel to work migration movements are available from the 2001 Census at ward level. Tables 3.8 to 3.11 illustrate the origin and destination of household movements and travel to work patterns within Kings Norton in 2001.

DTZ

Figure 3.12 Origin of household movements to Kings Norton - one year previous

Local Authority	*Ward Name*	*No of movements to Kings Norton*	*% of all movements to Kings Norton*
Birmingham	Bournville	161	8.4%
Birmingham	Brandwood	149	7.8%
Birmingham	Northfield	123	6.4%
Birmingham	Longbridge	87	4.5%
Birmingham	Billesley	60	3.1%
Birmingham	Selly Oak	50	2.6%
Birmingham	Weoley	49	2.5%
Birmingham	Bartley Green	28	1.5%
Birmingham	Fox Hollies	26	1.4%
Birmingham	Moseley	25	1.3%

Source: Census, 2001

Figure 3.13 Destination of household movements from Kings Norton - one year previous

Local Authority	*Ward Name*	*No of movements to Kings Norton*	*% of all movements to Kings Norton*
Birmingham	Northfield	149	7.4%
Birmingham	Longbridge	128	6.3%
Birmingham	Brandwood	120	5.9%
Birmingham	Bournville	103	5.1%
Birmingham	Billesley	67	3.3%
Birmingham	Weoley	58	2.9%
Birmingham	Bartley Green	34	1.7%
Birmingham	Kingstanding	27	1.3%
Birmingham	Fox Hollies	21	1.0%
Bromsgrove	Drakes Cross and Walkers Heath	21	1.0%

Source: Census, 2001

Figure 3.14 Origin of workplace movements to Kings Norton

Local Authority	Ward Name	No of movements to Kings Norton	% of all movements to Kings Norton
Birmingham	Northfield	370	7.8%
Birmingham	Longbridge	311	6.5%
Birmingham	Bournville	286	6.1%
Birmingham	Brandwood	258	5.5%
Birmingham	Weoley	149	3.2%
Birmingham	Billesley	126	2.7%
Birmingham	Bartley Green	109	2.3%
Birmingham	Selly Oak	102	2.2%
Birmingham	Harborne	64	1.4%
Birmingham	Hall Green	53	1.1%

Source: Census, 2001

Figure 3.15 Destination of workplace movements from Kings Norton

Local Authority	Ward Code	No of Movements from Kings Norton	% of all movements from Kings Norton
Birmingham	Ladywood	810	10.0%
Birmingham	Bournville	758	9.4%
Birmingham	Edgbaston	401	5.0%
Birmingham	Selly Oak	340	4.2%
Birmingham	Nechells	337	4.2%
Birmingham	Longbridge	260	3.2%
Birmingham	Northfield	251	3.1%
Birmingham	Moseley	243	3.0%
Birmingham	Brandwood	181	2.2%
Birmingham	Aston	175	2.2%

Source: Census, 2001

3.6.2 There is a significant amount of self-containment in the Kings Norton ward (in which the 3 Estates are located) in terms of both migration and travel to work. Approximately a third of house moves between 2000 and 2001 occurred within the ward and 35% of people who live in Kings Norton also work within the ward.

3.6.3 There are strong relationships with the adjacent wards of Northfield, Longbridge, Brandwood and Bournville. 27% of those who moved to Kings Norton originated from these wards and almost 25% of those who moved out of Kings Norton moved to one of these three wards (although Northfield and Longbridge were more popular for moving out, with the opposite for Brandwood and Bournville).

3.6.4 These wards are also important in terms of employment. 26% of commuters to Kings Norton travel to work from these four wards. However, commuters from Kings Norton travel much farther afield to their workplace in wards including Ladywood (10%), Edgbaston (5%), Selly Oak (4.2%) and Nechells (4.2%).

3.6.5 The market catchment described in the introduction to this section was based upon these migrations and travel to work patterns and is shown in Figure 3.1. The wards used for the market catchment (aside from Kings Norton) are:

- Brandwood;
- Bournville;
- Northfield;
- Longbridge.

3.6.6 These four wards make up a significant proportion of household migration (27.1% of household movements to and 24.7% of household movements from) relating to Kings Norton ward, and a large number of those who commute to the ward[2] (25.9%). We have excluded the travel to work of those from Kings Norton, as table 3.15 shows this is heavily weighted in favour of commuters to the city centre and its immediate surrounding area.

3.7 Experian Profile

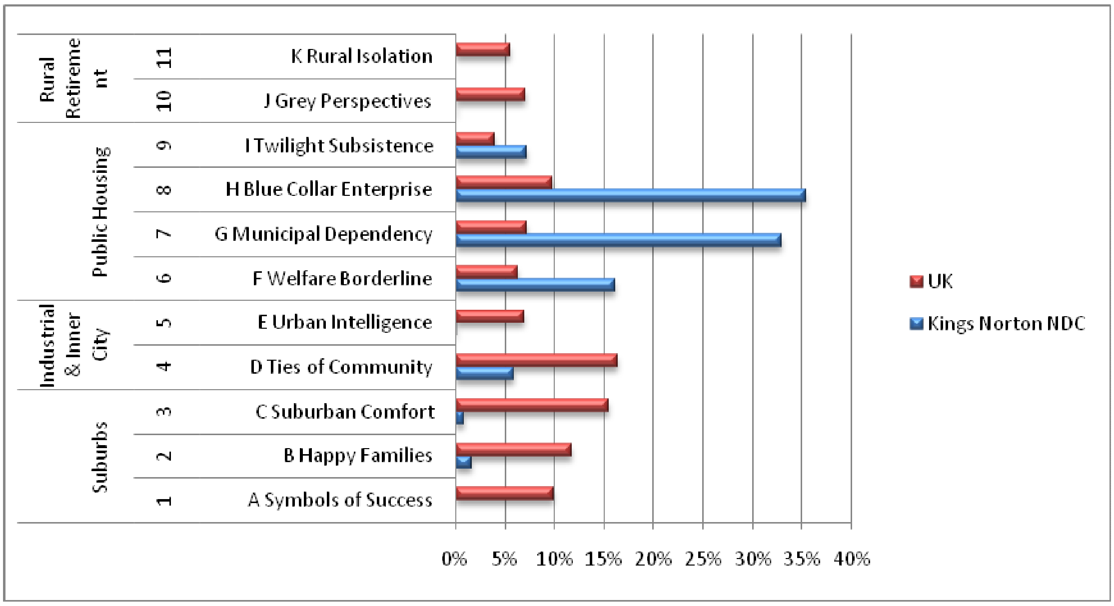
3.7.1 Experian data combines a range of demographic, socio-economic, geographic and consumer behaviour data to create a comprehensive profile for every area in the UK, grouping areas and people into 'lifestyle categories'. Drawing on a wide range of data, this can be then used to identify gaps in the market and shape our initial thinking on new developments within the Kings Norton 3 Estates. Figure 3.16 compares the "lifestyle profile" of the Kings Norton New Deal for Communities (NDC) Area with that for the United Kingdom.

Mosaic Groups and Types

3.7.2 Mosaic UK is considered to be one of the most comprehensive data collections in the UK, sorting over 24 million UK households into 11 lifestyle groups, and 61 types.

[2]Workplace Migration /Travel to Work patterns are an important housing market area indicator, as, unless there is a lifestyle change, households tend to move within the same travel to work area

Figure 3.16 Mosaic Groups for Kings Norton NDC



Source: Experian Mosaic Data, 2008

3.7.3 Not surprisingly, Figure 3.16 shows that the most popular groups in the Kings Norton NDC are 'Blue Collar Enterprise' (35.3%) and 'Municipal Dependency' (32.9%). Representation in these groups is significantly over that of the UK averages (9.7% and 7"% respectively).

Blue Collar Enterprise are summarised as:

People who, though not necessarily highly educated, are practical and enterprising in their orientation. Many of these people live in what were once council estates but where tenants have exercised their right to buy. They own their cars, provide a reliable source of labour to local employers and are streetwise consumers. Tastes are mass market rather than individualistic and focus on providing comfort and value to family members.

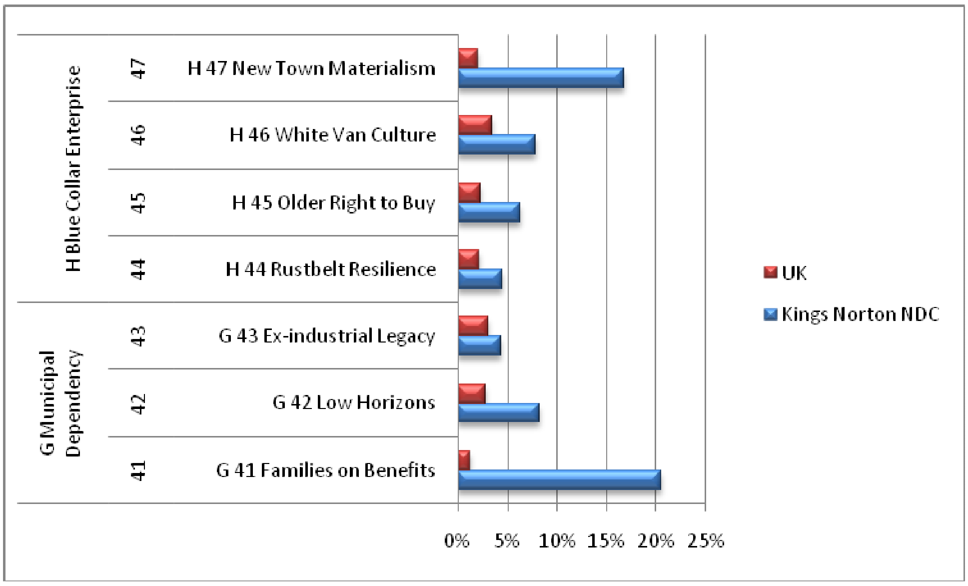
Municipal Dependency are summarised as:

Mostly families on lower incomes who live on large municipal council estates where few of the tenants have exercised their right to buy. Often isolated in the outer suburbs of large provincial cities, Municipal Dependency is characterised as much by low aspirations as by low incomes. Here people watch a lot of television and buy trusted mainstream brands from shops that focus on price rather than range or service.

3.7.4 This is perhaps unsurprising given the location of the area on the outskirts of Birmingham, with the green belt to the south and east of the Estates. Transport links are poor, with a high reliability on cars in order to travel to other areas.

3.7.5 Within these two groups it is possible to break the analysis further, as shown by Figure 3.17.

Figure 3.17 Mosaic Breakdown of Group G and H



Source: Experian Mosaic Data, 2008

3.7.6 Within this breakdown, it is apparent that the two most popular types are 'Families on Benefits' (20.5%) and 'New Town Materialism' (16.7%). Both of these categories share similarities between them;

- Families with young children;
- Located on council estates either around light industrial estates/assembly plants or on the outskirts of cities;
- Large numbers of single parent households;
- High levels of personal debt;
- Low levels of qualifications, combined with few opportunities to enhance them result in a cycle of deprivation.

3.7.7 This theme of deprivation shall be examined in greater detail in the following section. The demographic, household and education characteristics described in the profile, above, correlate with those presented in this report.

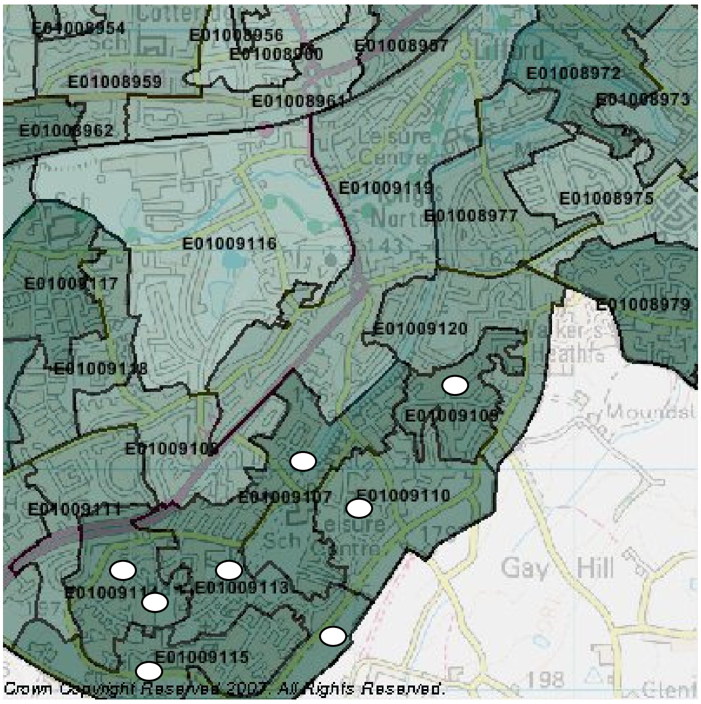
3.8 Indices of Multiple Deprivation 2007

3.8.1 The Index of Multiple Deprivation (IMD) 2007 combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England. This allows each area to be ranked relative to one another according to their level of deprivation. As with the 2004 Indices, the Indices of Deprivation 2007 have been produced at Lower Super Output

Area level, of which there are 32,482 in the country. The maps featured in the figures below are drawn from the Communities and Local Government (CLG) mapping and charting facility at;

www.imd.communities.gov.uk/InformationDisplay.aspx.

Figure 3.18 Overall Indices of Multiple Deprivation



3.8.2 Ranking within each of the IMD domains is calculated according to a number of indicators, which we have summarised in simplified form, below:

- *Income Deprivation*: Income based benefits and Tax Credits claimants;
- *Employment Deprivation*: Jobs Seekers Allowance claimants, New Deal participants, Incapacity Benefit and Severe Disablement Allowance claimants;
- *Heath Deprivation and Disability*: Incidence of certain illnesses and disabilities, emergency admissions, mood and anxiety disorders, years of potential life lost;
- *Education, Skills and Training Deprivation*: Achievement at Key Stages 2 – 4, level of absenteeism, numbers without qualifications, participation in post 16 and Higher Education;
- *Barriers to Housing and Services Domain*: Access to primary schools, food stores, GP, Post Office, difficulty of access to owner occupation, homelessness, overcrowding;
- *Living Environment Deprivation Domain*: Various measures of air quality, home condition, central heating.

3.8.3 The Maps below show the clear and unfavourable contrast between the 3 Estates and the surrounding areas with regard to overall deprivation, and in the income, employment, education and health domains.

Figure 3.19 Income

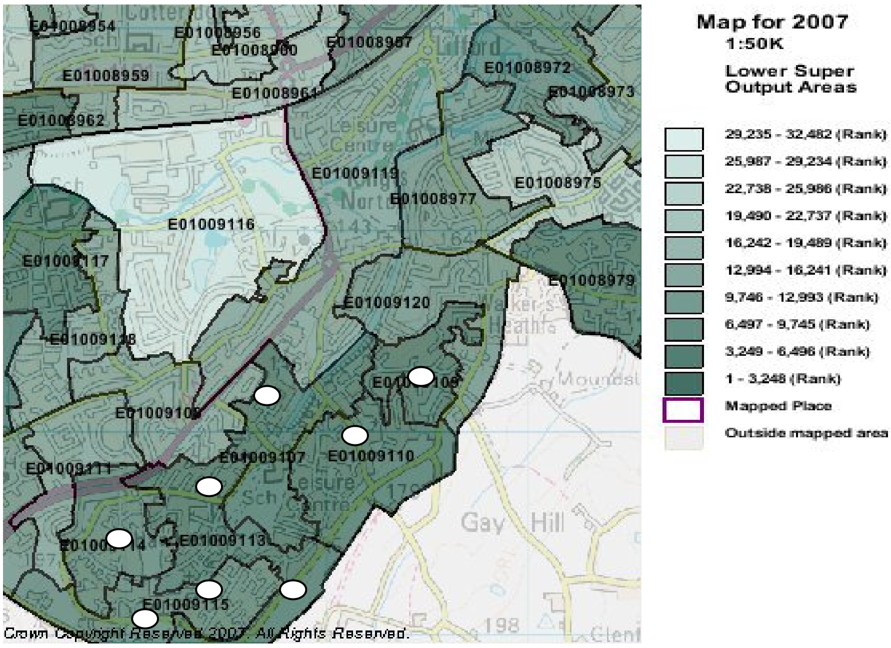


Figure 3.20 Employment

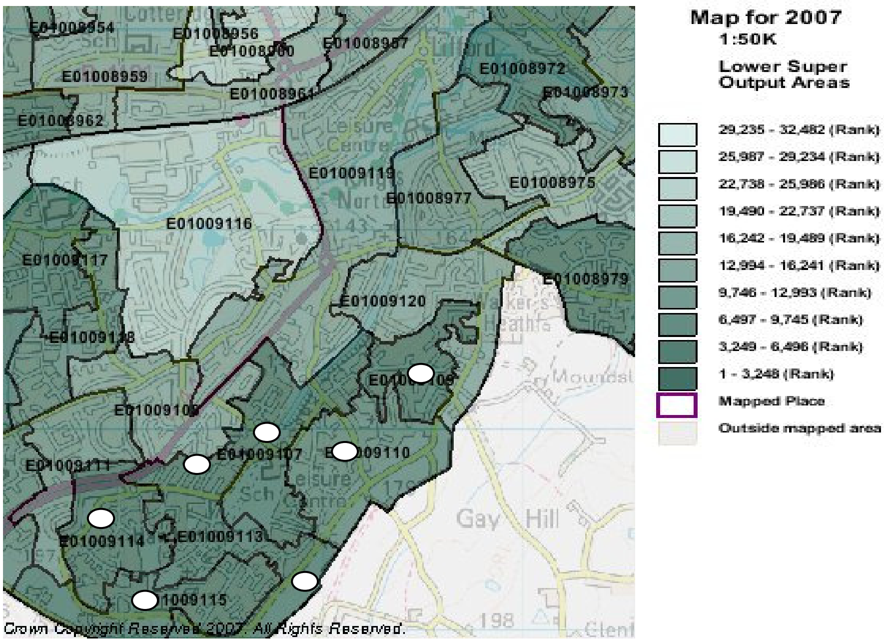


Figure 3.21 Health

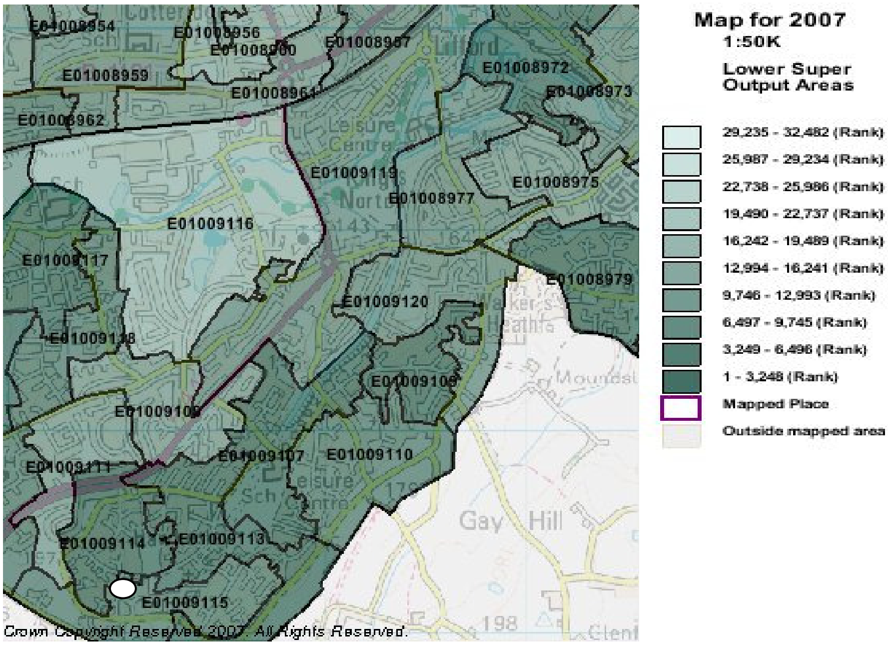
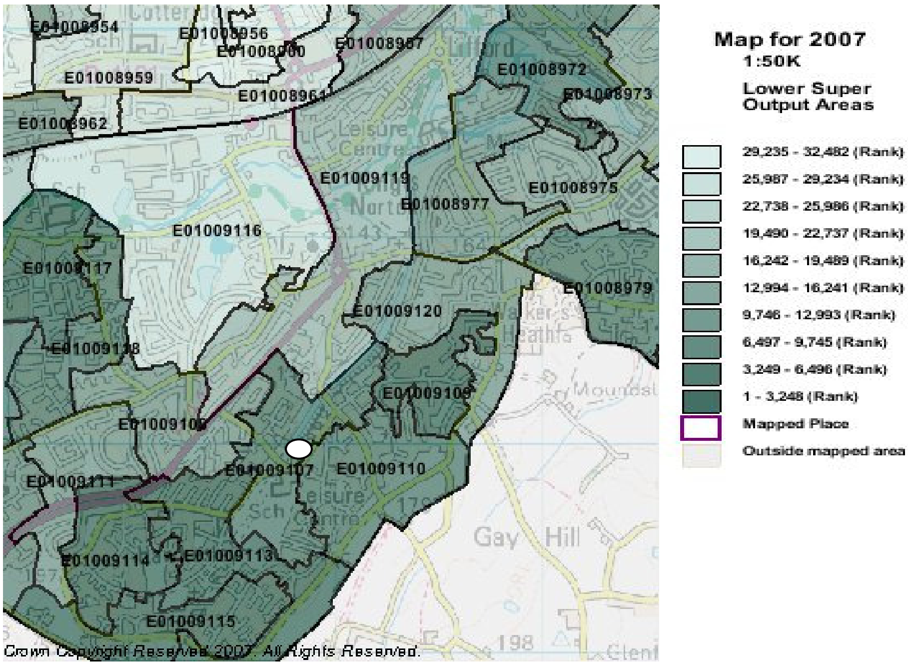


Figure 3.22 Education



3.8.4 With regard to the other domains, local contrasts remain, but not between the 3 Estates and the surrounding area:

- Barriers to Housing and services: Primrose and North Hawkesley are moderately ranked alongside neighbouring areas, whilst Pool Farm and South Hawkesley are lower ranked;
- Crime: Crime deprivation is similarly high in the 3 Estates as it is in some neighbouring output areas;

- Environment: The Hawkesley Estate super output areas are either the most favourably ranked, or amongst the most favourably ranked, in the immediate area. In contrast, the super output areas relating to Primrose and Pool Farm are of similar low quality to many of the super output areas of the immediate area.

Figure 3.23: Barriers

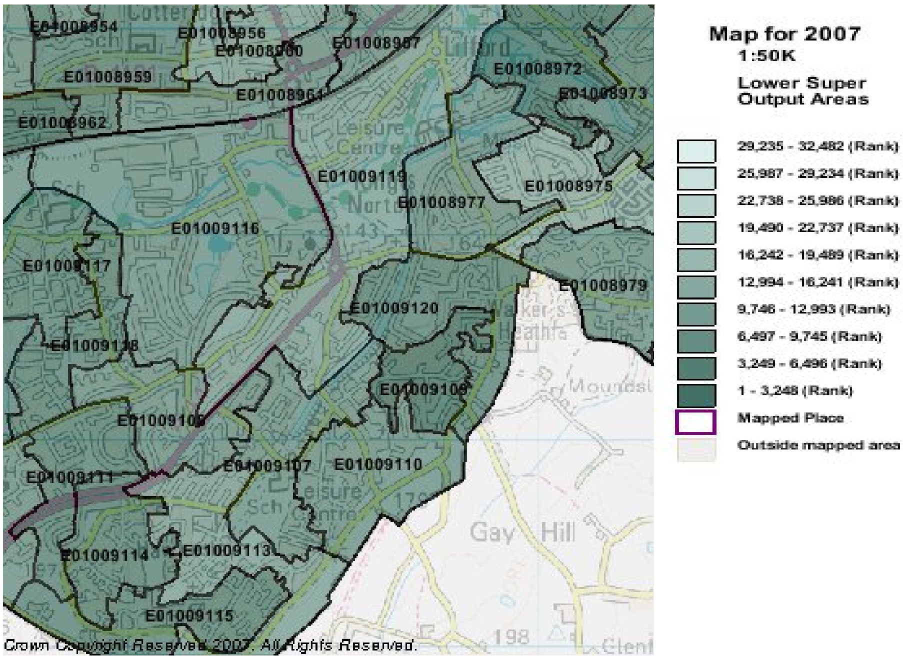


Figure 3.24 Crime

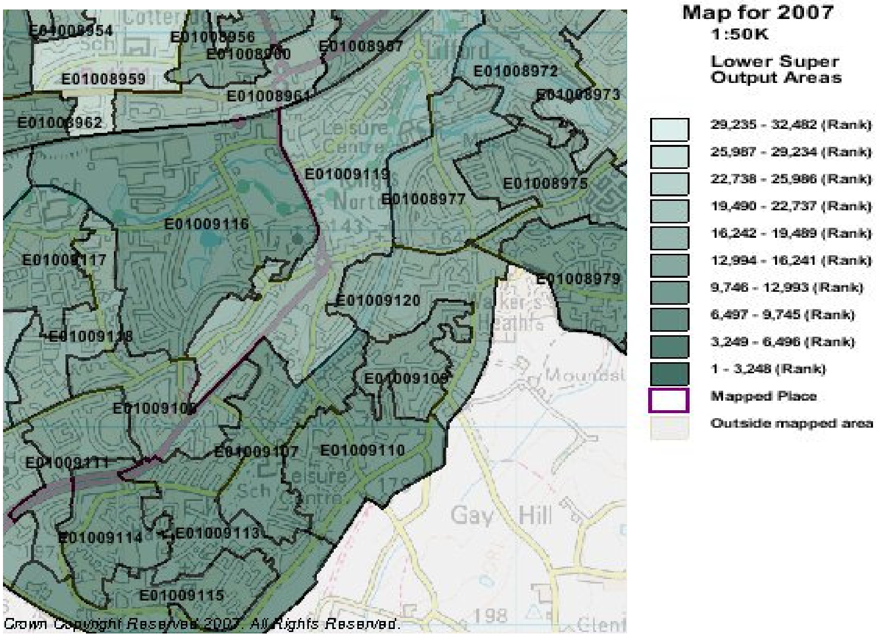
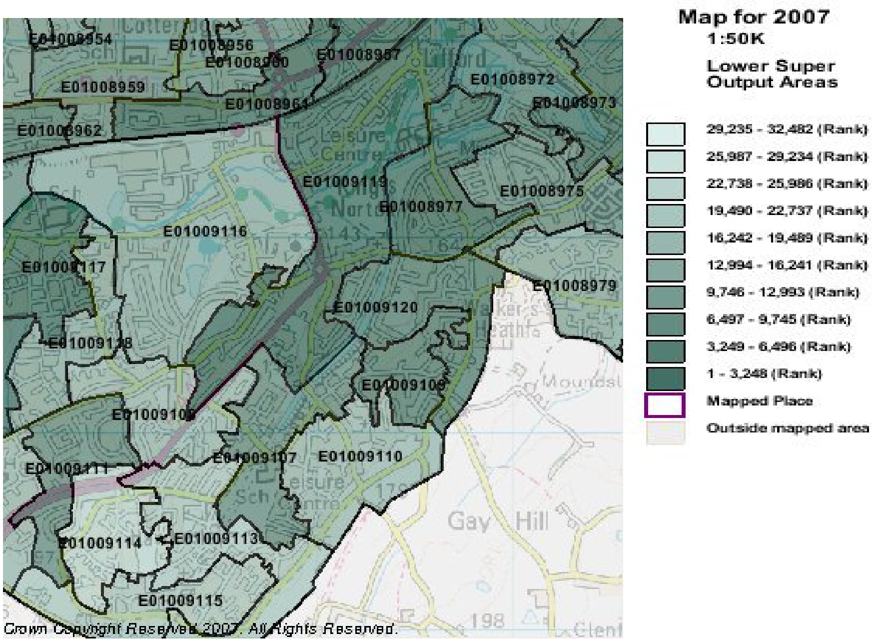


Figure 3.25 Environment

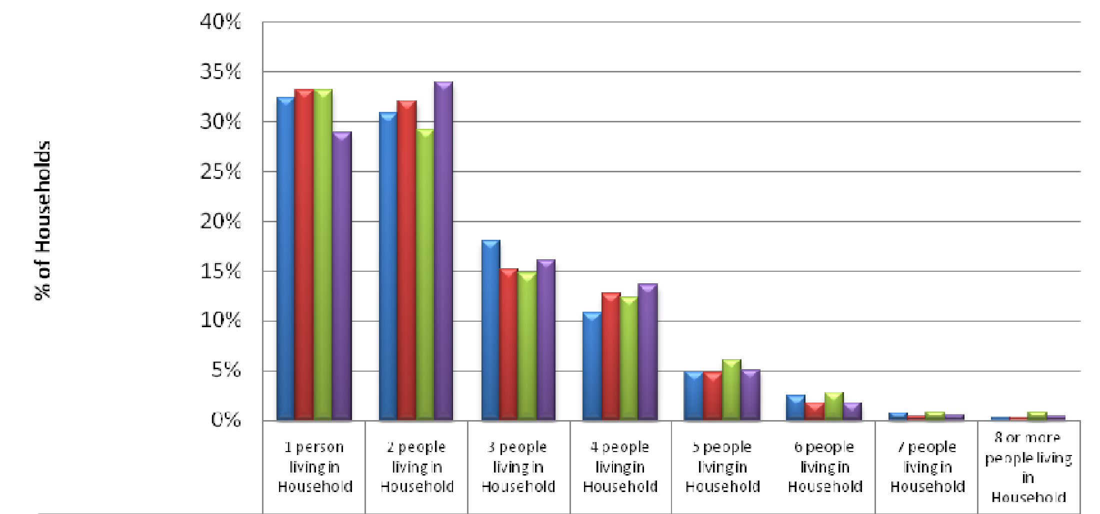


4. Residential Market Analysis

4.1 Household Size

4.1.1 The 2001 Census recorded 4070 households in the Kings Norton 3 Estates area. Figure 4.1 shows the average household size within this area against its comparators;

Figure 4.1 Average Household Size



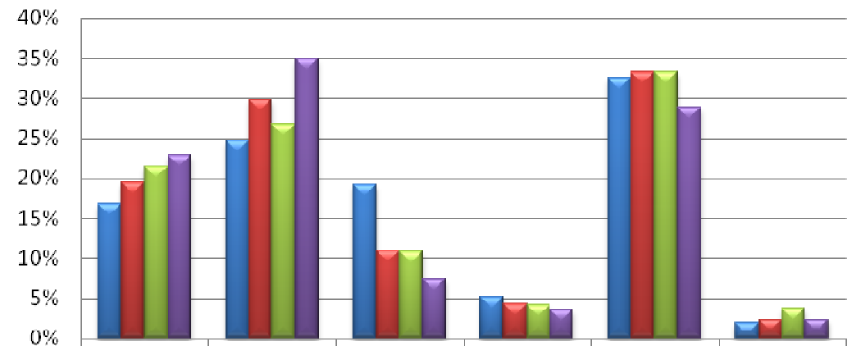
	1 person living in Household	2 people living in Household	3 people living in Household	4 people living in Household	5 people living in Household	6 people living in Household	7 people living in Household	8 or more people living in Household
Kings Norton NDC	32.4%	30.8%	18.0%	10.7%	4.8%	2.4%	0.7%	0.2%
Kings Norton Catchment Area	33.2%	32.1%	15.1%	12.6%	4.7%	1.8%	0.3%	0.2%
Birmingham	33.2%	29.2%	14.7%	12.3%	6.1%	2.8%	0.9%	0.9%
West Midlands	28.8%	33.9%	16.1%	13.6%	5.1%	1.7%	0.4%	0.3%

Source: ONS, 2001

4.1.2 This shows that compared to the market catchment and the region, there is an over representation of 3 person households (18% of dwellings), but under representation in all the other categories.

4.1.3 If we examine this in conjunction with the following graph (figure 4.2) showing household composition in the 3 Estates and benchmark area, it can be concluded that the large numbers of three person households on the 3 Estates are either married/cohabiting couples with one child or lone parent households with 2 children. From this we might judge an under representation of larger families and couple households on the 3 Estates. This may relate to the under representation of traditional family housing formats (by which we mean a 2-3, and 4 bedroom house) on the 3 Estates, which is discussed later in this section.

Figure 4.2 Household Composition in Selected Market Areas, 2001



	Married/cohabiting couple with dependent child(ren)	Married/cohabiting couple with no dependent child(ren)	Lone parent household with dependent child(ren)	Lone parent household with no dependent child(ren)	One person household	Multi person household
Kings Norton NDC	16.70%	24.64%	19.24%	5.10%	32.45%	1.87%
Kings Norton Market Catchment	19.47%	29.87%	10.95%	4.23%	33.18%	2.30%
Birmingham	21.48%	26.62%	10.79%	4.20%	33.19%	3.72%
West Midlands	22.91%	34.98%	7.40%	3.60%	28.82%	2.28%

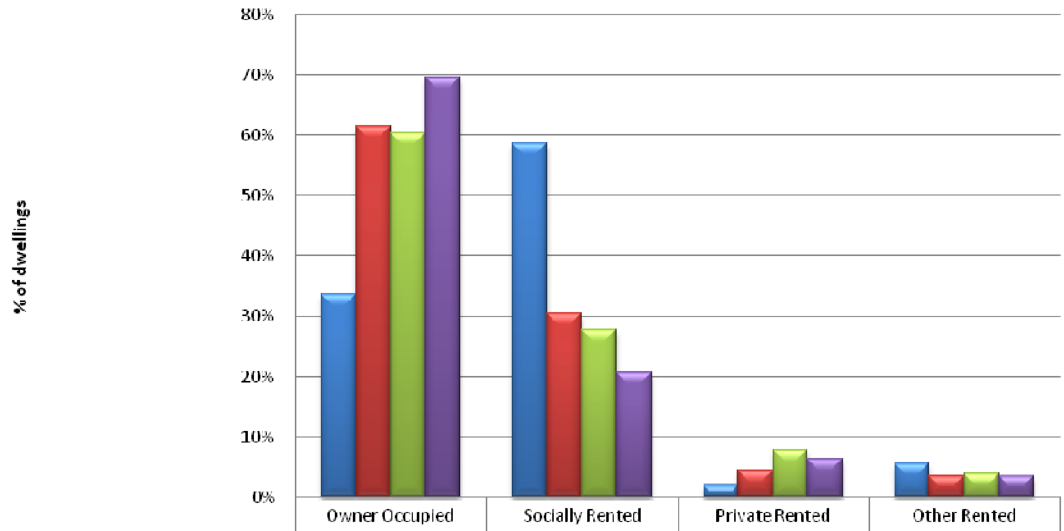
Source: ONS, 2001

4.1.4 As can be seen, there is significantly higher proportion of the population of the 3 Estates who are lone parent household with dependent child(ren) (almost twice the market catchment and city wide average). However, the proportion of married or cohabiting couples (with or without children) is lower than the other market areas.

4.2 Household Tenure

4.2.1 Figure 4.3 shows the housing tenure for Kings Norton Three Estates and its comparators.

Figure 4.3 Housing Tenure



	Owner Occupied	Socially Rented	Private Rented	Other Rented
Kings Norton NDC	33.6%	58.7%	2.0%	5.7%
Kings Norton Market Catchment	61.5%	30.5%	4.5%	3.5%
Birmingham	60.4%	27.7%	7.8%	4.0%
West Midlands	69.6%	20.6%	6.3%	3.5%

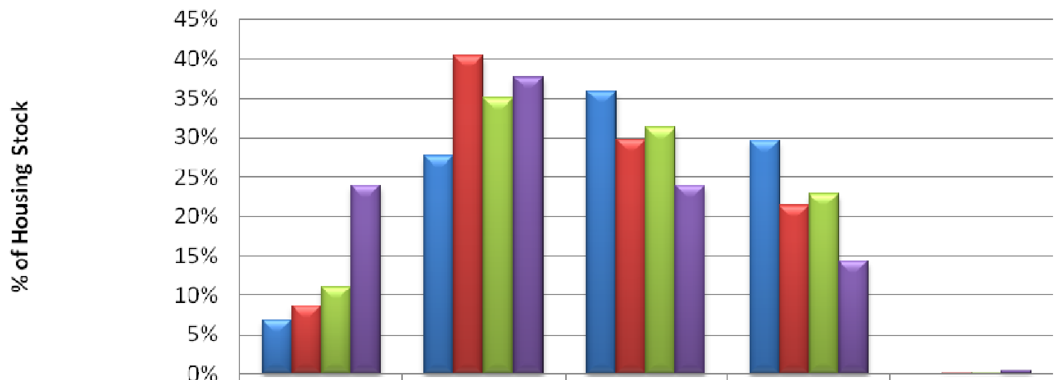
Source: ONS, 2001

4.2.2 Reflecting the heritage of the 3 Estates, there are high levels of socially rented dwellings (58.7%) compared to the wider Market Catchment and City wide averages of around 30%.

4.2.3 Given this background of the 3 Estates, the fact that nearly a third of homes on the 3 Estates are owner occupied (including those that own their home with a mortgage and outright), compared to around two-thirds in the Market Catchment and the City as a whole, is a reasonable reflection of the past popularity of Right to Buy opportunities.

4.3 Dwelling Type

Figure 4.4 Dwelling Type



	Detached	Semi-detached	Terraced	Flat, maisonette or apartment	Other
Kings Norton 3 Estates	6.8%	27.7%	36.0%	29.6%	0.0%
Kings Norton Catchment	8.6%	40.4%	29.7%	21.3%	0.0%
Birmingham	11.0%	34.9%	31.3%	22.8%	0.0%
West Midlands	23.8%	37.7%	23.9%	14.3%	0.4%

Source: ONS, 2001

4.3.1 Figure 4.4 above shows clearly the most common dwelling type in the Kings Norton Three Estates is terraced housing, accounting for almost 36% of dwelling stock. The Three Estates would also appear to have an over representation of flats, maisonettes or apartments, which account for 29.6% of the stock. This profile contrasts with the wider catchment area, in which semi detached dwellings are the clear primary dwelling type, with terraced dwellings and then flat/maisonettes/apartments playing progressively lesser roles.

4.3.2 Detached (and typically larger) dwellings are less numerous in the area, accounting for only 6.8% of stock, though this is close to the catchment and city averages, which fall way below the regional average of 23.8%, which is to be expected.

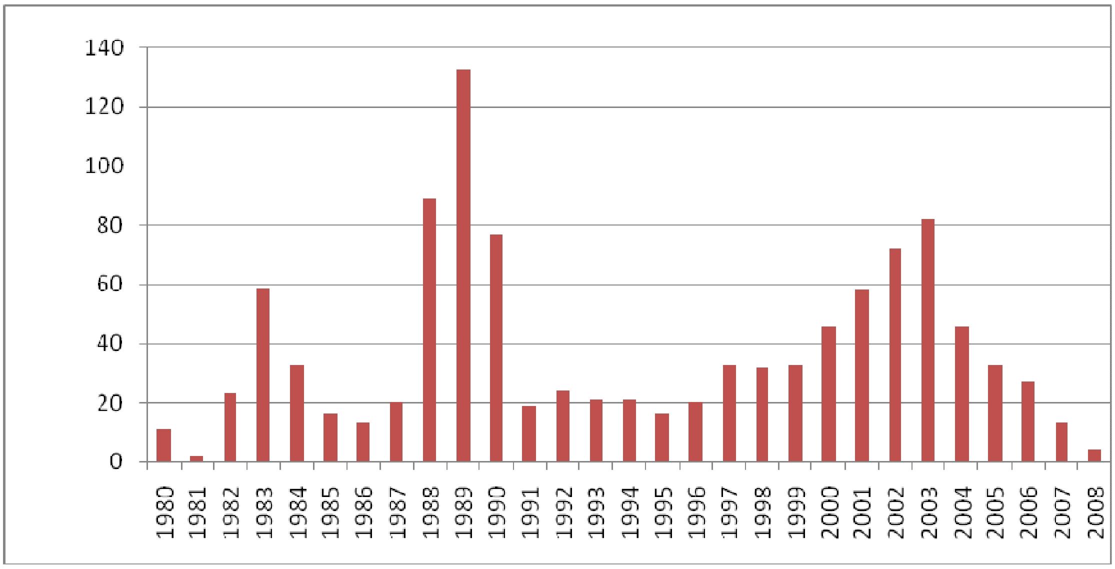
Right to buy activity

4.3.3 As of April 2008 there were 1076 right to buy properties in the 3 Estates Area. This is equivalent to 42% of the remaining quantum of Social Rented properties (Birmingham City Council and Housing Associations' stock - 2556). This compares reasonably well with the equivalent figure for Birmingham City, which is 39%[3], though is some way behind the national figure.

4.3.4 Figure 4.5, below shows the distribution since the introduction of Right to Buy in 1980. The past two years have seen the lowest right to buy activity since the mid 1980s.

[3] Based on the April 2006 Estimate of social housing stock featured in the Housing Development Plan and CLG "Live"Table 648 Social housing sales: Local authority stock sold through right-to-buy and other council house sales by district and region

Figure 4.5: Right to Buy Activity on the 3 Estates 1980 - 2008



4.4 Social Housing Stock

4.4.1 In this section the housing stock owned by Birmingham City Council (the largest provider of Social Housing on the 3 Estates) and other housing associations, shall be examined in greater depth.

Birmingham City Council (BCC) - Total Stock and Change in Stock

4.4.2 BCC stock accounts for a large proportion of the social rented stock in Kings Norton 3 Estates. As at April 2008 BCC stock accounted for 2371 out of 2556 social rented dwellings (Figure 4.6) or 93%, a 202 fall since 2003, most of which may be attributed to right to buy activity (See Figure 4.5, above)

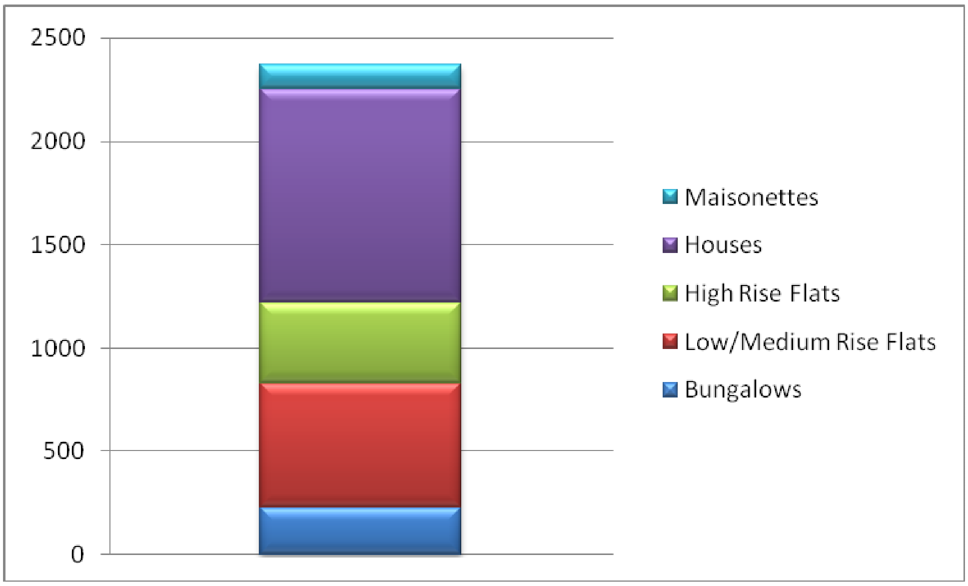
Figure 4.6: Change in total BCC stock

Date	Birmingham City Council Stock	Year on year change
April 2003	2573	
April 2004	2474	-99
April 2005	2430	-44
April 2006	2408	-23
April 2007	2385	-22
April 2008	2371	-14

Current Type profile

4.4.3 Figure 4.7, below, shows the current type profile of dwellings operated by BCC on the 3 estates in Kings Norton. Whilst houses are the largest single dwelling type, they do not form the majority, accounting for just over 4 in 10 (44%, 1033) of all dwellings. Other dwelling types are well represented, particularly low and medium rise flats, which account for just over a quarter of total council stock (26%, 605), and together with high rise flats account for just under 4 in 10 of all the BCC stock. A small, but notable, proportion of BCC's housing stock is in the form of bungalows (226, 9.5%) and maisonettes (120, 5.1%).

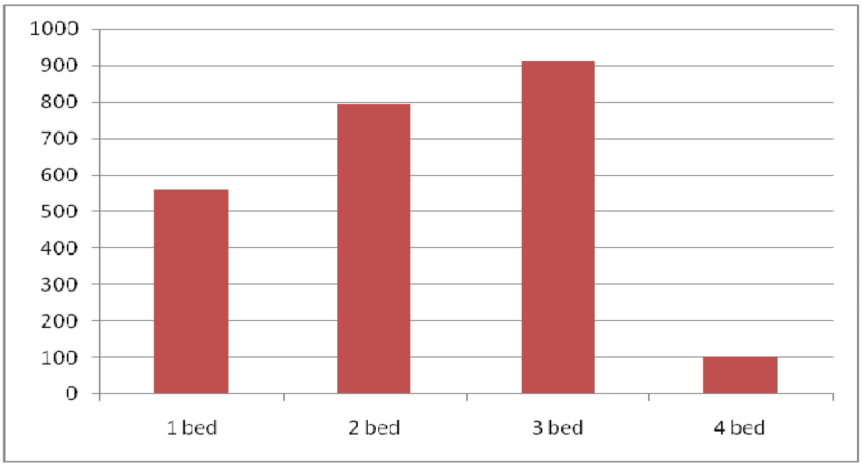
Figure 4.7: BCC Stock by Type



Source: BCC, April 2008

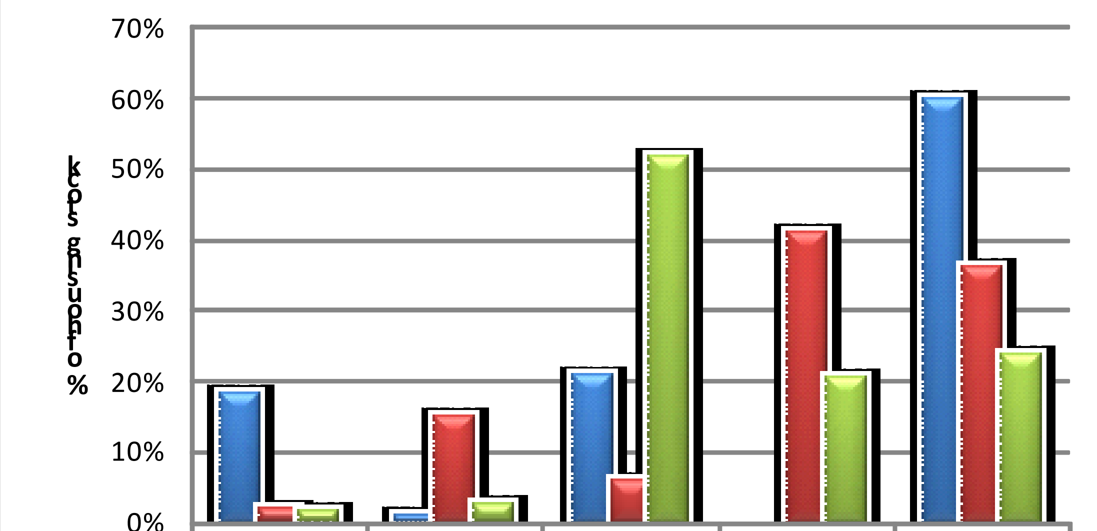
4.4.4 Figure 4.8, below, shows the size profile of BCC stock dwellings size, which shows a notable proportion of one bedroom dwellings, which account for nearly a quarter of all dwellings.

Figure 4.8: BCC Stock by Size



4.4.5 Figures 4.9 below, presents the dwelling type profile of the BCC stock by Estate.

Figure 4.9 – House types in the 3 Estates

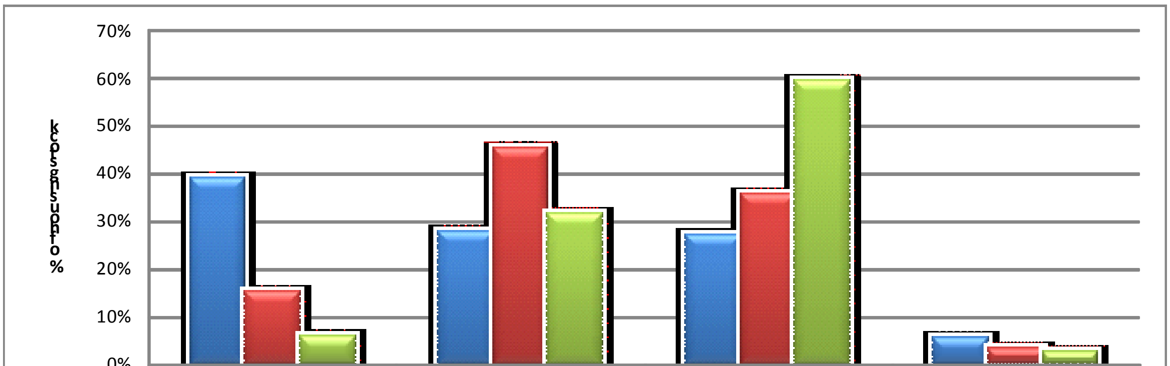


	Bungalow	Maisonette	Low/Medium Rise Flat	High Rise Flat	Houses
Hawkesley	18.4%	1.0%	20.8%	0.0%	59.8%
Primrose	2.0%	15.0%	5.9%	40.9%	36.2%
Pool Farm	1.8%	2.6%	51.6%	20.5%	23.6%

Source: BCC, 2008

4.4.6 It is also possible to examine the breakdown of dwelling size within the estates (figure 4.10).

Figure 4.10 – Number of bedrooms per dwelling in the 3 Estates



	1 bed	2 bed	3 bed	4 bed
Hawkesley	39.0%	28.0%	27.3%	5.8%
Primrose	15.5%	45.4%	35.9%	3.3%
Pool Farm	6.0%	31.7%	59.5%	2.7%

Source: BCC, April 2008

Figure 4.11: Distribution of BCC Stock by Size, Type and Estate

	Bungalow	Bungalow	Flat	Flat	Flat	House	House	House	Maison-ette	Maison-ette	Total
Bedrooms	1	3+	1	2	3	2	3	4	2	3	
Pool Farm	12	0	28	198	253	9	130	18	4	13	**665**
Primrose	12	0	83	204	0	28	174	20	46	46	**613**
Hawkesley	200	1	226	1	0	294	297	63	11	0	**1093**
All	**224**	**1**	**337**	**403**	**253**	**331**	**601**	**101**	**61**	**59**	**2371**

Source: BCC, 2008

4.4.7 Figure 4.11 identifies the distribution of housing stock by size, type and estate. It is notable that:

- the high proportion of one bedroom dwellings, which account for nearly a quarter of all dwellings, and which are split between bungalows (225) and flats (337), are virtually all on the Hawkesley Estate;
- there are a low number of four bedroom houses (101, or 4%), mostly on the Hawkesley Estate;
- there is a large amount of two bedroom stock accounted for by flats and maisonettes. Of the 795 two bedroom dwellings, 403 are flats (split evenly between Pool Farm and Primrose) and 61 are Maisonettes (mostly on Primrose Estate), and just 294 are houses (mostly on Hawkesley);
- there is a large amount (over one quarter) of 3 bedroom accommodation provided as flats – 253 (all on Pool Farm) out of 914 units.

4.4.8 Hawkesley is the biggest of the 3 Estates, encompassing an area of approximately 93 hectares (230 acres). It contains 1093 dwellings operated by BCC:

- the dominant form of dwelling type is houses (60%), with a number of low/medium rise flats (21%) and bungalows (18%);
- however, the volume of one bedroom bungalows and flats is such that one bedroom dwellings are the most common dwelling size (39%), with two and three bedroom dwellings (mostly provided through houses) at 28% and 27% respectively;
- four bedroom dwellings account for only 5% of the stock in Hawkesley, which given the dominance of houses in the area may be surprising;
- it should be noted there are no high rise flats and relatively few maisonettes in Hawkesley.

4.4.9 Primrose is the smallest of the estates at 30 hectares (75 acres) and housing 613 (or 438 if exclude the high rise towers) dwellings operated by BCC:

- notably houses account for only 51% of the BCC operated stock, and an even lower proportion if including the high rise towers.

4.4.10 Pool Farm Estate consists of 665 BCC operated dwellings across the 41 hectares (101 acres) of the estate:

- low and medium rise flats account for over 50% of the BCC dwellings to be found in the area, with a further 20% being accounted for by high rise flats;
- due to the concentration of BCC 3 bedroom flats on the Estate (which outnumber 3 bedroom houses at a rate of nearly 2:1), 3 bedroom dwellings dominate with almost 60% of the BCC stock being of this size. It should be noted that the 171 dwellings in RSL ownership on the estate is rather more balanced.

Residential Social Landlord (RSL) Stock

4.4.11 There are five other registered social landlords active in the Kings Norton 3 Estates, the holdings of which are presented in Figure 4.12, below.

Figure 4.12 RSL Stock by ownership, type and size

	Flat/Maisonette 28, 1 bed flats; 9, 2 bed flats; and 6, 3 bed maisonettes	**Bungalow** all 2 bedroom	**House** 29, 2 bedroom; 44, 3 bedroom; 8, 4 bedroom; and 57 of unlisted size	**Total**
Mercian	43	4	54	101
Family HA	0	0	57	57
Midland Heart	0	0	11	11
Sanctuary	0	0	9	9
Waterloo	0	0	6	6

Source: BCC, 2008

4.4.12 From this it is clear to see that Mercian is the second largest RSL present on the Kings Norton 3 Estates accounting for over half of the non-BCC socially rented accommodation. It should also be noted that nearly all (171 or 93%) of the RSL stock is on the Pool Farm Estate, with the remaining 13 (7%) located on the Hawkesley Estate, including the 11 houses operated by Midland Heart[4].

4.4.13 However, when considered against BCC's stock of over 2,300 dwellings, these RSL's represent less than 8% of the total stock held in the socially rented sector.

4.5 The Nature of Demand and Supply (Social Rented Sector)

4.5.1 The overall importance of different house sizes and types can be assessed by considering a variety of indicators together.

Bids to Lets

4.5.2 Some 200 council properties a year are advertised across the estate. Expressed demand is generally very low, varying between virtually 1 bid per property over 2007/8, 1.11 bids per property in 2005/6, and 1.26 bids per property in 2006/7. As a comparison, the ratio between expressed demand and lettings in the South West HMA (of which the 3 Estates falls within) was just over 3 in 2005/6, whilst that for Birmingham was just over 6[5].

4.5.3 The greatest supply of properties available for social letting, as demonstrated in Figure 4.13, below, tends to be one and two bed flats, followed by Bungalows, three bed flats and three and two bed houses. Letting opportunities for 4 bedroom houses are notably rare.

Figure 4.13: BCC Properties advertised by type 2005/6 - 2007/8

	2005/6	2006/7	2007/8	average
Bungalow	24	21	22	22
1 bed flat	43	41	41	42
2 bed flat	73	51	47	57
3 bed flat	26	25	32	28
2 bed house	10	25	14	16
3 bed house	20	19	18	19
4 bed house	7	4	10	7
2 bed maisonette	6	10	7	8
3 bed maisonette	4	4	5	4

4.5.4 Figure 4.14, below, considers the ratios of bids to letting opportunities for the different dwelling types. The most scarce dwelling types, in terms of ratio of bids to letting opportunities, are Bungalows (an average of 1.25 bids per property over the 3 years 2005/6 – 2007/8), flats of all sizes (1.1 bids per property for 1 and 2 bedroom

[4] 10, 2 bedroom houses (No's. 2-20 Beech Walk), and 3, 3 bedroom houses on the Hawkesley Estate

[5] Birmingham City Council Housing Development Plan

apartments, and 1.2 bids per property for 3 bedroom flats) and four bed housing (1.3 bids per property). BCC Housing Officers state that this measure significantly underestimates the demand for 4 bedroom housing on the 3 Estates, as applicants are advised to consider alternative locations given the low level of letting opportunities for this type of housing.

Figure 4.14: Bids to Lettings Opportunities by type 2005/6 - 2007/8

	Average Annual Bids per Property			
	2005/6	**2006/7**	**2007/8**	**Annual Average**
Bungalow	1.17	1.57	1.00	1.2
1 bed flat	1.09	1.32	1.00	1.1
2 bed flat	1.10	1.25	1.00	1.1
3 bed flat	1.12	1.32	1.03	1.2
2 bed house	1.10	1.00	1.00	1.0
3 bed house	1.10	1.00	1.00	1.0
4 bed house	1.14	1.75	1.10	1.3
2 bed maisonette	1.17	1.20	1.00	1.1
3 bed maisonette	1.25	1.00	1.00	1.1

4.5.5 Whilst the average bid per property across the estate is low, this hides some marked variation in demand and supply ratios both in geography and by house type. Analysing the location and type of properties subject to 2 or more bids is more revealing (figure 4.15).

Figure 4.15: Proportion of letting opportunities subject to 2 more bids

Proportion of 2 more bids to properties advertised				
	2005/6	2006/7	2007/8	**average**
Bungalow	0.17	0.43	0.00	0.20
1 bed flat	0.09	0.29	0.00	0.13
2 bed flat	0.08	0.24	0.00	0.11
3 bed flat	0.12	0.32	0.03	0.16
2 bed house	0.10	0.00	0.00	0.03
3 bed house	0.10	0.00	0.00	0.03
4 bed house	0.14	0.25	0.10	0.16
2 bed maisonette	0.17	0.20	0.00	0.12
3 bed maisonette	0.25	0.00	0.00	0.08

4.5.6 Figure 4.15, above suggests that, on average, 1 in 5 Bungalows advertised in the 3 years 2005/6 – 2007/8 were subject to 2 or more bids, the highest ratio of all dwelling types, or in other words they would seem to be the scarcest dwelling type.

4.5.7 On this basis, 4 bed houses and 3 bed flats are the second most scarce dwelling type (around 1 in 7 advertised dwellings subject to 2 or more bids), though as stated above, we suggest that the quantum of bids for 4 bedroom houses under represents the latent demand for such homes on the 3 Estates, followed by 1 and 2 bedroom flats and 2 bedroom maisonettes. Three bed maisonettes and 2 and 3 bedroom houses are the least scarce dwelling type in relation to demand.

4.5.8 The relative popularity of the different estates with regard to different types of housing can be assessed by comparing the distribution of advertised properties subject to two or more bids with lettings activity. If location (the estate) was not an issue, then we would expect the geographical incidence (by estate) of multi bids to broadly reflect the geographical incidence (by estate) of overall lettings. We have done this for the years 2006/7 and 2007/8 (we do not have lettings data for 2005/6). The data for 2006/7 shows the distribution of multi bid properties is broadly in line with the distribution of lettings, with a few exceptions:

- **Bungalows:** The slight under performance of Pool Farm / The Fold, and the slight over performance of Primrose;
- **1 bedroom flats:** the under-performance of Primrose, and the over performance of Pool / Farm and Hawkesley;
- **2 bedroom flats and two bedroom maisonettes:** the over performance of Primrose, though the good performance of the two bedroom flats relates specifically to the popularity of the high rise accommodation.

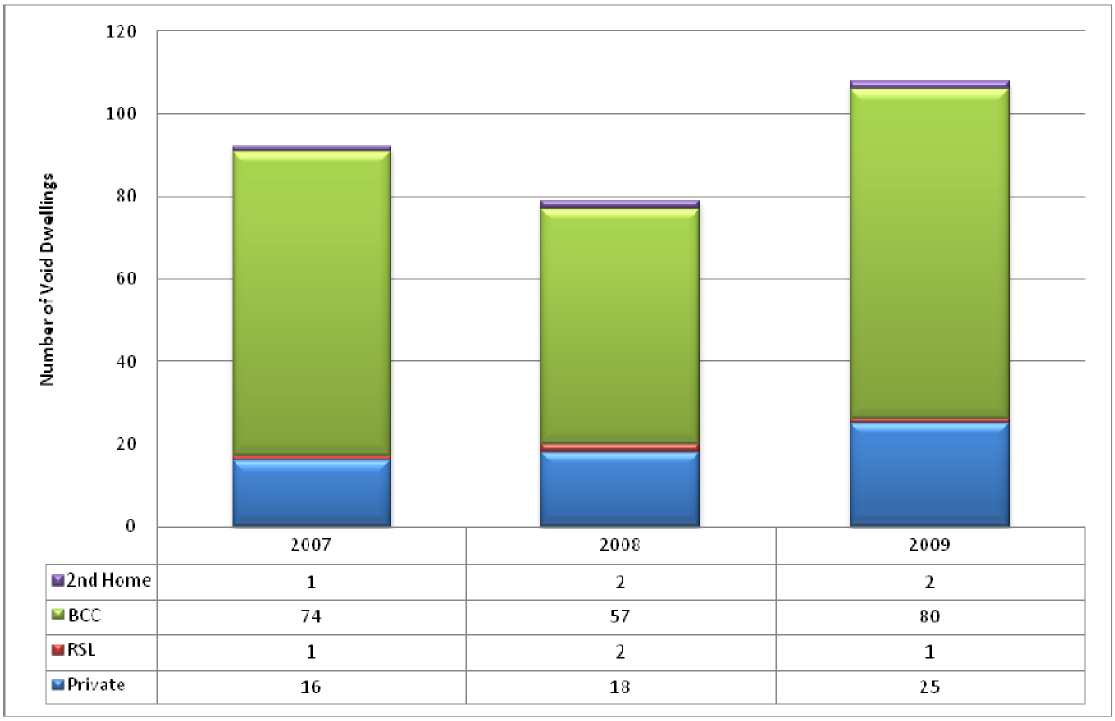
4.5.9 On the basis that the bids to lets measure significantly underestimates the demand for 4 bedroom housing on the 3 Estates, we would also suggest that it underestimates the demand for 4 bedroom housing on the Hawkesley Estate, given the particular popularity of this stock over those on Primrose and Pool Farm, as explored in the sections on voids and turnover, below.

Voids

4.5.10 There are various reasons for a property being void – such as those premises awaiting demolition, voids awaiting works and other voids and properties available to let. A consideration of the number of lettable voids gives an indication of supply in relation to demand.

4.5.11 Figure 4.16 below shows the number of voids in the 3 estates area over 2007-2009. This also shows the total level of 'void' dwellings in the private sector, those operated by RSL and those with Second Home Discounts.

Table 4.16: Voids in the Kings Norton 3 Estates, 2007 – 2009



Source: BCC, April 2009

4.5.12 Not surprisingly, the key representation of voids is through BCC stock, though at 98% of all social housing voids, this is slightly higher than the stock representation (93% of all social rented stock). What is more interesting is the growing number of privately owned voids.

4.5.13 Table 4.17 presents voids as a percentage of stock as of March 2009. For context, the council void rate in January 2008 was 1%, and that for the wider Northfield Constituency, of which the 3 Estates is part, was 0.6%.

Table 4.17: Void as a % of stock by type and estate

	Bungalow 1 bed	Flat 1 bed	Flat 2 bed	Flat 3 bed	House 2 bed	House 3 bed	House 4 bed	Maison-ette 2 bed	Maison-ette 3 bed	Total
Pool Farm	0%	0%	2%	4%	0%	2%	6%	0%	0%	3%
Primrose	0%	6%	3%		0%	2%	10%	2%	9%	4%
Hawkesley	0%	3%	0%		1%	1%	0%	0%		1%
All	**0%**	**3%**	**2%**	**4%**	**1%**	**1%**	**3%**	**2%**	**7%**	**2%**

4.5.14 Voids are low (1%) in Hawkesley, and are generally short term. Of the 10 voids on the Hawkesley Estate at March 2009, half had been empty for 50 days or less. Notably, one each of the void 2 (2) and 3 (2) bedroom houses on Hawkesley Estate had been empty for 598 and 601 days respectively (one of them a Class L void), indicating an issue with the property rather than the appeal of such stock overall on Hawkesley.

4.5.15 Voids are on the high side in Pool Farm and Primrose, at 3% and 4%, respectively. The driver behind the high void rate for Pool Farm is the 11, 3 bedroom flats that are void at Pool Farm (4% of that stock). The voids are more evenly spread on Primrose with 1 and 2 bedroom flats, and 3 bedroom houses and 3 bedroom maisonettes accounting for most of the voids on the Primrose Estate.

4.5.16 By house type and location, the void rates are varied:

- No reported voids:
  - bungalows across the three estates;
  - 1 bedroom flats on Pool Farm;
  - 2 bedroom houses on Pool Farm and Primrose;
  - 2 and 3 bedroom maisonettes on Pool Farm; and
  - 2 bedroom flats, 2 bedroom maisonettes and 4 bedroom houses in Hawkesley.
- Void rates of 1-2%:
  - 2 bedroom flats and 3 bedroom houses on Pool Farm;
  - 3 bedroom houses and 2 bedroom maisonettes on Primrose;
  - 2 and 3 bedroom houses on Hawkesley;
  - Note that void rates for 3 bedroom houses are similar across the 3 Estates. However, void periods for Pool Farm (366-1810 days over two properties) and Primrose (median value of 108 days over four properties) would seem to be longer than for Hawkesley (32 days and 601 days).
- Void rates of 3-4%:
  - 3 bedroom flats on Pool Farm (which represents the entire stock of 3 bedroom flats on the 3 Estates);
  - 2 bedroom flats on Primrose;
  - 1 bedroom flats on Hawkesley;
  - the small stocks of 1 bedroom flats and two bedroom houses on Pool Farm;
  - Note that amongst the 1 and 2 bedroom high rise stock on Primrose, most (8 out of 12 voids) had been void for less than 100 days, and three of these under 50 days.
    - the Medium Rise 3 bedroom flats of Pool Farm have generally short void periods (7 out of 9, void for under 50 days);
    - there is no discernable variation in the void periods of the 1 bedroom flats in Hawkesley (128 days for one property) and Primrose (mean of 131 days over five low rise properties, and 94 days over five high rise properties);

- likewise, there is no discernable difference in the void periods for 2 bedroom flats on Primrose and Pool Farm.

- Void rates over 4%:
    - the three bed maisonettes and four bedroom house stock on the Primrose Estate, at 9% and 10% of the stock type respectively;
    - this may not be surprising given the small amount of such stock on these estates (the absolute number of voids being just 4 and 2 respectively. However:
        - it is notable that the 3 of the 4 void 3 bedroom maisonettes, all on Reddich Road, have been void for over 200 days;
        - conversely, the 4 bedroom stock on Primrose Estate have been void for the shortest period of time on this Estate[6].
        - likewise, the 6% void rate for four bed houses on Pool Farm is just one 1 unit (which has been vacant for 303 days), and represents just five, 1 bed flat units, on the Primrose Estate. As to whether this suggests low demand, one can only make a conclusion when a consideration is made alongside turnover rate.

Turnover

4.5.17 Turnover, that is the number of lettings in proportion to the overall stock, is another useful indicator of demand. Turnover can be interpreted in different ways. In a context of normal or high demand, a low turnover can be interpreted as an indicator of neighbourhood satisfaction, whilst in a context of low demand it can be taken to mean the opposite. As a benchmark, overall turnover of BCC stock in Birmingham was 8% in 2006, and 8.5% for the South West Housing Market Area, which the 3 Estates forms part of.[7]

[6] Voids of over 100 days are found across the void stock on the Primrose Estate , except for the four bedroom stock (93 and 58 days).

[7] Birmingham City Council Housing Development Plan

Table 4.18: Turover (Lets as a % of stock) by type and estate

Turnover	Bungalow 1 bed	Bungalow 3 bed	Flat 1 bed	Flat 2 bed	Flat 3 bed	House 2 bed	House 3 bed	House 4 bed	Maisonette 2 bed	Maisonette 3 bed
2007/8										
Pool Farm	17%		18%	9%	13%	11%	3%	22%	0%	8%
Primrose	8%		10%	2%		7%	3%	20%	11%	9%
Hawkesley	11%	0%	12%	0%		4%	3%	5%	0%	
2006/7										
Pool Farm	17%		18%	11%	10%	0%	5%	6%	75%	0%
Primrose	25%		14%	2%		0%	5%	15%	11%	9%
Hawkesley	9%	0%	10%	0%		8%	1%	0%	9%	

4.5.18 The notably high turnover of bungalows, especially those in Hawkesley, is of note. Anecdotal evidence cited in the John Thompson Report suggests that this may be due to the preference of many pensioner tenants for the sheltered housing provision in the High Rise Campion and Saffron Houses, on the Primrose Estate. However, the relative scarcity of this stock type in relation to demand (when considering the bids to lets ratio) and the lack of voids suggests that the bungalows are an important part of the housing stock, even if they are only an interim measure for some.

4.5.19 The turnover of flats of all sizes is generally high (over 10%) in each of the Estates. This is to be expected. A notable exception to this trend is the exceptionally low turnover of 2 bedroom flats on the Primrose Estate, reflecting the relative scarcity in relation to demand of the high rise 2 bedroom flats discussed in our consideration of bids to lets, above.

4.5.20 Conversely, the annual turnover of between 10% and 13% for the 3 bedroom flats on Pool Farm is notably high given the high volume of overall stock, and reflects a situation whereby typically 25 of these units are re-let annually. Considered alongside the high incidence of multi bids for this housing type, it appears that it is used as a stepping stone to more preferable family accommodation.

4.5.21 The turnover of two bedroom houses on the Hawkesley Estate (which has the main concentration of this type of accommodation) at between 4% (2007/8) and 8% (2007/8) is a reasonable level, indicating that demand is broadly in balance with supply, which is consistent with the general good availability of this housing in relation to demand discussed in the section on Bids to Lets.

4.5.22 The turnover of three bedroom houses (broadly half of which are on Hawkesley, and a quarter each on the Pool Farm and Primrose Estates) over the past two years is low in the case of Pool Farm and Primrose (between 3% and 5%) and exceptionally low on Hawkesley (between 1% and 3%). This suggests a settled community.

4.5.23 The turnover of four bedroom houses on Pool Farm (between 6%-22% per year) and Primrose (between 15% and 20% per year) is on the high side. The relative small size of the stock of this type on the two estates is low (20 units, such that one unit changing hands on Pool Farm is reflected as a 6% stock turnover), and so perhaps over magnifies changes in stock. Nevertheless, when considered alongside void rates

(6% for Pool Farm and 10% for Primrose), this suggests low demand for this type in Primrose. However, it is also notable that 4 bedroom houses here are as much likely to be subject to two or more bids as those in Hawkesley, which may reflect on a general shortage of 4 bedroom housing across the 3 Estates area.

Summary

4.5.24 In order to interpret and make sense of housing demand and supply indicators, it is important that the indicators are considered in relation to one another. In doing so here, we suggest the following market pattern on the 3 Estates:

Accommodation with reasonable level of demand, but transient tenancy

- **The 3 bed flats on Pool Farm** would seem reasonably popular. They have a relatively high bids to lets ratio compared to some other types, and the 4% void rate (out of a stock of 253) is not particularly high and they tend to be re-let within 50 days. However, the churn rate (at between 10% and 13%) is high, which suggests this form of accommodation is seen as a stepping stone to more satisfactory accommodation, which BCC Housing Officers suggest is the case;

Demand and Supply Balance, but high transient tenancy

- **2 bedroom flats on Pool Farm:** Void rates of around 2-3%, and void periods of around 60 days suggest that the stock supply and demand is broadly in balance, but the rate of turnover (9%) is rather high;

Unpopular accommodation with high transient tenancy

- **The 3 bed Maisonettes on Pool Farm and Primrose:** The void rate for the 3 bedroom maisonettes on Primrose is 9%. Whilst this type of accommodation has a higher bids to lets ratio than 3 bedroom houses, the stock has an annual turnover of around 8%-9%, which is quite high for units offering 3 bedroom family accommodation. To contrast, 3 bed houses on the same estates have a lower annual rate of churn, of around 3%-5%. The rate of churn for 3 bedroom accommodation in the South West HMA is 4.8%, and for Birmingham – 4.7%;

- **1 bedroom flats on Primrose and Pool Farm:** A moderately high void rate (6% void rate on the 83 units on the Primrose Estate, compared with the 3% void rate on the 226 units on Hawkesley). The key issue would seem to be the high rate of churn (10-14% on Primrose, and 10-12% on Hawkesley);

- **2 bedroom Maisonettes Pool Farm and Primrose:** The only void amongst the stock of 61 across the 3 Estates is on the Primrose Estate. However, churn is a key issue. For example, over the years 2006/7 and 2007/8 churn amongst this stock on the Primrose estate ran at 11%, whist in 2006/7, 3 of the 4, 2 bed Maisonettes on Pool Farm changed tenancy. The churn in the wider South West HMA and City is lower, at around 8%;

Balanced demand and supply, stable occupation

- **2 bedroom houses (most of which are on Hawkesley):** Relatively low demand is generally in balance with supply, with churn of between 4% and 8%, and voids at 1%, in Hawkesley, where virtually all this supply is located;

- **3 bedroom houses across the 3 estates:** Relatively low demand is generally in balance with supply in Pool Farm and Primrose (void rates of 2%-3%, and turnover of 3%-5%). Hawkesley is more popular, with voids at 1% as at March 2009, and turnover low at between 1% and 3%;

Further Supply may be required

- **4 bedroom houses**: This type has the highest bids to let ratio over 2005/6 – 2007/8, and incidences of multi bids to lets have been apparent across all three estates. Voids are generally very low, 0% on Hawkesley and 2% on Pool Farm. The 10% void rate on Primrose relates entirely to two properties on Ithon Grove. Turnover is low on Hawkesley at between 0% – 5%, whilst for Primrose (15%-20% turnover), and Pool Farm (6%-22%), the turnover rate is high for this type of family accommodation. This suggests a keenness for 4 bedroom housing, though offset by neighbourhood dissatisfaction in Primrose and Pool Farm;
- **Specialist Elderly Persons Accommodation:** Whilst there is a high turnover rate for the Bungalows, there are no current recorded voids, and the type has a high bid to lets ratio.

4.5.25 Overall, the pattern of demand and supply across the 3 estates is complex. Not only does popularity vary by estate, it also varies by dwelling type. Overall, based on an analysis of void and turnover rates Hawkesley is the most popular and settled estate, though there is a notably high turnover amongst the significant stock of Bungalows.

4.5.26 An analysis of bids to lets suggests that, in the first instance, people will accept accommodation in the "less popular estates" of Pool Farm and Primrose, with Pool Farm "over performing in terms of the incidence of multiple bids to lets for one bed flats and bungalows, and Primrose over performing with regard to two bedroom flats and two bedroom maisonettes.

4.5.27 By the same measure, bungalows and houses on Pool Farm and Primrose would seem just as likely to be subject to multiple bids as those on Hawkesley, whilst the 3 bedroom flats of Pool Farm are also popular by this measure. However, churn and void rates are higher for 3 and 4 bed houses on Primrose and Pool Farm, suggesting a desire to move on due to an unsatisfactory neighbourhood environment.

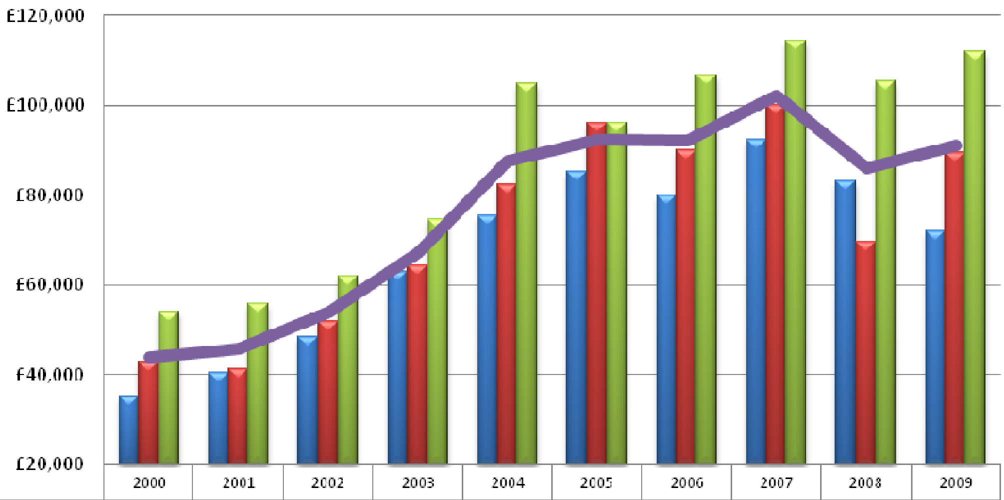
4.5.28 However, there seems a willing line of replacement households as the void four bedroom houses on Primrose estate tend not to be void for particularly long periods (current average, 75 days).

4.5.29 This suggests that neighbourhood dissatisfaction in Primrose and Pool Farm may be related to the high concentration of unit types (2 and 3 bedroom maisonettes, and 1 bedroom flats) which, by their nature, are occupied by transient tenants in these areas, thus undermining community stability.

4.6 House Prices and Sales

4.6.1 Using data from the Land Registry (until the end of March 2009) it is possible to analyse the average house price and levels of sales on properties of the 3 Estates. The following figures illustrate the overall house prices as a cumulative total of the Kings Norton NDC against the individual three estates.

Figure 4.19 Average Property Prices, 2000-09



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Primrose	£35,250	£40,672	£48,464	£62,936	£75,624	£85,375	£79,918	£92,429	£83,304	£72,000
Pool Farm	£42,915	£41,440	£51,918	£64,350	£82,440	£96,140	£90,070	£100,116	£69,600	£89,500
Hawkesley	£54,086	£55,837	£62,049	£74,749	£104,776	£96,166	£106,314	£114,341	£105,388	£112,000
Average	£44,084	£45,983	£54,144	£67,345	£87,613	£92,560	£92,269	£102,295	£86,097	£91,167

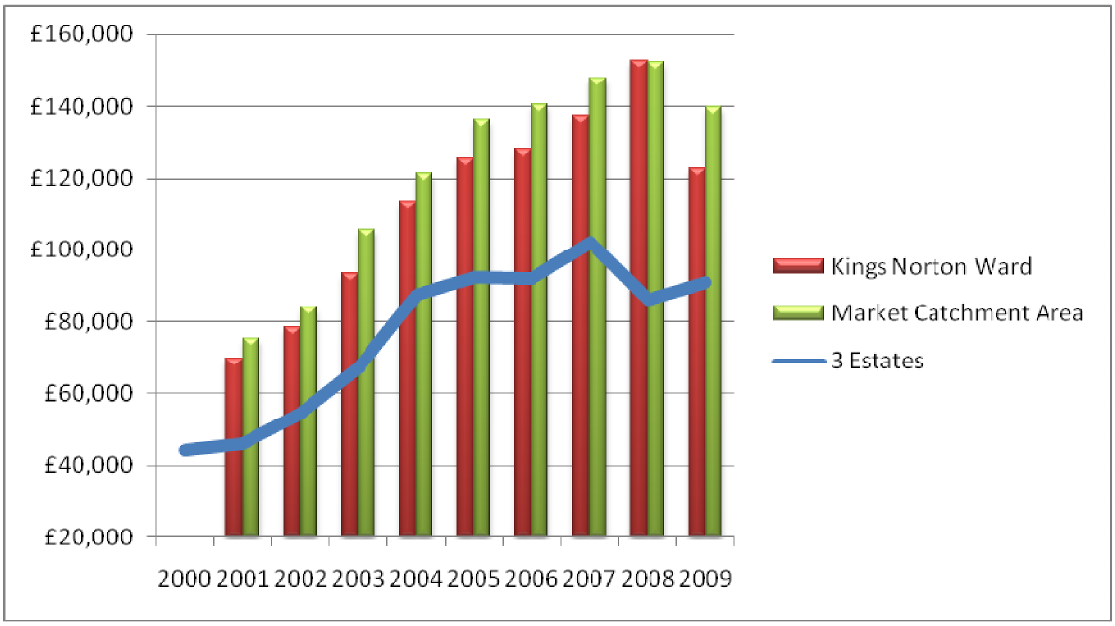
Source: nethouseprice.com (Land Registry), 2009

4.6.2 There has been an increase in the average price of dwellings sold on the 3 Estates from 2000-07, with a peak in average prices in 2007 of £102,295. However, since 2007, there has been a decline in the average price of 16% to 2008 (Quarter 1 of 2009 is shown, but reliable conclusions should not be based on this figure).

4.6.3 Of the 3 Estates, Hawkesley has the highest property prices, reaching a peak of £114,341 in 2007. However, more in depth analysis of 2007 prices shows that the most expensive homes on Pool Farm and Hawkesley are similarly priced (if the apparently purpose built owner occupied properties of Mash End Meadowsweet Avenue and Manitoba Croft are excluded from the Hawkesley average), the average for Pool Farm being pulled down by a number of significantly lower priced properties. Properties on Primrose are significantly lower priced than on Hawkesley and Pool Farm.

4.6.4 An analysis of price change since the market peak of 2007 (See Figure 4.20, below) also suggests that the markets of Hawkesely and Pool Farm are proving more robust than that of Primrose. Despite the difficult property market of 2008-09, the average price for a property on Hawkesley only dropped by 8% in 2008. Whilst house prices in Pool Farm saw a dramatic drop of 30.5% from 2007-08 values, which saw prices retreat to pre 2004 levels, there seems to have been more encouraging signs in the first quarter of 2009 (albeit based on only three transactions).

Figure 4.20 Average Property Prices, 3 Estates, Kings Norton Ward and Wider Catchment



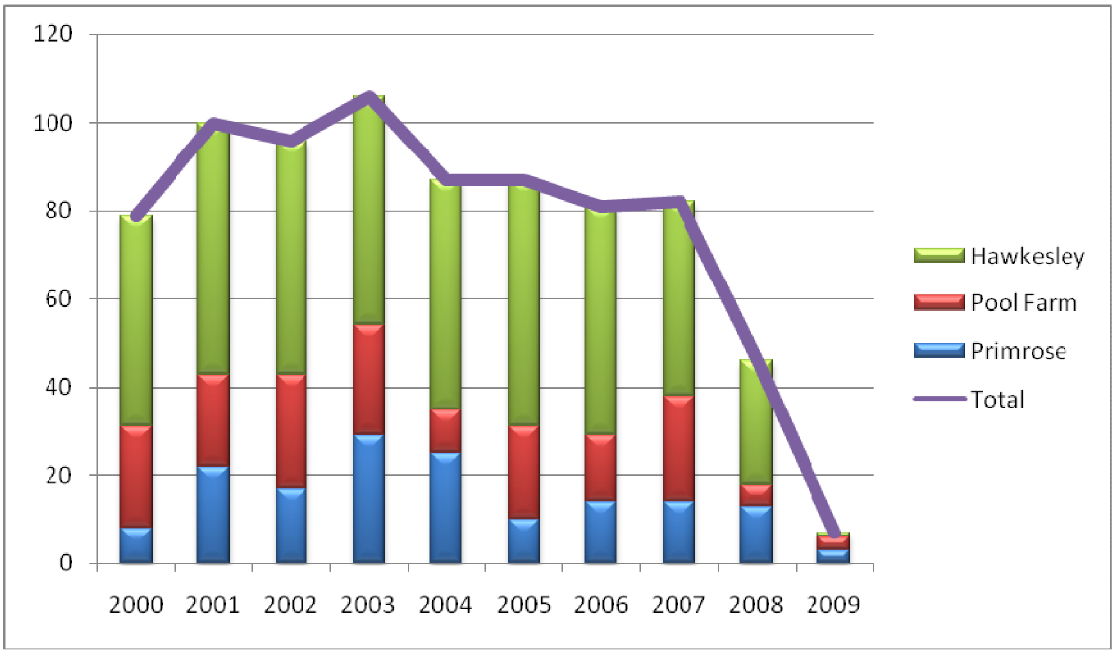
Source: nethouseprices.com/HomeTrack, 2009

4.6.5 From Figure 4.20 it is apparent that property prices on the 3 Estates are significantly lower than the average for the wider Kings Norton ward, and the wider market catchment area. These values typically range from 65%-75% of those achieved in the Kings Norton ward.

4.6.6 Both the Kings Norton ward and the market catchment area (as defined in section 3) follow a broadly similar pattern, with increases from 2001-08. Property prices in Kings

Norton tend to be 10% lower than those in the wider catchment area (apart from in 2008, when they were slightly higher).

Figure 4.21 Volume of Transactions in 3 Estates



Source: nethouseprices.com, 2009

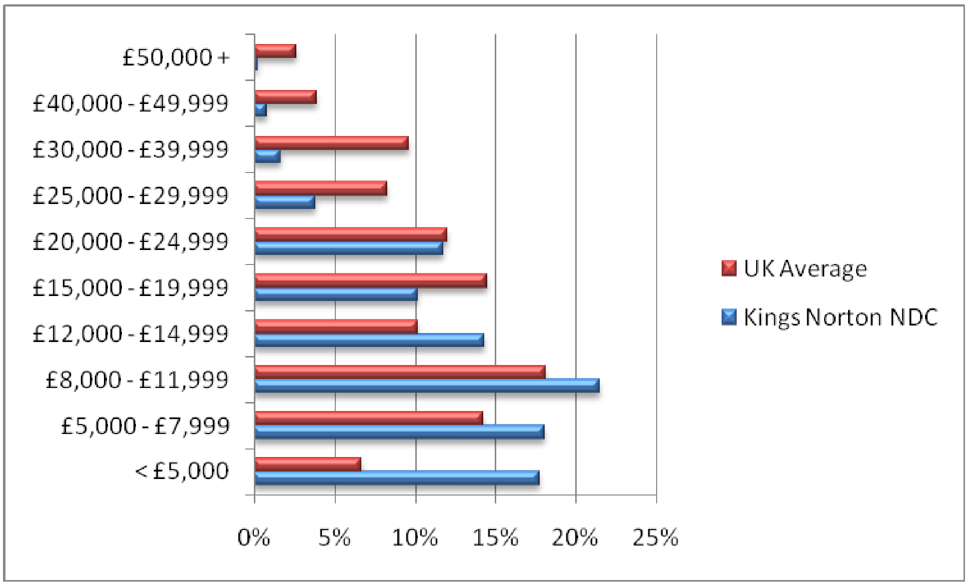
4.6.7 Figure 4.21 above identifies the volume of private sale transactions for the 3 estates. From the period 2000-08 the number of sales transactions on an annual basis was above 80 per year, with 2003 seeing a peak of 106. However, 2008 saw the volume plummet to just over half the previous levels. The first quarter of 2009 has seen only 7 transactions across all three estates.

4.6.8 Hawkesley dominates the 3 Estates market, with frequently over half of transactions occurring on this estate (which is not surprising given the large area). Pool Farm and Primrose fluctuate with their volumes, although Pool Farm has seen marginally more transactions than Primrose.

4.7 Incomes and Affordability

4.7.1 In this section, the income of residents of the 3 Estates is examined. It will have relevance when calculating the affordability of different tenures, later in the study.

Figure 4.22 Experian Income Data, 2008



Source: Experian, 2008

4.7.2 The most common income bracket for the Kings Norton NDC is £8,000 - £11,999 per annum, with 21% of respondents falling into this category. Whilst this is also the most common national income band, there is a more even spread across the income spectrum than in Kings Norton, where 57% of the working population earn under £11,999 per annum.

4.7.3 With reference to this data, it is assumed that the lowest income brackets relate to social housing tenants and the remainder related to owner occupiers. The lowest income bracket that first time buyers can purchase (based on the current lower quartile house prices, a five percent deposit, an affordability ratio of 30%, and an interest rate of 6%) is estimated to be £20,000 - £24,999, whilst that for those buying two years ago, at the peak of the market, would have been £25,000 - £29,999. However, a number of owner occupiers will have bought their property at the start of the decade or earlier at £50,000 or less, and on this basis it is fair to say that lowest income of owner occupiers could fall within the £12,000-£14,999 bracket.

5. Residential Development Activity

This section informs the regeneration of the Kings Norton 3 Estates by outlining the current and future supply of housing in the immediate and market catchment area. This section looks at the housing supply position in relation to planning policy and highlights new housing developments in the area.

5.1 Housing Requirement

5.1.1 The revised West Midlands Regional Spatial Strategy (published January 2008) sets out a housing requirement figure of approximately 2,500 dwellings per annum between 2006 and 2026. This equates to 50,000 new houses in the region (excluding any demolitions).

5.1.2 In order to meet the RSS target, Birmingham have undertaken a Strategic Housing Land Availability Assessment (SHLAA) to look at potential sites to provide new housing over this RSS period (i.e. until 2026).

5.1.3 The below table shows the capacity of the sites identified in the SHLAA, relevant to the Kings Norton ward and the surrounding market catchment.

Table 5.1 Capacity of potential sites identified by the Birmingham SHLAA (2008)

Ward	*Area of Development Potential (Ha)*	*Capacity of area for residential dwellings*
Kings Norton	30.4	1,075
Brandwood	87.4	1,607
Bournville	24.8	922
Northfield	6.9	225
Longbridge	16	1,636
Total	165.5	5465

Source: Birmingham City Council 2008

5.1.4 Table 5.1 shows that there is considered to be 165.5 hectares (409 acres) suitable for development potential within the market catchment for Kings Norton. Of this, 30.4 hectares (75 acres) is specifically set aside as potential development in Kings Norton, providing up to 1,075 dwellings.

5.1.5 It should be noted that although the areas are quantified as development potential, it includes areas that have been identified as being able to accommodate 'intensification of existing housing' and 'redevelopment of existing housing'. This is the case for much of the Kings Norton ward, where many of the sites identified by the SHLAA are recognised under these two main reasons[8].

5.1.6 The adopted Birmingham Unitary Development Plan (UDP) sets out existing allocations for new housing development (sites beginning with H) and housing regeneration (sites beginning with HR).

Table 5.2 Birmingham UDP Housing and Housing Regeneration Allocations

Ward	*Allocated sites*	*Size and Capacity (where provided)*
Kings Norton	HR21 – Kings Norton 3 Estates HR29 – Ingoldsby Estate HR29A – Wychall Farm Estate H54 – Ten Acres	 50 dwellings
Brandwood	H55 – Monyhull Hospital site H56 – Allens Croft HR29B – Saunderton Road/Bayton Road	600 dwellings 4 sites – 5 ha in total 200 dwellings
Bournville	n/a	n/a
Northfield	HR27 – Bellfields HR28 – Turves Green Estate HR53 – Tinkers Farm Centre H53A – Griffin Close	 65 dwellings 286 dwellings
Longbridge	Longbridge AAP	llings[9]

Source: BCC

[8] This also is the main reason for the large area in Brandwood – which proposes the intensification of existing housing to accommodate 1500 new dwellings on 85 hectares in the Druids Heath area of the ward.

[9] This includes land in the Bromsgrove District Council. However, as part of the Longbridge AAP it is taken to fall under the Birmingham City Council's control.

5.1.7 The SHLAA was written after the UDP, and thus some of the areas allocated in the UDP have been built out (such as H55 – Monyhull Hospital site, which has now been built out by Bellway and George Wimpey).

5.1.8 From these two documents, it is apparent of a strong commitment to improving and enhancing the housing offer within the market catchment.

5.2 Pipeline Supply and New Housing Developments

5.2.1 It is possible to look at recent planning permissions granted for residential developments on sites of 8 new homes or more, to gain an indicative impression of pipeline supply.

Table 5.3 Planning Permissions granted in Kings Norton Market Catchment Area 2007-2009

Planning Application	*Date Approved*	*Address*	*Ward*	*Applicant*	*Details*
S/05722/08/FUL	15/01/09	155/57 Wychall Road, 286/288/290/292 Staple Lodge Road	Kings Norton	Bromford Housing Group	Demolition of 6 existing houses, creation of 10 x 2/3 bedroom houses
S/00515/08/FUL	09/12/08	Westhill Road (site of St Nicholas' Church)	Kings Norton	McCarthy and Stone	Development of 2/3 storey building to house 30 sheltered apartments
S/04968/08/FUL	11/12/08	145-147 Redditch Road	Kings Norton	Piper Homes	Development of 12 dwellings
S/03826/08/FUL	28/10/08	Land at Turves Green	Northfield	Housing 21	2/3/4 storey building housing 87 apartments and 8 bungalows
S/06435/07/FUL	29/05/08	Hudsons Drive	Kings Norton	Optima Community Association	Demolition of factory, and construction of 22 houses and 18 flats
S/00288/08/FUL	08/05/08	Longfellow Road/Popes Lane	Kings Norton	W Bridger	Development of 46 dwellings
S/05678/07/FUL	08/05/08	Brandwood Park Road, Ash Meadow Public House	Brandwood	Wynpub Company Ltd	Development of 7 houses and 4 flats
S/06191/07/OUT	13/12/07	350 Groveley Lane	Longbridge	B & T (Leics)	Outline application for 13 dwellings

Planning Application	Date Approved	Address	Ward	Applicant	Details
S/05464/07/FUL	03/12/07	Kalamazoo, Mill Lane	Northfield	Miller Homes	Development of 152 dwellings
S/03319/07/FUL	23/08/07	Broad Lane	Brandwood	Waterloo Housing Association	Development of 23 houses
S/02604/07/FUL	02/08/07	35-37 Wharf Road	Kings Norton	HSP Estates	Development of 2 x 3 bedroom houses, 2 x 2 bedroom houses, 4 x 2 bedroom flats and one 3 bedroom flat
S/00672/07/FUL	15/06/07	Rubery Ln, Land at Hollyhill Nursing Home	Longbridge	David Wilson	8 detached homes
S/01111/07/FUL	23/05/07	Staple Lodge Road (Wychall Farm)	Northfield	Bromford Housing Group	Development of 48 affordable dwellings – 28 x flats, 20 x houses
S/04244/06/FUL	10/05/07	Bayston Road/Jasmin Croft/Broad Lane	Brandwood	Waterloo Housing Group	Development of 19 dwellings
S/05173/06/FUL	26/04/07	Hudsons Drive	Kings Norton	Caspian Asset Manageme nt	Development of 5 x 4 bedroom houses, 7 x 2 bedroom houses, 8 x 3 bed houses and 18 x 2 bed flats
S/00405/07/FUL	19/04/07	Sunderton Road/Broad Lane	Brandwood	Waterloo Housing Association	Development of 10 houses and 12 flats
S/07733/06/FUL	15/03/07	Harpers Road	Northfield	Bromford Housing Group	Development of 17 affordable dwellings – 11 x 2 bedroom houses and 6 x 3 bed houses
S/06936/06/FUL	15/02/07	1650 Pershore Road	Kings Norton	J Filer	Development of 18 houses and 38 flats

Planning Application	Date Approved	Address	Ward	Applicant	Details
S/06080/06/FUL	26/01/07	Harpers Road/Willetts Road/Purslow Grove	Northfield	Bromford Housing Group	Development of 57 affordable houses
S/05463/06/RES	21/12/06	Chatham Road/Deal Grove/Church Road/Maas Road	Northfield	Midland Heart	Development of 71 new dwellings

Source: BCC Planning Online

5.2.2 Table 5.3 shows that in the period 2007-2009 (May) that twenty sites received planning permission for a total of 741 dwellings. By far, the ward with the most new dwellings granted planning was the Northfield ward, with 6 sites being granted permission for a total of 440 dwellings. Some of these sites (such as the affordable housing scheme at Turves Green) have been included in planning policy (in this case as part of the Birmingham UDP HR28 – Turves Green Estate), but some (such as the scheme at Kalamazoo) are windfall sites and as such are unable to be forecasted.

5.2.3 Within the Kings Norton ward, a total of eight sites were granted planning permission, potentially providing a total of 205 new dwellings. Some of these schemes such as Hudsons Drive have been built out, but a number of schemes have been put on hold due to the wider economic climate and the inability of some developers to find funding for their developments.

New Developments

5.2.4 As already suggested, a number of sites have received planning permission but have not yet begun on site due to the uncertain and difficult economic climate. The recession has prevented the free flow of capital and finance that has become common over the past few years, which has particularly hit the housing market. Developers are, in some cases, unable to find financing for their schemes, while purchasers are unable to secure mortgages, resulting in a stagnation of the residential development market.

5.2.5 Thus, there are few housing developments currently being built out, with the following table (table 5.4) summarising those in the Kings Norton market catchment area.

Table 5.4 New Housing Developments on the Market in the Surrounding Area

Scheme	Address	Developer	Prices	Description
Chaddesley Grange Phase 2	Staple Lodge Road, B31 3EE	Bromford Housing Group	£62,500 - £73,000 (50% share)	Part of an ongoing development, this comprises of 2 and 3 bedroom shared ownership houses.
Saxon Gate	Turves Green	Bromford Housing Group	£50,500 - £63,000 (50% share)	This is part of a wider regeneration area. All the 3 bedroom houses are reserved, with only 2 bedroom apartments and houses remaining on a shared ownership basis.
Hudson Drive	Cotteridge, B30 3DE	Holliers Browne (Agent)	£67,500 - £95,000 (50% share)	This development comprises of 2/3/4 bedroom houses located near to Cotteridge Centre
Westminster Place	Alvechurch Road, B31 3PG	Barratt Homes	£130,500 – £209,500	Comprises of 1 & 2 bedroom apartments, with 3 and 4 bedroom houses.
Monyhull Grange	Monyhull Hall Road, B30 3QB	Bellway Homes	£199,995 - £289,995	Phase 2 of a large development, seeing the construction of 1/2 bedroom apartments and a number of 3 storey 3/4/5 bedroom family homes.
Brandwood End	Various (Sunderton Road, Bayston Road	Waterloo Housing Association	£34,987 - £159,950 (25%-75% ownership)	Part of a wider £17 million scheme to improve housing in the area, current scheme sees the release of 2/3 bedroom houses.
Waterside	Towpath Way and Boatmans Reach	Waterloo Housing Association	From £25,000 (25% share)	Two bedroom apartments (currently only 10 remaining) on this shared ownership scheme.

Source: DTZ, 2009

6. Retail Review

6.1 A retail assessment for the 3 Estates was originally undertaken by CBRE on behalf of the City Council in 2005 in order to assess the need for convenience foodstore retail development in the three estates area. An updated study (December 2008) brings the assessment up to date for the purposes of providing an evidence base to inform the development of the Planning Framework. The study also takes forward the findings of the 2003 Birmingham local centres study, which identified a gap in foodstore provision in this area.

6.2 The main retail offer within the 3 Estates is located at The Fold and Hawkesley Square. Additionally, there is Teviot Square and Greaves square, which have extremely limited provision. All centres are considered to have a poor quality environment with Teviot square being almost entirely vacant. The wider retail provision surrounding the 3 Estates is dominated by centres at Northfield, West Heath, King's Norton, Cotteridge, Kings Heath and Maypole.

6.3 In qualitative terms the study concludes that the foodstore offer is very limited in the 3 Estates area with the nearest major foodstores being some distance away. Therefore, provision continues to be inadequate to meet all but the most basic shopping needs and qualitative need remains clear.

6.4 In quantitative terms the study considers three alternative market share scenarios (1 – existing market share, 2 – market share plus 3.5% claw back, 3 – market share plus 7% claw back) and concludes that based upon scenario three a full price[10] foodstore of between 4,000 sq m to 4,500 sq m gross (approximately 2,000 sq m net convenience floorspace) can be supported between 2013 and 2018.

6.5 Important assumptions of note in the study for comparison with the Planning Framework proposals are that the study assumes a new population (increase from net additional homes) of 1,250 people. Additionally, it does not take into account the likely increase in average spending power brought about by the influx of 'wealth' through higher private home ownership.

6.6 The study also concludes that the qualitative benefits associated with a full price store are significantly higher than any other format, e.g. a discount retailer.

6.7 Taking into account the qualitative and quantitative need for a new foodstore, as well as qualitative improvements to local shopping areas the study then considers how and where such provision should be located. The study assumes The Fold will be redeveloped (improved), as will Teviot Square. It does not assume changes will occur to Hawkesley Square or to Greaves Square.

6.8 The study considers the foodstore development against the sequential test set out in PPS6. It is important to note that the study refers to the provision of a new foodstore as part of a local centre, or small district centre. The study concludes that there are no suitable sites within existing centres and that attention should be drawn toward a site, which is more accessible

[10] A full price foodstore refers to one of the big four foodstore retailers plus M&S and Waitrose

and serves the needs of the three estates in a sustainable manner. It reiterates that land fronting Redditch Road could represent a suitable location.

Summary

6.9 The supporting evidence base identifies both quantitative and qualitative need for a 'full price' foodstore to be provided at a site fronting the Redditch Road as part of a new local centre (or relocation and improvement to Teviot Square. The study also strongly suggests that if The Fold is redeveloped, then re-provision of existing floorspace would be sufficient to meet tenant demand and resident's short term shopping needs.

6.10 The study recommends that detailed feasibility work to determine the appropriate location for new development is undertaken, as well as examining the viability of the proposals and the need to embed the allocation of the centre into a relevant planning document. The Planning Framework will include a substantial amount of the further work identified by the study.

7. Stakeholder issues and aspirations

7.1 Introduction

7.1.1 In 2001, the three estates of Primrose, Pool Farm and Hawkesley were selected for inclusion in the Government's New Deal for Communities (NDC) programme. In preparation for the 3 Estates bid for NDC funding, a 'planning for real' consultation provided residents with the opportunity to express their needs and concerns and make suggestion for how the area could be improved.

7.1.2 This proved to be the first of a number of consultation exercises seeking the views of local people on potential improvements to the area. The purpose of this section of the report is to map consultation that has already taken place to enable views already expressed to be taken into consideration and avoid unnecessary duplication.

7.1.3 The principles of consultation within the Kings Norton 3 Estates have been defined by the KN3E Development Trust and are captured within its Consultation Strategy. Residents are encouraged to be involved, through the Community Development Team, at policy, programme, scheme and project levels during planning, strategic development, implementation and evaluation stages.

7.1.4 The principles defined in the KN3E Consultation Strategy have guided community engagement throughout the life time of the KN3E Development Trust.

7.2 The Kings Norton 3 Estates Development Study

7.2.1 In December 2003, John Thompson and Partners were commissioned by the Kings Norton 3 Estates Community Development Trust and Birmingham City Council to carry out a Development Study for the three estates of Hawkesley, Pool Farm and Primrose. The report identified a Preferred Approach to regeneration for the 3 Estates area.

7.2.2 The active involvement of the local community was an important part of the Development Study Process which were included at every stage of the process. Their input informed the understanding of the existing strengths and weaknesses of the area and helped to identify the opportunities for improvement.

7.2.3 Publicity for consultation events was achieved by various means which were designed to reach as many of the residents of the area as possible. The consultants liaised with the Community Development Trust and Birmingham City Council on all publicity matters in order to ensure that there was coordination between:

- existing mediums such as the 3 Estates newsletter, and Development Study specific material such as leaflets and information bulletins; and
- that there was Coordination with other events held by the Community Development Trust and Birmingham City Council.

7.2.4 The following methods were employed to keep residents and stakeholders aware of the consultation process and up to date with progress:

- Leaflets and Postcards – mailed to homes and also available in specific locations and giving details of the dates and times of forthcoming events;
- Newsletter – Used for feedback and advertising of events;

- Bulletin – Large format document explaining the four approaches;
- Direct Mailing – Personal invitations to Stakeholder meetings and 'Seeing is Believing' trips; and
- Website / Email address – Containing information and providing an opportunity for feedback.

7.2.5 The following methods of consultation were employed to gather information and judge levels of resident and stakeholder approval for various proposals:

- Exhibitions – Two major exhibitions held at three different venues around the 3 Estates;
- Hands-on-planning' – An opportunity for residents to investigate their ideas and record their comments in a visual manner;
- Street Talk' – A mobile exhibition venue which was taken out onto the streets to encourage greater levels of participation;
- Development Study Bulletin – Posted to all the homes in the area and providing an alternative to visiting the final exhibition. Also contained an opportunity to complete a feedback form;
- Comments sheets – To collect the views of residents and Stakeholders for later review and assimilation and to confirm viewpoints;
- Questionnaires – A more structured form of information gathering to record quantifiable responses to proposals;
- Freephone number – A means to obtain further information or request a home visit for residents who are less mobile;
- Freepost address – A simple means to return comments sheets.

7.2.6 The main conclusion to be drawn from the consultation was that there was a strong level of support for some form of radical change on the 3 Estates.

7.2.7 The preferred approach proposed large scale redevelopment through the construction of new housing, new shopping and leisure facilities and significant areas of public open space. It proposed that funding, generated by redevelopment, could enable significant improvements to be made to the retained housing stock and for environmental improvements to be carried out throughout the area.

7.2.8 Improvements to sustainable forms of transport were proposed to create stronger linkages both inside and outside the area and help reinforce strategies for improved training and job creation for local people. The creation of extended community facilities based around a new Secondary School would provide a range of new services and create a social and educational focus for the whole community.

7.2.9 In summary, the preferred approach aimed to meet all of the objectives for a revitalised 3 Estates:

- greater housing choice;
- better quality environment;
- improved amenities and service delivery;

- improved access to employment and training;
- easier social and physical access and linkages;
- closer integration with Kings Norton;
- better image.

7.2.10 However, there were a number of key concerns which prevented an even higher level of support for this approach:

- how long will residents have to live with the disruption caused by redevelopment?
- how will the older residents of the area be affected by redevelopment – particularly the residents of Campion and Saffron?
- how will existing leaseholders be able to afford a suitable replacement home if their house falls within a redevelopment area?
- what will be the effect of redevelopment on the value of residents' homes?
- to what extent will additional traffic serving the proposed new hotel and supermarket cause added disturbance and loss of amenity to surrounding residents?
- will a new supermarket on the Redditch Road be truly affordable to local residents?
- what affect will the provision of new retail facilities on the Redditch Road have on the existing local shopping facilities at Hawkesley Square and The Fold?
- what will be provided in terms of new youth facilities?
- what are the proposals for Primrose School and how will this also affect the Nursery School attached to it?
- do new homes need to be built on the 'Spinney'? (Land fronting Longdales Road between Meadowsweet Avenue and Primrose Hill).

7.3 Further Studies

7.3.1 Since the publication of the Kings Norton 3 Estates Development Study in 2005 a number of further studies have been undertaken:

- In 2006, consultants Donaldsons were appointed to review the preferred approach and consider the way forward for the City in doing so. As a result of this work, major issues were identified in respect of the cost to the Housing Department's Housing Revenue Account, particularly the loss of around 200 affordable units and concerns over the proposed timescales for redevelopment. This highlighted the need for further work to be undertaken, and Tribal Consultants were appointed to undertake a study detailing the implications to the Housing Revenue Account if the Preferred Approach were to be implemented.
- CBRE were commissioned to carry out a Retail Study in 2006. Although currently being updated the draft report recommends that a supermarket/superstore of up to 4,500 sq.m (gross area) could be accommodated as part of a new centre adjacent to Redditch Road. It also recommends improvements to existing shopping facilities at Hawkesley and the replacement of The Fold with a new neighbourhood centre of similar size and facilities.

- Further urban design work was undertaken by the City Council's City Design Team to work up the proposals in the Development Study in more detail.

7.4 New Futures Programme

7.4.1 Following extensive work by the Housing Department and the Kings Norton 3 Estates Community Development Trust, 4 options were developed and further public consultation was undertaken. Over 50% of local residents responded and again there was overwhelming support for the most radical option. Known as the new futures programme, it has now been refined to achieve a level of transformational change that will meet the aspirations of the local community, realise the New Deal For Communities vision and be affordable to the Housing Revenue Account. This has led to the development of what are believed to be firm, realistic and deliverable proposals for the regeneration of the 3 Estates comprising of:

- a programme of clearance and development over the next 10-15 years;
- the phased demolition of some 826 properties of mixed tenure, enabling the release of approximately 24 hectares for redevelopment;
- the creation of at least 1,000 new dwellings for rent, shared ownership and private sale;
- no reduction in the number of affordable housing units as a result of the scheme;
- a new supermarket on a site adjacent to the A441 Redditch Road and new facilities to serve the local community.

7.5 Planning Framework Consultation Strategy

7.5.1 It is apparent that over the past five years a considerable amount of consultation has been undertaken and a clear picture of residents and stakeholder aspirations has emerged. Birmingham City Council and Kings Norton 3 Estates Community Development Trust have highlighted that consultation fatigue is becoming increasingly apparent within the 3 Estates' community (consultation fatigue occurs when local community groups are repeatedly asked to engage with consultation on the same issues with little evidence that any progress has been made from previous consultation exercises). Therefore, the Planning Framework process aims to build upon this work minimising the need to undertake similar consultation again.

7.5.2 With the agreement of Birmingham City Council and Kings Norton 3 Estates Community Development Trust a consultation strategy that engages with key stakeholders throughout the development of the framework and undertakes full public consultation at the draft Planning Framework stage will be undertaken.

7.5.3 It is proposed that key stakeholders identified by Birmingham City Council and Kings Norton 3 Estates Community Development Trust will be invited to comment at three key stages of the study.

- Stage 1 Inception. During May Stakeholder will be invited meet the study team and identify their key aspirations and concerns. This information will build upon the previous consultation findings;

- Stage 2 Options. During July Stakeholders will invited to comment on Planning Framework options developed by the study team. The options will identify alternative development options for achieving the objectives of the New Futures Programme;
- Stage 3 Draft Planning Framework. During September Stakeholders will be invited on the preferred approach developed from the previous options analysis stage.

7.5.4 A full public consultation event in each of the three estates will be undertaken in September where all residents will have an opportunity to comment on the Planning Framework proposals.

7.5.5 Residents will be updated by progress through News Letter articles and Leaflets distributed to each household.