

Iceni Projects

Housing Delivery Study

London Borough of Merton: Final Report | April 2021



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1. Introduction

1.1. London Borough of Merton (“LB Merton”) have commissioned IcenI Projects (“IcenI”) to investigate and report on opportunities and barriers to housing delivery in Merton.

- 1.2. There is a need to increase housing delivery in Merton to meet local housing needs and comply with wider policy requirements set out in the London Plan and by national government. However, Merton is a relatively constrained borough in terms of land for new homes which does not have significant brownfield development land, significant large sites or many regeneration opportunities. Indeed, much of Merton is more suburban in nature. In this context, the Study therefore explores how housing delivery could be increased.
- 1.3. The Study’s core objectives are set out below.

Housing Delivery Study: Core Objectives

- Identify housing delivery trends in Merton and in its different neighbourhoods, profiling the types of housing which have been delivered;
 - Appraise the delivery timescales for different forms of development, including from decision to start and start to completion;
 - Identify what attracts or discourages the development industry from building homes in Merton, what potential barriers there are to housing delivery, and what the Council might be able to do to address these;
 - Understand views of the local communities within Merton regarding the types of housing they want to see in Merton and their concerns regarding development;
 - Advising on opportunities to accelerate or increase housing delivery in Merton in the short, medium and longer-term.
- 1.4. The Study has included analysis of the form and types of development which have been brought forward in different parts of Merton, and how this is changing. It considers the need to increase housing delivery in Merton and seeks to examine how this might be achieved.
- 1.5. A major component of the Study has been the engagement of almost 2,100 Merton residents to understand their views about what type of housing development they want to see in Merton, where it should be built, and what their priorities are for housing delivery. This has been undertaken alongside a wider engagement programme through which IcenI has spoken to a range of wider stakeholders – including developers, registered providers, Council officers and Members – to interrogate key issues and factors which influence the planning and development process in Merton.
- 1.6. The research and engagement have then been brought together to set out what the Council can do, either itself or working with other stakeholders, to increase housing delivery in Merton.

- 1.7. The Council is in the process of preparing a new Local Plan which will set out policies to guide development in Merton and identify areas or sites suitable for development. The intention is that the Housing Delivery Study, together with other pieces of evidence, will inform the preparation of the new Local Plan and the policies within it.
- 1.8. The wider evidence being prepared includes a Character Study which is exploring what contributes to local character in Merton and how development can respond to this. The Council's aim is to deliver sustainable, high quality development that responds to local character and which strengthens and improves the quality of Merton's distinct neighbourhoods and places.

Report Status and Structure

- 1.9. This report is structured as follows responding to the core requirements of the brief:
 - **Section 2:** Understanding the London Borough of Merton
 - **Section 3:** Evolving Policy Context for Housing Delivery
 - **Section 4:** Past Housing Delivery Trends in Merton: Summary
 - **Section 5:** Perceptions of Housing Delivery and Key Issues: Summary
 - **Section 6:** What are the Barriers to Housing Delivery?
 - **Section 7:** Looking forwards at Housing Delivery in Merton
 - **Section 8:** A Framework for Increasing Housing Delivery

2. Understanding Merton

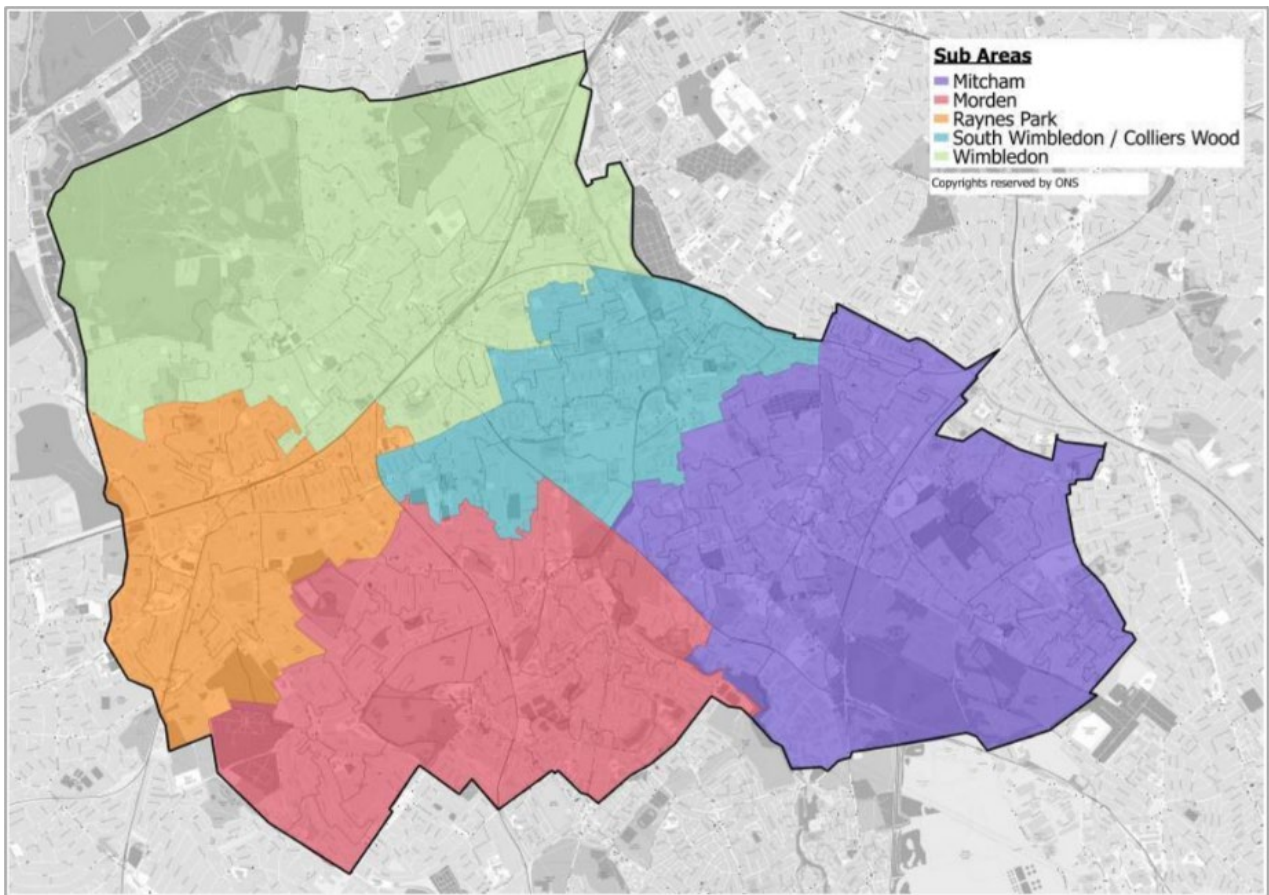
1.10. **Merton is a south-west London Borough which adjoins Wandsworth, Sutton, Croydon and Kingston to the north, south, east and west respectively.**

2.1. Merton is home to 206,500 people in 84,600 homes and accommodates 108,000 jobs and more than 100 parks and green spaces from Wimbledon and Mitcham Commons to small pocket parks in residential areas.

Merton's Neighbourhoods

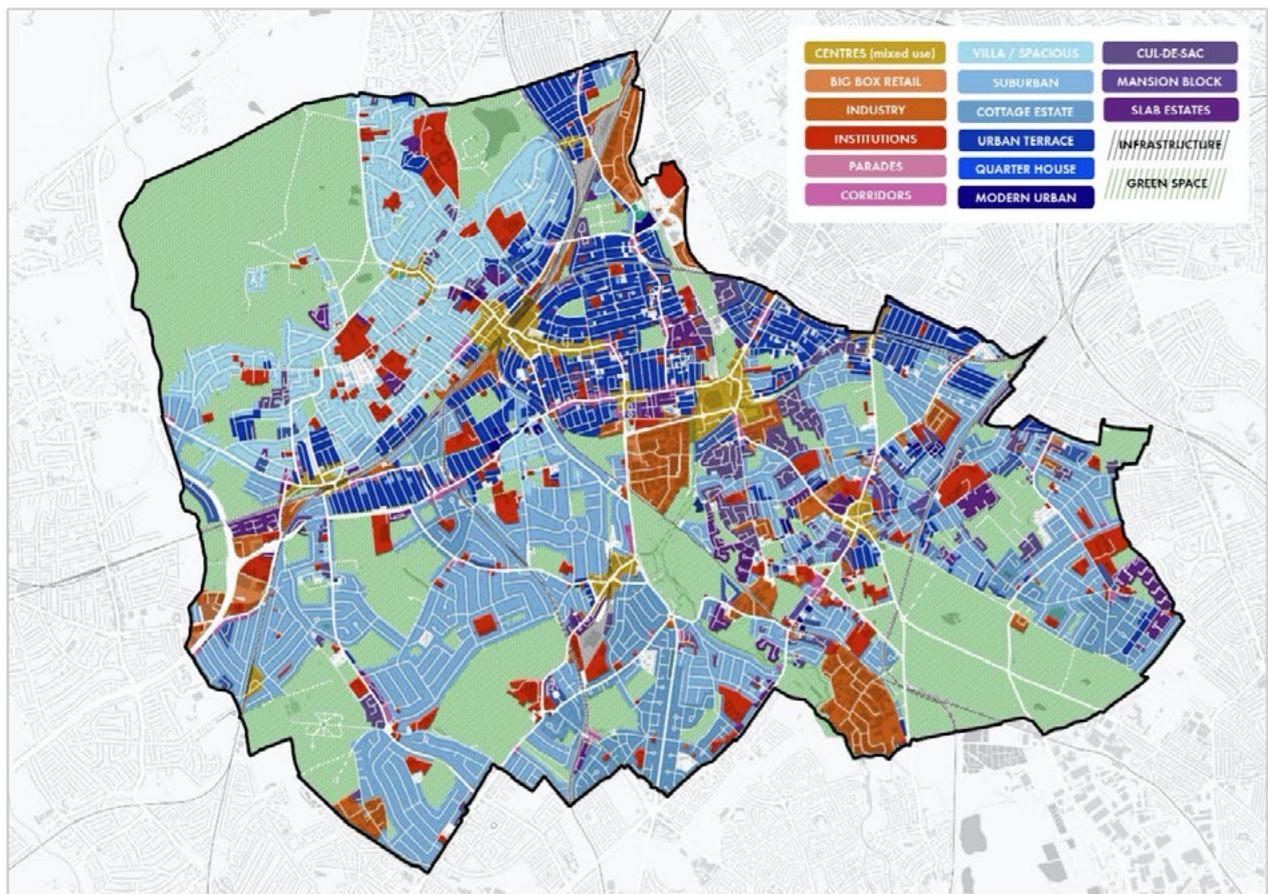
2.2. Merton can be broken down into five different neighbourhoods, each of which has a distinct character and separate town centre. These are shown below and have formed building blocks for considering housing development trends and the views of local residents regarding what type of housing development they want to see in Merton, where it should be built, and what their priorities are for housing delivery.

Figure 2.1: Merton's Neighbourhoods



- 2.3. The Council has commissioned a Character Study which is exploring how the urban form varies in different areas, what local people value about their area and what they think makes each neighbourhood special, or could be improved. This will provide a detailed assessment of each area.
- 2.4. Merton has largely however developed as a suburban area through the progressive expansion of London. The map below helps to explain how Merton has developed over time. Prior to suburban growth from the 19th century onwards, Merton as it is today would have been a place of villages - from Wimbledon Village and Merton Park to Church Road, Central Mitcham and Colliers Wood.
- 2.5. Merton began to grow as new transport links were developed. The main line through Wimbledon opened in 1828; the Wimbledon and Croydon Railway which runs through Mitcham in 1855; the current Thameslink Route in 1868 (which was subsequently extended to Sutton in 1930); and the District Line extension from Putney Bridge to Wimbledon in 1889. This spurred suburban growth around the rail stations pre-1919 including at Mitcham, Merton Abbey, Morden and Wimbledon.

Figure 2.2: Residential Typologies in Merton (credit to Allies and Morrison)



- 2.6. The more urban parts of Merton are located in the north, with tightly packed streets of terraced Victorian and Edwardian housing around Colliers Wood, South Wimbledon and Wimbledon Park; as well as North Mitcham on the borders with Tooting.
- 2.7. Morden developed later, following the extension of the then City & South London Railway (now the Northern Line) in 1926 and the opening of the Wimbledon-Sutton Rail Line in 1930, spurring residential growth in the inter-war period in lower density suburban neighbourhoods comprising semi-detached and terraced homes with gardens and which included the development of the St Helier Estate in the 1930s by the London County Council. Mitcham also saw substantial growth in the inter and post-war period; including the development of social housing in the inter-war period and then redevelopment of the Eastfields, Phipps Bridge and Pollards Hill areas.
- 2.8. An overview of the five neighbourhoods within Merton is set out in the Table below. This includes commentary on the built form of each neighbourhood, key socio-economic characteristics, and connectivity.

Table 2.1 Overview of London Borough of Merton Neighbourhoods

Neighbourhood	Built Form	Socio-Economics	Connectivity
Colliers Wood	Characterised by grid terraced housing around transport nodes with pockets of loosely structured suburban development and post-war Council Estates. A proportion of the terraced housing has been converted into flats.	Focused towards professional, and managerial occupations. Approximately 48% of residents have obtained degree level qualifications and 10 % of residents have no qualifications. Around 80% of residents aged 16-75 are economically active.	A well-connected neighbourhood with a PTAL rating of between 4 and 6. The Northern line stations in South Wimbledon and Colliers Wood together with a variety of buses serve the area.
Mitcham	Characterised by Inter War Council Estates and medium density inter-war suburban development with grid terraced housing to the east.	Focused towards professional, administrative and skilled trade occupations. Approximately 30% of residents have obtained degree level qualifications and 20% of residents have no qualifications. Around 70% of residents aged 16-75 are economically active.	Poor connectivity with an average PTAL of 2-3. The area is mainly served by buses together with tram and three train stations, namely Mitcham Eastfields and Mitcham Junction and Tooting towards the north.

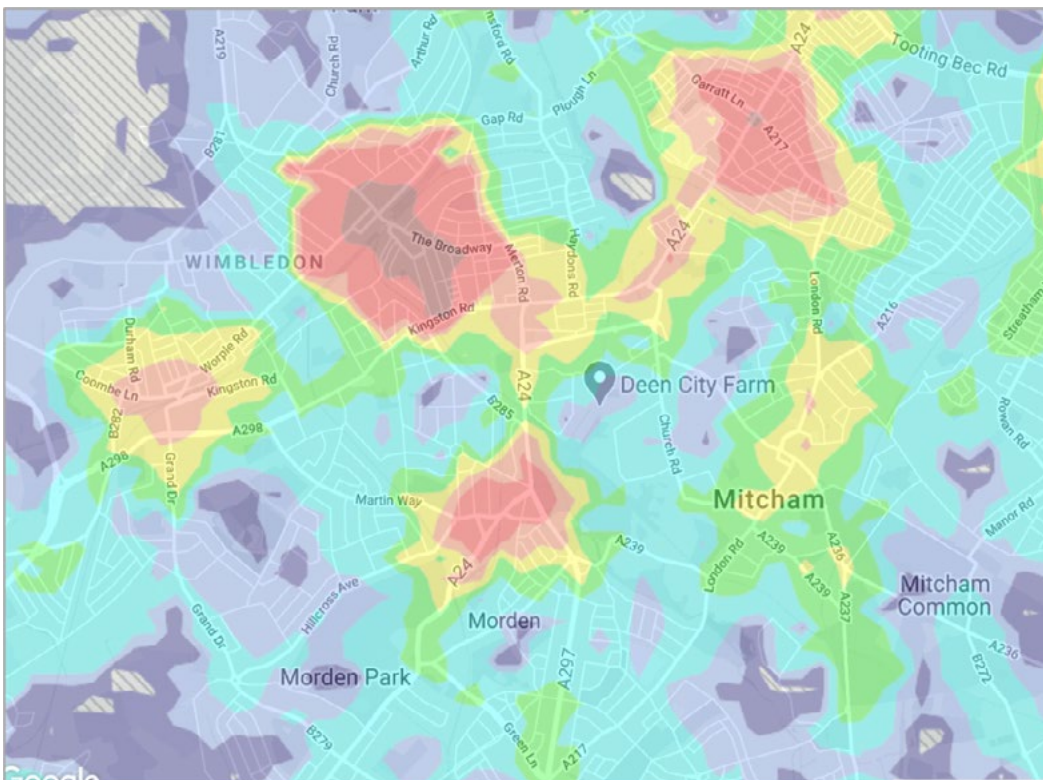
Neighbourhood	Built Form	Socio-Economics	Connectivity
Morden	Characterised by medium intensity suburban development comprised primarily of semi-detached housing as well as 19th Century terraced housing around the town centre.	Focused towards professional, and managerial occupations. Approximately 48% of residents have obtained degree level qualifications and 10 % of residents have no qualifications. Around 80% of residents aged 16-75 are economically active.	The PTAL varies from 1 in Lower Morden to 6 in Morden Town Centre. Morden Underground station has regular train services to Central London. Morden South and South Merton have a 30 min service frequency.
Raynes Park	Characterised by grid terraced housing and medium density suburban development with more loosely structured, larger family homes north of the railway line.	Focused towards professional, administrative and skilled trade occupations. Approximately 30% of residents have obtained degree level qualifications and 20% of residents have no qualifications. Around 70% of residents aged 16-75 are economically active.	The area is well-connected with a PTAL varying from 3 to 5. Raynes Park train station is the key transport hub with regular suburban services to London Waterloo. In addition, Wimbledon Chase train station also serves the area; however, trains are only every 30 minutes.
Wimbledon	Characterised by larger properties set in a loosely structured suburban form in Wimbledon Village/ Hill with pockets of 3-4 storey flatted development off Worple Road and close to Wimbledon Station and grid terraced housing to the south-west of rail line.	Focused towards professional and administrative occupations. Approximately 30% of residents have obtained degree level qualifications and 20% of residents have no qualifications. Around 70% of residents aged 16-75 are economically active	A high PTAL rating of 6b and 6a which is supported by strong connectivity to London. The neighbourhood benefits from access to Wimbledon Railway Station which provides frequent train and tube services into Central London and the tram to East Croydon.

- 2.9. The profile of Merton’s neighbourhoods thus varies relatively significantly. Wimbledon has a strong density of public transport connections and a high concentration of those employed in managerial or professional roles, the level of which is more than twice that in Mitcham and Morden which saw later suburban development and have weaker transport accessibility in particular to Central London.
- 2.10. The morphology of the different areas within Merton, and their transport accessibility, has influenced the level and nature which has been seen in recent years.

Transport Accessibility

- 2.11. Transport accessibility varies across Merton. As described above, it has influenced the timing and nature of development of different parts of Merton. But it also continues to influence the profile of housing demand and development interest in different parts of Merton today.
- 3.12. Transport accessibility varies across Merton which in turn influences residential values, demand and absorption rates. The map below shows the relative Public Transport Accessibility (PTAL) ratings of different locations within Merton. It is strongest in central Wimbledon and central Morden; followed by Raynes Park, South Wimbledon and Colliers Wood. It falls as you move away from the rail or tube stations.

Figure 2.3: PTAL Ratings (Source: tfl.gov.uk)



- 2.13. Wimbledon has the greatest network capacity, with high frequency services running in multiple directions. Trains from Wimbledon train station taking 16 minutes to London Waterloo, 32 minutes into London Blackfriars and around 35 mins to Victoria. This will contribute (other things being equal) to the potential to support higher sales rates than other locations; and is an influence on residential values (alongside quality of place and local services). Similarly, in other locations in Merton, public transport accessibility to larger employment centres influences potential absorption rates for residential development.
- 2.14. The tube and overland rail services provide transport links to concentrations of higher wage jobs in Central London. This influences the earnings profile of people who would potentially seek to live in these areas – what those seeking to rent or buy a home can afford – which feeds through into residential values.
- 2.15. Overall, there is a strong correlation between public transport connectivity, in particular to Central London, and higher house prices. This can be seen within Merton, with locations which offer high frequency transport accessibility to higher paid jobs in Central London having a socio-economic profile more focused towards those in higher paid roles and commanding higher residential values.

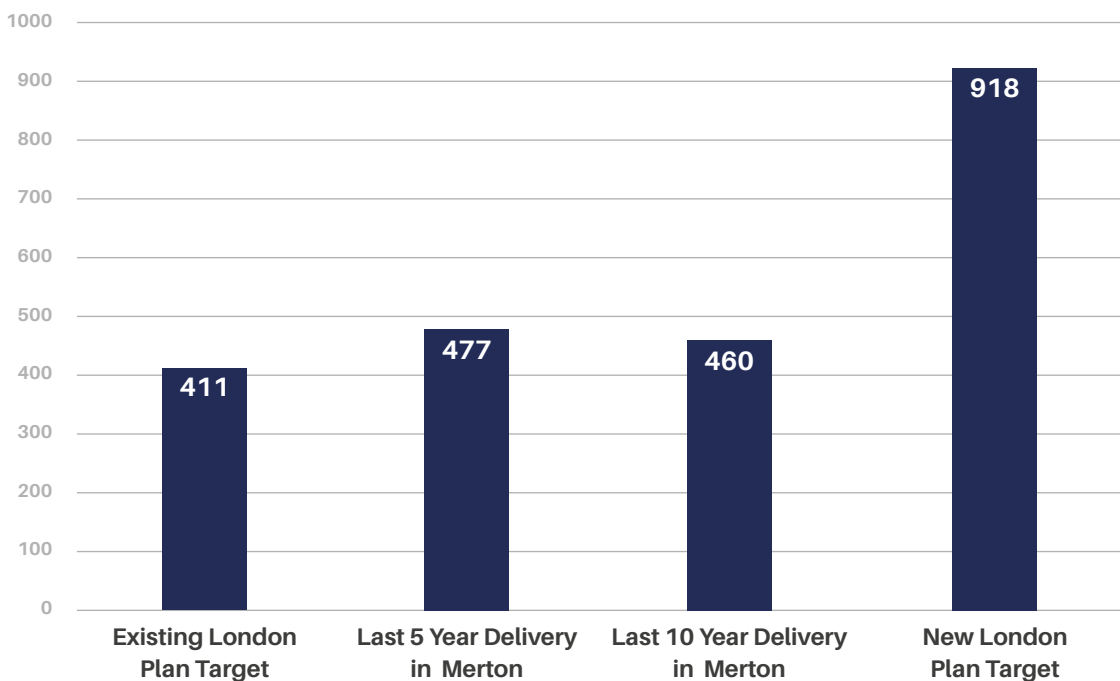
3. The Context for Increasing Housing Delivery

- 3.1. **Housing delivery is influenced by planning policies, both within the London Plan - which sets housing targets - and Merton’s own Development Plan which identifies the local housing requirement, allocates sites and sets out policies for development management.**
- 3.2. The Figure below shows the evolution of strategic policies for London and Merton’s own Local Plan over the last decade.

Figure 3.1: Evolving Planning Policies



Figure 3.2: Historical Housing Delivery compared to Housing Targets in Merton



- 3.3. The new London Plan however requires a significant uplift in housing delivery in Merton to now be delivered. Housing delivery needs to increase by an average of 458 dwellings a year (equal to an almost 100% increase) to what has been achieved over the last 10 years. This needs to be achieved effectively through intensification within Merton's existing neighbourhoods.
- 3.4. The strategic policy framework for Merton set out in the 2021 London Plan envisages that key town centres – Wimbledon, Mitcham, Morden and Colliers Wood – offer 'high' potential for residential growth.
- 3.5. Furthermore Wimbledon, Colliers Wood and South Wimbledon are identified within the Crossrail 2 South Opportunity Area which indicatively is expected to contribute around 5,000 homes and 6,000 jobs through intensifying the use of land, taking account of the existing transport infrastructure and potential of Crossrail 2 which would run through Wimbledon (as well as Raynes Park).
- 3.6. Set against this, the policy framework for employment land is also tightening, with Merton identified as a 'retain industrial capacity' borough. The London Plan is introducing high affordable housing requirements for industrial land as well as requirements for no net loss of industrial floorspace. In a context whereby industrial values are increasing; these factors affect the viability of redevelopment of industrial land.

The Housing Delivery Challenge

- 3.7. Housing delivery needs to increase to meet housing need. The NPPF sets out that the unconstrained housing need should be assessed using the 'standard method' set out in Planning Practice Guidance. This, as at February 2021, defines a minimum Local Housing Need for 1,519 dwellings per annum for Merton. The uncapped need would be higher still at 1,819 dpa based on household growth and an upward adjustment of 68% to improve affordability.
- 3.8. Government recently consulted on Changes to the current planning system which proposed adjustments to the standard method for calculating housing need. On 16th December 2020, the Government issued formal revisions to the method through the PPG on Housing and Economic Development Needs Assessments. This includes an additional fourth step to the standard method requiring an uplift of 35% on top of the figure generated by the first three steps for authorities with one of the top 20 most populated cities in England, which is relevant to London.
- 3.9. The additional 35% uplift will be applied to the entirety of London (i.e., all Boroughs) and it will be for the Mayor to determine the overall distribution of this housing need in the next London Plan. It is not possible to determine the impact of this additional uplift on Merton specifically.
- 3.10. Housing delivery in Merton however is evidently constrained by land availability and strategic development constraints such as Metropolitan Open Land ("MOL") which is protected from development by planning policies. Within London, housing requirements are thus principally set through the London Plan process. The minimum requirement for a new Local Plan in Merton is thus to deliver 9180 dwellings (918 dpa) over the 2019-29 period.

- 3.11. A significant scale of housing need, beyond that which planning policies set out can be met, is not a factor which is unique to Merton. The evidence points towards a strategic challenge across London to increase housing delivery. The new London Plan housing target falls short of the current standard method assessment of need and the next iteration of the London Plan will have to be aligned with new national policy and guidance which requires an additional 35% uplift over and above the current calculation of local housing need using the standard method.
- 3.12. The rate of housing delivery in the London Borough of Merton has been relatively low. Over the last decade from the beginning of the previous recession in 2009 up to the latest monitoring year, housing stock growth has been equal to around 0.4% per annum¹. The Table below puts this rate of housing growth in a London context over the last 10 years as well as considering delivery trends the post-recession period from 2014 to 2019.

Table 3.1: Rate of Housing Stock Growth in London Borough of Merton (Source: MHCLG Live Table on Housing Stock)

	2009-2019 (%)	2014-2019 (%)
London Borough of Merton	0.4%	0.6%
Outer London	0.7%	0.8%
Inner London	1.1%	1.1%
London	0.8%	0.9%
England	0.7%	0.9%

- 3.13. This is in part a reflection of the geography of Merton which does not have significant tracts of brownfield land which is readily available for development, and the protections afforded through planning policies for open space and employment land. It is influenced by the complexities of delivery associated with development within Merton’s Estates. However, it is also a reflection of lower development interest historically in Merton which has been influenced by a multitude of factors explored in this report.

¹This expresses completions relative to the housing stock in an area to calculate a housing stock growth rate which enables comparisons of housing delivery between different areas

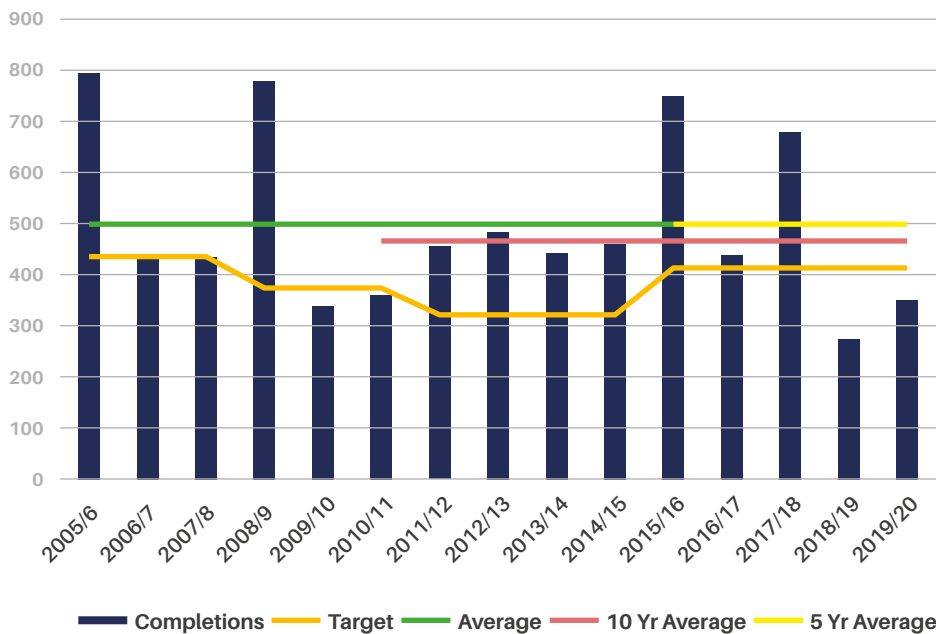
4. Past Housing Delivery Trends - A Summary

- 4.1. **This section of the report summarises the headline analysis of development trends by neighbourhood over last fifteen years.**
- 4.2. The full extent of our analysis is contained in Appendix A1 which provides a greater level of detail around the neighbourhoods where we have disaggregated the data by type, size, location and tenure and considers the differences between the neighbourhoods. Factors which influence delivery have also been considered.

Housing Delivery Trends: Merton

- 4.3. The starting point is considering development trends at a Borough level. The Figure below provides a view of net housing completions over the last fifteen years in Merton. The rate of housing delivery has averaged 495 homes over the fifteen year period.

Figure 4.1: Net Completions Trends in Merton Borough, 2005/06 - 2019/20



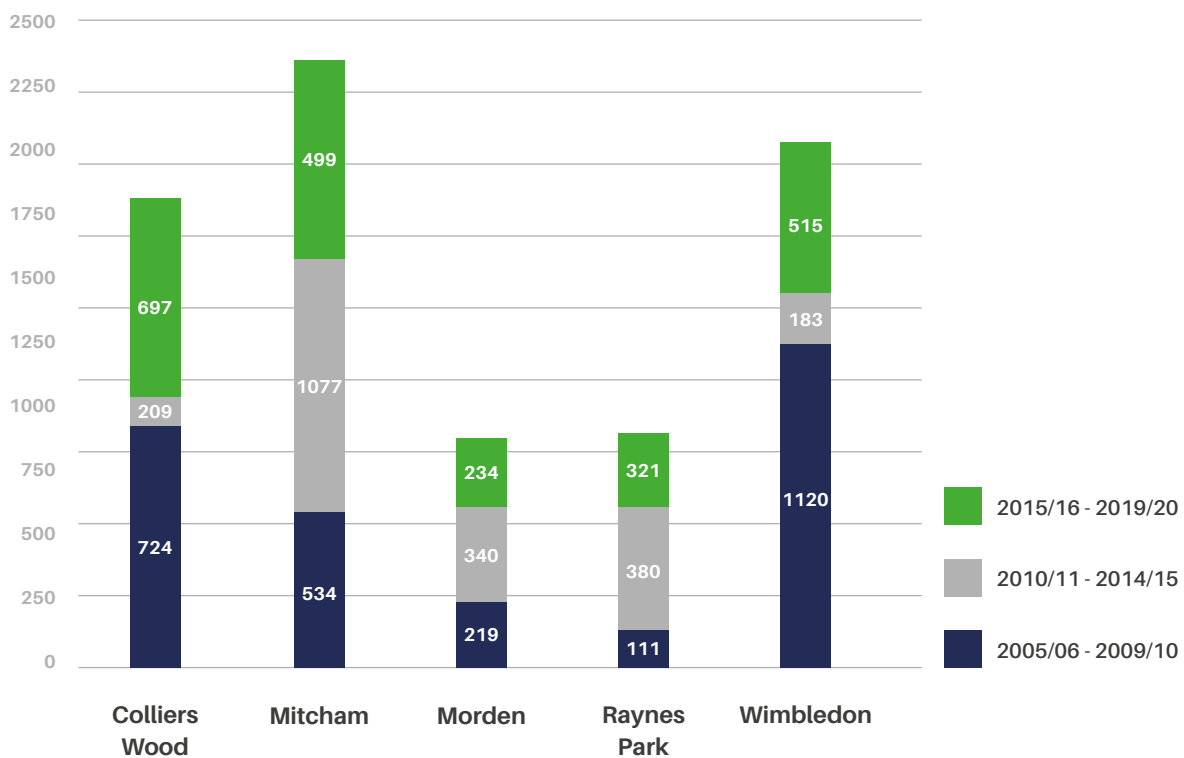
- 4.4. The credit crunch and subsequent economic recession had a significant impact nationally on housing delivery. The effects of this were particularly borne out over the 2009-13 period which can be seen in Merton, with low housing delivery over this period. However, whilst at a national level, housing delivery has increased over time since 2013, there has been a less pronounced upward trend in Merton.
- 4.5. Merton has seen housing delivery exceed the relevant London Plan target over the last fifteen years as a whole – exceeding the number of homes required (equal to 5,735 homes) by around 1,700 homes since 2005. However, it is important to set this level of housing delivery in context.

- 4.6. Over the ten year period, Merton has had one of the lowest rates of delivery of any of the London Boroughs. It has seen a rate of housing delivery over the last decade, which is half the London average, and a more than 40% below the national average. This is in a context in which housing delivery nationally has fallen substantially short of housing need.
- 4.7. Housing delivery is also particularly low when set against the scale of housing stock, population and strong characteristics of the housing market in Merton. The substantial house price growth which has been seen is symptomatic of a sustained supply-demand imbalance. This therefore doesn't suggest a 'market capacity' issue is constraining delivery; however, land supply is constrained.
- 4.8. The position is however a more nuanced one than can be understood through consideration of housing delivery and the strength of the market at a Borough-level. Overall housing delivery and the factors which affect delivery have to be considered by recognising the varying characteristics of Merton's neighbourhoods.

Housing Delivery Trends: Merton's Neighbourhoods

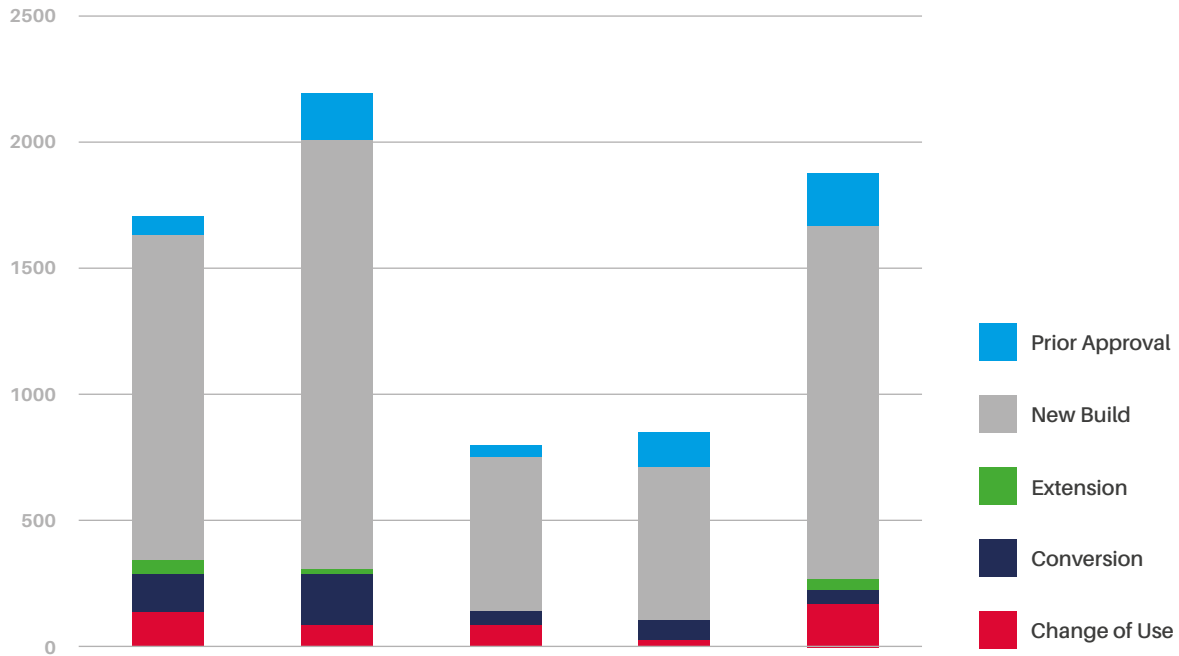
- 4.9. At a neighbourhood level, the eastern neighbourhood of Mitcham has seen the strongest housing delivery over the last fifteen years as a whole and contributed strongly to delivery in the 2010-15 period in particular. This was influenced by a number of large strategic sites coming forward in Mitcham including the regeneration of estates and the redevelopment of industrial sites.

Figure 4.2: Net Housing Delivery by Neighbourhood, 2005-2020



- 4.10. Over the last five years, delivery has reduced in Mitcham as less large schemes have come forward. In contrast, Colliers Wood and South Wimbledon has seen a notable increase in housing delivery between 2015/16 – 2019/20 in comparison to the previous five year period. This has been supported by the delivery of higher density flatted development schemes particularly along Merantum Way/A24 including the development of Brown & Root Tower, Cavendish House and Morris Court, Christchurch Road, which have each delivered 50 homes or more. Although it should be noted that all of these sites fall under 0.25 ha and are therefore regarded as small sites by the London Plan definition.
- 4.11. As recognised in this report and through engagement with stakeholders, Merton has significant variation in residential values across neighbourhoods – more so than elsewhere in London – and our analysis at Appendix A1 considers this in greater detail. In summary, the higher values and stronger public transport accessibility to Central London drive developer interest in the northern neighbourhoods of Merton and there is a strong correlation between the volume of development schemes coming forward and the higher values shown.
- 4.12. In Merton, there is a constant backdrop of Change of Use and conversion applications. This type of development is stronger in the northern neighbourhoods of Merton including in Wimbledon, Raynes Park and Colliers Wood where there is more loosely structured suburban development and larger properties which offer potential for conversion or intensification within the plot.
- 4.13. Overall development volumes are however being driven by new-build development. Over the last fifteen years this has been strongest in Mitcham, Wimbledon and Colliers Wood. This is shown in Figure 5.4 below with change of use applications and prior approval development also supporting overall numbers in these neighbourhoods. Additional analysis is provided around these dynamics at Appendix A1.

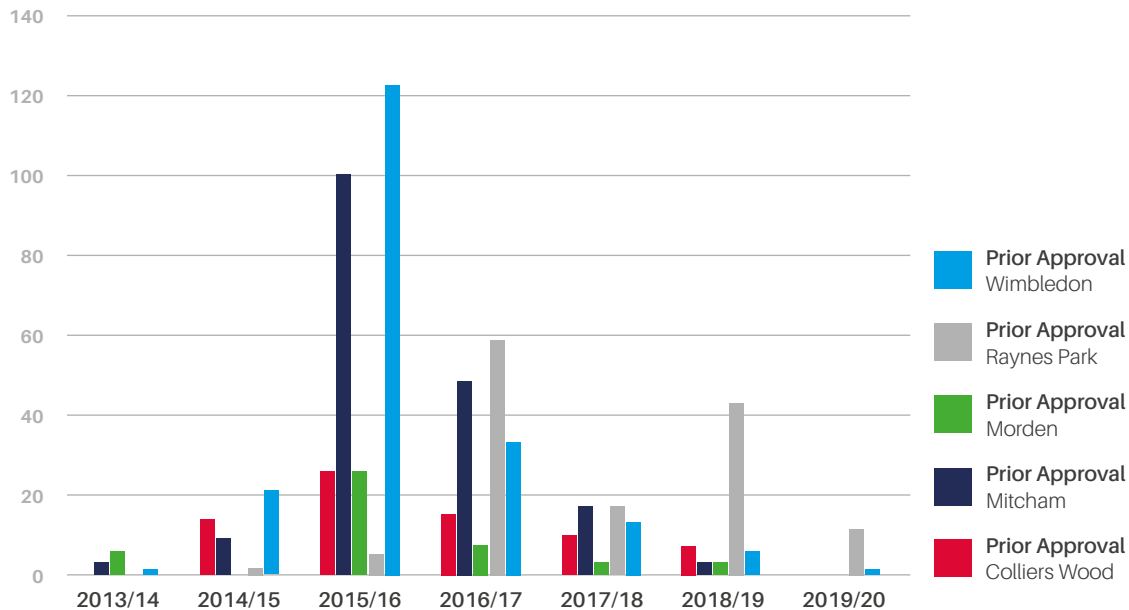
Figure 4.3: Profile of Net Completions by Application Type, 2005-2020



The Impact of Prior Approval Development

- 4.14. The introduction of Permitted Development Rights in 2013/14 has supported some growth in housing delivery in the period since. As Figure 5.5 shows, prior approval applications coming forward have been focussed in Wimbledon, Raynes Park and Colliers Wood more than the Mitcham and Morden.
- 4.15. The higher number of approved applications in these neighbourhoods is principally due to a greater volume of commercial space in these areas, such as along High Street and Worple Road in Wimbledon. In effect, these neighbourhoods are where the commercial centres are found, and the volume of applications reflect this. However, prior approval applications have had also an upward impact on delivery in Mitcham.

Figure 4.4: Completions from Prior Approval Development by Neighbourhood



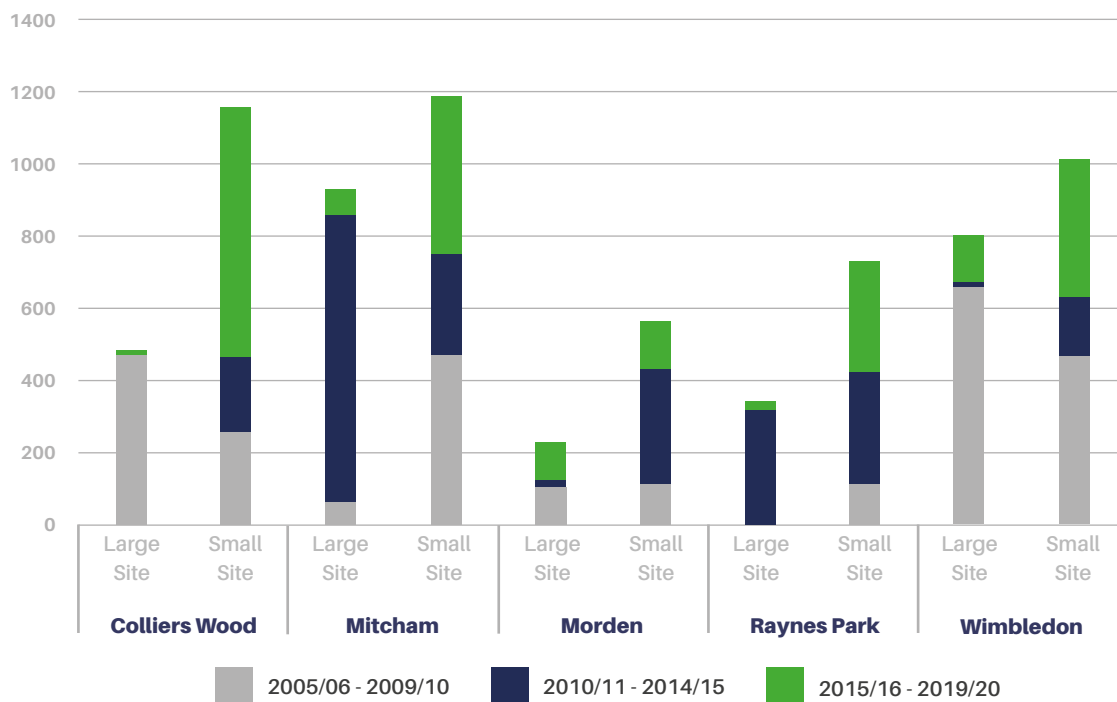
- 4.16. Following the introduction of Permitted Development Rights in 2013, an Article 4 Direction came into effect in Merton from 3rd April 2015 onwards which reintroduced the need for planning permission for the conversion of offices to dwellings in Wimbledon town centre and a number of industrial estates in Merton which is likely to have slowed interest.
- 4.17. This source of supply is however expected to continue; and may even make an enhanced contribution given further changes to permitted development and Use Class Order. The Government introduced a new Permitted Development Right that enables the construction of up to two storeys as an upwards extension to create additional dwellings; which came into force on 31st August 2020.
- 4.18. A number of changes to the Use Class Order has also been introduced from 1st September 2020 to allow flexibility between certain uses through the creation of Class E (commercial, business and service) enabling complete flexibility between former retail and business uses.

The Dynamic between Small and Large Sites and Schemes

- 4.19. In simple terms, Merton is constrained, there is a lack of additional development land; and therefore, where large sites are brought forward, these sites drive overall housing delivery. These larger schemes principally comprise the redevelopment of employment land, the development of open space and estate regeneration schemes have a significant influence on overall delivery rates in Merton, and the distribution of housing completions by neighbourhood.

- 4.20. The influence of these large sites varies over time depending on availability and phasing and this is clear from the fluctuation in which neighbourhood sees the highest growth in different time periods. Over the last fifteen years, small sites have accounted for 62% of total completions Borough-wide but account for 97% of planning applications which are approved. Small sites² across Merton contribute only 2.4 homes per application on average and therefore a significant upward shift in small site development will not be enough on its own.
- 4.21. The proportion of net housing completions that have come forward on large sites or large development schemes (i.e. sites exceeding 0.25 ha) is equal to 37% in Merton over the last fifteen years but only 14% over the last five. Ultimately, there has been relatively modest levels of larger development sites which have been approved and come forwards and the availability of additional larger sites are not on the table.

Figure 4.5: Geography of Housing Delivery on Small (<0.25ha) and Large Sites (>0.25ha), 2005-2020

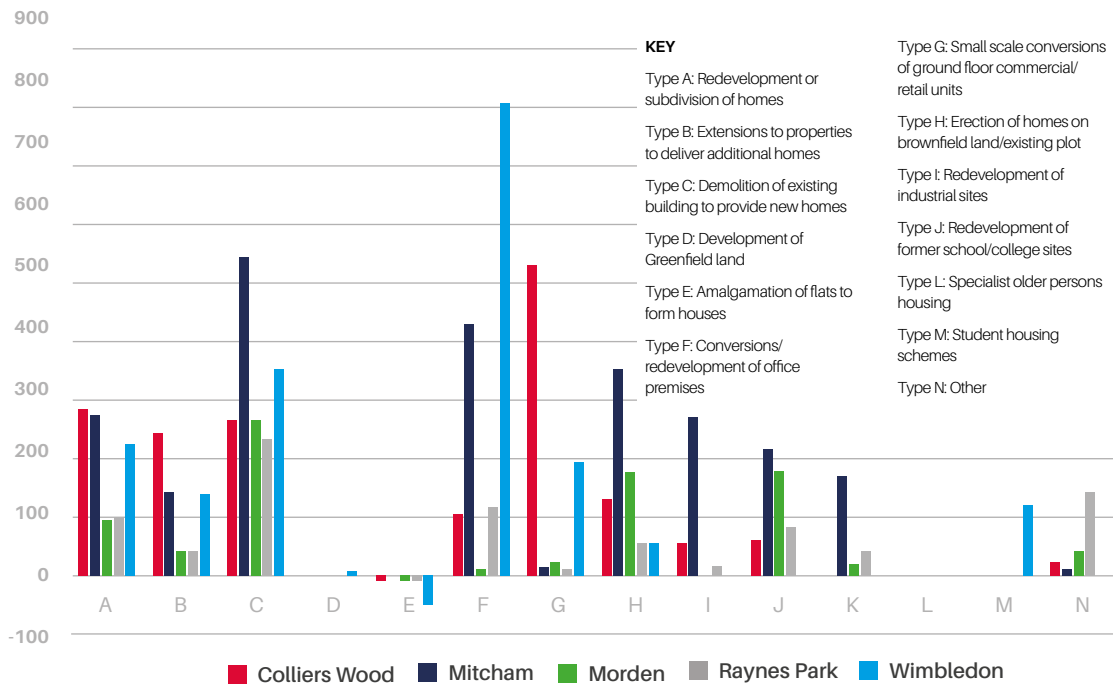


Delivery by Typologies

- 4.22. Our analysis has also sought to define a number of typologies of development which helps us to understand the character of housing delivery in each neighbourhood. The typologies are wide ranging and recognise that in some neighbourhoods, the redevelopment of large family homes are more prevalent in comparison to the redevelopment of industrial sites. As the Figure below demonstrates, there is a very clear distinction between each neighbourhood in respect of the types of development that is driving completions.

²Small sites defined as below 0.25 hectares in size

Figure 4.6: Net Completions by Typology, 2005-2020



- 4.23. The analysis shows that the majority of housing delivered in Mitcham is centred around the redevelopment or development of brownfield sites, industrial land, playing fields and former school land as well as the redevelopment of former office buildings including sites such as Brenley Playing Fields (169 homes), Windmill Trading Estate (212 homes) and Seagas House (Mitcham Gas works) (137 homes). In effect, the neighbourhood has more land available for development.
- 4.24. In contrast, neighbourhoods such as Colliers Wood and Wimbledon is reliant more so on the redevelopment of larger family homes and the redevelopment of commercial space (office to residential permitted development); as well as the demolition of existing buildings to provide a greater number of homes.

Affordable Housing Delivery

- 4.25. There has been a decrease in affordable housing over last 5 to 10 years and the analysis reviews the impact of the size of schemes and the impact of policy changes. In overall terms, it is important to recognise that the size of sites which comes forward in Merton have a significant influence on affordable housing delivered.
- 4.26. The Council’s Adopted Local Plan Policy (CS8) on affordable housing does not apply on sites which are less than 10 homes nor sites which are submitted under the prior approval process. Those schemes which are eligible should seek to provide a minimum of 40% of all homes as affordable.

- 4.27. 4Iceni has undertaken a review of all schemes over the last fifteen years which is set out in Appendix A1. This shows that in neighbourhoods where these schemes – small sites and prior approvals - account for a greater proportion of overall development, lower levels of affordable housing delivery (as a proportion of total completions) can be expected as planning policies do not require affordable housing from these forms of development.
- 4.28. It is also apparent that due to the higher proportion of smaller sites coming forward and the increase in schemes submitted under the prior approval process in recent years, there have been fewer opportunities to secure affordable housing across the Borough. In 2018/19 for example, only one scheme was completed which was eligible to provide affordable housing which resulted in only five affordable homes.
- 4.29. At a neighbourhood level, there are higher rates of affordable housing delivery in Mitcham and Morden which has been driven by the nature of development which has been focussed more so on estate regeneration schemes and the redevelopment of industrial sites. These schemes have supported higher levels of housing delivery due to their eligibility.
- 4.30. In the northern neighbourhoods of Wimbledon, Colliers Wood and Raynes Park, schemes which do exceed the size threshold are largely Prior Approval applications are therefore not eligible. However, the level of affordable housing delivery coming forward is not only linked to the eligibility of schemes.
- 4.31. The analysis is showing that affordable housing levels have been particularly low in Wimbledon, Colliers Wood and Raynes Park. The number of sites delivering schemes of 10 homes or more are limited as a proportion of all development in these areas due to the nature of schemes coming forward with “new build” development largely representing the dominance of 1 for 1 replacement schemes, conversions of larger family homes and Change of Use applications. In other words, there has been a lack of larger sites coming forward in these areas to support higher levels of delivery.

5. Perceptions Of Housing Development - A Summary

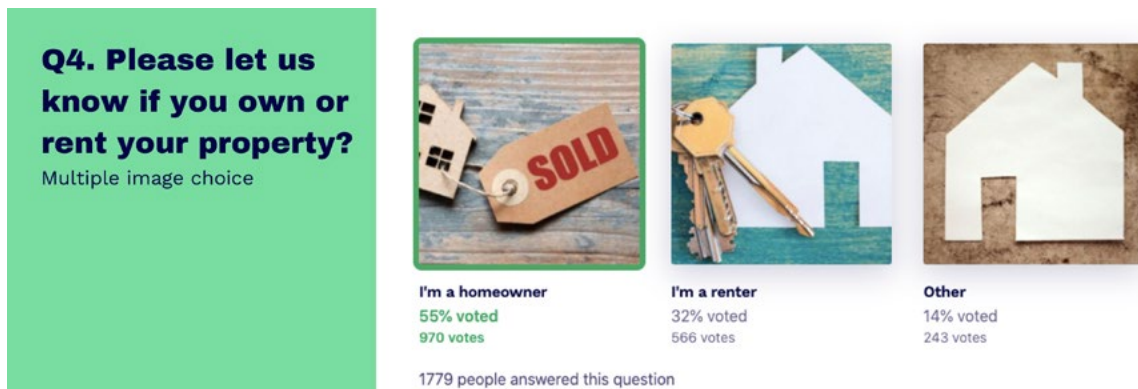
- 5.1. **As part of the work, we undertook an online engagement exercise focussed on gaining insight into priorities, issues and opportunities in relation to housing delivery across Merton. The aim was to widen community participation early in the process and to start to build awareness, understanding and generate interest in a discussion around housing delivery, resulting in greater participation downstream.**
- 5.2. This section of the report summarises the headline results, the full results are contained in Appendix A2.

A Summary of The Process

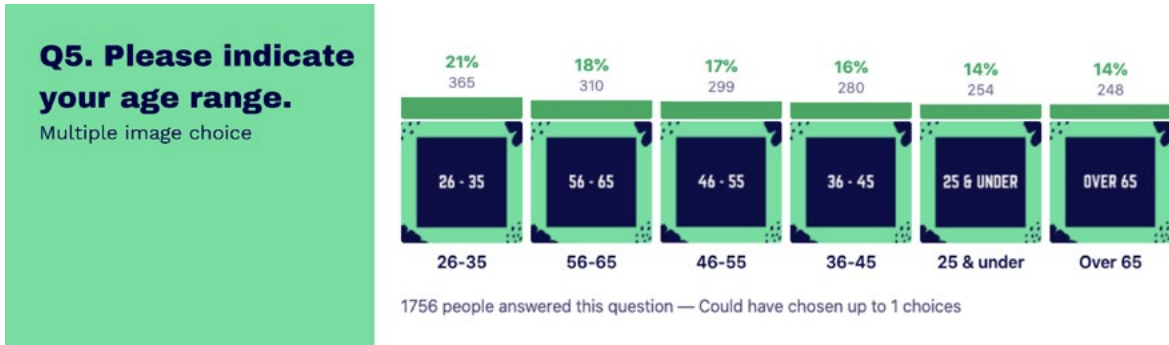
- 5.3. In summary, the website achieved 9,097 visits with 2,096 members of the community completing the poll and providing 10,529 pieces of individual feedback. There was clear consensus from the community across neighbourhoods and age groups. A summary is shown in the Figure below.



- 5.4. The community left 1,394 pieces of 'free text' written feedback, in addition to their responses to the poll questions. 512 people provided contact details to say they would like to be involved in future discussions around housing delivery in Merton.
- 5.5. As a proportion of all respondents, 55% were homeowners.



- 5.6. We had a strong proportion of votes from people of all ages, hearing most from 26 – 35 year olds, with 35% of voters ‘young voters’.



A Summary of the Results

- 5.7. To the question ‘What do you consider as successful housing delivery in Merton?’, over half of voters in every area felt terraced housing was the most successful housing delivery. This sentiment was consistent across all voters, with voters from Colliers Wood & South Wimbledon favouring it the most at 59%. All followed by over a third favouring lower flatted development.



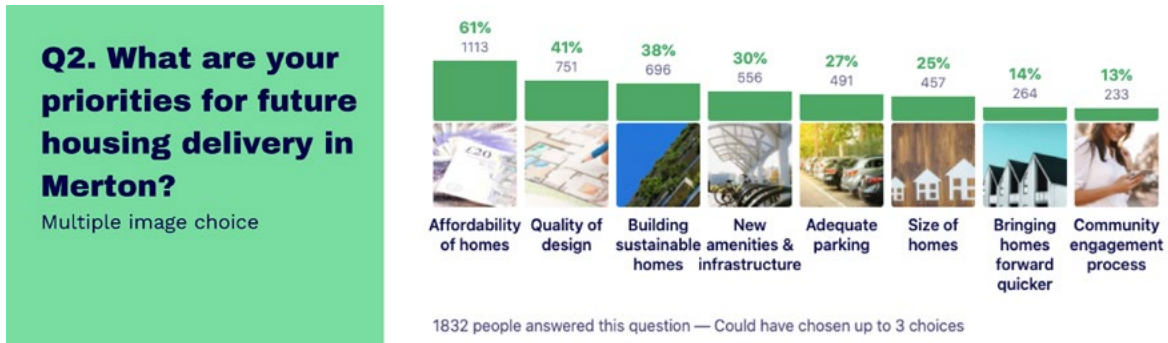
“It would be wonderful to see more community led housing and generally improve levels of innovation and affordability.”

“Family homes are needed to build stable communities.”

“Terrace houses are great as it stops too many generic blocks of flats being built. And then you also have more private access to outside space, so this would be a great priority for new builds.”

- 5.8. To the question ‘What are your priorities for future housing delivery in Merton?’, affordability of homes was the clear winner, receiving votes from 61% of voters. It was the top choice across all areas of Merton. Quality of design

and building sustainable homes also received a large proportion of votes with 41% and 38% respectively. These were consistently represented at the top end for all areas. Bringing homes forward quicker & the community engagement process were the lowest choices across all areas.

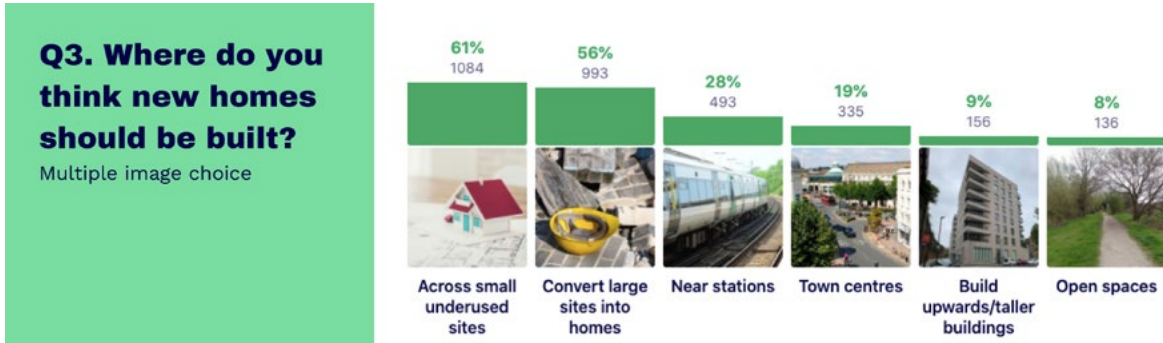


“Merton needs to use housing demand as a catalyst for 1) urban regeneration 2) economic growth 3) reducing homelessness 4) environmental sustainability 4) the council should be a lead partner in facilitating development through enhanced borrowing capacity to partake in Joint Ventures with developers and or acting independently through the creation of a property investment vehicle.”

“Affordability for young people is really important. I can’t even afford to live in the same town as my parents, so I’m stuck living with them as London is so expensive to live in. Sustainability should also be a priority, as well as being environmentally friendly. I think by making new developments like this, the whole area will look and feel more like a community, and it will make people want to live here.”

“In order to accommodate a larger population density I believe the council needs to work harder and faster in delivering infrastructure that allows for more efficient use of road space e.g. active travel, healthy streets, low traffic neighborhoods, and expansion of public transport.”

5.9. To the question *‘Where do you think new homes should be built?’*, there is a clear consensus with 61% of voters voting for new homes to be built across ‘Small underused sites’. Converting large sites into homes was also another very popular choice with the community receiving support from 56% of voters respectively. This sentiment and order was consistent across all areas of Merton with all responses in the same order except for in Raynes Park & Mitcham where Build upwards/taller buildings had the lowest votes.



“Respect conservation areas, historic character.”

“Wimbledon should keep its intrinsic value as a green and suburban area for families and locals. Residents do not want high rise housing and increased urbanisation as some have proposed. This would totally change the character of our area.”

- 5.10. There were 3 key themes when we analysed the open feedback question:
- 5.11. **Affordable housing:** Related to the need for affordable housing. People were vocal about the expense and difficulty to buy in Merton. A lot of comments were in relation to the need for affordable housing for young people & families to get on the property ladder.
- 5.12. **Building and design:** There were a number of different themes within this category the first being a requirement for quality design & builds. The second theme was related to thoughts on height which steered towards an aversion to tall buildings.
- 5.13. **Environment and sustainability:** There is a consensus from the community that house building in Merton should be sustainable - incorporating modern construction methods but also making the housing efficient in the coming years.

6. What are the Barriers to Housing Delivery?

- 6.1. **Merton has historically exceeded the housing targets set for Merton in the London Plan; however, as our analysis has shown, housing delivery has been low in relative terms compared to other London Boroughs (relative to the existing housing stock).**
- 6.2. In this section we consider the factors which the evidence suggests is contributing to relatively modest housing delivery. We do this by drawing on the analysis of historical housing delivery trends but with a focus on our engagement with key stakeholders involved in the development process.
- 6.3. In terms of the engagement with key stakeholders, which was undertaken alongside the community engagement process, IcenI undertook telephone/ video discussions with a range of stakeholders, including Registered Providers (RPs), developers, councillors, and council officers. We spoke to both developers and RPs who operate in Merton now, and those who would like to in the future. The discussions covered the following topics:
- The key issues affecting housing development in Merton;
 - Identifiable development trends within Merton's sub areas;
 - Small site development, considering specific trends and perceptions;
 - The planning process;
 - Community perceptions;
 - Timeframes; and
 - Supporting planning policy
- 6.4. The key comments made during discussions have been summarised below together with our analysis where relevant.

The Housing Requirement and Land Supply

- 6.5. Through engagement with stakeholders, it is notable that all parties agree that housing land supply is constrained, and it presents a key issue in Merton. The existing sites are fragmented and not in public sector ownership and the availability of land is undisputedly a clear barrier to delivery.
- 6.6. Our analysis around historic delivery trends supports this feedback. The proportion of net housing completions that have come forward on large sites or large development schemes (i.e. exceeding 0.25 ha) is equal to 37% in Merton over the last fifteen years but only 14% over the last five.
- 6.7. Ultimately, there has been relatively modest levels of larger development sites which have been approved and come forwards and the availability of additional larger sites are not on the table. The availability of land supply – both in terms of sites of scale and suitable is a key barrier to increasing delivery.

The Market's Perception of Merton

- 6.8. Through our stakeholder engagement exercise, the market noted that aspirations of Merton from a policy perspective at times made viability more difficult. The perception from some is that Merton is less open for business, with less appetite for height. However, it is recognised that housing land supply factors do play a part in this.
- 6.9. Specific examples cited included the quantum of 3 beds, onerous design requirements (podiums) and the principle of no net loss of retail floor space in town centres. In addition, it was noted that the Community Infrastructure Levy ("CIL") policy did not make an appropriate allowance for regeneration benefit within schemes.
- 6.10. It was felt that there was a lack of clear direction in the tall buildings policy and additional guidance around effectively achieving density in Merton would be welcomed.
- 6.11. It was noted that the Future Wimbledon SPD, which was adopted by the council in November 2020, would help with further guidance on development in that location. Currently it was felt that the tone of policy in relation to Wimbledon and South Wimbledon was anti-development, being sympathetic to local constraints was expected, but there was a feeling that it was above that.

Character and Design

- 6.12. The character of Merton featured heavily in conversations. The area was described as five distinct towns. It was noted that people move to Merton and remain, perceive it as suburban, like the nature of the area and want to preserve it.
- 6.13. Traditional architecture and family homes were felt to be favoured by residents whereas developers may prefer to deliver something more modernist and denser, to achieve a higher number of homes, leading to conflict.
- 6.14. In the north of Merton, with specific references to Wimbledon, it was felt there was a default resistance to development and any changes were detrimental to the character of the area, including small site development.
- 6.15. Merton has a high number of Conservation Areas, in particular in the northern part of Merton, together with a high proportion protected open spaces. In some cases (Wimbledon Town Centre), there was a high PTAL rating of 6 within a Conservation Area, the built fabric was predominantly two storey housing, leading to difficulties in housing delivery appropriate in high PTAL areas.
- 6.16. Height was cited as a critical issue in Merton with a feeling that many were unreceptive to tall buildings. Stakeholders noted that residents were concerned about height and in some cases reluctant to accept buildings any taller than the existing built form; however, it is notable that the vast majority of housing delivered over the last decade is flatted development.
- 6.17. **Merton Council has prepared a Character Study to assist the Council, community groups, stakeholders and others with an interest in the borough to better understand Merton's distinctive local character. It is**

an update to the Borough Character Study undertaken between 2011 and 2015. The Character Study will support preparation of the Council's New Local Plan as a Supplementary Planning Document (SPD) and be used to inform a character and 'place-based' approach to managing growth in the borough.

Public Transport

- 6.18. It was felt that some areas within Merton were less accessible than others, and that transport infrastructure was a concern from residential developer sales team in terms of the ability to get into central London.
- 6.19. This was seen as a fundamental issue for large sites, with a lack of public transport in some areas, for instance parts of Morden. Morden was an area that met a number of RPs ambitions, but public transport was an issue for them.
- 6.20. Through our analysis of past delivery trends, it is clear that the connectivity in the southern neighbourhoods of Lower Morden, St Helier and Pollards Hill is not as strong; and despite there being a number of stations with transport links, it is clear that development does not wrap around these nodes in the same way that parts of the northern neighbourhoods experience.
- 6.21. The transport links that exist are of lower frequency or do not connect to higher value jobs in Central London. This influences potential development values and absorption rates. However, it is recognised that Mitcham Eastfields station – which opened in 2008 - is likely to have a positive impact moving forward.
- 6.22. Feedback from stakeholders is suggesting that whilst developing at scale on complex sites is feasible, when developers look towards the southern neighbourhoods of Mitcham and Morden and in close proximity to tram link stops, values fall to levels in line with those outside of London and viability becomes an issue.

Decision-Making

- 6.23. The lack of certainty around decision-making was cited as contributing to development risk and time in planning. The feedback is summarised below based on both internal and external influences:
- 6.24. It was noted by stakeholders that a vocal minority in the community have a strong voice in Merton, their views carry weight and influence decision making despite not necessarily being fully representative.
- 6.25. Further that there was a north (i.e. the neighbourhoods of Wimbledon, Colliers Wood and Raynes Park) / south (i.e. the neighbourhoods of Mitcham and Morden) divide in participation levels, with those in the south of Merton less likely to be involved and make their views known.
- 6.26. The vocal minority are felt to be anti-development and anti-height, which creates clear tension for Councillors in balancing resident expectations against realities. These issues are also difficult for officers to navigate.

- 6.27. It was felt there was a need to inform and empower a wider range of residents to get involved in planning decisions in the future, and to do so at an earlier stage.
- 6.28. A number of comments were also made in respect of the committee structure:
- Decision making was at times said to be complicated by ward councillors deciding on strategic applications in their ward with pressure from local residents.
 - Greater transparency was needed around the appeals process and how much it costs the authority.
 - It was felt that planning refusals were sometimes technically acceptable applications, refused on the grounds of character.
 - The committee structure of other boroughs was highlighted. For instance, Greenwich have a strategic planning application committee which is made up of cabinet members including the Leader. Some felt a similar structure would allow for better and more strategic decision making in Merton.

The Viability of Housing Development

- 6.29. A key barrier to housing delivery in Merton is viability; however, there are notably different perspective from the development industry and RPs.
- 6.30. IcenI has undertaken a review of a number of viability appraisals relating to larger development schemes in Merton which are eligible to provide affordable housing. Our analysis has been corroborated with feedback from our stakeholder engagement.
- 6.31. It is apparent both through our review of past delivery trends and through stakeholder engagement that there are issues with Housing Associations being willing to provide the affordable housing on small sites. For example, the developer of the scheme at the former Sun Alliance Sports Club contacted almost 20 Registered Providers ("RP") with no positive responses. This is an issue on smaller schemes with less than 20 affordable units according to stakeholders.
- 6.32. It was noted that some RPs have been asked to consider 20 to 50 unit schemes in Merton, but felt this quantum of development was not viable with a need for 50 to 100 units as a minimum with a preference for 80 units or above. Other RPs specialise in smaller schemes on the basis they manage other properties in the area.
- 6.33. Owing to the significant disparity in land and property values between the northern and southern neighbourhoods of Merton, from an RP perspective, the values were cited as too high in Wimbledon and as a result, it is more challenging to develop viable schemes. Their business plan objectives were more suited to Mitcham and Colliers Wood. In those locations' houses were noted most appropriate, but the mission from the point of view of RPs is to deliver quantum and volume to address housing shortage from the pan London point of view. In addition, RPs would prefer to develop in areas where they have existing stock to achieve efficiencies.

- 6.34. From a developer viewpoint, there was a feeling that development risk is not fully captured - the site, planning and sales risk is too great. Acknowledging the viability constraint and adjusting expectations on affordable housing was suggested on a site-specific basis. Some were keen to know what the 'trade-off' between height and affordability was.
- 6.35. As noted, there is a large value spectrum in Merton, more so than in other areas. Towards the south of Merton, the sales values achievable from a developer market perspective reduce. The area becomes more suburban in nature and less well connected in terms of public transport to central London.
- 6.36. Ultimately, there is a stronger market and developer appetite with potentially higher absorption rates in the northern neighbourhoods of Merton which relates to the stronger transport accessibility to higher paid jobs in Central London.
- 6.37. On the other hand, it is clear from our analysis that an area with lower earnings potential will influence house prices which in turn will influence GDV and therefore the viability of development schemes. Similarly, where there is lower catchment interest, this will influence absorption rates and will have an impact on the density which can be achieved and volume of flatted development. This largely describes one of the barriers to higher density delivery in the southern neighbourhoods from a development industry perspective.
- 6.38. The council has lacked someone in housing team to link up developers with RPs. This person left and there has been a gap which has led to issues in forging the relationship early on the planning process which is leading to issues when permission is granted. Often, affordable housing provision has to be paid as a contribution which is not having a significant positive impact on overall provision.
- 6.39. It is clear through a review of submitted viability assessments that from the development industry's perspective, large CIL and S106 payments are limiting scheme viability and the existing use value hence they are lessening their affordable housing contributions.
- 6.40. This is further compounded by the fact that unlike CIL and s106 which are arbitrary inflexible requirements the affordable housing planning policy requirements have the inbuilt flexibility of taking account of viability and economics of provision. This ultimately results in the reduction of affordable housing in order for schemes to also be able to meet wider requirements and still remain viable.
- 6.41. A distinctive pattern highlighted in the viability appraisals is also that developers are finding that the Residential Land Value ("RLV") is very similar to the Benchmark Land Value ("BLV"), hence developers do not make large profits with the London Borough of Merton and therefore cannot provide large amounts of affordable housing. This is suggesting that in instances where developers are factoring policy compliant affordable housing provision and a developer's profit into the RLV, the RLV and BLV are similar with there being limited commercial incentive for redevelopment. It is also important to note the findings of Merton's Local Plan Housing Viability Study which states that:
- 6.42. In considering the outputs of the appraisals, it is important to recognise that some developments will be unviable regardless of the Council's requirements. In these cases, the value of the existing building will be higher than a

redevelopment opportunity over the medium term. However, this situation should not be taken as an indication of the viability (or otherwise) of the Council's housing policies and requirements (paragraph 7.7)

- 6.43. It is critical that developers do not over-pay for sites such that all of the value generated by developments is paid to the landowner, rather than being used in part to provide affordable housing and to meet other planning policy requirements (para 7.8).
- 6.44. In terms of the use of CIL and s106, it was felt there was a lack of clarity on how it was spent and that more should be done to show the community the benefits of development and how it can fund improvements to local infrastructure. For example, visible improvements like high street façade upgrades, extended parks, playgrounds and active transport links.
- 6.45. In instances where there is large scale delivery or sites are expected to deliver at pace, developers are noting that sales rates are really poor. This is creating a risk for developers who do not want to overstock the market. In neighbourhoods of Merton with lower accessibility and land values such as Mitcham and Morden, it is more challenging to sell homes which in turn is dampening the attitude of developers and therefore creating a barrier to development.

Application and Decision Timescales

- 6.46. Another key barrier to delivery identified through stakeholder engagement is application and delivery timescales associated with applications. As a result, we have undertaken analysis of the time from registration to approval, approval to start and start to completion over the last fifteen years for planning applications in Merton.
- 6.47. The starting point is consideration of the overall time taken for all applications to reach a decision, to start and to reach first completion on the basis of the scheme's size with regards to proposed homes. This allows us to understand in part whether the planning system is causing unreasonable delays both in consideration of the types of schemes coming forward and the size of schemes through a comparison of small and large sites. The Table below considers the timescales by size of application.

Table 6.1 Average Timescales by Scheme Size, Months, 2005-2020

	0-24 Units	25-49 Units	50-99 Units	100+ Units	All
Registration to Decision	9	11	12	17	12
Decision to Start	10	12	10	14.5	11
Start to Completion	17	18	24	31	22
Average Total Time	35	37	44	62	44

Source: LB Monitoring Database

- 6.48. Upfront, it is notable that there is a clear cut issue with larger schemes taking longer to come forward in Merton; however, this is to be expected given the complexity involved in bringing forward larger schemes through the planning process. A scheme of over 100 homes is likely to take around 5 years from registration to first completion in Merton. The evidence would suggest that most of this time is taken between a start on site and first completion without any major influence of planning; however, there are outliers and specific issues on particular sites.
- 6.49. One of the key issues associated with timescales is focussed on the time taken from registration to approval. This is being driven by the length of time taken to sign S106 Agreements. Stakeholders are indicating that the signing of legal agreements can typically take around 8-12 months from a resolution to grant planning permission which is having a negative effect on the perception of Merton with housebuilders and developers.
- 6.50. As we have found in this report, there are particular types of development which are more common in different neighbourhoods of Merton, and it is therefore also helpful to drill down into the timescales associated with change of use applications, conversions, extensions and new build development. As the Table below shows, the vast majority of conversion applications are dealt with swiftly in less than 6 months – most of which occur in Colliers Wood, Mitcham and Wimbledon – and help to support delivery overall.

Table 6.2 Timescales for Decision-Taking by Broad Type (% of Applications)

Type	< 6 Months	6 Months - 1 Year	1 - 2 Years	>2 Years
Change of Use	70.9%	16.3%	10.3%	2.5%
Conversion	83.0%	10.7%	5.2%	1.1%
Extension ³	62.3%	21.3%	13.1%	3.3%
New Build	56.8%	26.3%	13.5%	3.4%

Source: LB Monitoring Database

- 6.51. The “new build” development such as the redevelopment of former industrial sites, estate regeneration programmes and development on brownfield land, which is also relative to extensions, does however take a notably longer time to come forward through the planning stage. Although most applications have a decision in less than a year, we see a higher proportion taking between 1 to 2 years and around 3.5% taking over 2 years. This is clearly influenced by the breadth of this broad type including the size of schemes.
- 6.52. The Table below considers the average timescales for new build only drilling into the different size thresholds for this category. As a result of the predominance of new build applications submitted in Merton, the average timescales taken are broadly similar to the average timescales for all applications.
- 6.53. However, it is notable that smaller new build development schemes do come forward relatively quickly in line with other types of development whilst larger new build schemes take longer to come forward at all

³This includes instances where buildings are extended upwards or to the side to provide additional homes. This excludes householder extensions. ares in size

stages. This demonstrates the role of a continued stream of small sites in maintaining a five-year supply or for meeting the Council’s housing target for the Local Plan period.

Table 6.3 Average Timescales on New Build Schemes by Scheme Size, Months

New Build	0-24 Units	25-49 Units	50-99 Units	100+ Units	All
Registration to Decision	10	11	11	18	12
Decision to Start	11	10	11	17	11
Start to Completion	18	18	24	31	22
Average Total Time	39	39	47	66	44

Source: LB Monitoring Database

- 6.54. Following approval, some stakeholders cited long timescales and delays, for instance to agree a variation to a S106 agreement. From the perspective of developers, there is no sense of urgency or action orientated response when these issues arise. It was felt there were good intentions but a lack of resources to back up the requirements and speed needed to deliver. It was felt that Merton needed greater resources and Government support to assist in meeting the scale of the challenge.

7. Looking Forwards at Housing Delivery In Merton

- 7.1. **The London Plan sets out a minimum requirement of 918 homes per annum for Merton and the Council through its Local Plan needs to plan to meet this level of provision. This is 104% above what has been delivered on average over the past 5 years (equal to 450 homes per annum). However, the issues at play in Merton - including the need to increase housing delivery in a context of constrained land supply - are not unique to Merton and the Council is already responding to this.**
- 7.2. This section considers the strategy and housing land supply profile of Merton Borough Council looking forward with consideration of the Council's current housing trajectory alongside the London Plan's strategy for Merton as well as the Council's own strategy. This is helpful in understanding what the Council is already doing in terms of increasing delivery.

Merton's Housing Trajectory

- 7.3. The profile of housing in the council's trajectory is a key factor in understanding the number of large sites expected to come forward which are critical to driving housing delivery higher in Merton in the context of the minimum requirement of 918 homes per annum during the London Plan period.
- 7.4. The 2017 London SHLAA sought to define the capacity arising from large sites in Merton. The SHLAA assesses large site capacity between 2017 to 2041 using four broad categories. The Merton data is clear in showing that there is very limited capacity expected to come forward on approved sites with 321 homes over 6 sites. On the 20 large, allocated sites, there is capacity for 4,029 dwellings. This is shown in the Table below.

Table 7.1 Breakdown of Capacity in Merton to 2041

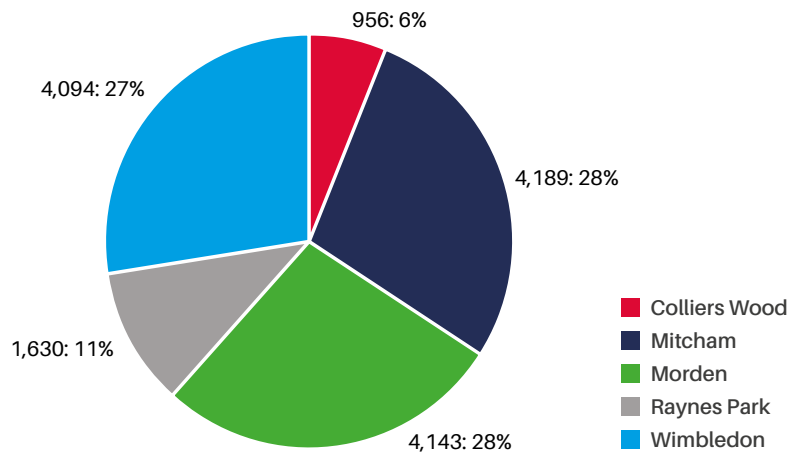
New Build	0-24 Units	25-49 Units	50-99 Units	100+ Units	All
Capacity of large sites	321	4,029	4,753	255	9,358
Number of large sites	6	20	60	14	100

Source: Figure 4.11 of the SHLAA

- 7.5. The large, allocated sites include some of the following key proposed development schemes included in the emerging Local Plan:
- 49 Western Road, Mitcham, Merton (Former Mitcham Gasworks) - capacity of 329 homes
 - Ravensbury Estate - capacity of 192 homes
 - High Path Estate - capacity of 1,700 homes
 - Morden Station and Surrounding Land - capacity of 2,000 homes
 - Wimbledon Stadium and adjacent allocation, Wimbledon Park - capacity of around 700 homes
 - Eastfields Estate - capacity of 308 homes

- 7.6. Merton has identified capacity for enough homes to meet the London Plan target of 918 new homes per year to 2028/29, as identified in the SHLAA. The delivery of these homes will step up from the early 2020s with the delivery of large sites including the Estates Regeneration schemes (over 1,400 new homes), Wimbledon Stadium (over 600 new homes) and Benedict Wharf (up to 850 homes). The figure below shows how this capacity is spread across Merton’s five neighbourhoods.
- 7.7. Merton plans to take a stepped approach to housing delivery to 2028/29 to meet the increased housing target, in accordance with paragraph 4.1.10 of the London Plan. The delivery of homes will step up with the delivery of large sites including the Estates Regeneration schemes (over 1,400 new homes), Wimbledon Stadium (over 600 new homes) and Benedict Wharf (up to 850 homes). The Figure below shows how this capacity is spread across Merton’s five neighbourhoods.

Figure 7.1: Local Plan Delivery by Neighbourhood



- 7.8. Beyond the London Plan period, Merton’s housing target is set by the 2017 SHLAA findings for large sites and small sites. This is shown in the Table below:

SHLAA, 2017	2029/30-33/34	2034/35-40/41
Period total (large sites)	1,065	1,437
Annual large sites	213	287
Annual small sites	261	261
Annual target for these years	474	548

- 7.9. For the period 2029/30 to 2035/36 of Merton’s Local Plan, the requirement in the SHLAA is for 3,466 new homes. Including the small sites allowance of 261 new homes per year in the SHLAA, Merton has identified capacity for around 6,000 new homes during that period. Merton’s housing trajectory is updated annually and published online in Merton’s Authority Monitoring Report.

- 7.10. As is clear, the profile of large site supply which is expected to come forward is characterised by a combination of large-scale estate regeneration schemes and the regeneration of former brownfield sites such as the Former Mitcham Gasworks. There is also a critical role of not only maintaining but increasing the role of small sites through intensification and site finding exercises.

The London Plan Strategy: Merton Context

- 7.11. The new London Plan promotes new Opportunity Areas in London directly connected to Crossrail 2. One of these is the Wimbledon, Colliers Wood/South Wimbledon Opportunity Area which is expected to provide for 5,000 homes and 6,000 jobs in the area. This will provide for opportunities in Colliers Wood – particularly higher density development within the town centre. Any area identified in the London Plan as an Opportunity Area is expected to see the most significant change.
- 7.12. It should be noted that Crossrail 2 would not be constructed before the mid-2030s therefore the benefits from over-station development or development on Wimbledon sites that are currently safeguarded by Crossrail 2 will arise outside the new Local Plan period. However, invariably, Wimbledon being identified as an Opportunity Area in the new London Plan – coupled with the progress around the Future Wimbledon SPD will provide opportunity for further growth in and around Wimbledon and South Wimbledon.
- 7.13. The new London Plan also has a particular focus on prioritising residential development above shops in town centres. As a result, the redevelopment of sites in and around Mitcham town centre will be able to accommodate apartments, allowing for higher density development in comparison to the surrounding terraces and semi-detached houses.
- 7.14. The new London Plan also recognises that if London is to meet the challenges of the future – in particular a significant upward shift in housing delivery – at the very least, incremental change must occur. The London Plan (paragraph 2.0.3) notes that this is especially the case in Outer London where the suburban pattern of development has significant potential for appropriate intensification over time, particularly for additional housing.

The Council's Strategy for Merton

- 7.15. The Council's latest draft of its emerging Local Plan (November 2020) sets out more widely potential development opportunities which are expected to contribute to increasing housing delivery as well as the overall strategy and objectives – particularly for each neighbourhood. In headline terms with regards to housing need, there is currently some uncertainty around the overall housing number for London, and consequently in Merton; however, all scenarios represent a significant increase on current delivery.
- 7.16. The Local Plan looks ahead to growth in the context of significant transport improvements including the Sutton Link and Crossrail 2 recognising the opportunities brought through these. The Local Plan notes the benefits to be brought about by the comprehensive Estate Regeneration programme which is building on the adopted Estates Local Plan.

- 7.17. Alone, Estate Regeneration is expected to contribute around 1,500 additional homes over the plan period. In South Wimbledon, the redevelopment of the High Path Estate will bring benefits to Merton's newest local centre in South Wimbledon. Mitcham is proposed to accommodate a range of new homes, including the major estate regeneration sites of Eastfields (around 700 homes) and Ravensbury (around 190 homes) estates and other sites such as Benedict Wharf (around 850 homes).
- 7.18. Through the Local Plan, the Council intends to continue to campaign for increased rail services – particularly at Mitcham Eastfields – which will help to increase the accessibility and therefore attractiveness to the development industry. The Council has also been working to improve Mitcham town centre with the £6million investment in Rediscover Mitcham having improved the public realm and helped to drive footfall. There are allocations and further opportunities in and around the town centre for intensification and for affordable housing provision.
- 7.19. For Raynes Park, larger sites close to Shannon Corner and incremental development within the surrounding neighbourhood will contribute to providing new homes. The Council has also identified the need for improvements for the Wimbledon Chase and Motspur Park areas which will increase the attractiveness of the area for the right type of growth. This includes the intensification of existing sites through the redevelopment of existing units into multiple units – a trend which, along with commercial conversions, has supported housing delivery in Raynes Park over the last fifteen years.
- 7.20. In respect of Wimbledon, the emerging Local Plan welcomes the identification of the Wimbledon, Colliers Wood/ South Wimbledon Opportunity Area and recognises that a substantial level of work is already being progressed through the Future Wimbledon Supplementary Planning Document (“SPD”) which was adopted by Full Council in November 2020.
- 7.21. Merton Council will work with the Greater London Authority (“GLA”) to promote and prepare an Opportunity Area Planning Framework (“OAPF”) to supplement the London Plan policy. The Future Wimbledon SPD expresses a vision for Wimbledon town centre which will provide the context for any future OAPFs by the mayor. The town centre offers opportunities for intensification, accepting a moderate increase in height whilst respecting the local character of the area, to achieve higher density development.
- 7.22. Wimbledon will also see the development of a major site come forward in the plan period - the redevelopment of Wimbledon Stadium, which is an allocated site, is underway and is expected to deliver over 600 homes over the plan period.
- 7.23. The emerging Local Plan states that the most significant change will have taken place in Morden town centre. The OAPF to be prepared for Wimbledon Opportunity Area is also expected to explore the potential for development at Morden town centre. The regeneration of Morden will include the intensification and comprehensive development of the Morden Town Centre Regeneration, which will incorporate the provision of around 2,000 new homes.
- 7.24. There is acknowledgement in the Local Plan that there must be change to respond to the increasing challenges of delivering more housing. The Council has commissioned a Character Study which is exploring how the

urban form varies in different areas, what local people value about their area and what they think makes each neighbourhood special or could be improved. This will provide a detailed assessment of each area, with a view to achieving sensitive development in context and allow for a greater level of intensification in Merton.

8. A Framework for Increasing Housing Delivery

8.1. **This section sets out the recommended framework for achieving higher housing delivery in Merton, focussing on key areas for exploration for the Council.**

8.2. It seeks to address what the Council can do in both putting in place a policy framework which encourages and supports an increase in the rate of development in Merton, and addressing issues related to improving the efficiency and effectiveness of the development management process with a view to reducing the time which development schemes spend 'in planning' and helping to grow the market appetite for development in Merton. It also sets out how the council and developers can work together to deliver on community aspirations, based on the engagement feedback received.

Establishing a Clear Policy Framework

8.3. A key issue for the planning system is balancing certainty and quality. A key ambition for the Council is to deliver high quality development together with supporting infrastructure. Merton's communities have identified their clear priorities for affordable, well-designed, sustainable, low-rise (terraced or low rise flatted) development. On the other hand, developers considering development sites in Merton want certainty about what form and design of development will be acceptable and that they will be able to get planning consent.

8.4. The Local Plan plays an important part in this process: it allocates sites for development and makes clear through its policies what form of development will be acceptable on such sites and the criteria and standards with which development must comply.

8.5. The Council is seeking to progress its new Local Plan to do this, and it consulted on Stage 2a in Autumn 2020 with a Pre-Submission version of the Plan in Spring 2021, and that the Plan will be adopted in 2021. The Plan will include site allocations in each neighbourhood in Merton, which should be clear regarding the form and quantum of development, which is acceptable on allocated sites, and set out key design principles.

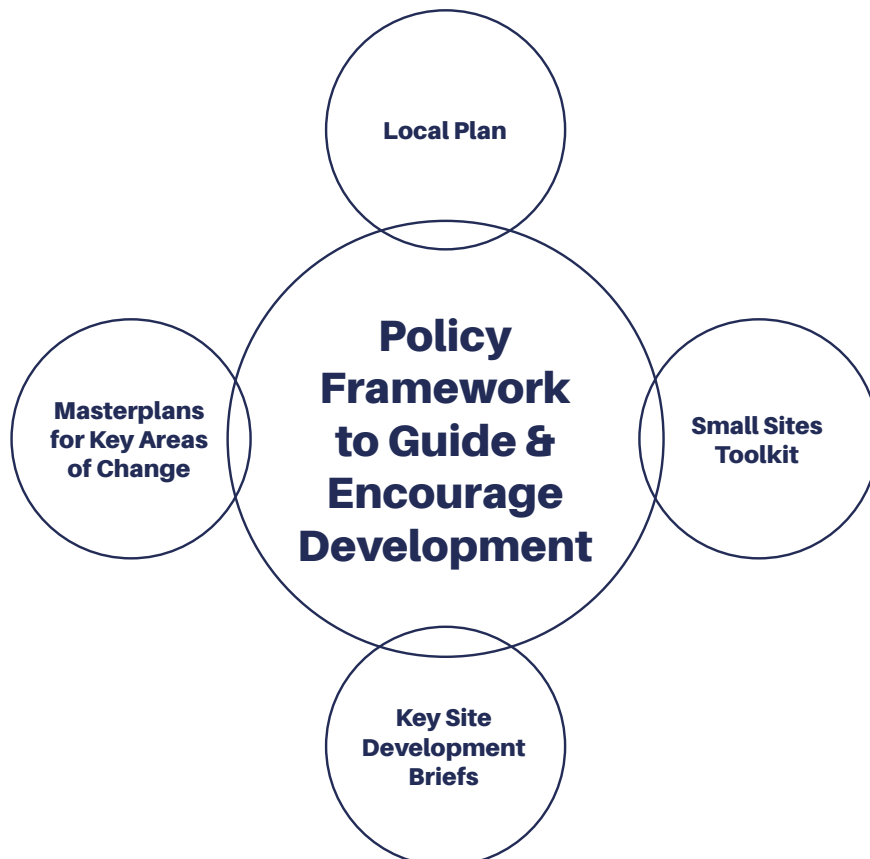
8.6. It is not likely to be feasible however to identify site specific policies for all potential development sites, and it seems highly likely that a considerable quantum of development will continue to be brought forwards through 'windfall' development schemes – in particular on small sites within existing residential neighbourhoods in Merton.

8.7. Given the significance of small site delivery to the overall quantum of development in Merton, the lack of larger site opportunities in Merton, and the growth in the housing target through the London Plan and its focus on increasing small site delivery, it is going to be particularly important that Merton provides a clear policy framework which encourages smaller house builders to bring forward infill development and intensification opportunities, according with the community desire for small site housing delivery. The local plan will also need to recognise that this means that the density and character of existing residential areas may need to evolve over time and to articulate how this can be achieved.

8.8. NPPF Para 127c sets out that policies and decisions should be sympathetic to local character and history, but that this should not per se prevent or discourage appropriate innovation and change (such as increasing densities in existing residential areas). The Council has prepared a Character Study which will define urban typologies and

character areas across Merton and identify opportunities within these for intensification. It will also provide guidance on development principles with regards to height, massing and materials for each character area. The community engagement exercise undertaken as part of this piece of work is also informing the Characterisation Study.

- 8.9. The council has also prepared a Small Sites Toolkit that will provide design guidance for future development on small sites in Merton. This will provide guidance regarding specific forms of development, including extensions to properties, redevelopment of larger family homes, garden or back land development and corner plots.
- 8.10. The Toolkit can respond to Merton communities' priorities for delivery of terraced housing and low rise flats and the importance of high quality design. Potential development opportunities are also identified in the London Strategic Housing Land Availability Assessment and the Call for Sites which the Council has undertaken.
- 8.11. Future policy development should wherever possible reflect the findings of the community engagement exercise, emphasising the desire from the community for high quality, sustainable homes.. In addition, there was clear consensus across all neighbourhoods and age groups in Merton for terraced and lower rise flatted development.



- 8.12. Consideration also needs to be given to how development standards are set out in Policy, and how these standards are applied through the development management process. This includes being clear about:
- How policies regarding housing mix (the size of units proposed) will be applied to individual development schemes, and particularly small sites, and the interaction between this and site location and character;
 - The appropriate locations for tall buildings, which the draft plan currently says will only be permitted in town centres, and what heights might be acceptable in particular locations. These issues are appropriately considered through the plan-making process informed by community engagement which identifies limited support for tall buildings, and the Character Study;
 - Being clear on where tall buildings would be appropriate; and the design principles which should be applied specific to each area. This process should involve member engagement to achieve buy-in prior to schemes being put forward to planning committee – this is a clear challenge arising from consultation feedback as well as our analysis around application timescales.
 - How the Council will interpret the London-wide policies regarding employment land, including where there are opportunities for mixed-use intensification and how this can be achieved. How the Plan considers industrial land needs to balance the protection of Merton’s economy, London Plan policies with pressures for residential development including issues regarding the availability and deliverability of land from other sources and opportunities to use employment sites more intensely; and
 - In what circumstances residential development might be acceptable in town centres which results in a reduction or removal of retail or other commercial floorspace; what development densities are appropriate in town centres and where higher rise buildings might be appropriate, and where they would not. The role of town centres as a location for increasing housing delivery in Merton is evident when looking back over the last fifteen years and looking ahead, it is possible that town centres will play an increasing role given Covid-related changes around home working and online shopping.
- 8.13. Policies should be written to provide certainty, so that applicants are clear on designing schemes on the Council’s expectations. The Planning White Paper includes proposals that ‘permission in principle’ for development in certain circumstances including where it is consistent with a Design Code. The application of this to small site development in Merton warrants further investigation in particular regarding its potential to speed up the planning process.
- 8.14. However, it is not going to be appropriate to rigidly apply every policy in every circumstance, and there will be instances where conflicts between the application of different policies arise, or there is evidence or material considerations which are relevant in the application of policy. There may be an enhanced role for senior officers and for member training in this respect with a view to ensuring that high quality development proposals can progress with greater certainty.
- 8.15. The Government’s view is that planning policy should increasingly move towards digital, interactive map-based plans which clearly communicate development proposals for an area and applicable policies to aid and

promote engagement. The Local Plan provides the opportunity for the Council to take elements of this forwards, with a view to promote greater understanding amongst Merton's communities around policy, with key principles and development proposals identified in simple, non-technical and easy to understand summaries.

- 8.16. In key areas for change, there is a continuing role for the Council in preparing masterplans which bring together the community, developers and site promoters, and other key stakeholders to identify development proposals and set out a place-specific framework to coordinate major change. The Council has been doing this through the Future Wimbledon SPD. They may well be other major areas for change which arise from the Character Study where this is also appropriate. Our research suggests that the preparation of a Vision for Mitcham may be appropriate to assist in achieving development in the east of Merton.
- 8.17. Depending on the findings of the Character Study, there may also be a strategic case for investigating opportunities for intensification and in selected cases redevelopment in areas around the TramLink stops in Merton and other transport nodes such as the borough's railway stations.

A More Direct Role for the Council

- 8.18. The Council is not a significant landowner within Merton and is not a stock-owning authority; however, it is already progressing plans for estate regeneration and intensification working with Clarion. It is important that the Council continues to invest in this Partnership to drive forward these regeneration schemes.
- 8.19. The broader issue however is that land ownership is fragmented and there are few larger development opportunities. But against this context there may be further opportunities for the Council to act proactively to assist in the assembly of larger development opportunities in areas which it identifies as key areas of change, including through acquiring land and where necessary use of Compulsory Purchase Order (CPO) powers, to facilitate regeneration and growth.

An example from another London Borough would be the Bridge Close Industrial Estate in Romford, where Havering Council has established a joint venture partnership with the majority landowner, Savills Investment Management, and with a development partner, First Base, to take forward mixed-use redevelopment to optimise the use of a highly accessible site.

- 8.20. To support delivery of affordable housing, a key issue for the community, as noted in the poll, the Council could also investigate opportunities to 'package up' a portfolio of small site opportunities in a particular neighbourhood which it could then present to Registered Providers as a portfolio which achieves critical mass to justify investment across the portfolio.
- 8.21. This might include land owned by the Council, including underused sites, albeit that the Council's landownerships are limited; but could also involve a programme of selected small site acquisitions to support increased delivery of housing, and in particular affordable housing. Packaging up small site opportunities should help to spur developer interest and de-risk development because of economies of scale. The Council

could take this forward alongside a development partner, particularly given the strength of community feedback generated in the poll for developing across small sites.

An example from another London Borough is taking place in Brent. The Council has set up a specialist service team, 'Housing Supply and Partnerships' with a focus on delivering new Council homes - creating and maintain relationships with internal and external partners, helping to facilitate the delivery of sites in multiple landownerships and providing a consultancy function to the whole housing service. It should however be noted Merton would have to open a new Housing Revenue Account in order to own stock and achieve this.

- 8.22. In addition, we consider that there may be opportunities for the Council develop closer relationships with perhaps selected number of SME developers who are particularly active in Merton, or who could over time increasingly act in Merton.
- 8.23. The research indicates particular barriers associated with the cost and complexity of planning for small SME developers which often do not have significant resources. However, there are opportunities to ameliorate this as developers build up experience in Merton, as they begin to know the policies; and can build contacts within the Council. The Small Sites Toolkit should also help SME builders navigate Merton's planning policies and encourage (and indeed accelerate) development of small sites in the borough.

Resourcing Factors

- 8.24. The Council has to give careful consideration to how it organises itself internally to respond to an upward shift in the planning applications which will come through and to improve its efficiency and effectiveness in dealing with them.
- 8.25. As a starting point, the Council should explore opportunities through the use of technology to reduce the number of invalid applications and avoid the planning process becoming an unreasonable barrier to delivery. Given the nature of applications - many applications of small scale - technology would provide a crucial role in processing and improving efficiency.

As an example, the London Boroughs of Lambeth, Southwark, Lewisham and Camden are all involved in a MHCLG funded project which looks to change how data is submitted, which would see a move away from the submission of documents and reports which can only be read by humans to structured data that can be read by humans or machines in order to make the validation process more efficient.

- 8.26. There is also an opportunity to explore changes to the current development management structure. As it stands, there is currently a north team and a south team which is logical; however, there is a clear issue with large schemes taking notably longer to come through the planning process with undue delays associated with S106 obligations and post-approval amendments. The Council should consider retaining the north and south teams for small sites; and set up a separate major projects team.

8.27. The Council should also build on monthly cross-department meetings which bring together key stakeholders involved in driving housing delivery including the Council's legal team, highways and infrastructure bodies and so forth. These meetings could be improved by also including infrastructure bodies as key stakeholders in discussions. These meetings have a critical role in helping to unblock longstanding issues quickly, whilst ensuring a dialog is maintained throughout the process on challenging sites – helping to improve delivery as well as the development industry's perception of Merton.

An example from elsewhere is Eastleigh Borough Council. There are quarterly meetings held between all key stakeholders active in Merton to deal with longstanding barriers to delivery on individual applications as well as wider issues. This has resulted in a notable shift in housing delivery over the last five years.

8.28. Separately, there is a need to consider the Committee Structure with the potential for a separate strategic decision-making committee which deals only with sites of a particular size. There are a range of other examples – including Hackney, Greenwich and Southwark – which could be used to reshape the committee in Merton.

8.29. The delivery of affordable housing is a major priority for Merton's local communities. But the evidence suggests negotiating this, contributions to infrastructure and other developer contributions is a major factor affecting the time it takes to determine planning applications. The Council might consider appointing an in-house viability expert given this is one of the key barriers to delivery – both for developers and Registered Providers. It is understood that this is in progress. Linked to this, the Council should look to improve the S106 process, working in conjunction with the legal department, ensuring as streamlined a process as possible, given the feedback received from stakeholders.

8.30. The Council are exploring the utilisation of online tools where possible to support decision making, for instance, live independent 3D models to verify impact / views. The Council currently have VU City and are working to increase the use of this software in the Development Control team and at Planning Committee.

Boosting Delivery of Affordable Housing

8.31. Affordable housing delivery has been identified as a major community priority in the feedback of the public consultation undertaken by Icen. Respondents were particularly vocal about the expense and difficulty to purchase a home in Merton with a particular focus on the need for affordable housing for young people and families to get on the property ladder.

8.32. Our analysis of historic delivery trends has shown that affordable housing delivery is influenced in particular by the contribution of small sites and prior approvals, – which have been a major source of overall supply in Merton and are not required to provide affordable housing. The number of small sites coming forward in Merton has been high and there has been an increase in schemes submitted under the prior approval process in recent years.

8.33. As a result, there have been fewer opportunities to secure affordable housing across the Borough. In 2018/19

for example, only one scheme was completed which was eligible to provide affordable housing which resulted in only five affordable homes.

- 8.34. In respect of small sites, it is recognised that the Council are aiming to re-introduce a requirement for a financial contribution on sites delivering between 2 to 9 homes through emerging policy. This will be equal to up to 20% of provision and will address the clear barriers to increasing delivery which is principally the nature of applications and developments coming through the planning system in Merton. This has been viability tested in the Council's Local Plan Housing Viability Study which indicates that in certain scenarios, schemes can readily provide this.
- 8.35. Outside of this, the context of increasing affordable housing delivery should be focused on seeking to work with RPs on the GLA affordable housing programme whilst using grant funding to increase delivery above policy requirements. Although it should also be recognised that the Council's Local Plan Housing Viability Study has found the application of grant funding would result in a modest improvement in the level of affordable housing that can be secured.
- 8.36. Nevertheless, the Council could use the findings of this report – both in respect of community engagement and historic data analysis – to support discussions with the GLA around grant funding to support a higher level of affordable housing provision in particular neighbourhoods in Merton where it is more challenging to secure.

Engaging more Effectively with the Market

- 8.37. The Council is already engaging with some parties with existing interests in Merton now; however, this needs to be made effective. There is a need for the Council to have a proactive role as an enabler of development – identifying follow-up actions and marketing opportunities better.
- 8.38. The findings of the community engagement exercise undertaken as part of this study provide clear consensus from residents on key issues and should be shared and discussed with housing delivery partners.
- 8.39. Merton has the opportunity to have a more proactive role in communicating more widely the development opportunities available through conferences, brochures with opportunities and conversations with developers, building on the work they already undertake in this area. Stakeholders have told us that the perception of Merton is that the Council is less open for business than other London Boroughs.
- 8.40. A positive step forward would be the creation of a promotional website which is inciting to the market – this would create more visibility around opportunities and set out the authority's objectives and priorities, providing more transparency, helping to improve relationships. The Council has an opportunity to do this through its Future Merton Magazine.

An example from elsewhere is the London Borough of Enfield. Invest in Enfield is the borough's campaign to promote the benefits of doing business in Enfield. Investing in Homes is the Council's

channel of promoting available and ongoing development sites in the borough whilst inviting interested parties to get in touch.

- 8.41. The Council should also focus on strengthening relationships with developers in Merton, in particular smaller SME developers taking account of the nature of development opportunities in Merton. The Council should seek to become close to a number of these, who can have multiple schemes and grow output.

An example from elsewhere is the London Borough of Ealing. Ealing in London is the borough's promotional website to attract investors. It shouts loudly about Ealing being a pro-active, pro-development and pro-investment Council and promotes a range of initiatives alongside a range of opportunities which can be searched by size, on the map and by A-Z. There are a range of sponsors from A2 Dominion to Galliard Homes.

Engaging with the Community.

- 8.42. The residents' survey undertaken identified that residents considered the affordability, design and sustainability of housing to be more important considerations than the community engagement undertaken as part of the scheme development and planning process.
- 8.43. Given the importance of the issue of housing delivery in Merton over the coming years and the volume of useful feedback received as part of our work and the number of young people engaged, the council should continue to engage with residents, broadening engagement in relation to planning and housing delivery.
- 8.44. In total, 512 people noted they would like to be involved in future discussions and the Council is already making use of this interest, inviting them to be involved in the Character Study and Local Plan consultation.
- 8.45. Linked to the policy points noted earlier, the Council should review how they display and communicate policy, looking to expand on the volume of work done digitally and interactively, again creating greater understanding and involvement in the process. The Council is working towards publishing the final version of the new Local Plan as an ArcGIS Story Map in order to ensure it is more visual, interactive and spatial which is a positive move around accessibility.
- 8.46. The Council could also encourage resident participation in small site development, linked to the Small Sites Toolkit that will undergo a 6-week public consultation before being adopted as an SPD. The purpose of the document is to assist applicants in understanding planning policies and the process to improve the quality of proposed small sites developments, increasing the delivery of homes on small sites.

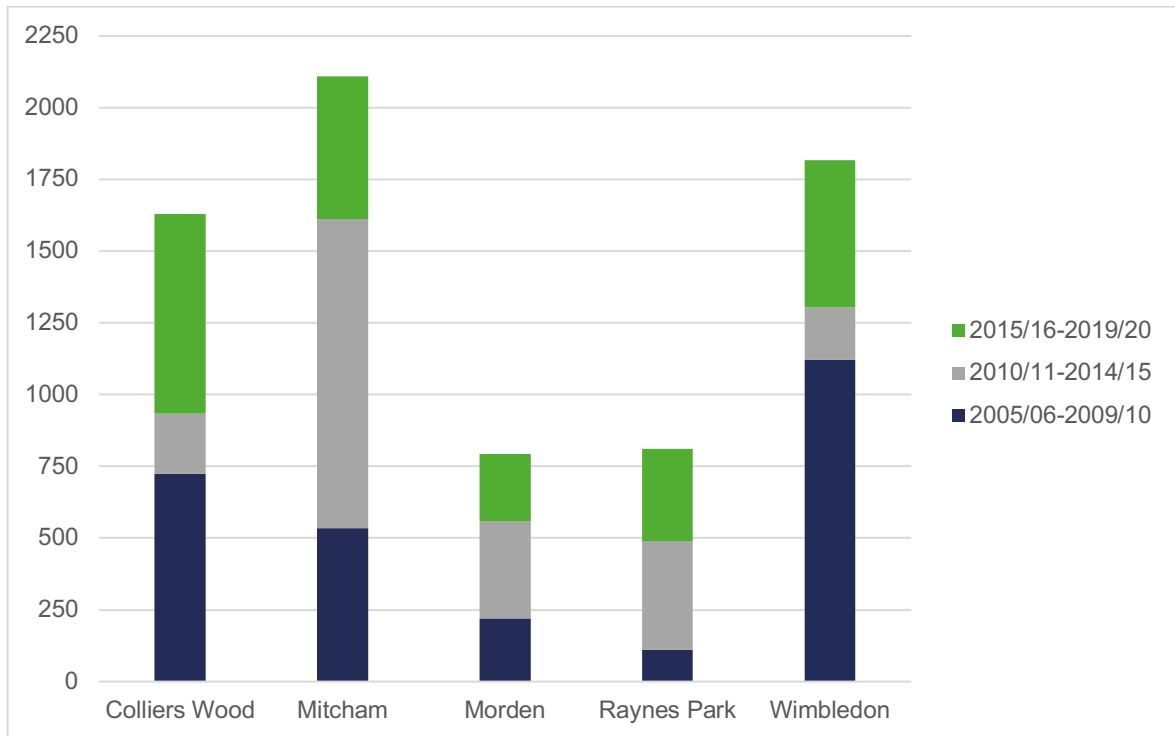
A1. Delivery Trends Full Neighbourhood Analysis

Housing Delivery Trends: Merton's Neighbourhoods

A1.1 At a neighbourhood level, the southern neighbourhood of Mitcham has seen the strongest housing delivery over the last fifteen years as a whole and contributed strongly to delivery in the 2010-15 period in particular. This was influenced by a number of large strategic sites coming forward in Mitcham including the regeneration of estates and the redevelopment of industrial sites.

A1.2 These large sites included the Windmill Trading Estate (around 250 homes) and Brenley Playing Fields (around 170 homes) which were built in Mitcham over the 2010-15 period. The nature of the built form in this neighbourhood – with more Inter War Council Estates and industrial warehousing – and the Council's active programme of Estate Regeneration has enabled these larger development schemes to come forward.

Figure A1.1: Net Housing Delivery by Neighbourhood, 2005-2020



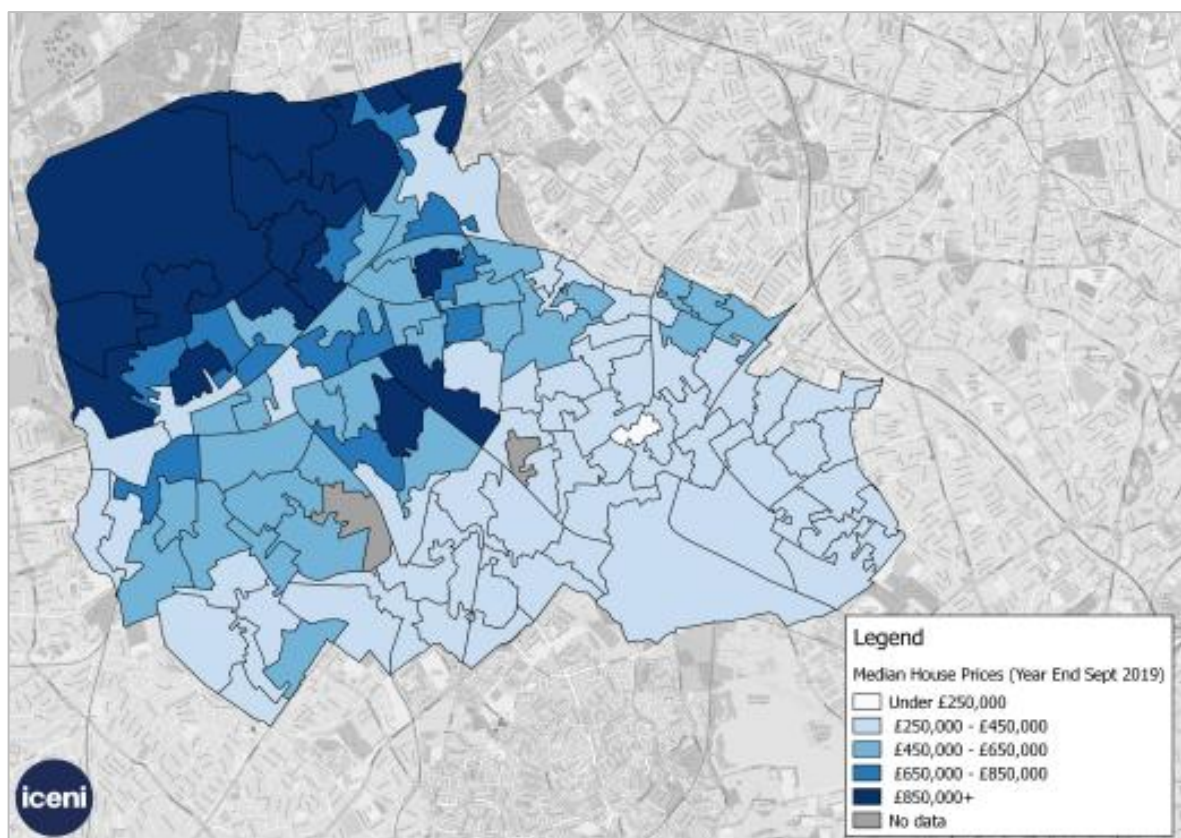
Source: LB Merton Monitoring Database

A1.3 Over the last five years, delivery has reduced in Mitcham as less large schemes have come forward. In contrast, Colliers Wood and South Wimbledon has seen a notable increase in housing delivery between 2015/16 – 2019/20 in comparison to the previous five year period. This has been supported by the delivery of higher density flatted development schemes particularly along Merantum Way/A24 including the development of Brown & Root Tower, Cavendish House and Morris Court, Christchurch Road, which have each delivered 50

homes or more. Although it should be noted that all of these sites fall under 0.25 ha and are therefore regarded as small sites by the London Plan definition.

- A1.4** Figure A1.2 below provides an overview of the house price geography across Merton. The Figure is clear in showing that the highest values are in and around Wimbledon including Wimbledon Hillside and Wimbledon Village to the north of the railway line. This is followed by Wimbledon Town, Merton Park and Raynes Park. Lower residential values are evident in areas in the south of Merton including Morden, St Helier and Mitcham.
- A1.5** As recognised in this report and through engagement with stakeholders, Merton has significant variation in residential values across neighbourhoods – more so than elsewhere in London – and the Figure below demonstrates the importance of considering delivery at a sub-Borough level.

Figure A1.2: House Price Geography at a Borough Level

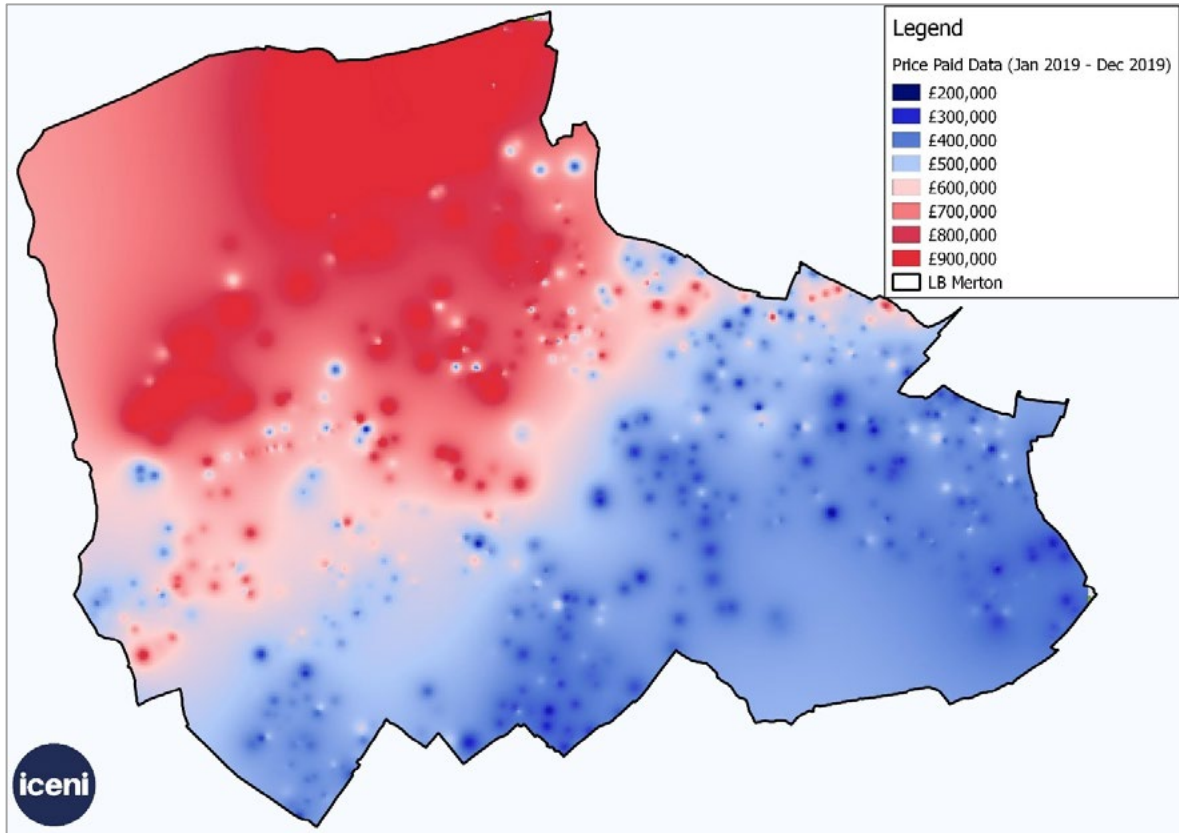


Source: ONS Small Area Statistics and HM Land Registry Data

- A1.6** The higher values and stronger public transport accessibility to Central London drive developer interest in the northern neighbourhoods of Merton and there is a strong correlation between the volume of development schemes coming forward and the higher values shown. This is a key factor affecting the volume of development schemes coming forward; recognising that land supply influences the potential for larger schemes which in turn influence the volumes of residential development.

A1.7 This Figure above does not however take account of the large variation in the mix of properties. As a result, the Figure below focusses solely on the house price differential across Merton in respect of terraced properties which shows the same, albeit more marked difference.

Figure A1.3: House Price Geography of Terraced Properties at a Borough Level

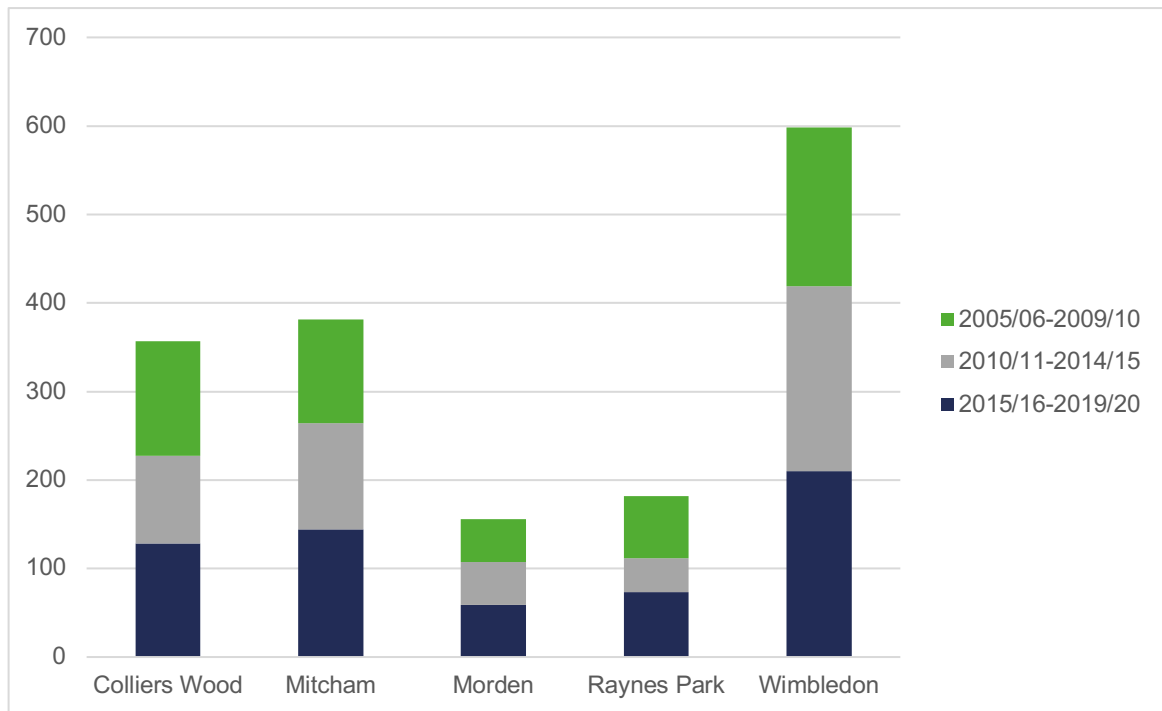


Source: HM Land Registry Data

A1.8 Figure A1.4 provides a context to the quantity of individual applications which the Council approves; with successful planning applications submitted in Wimbledon accounting for over a third (36%) of all planning applications submitted in the last fifteen years. This contrasts with a lower number of applications in Mitcham.

A1.9 The ability to support higher rates of housing delivery in Mitcham has been influenced by the delivery of a number of larger development schemes as described. The lowest number of application is in Raynes Park, which particularly reflects the smaller size of this neighbourhood.

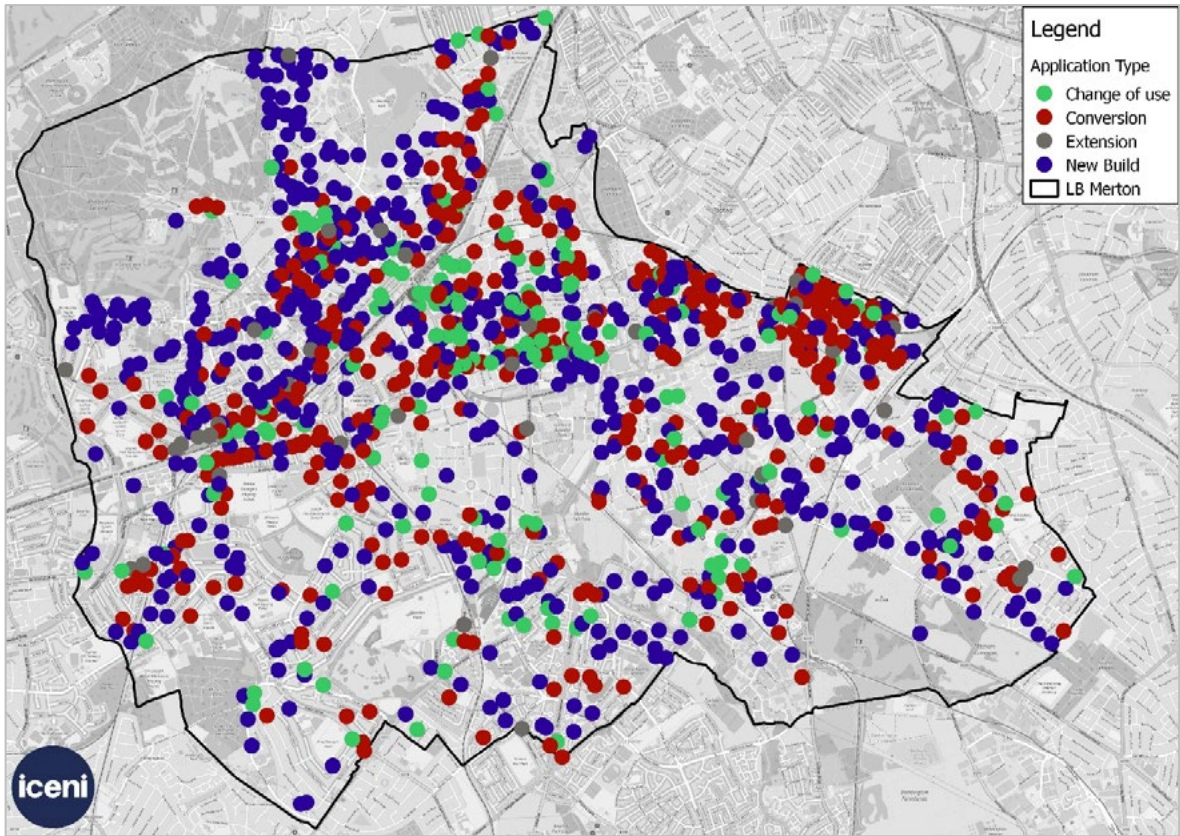
Figure A1.4: Planning Applications Approved by Neighbourhood, 2005-2020



Source: LB Merton Monitoring Database

- A1.10** There is a constant backdrop of Change of Use and conversion applications. This type of development is stronger in the northern neighbourhoods of Merton including in Wimbledon, Raynes Park and Colliers Wood where there is more loosely structured suburban development and larger properties which offer potential for conversion or intensification within the plot.
- A1.11** This is coupled with a stronger town centre offer and quality of place than other areas, with good schools and other attractive amenities, which – together with stronger relative public transport connectivity to higher value employment in Central London – contribute to a stronger demand profile and residential values.
- A1.12** Wimbledon also sees a significant volume of smaller-scale ‘new build’ development. This includes schemes whereby single dwelling large homes are demolished and redeveloped into more than one dwelling resulting in a net gain in units. This is influenced by the prevalence of larger properties and plots in Wimbledon, particularly in Wimbledon Village and on Wimbledon Hill.
- A1.13** Wimbledon has also seen a high proportion of applications to convert multiple dwellings into one single family home, which reflects the demand for family sized homes in an area with good schools, amenities and quality of place. A large proportion of these applications have been in Wimbledon Park and Wimbledon Village ward. The concentration of these forms of development is shown in the A1.5 below.

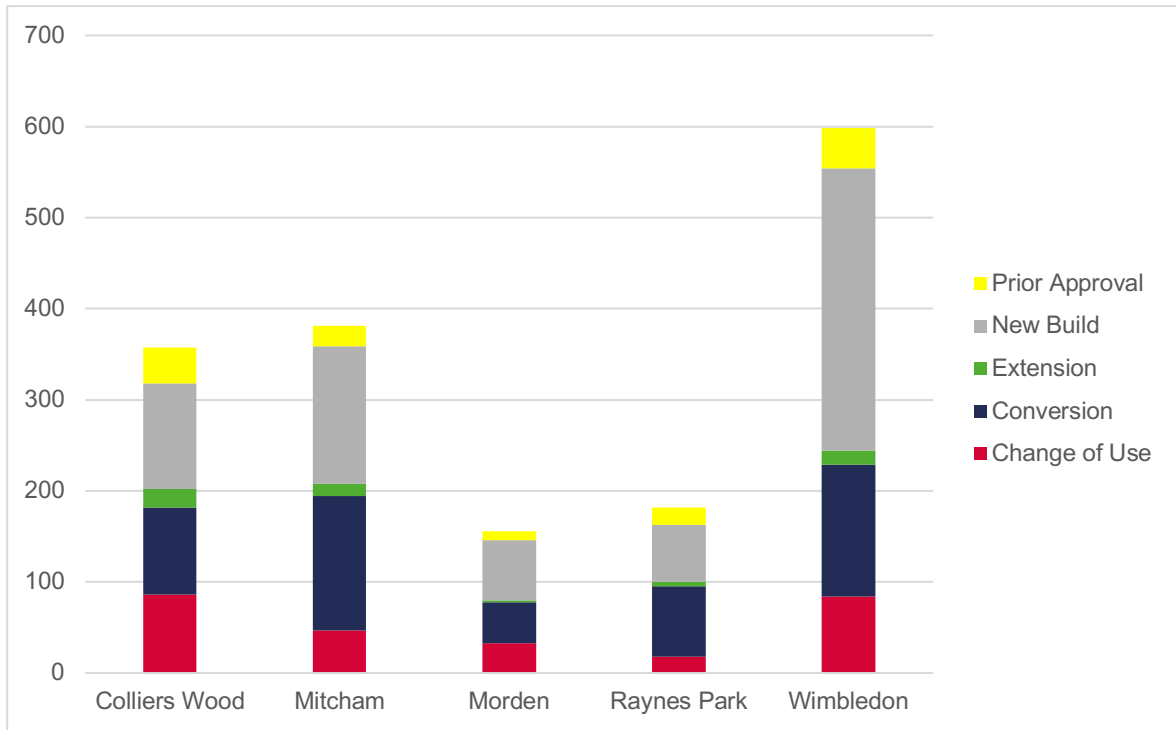
Figure A1.5: Distribution of Schemes by Application Type



A1.14 It is also clear from the Figure above that there is a concentration of conversions in Raynes Park along Worple Road and Bushey Road in particular, in Colliers Wood and in the streets of terraced housing in the Tooting borders area. These schemes are typically the conversion of single family dwellings (Victorian/Edwardian terraced) into multiple self-contained flats which is a typology trend seen in Merton.

A1.15 The profile of planning applications is shown in the Figure below and clearly demonstrates the higher volume of 'new build' development in Wimbledon. However, a significant proportion of these are 1-1 replacements of existing dwellings which do not contribute to net growth in the dwelling stock. In Raynes Park, the majority of applications have been for conversion schemes which is concentrated in areas of grid nineteenth century terraced housing. As noted, the majority of conversion schemes have been from existing family homes to self-contained flats in this area

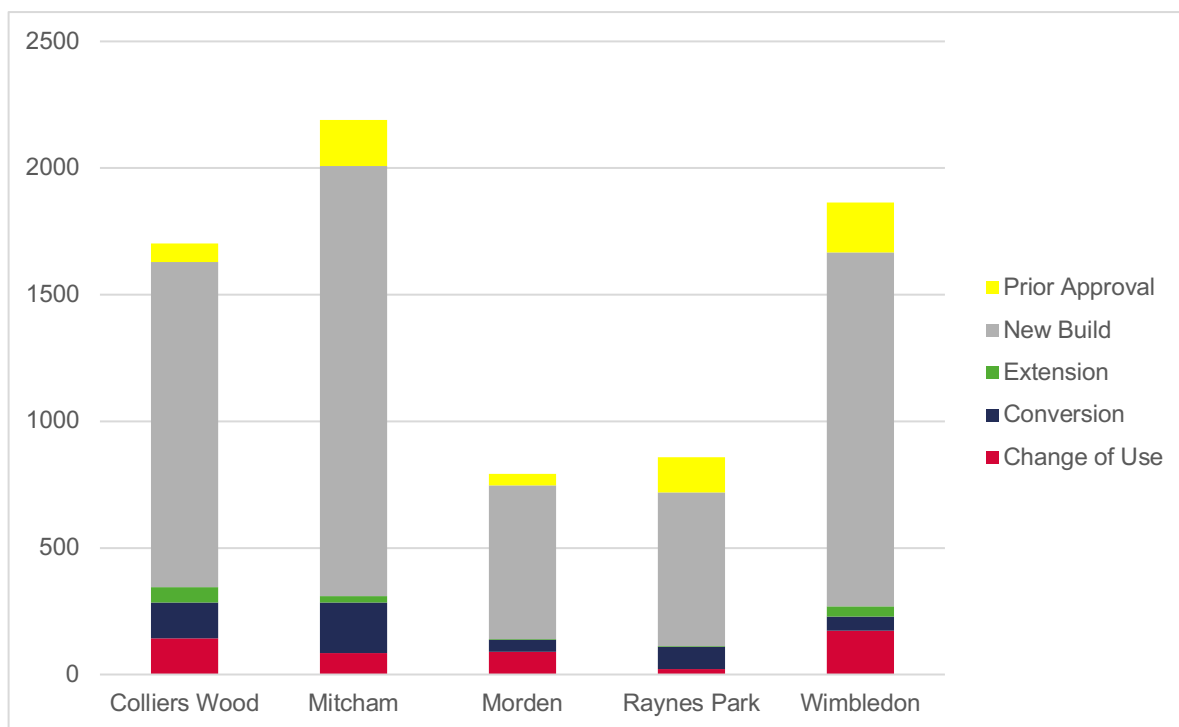
Figure A1.6: Profile of Approved Planning Applications by Type, 2005-2020



Source: LB Merton Monitoring Database

- A1.16** The greatest proportion of applications in all neighbourhoods outside of Raynes Park has been for new build development which includes the demolition of existing buildings to provide new dwelling and development on brownfield land and land with a former use. In Mitcham, there has been a significant volume of conversion applications submitted; however ultimately it is larger scale new build development which has been driving housing delivery in the neighbourhood.
- A1.17** Colliers Wood has seen the highest proportion of Change of Use applications which have been concentrated on High Street – which is one of the main commercial centres – whilst Morden has seen a notably low level of applications and development interest. This is partly driven by lower values as well as poor transport accessibility away from the tube station.
- A1.18** Bringing the focus back to housing delivery, the Figure below shows the profile of completions by type in each neighbourhood. This demonstrates that overall development volumes are being driven by new-build development. This has been strongest in Mitcham, Wimbledon and Colliers Wood.

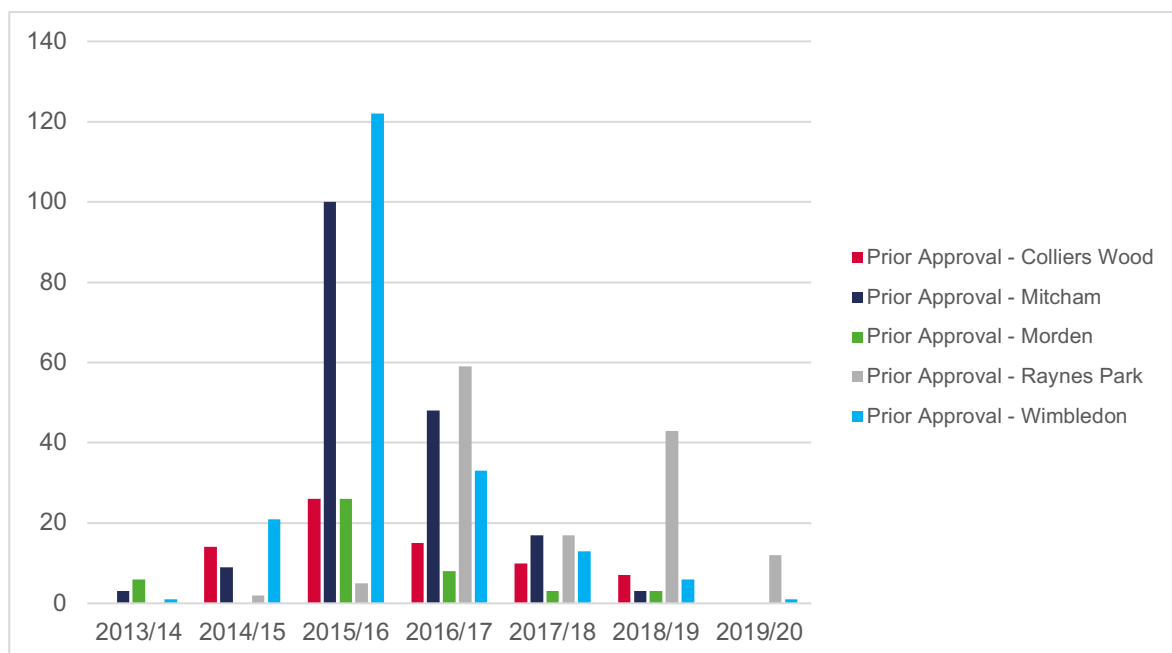
Figure A1.7: Profile of Net Completions by Application Type, 2005-2020



The Impact of Prior Approval Development

- A1.19** The introduction of Permitted Development Rights in 2013/14 has supported some growth in housing delivery in the period since. As Figure A1.8 shows, the number of prior approval applications coming forward have been focussed in Wimbledon, Raynes Park and Colliers Wood more than the southern neighbourhoods.
- A1.20** The higher number of approved applications in these neighbourhoods is principally due to a greater volume of commercial space in these areas, such as along High Street and Worple Road in Wimbledon. In effect, these neighbourhoods are where the commercial centres are found, and the volume of applications reflect this.
- A1.21** However, as the Figure below shows, prior approval applications have had also an upward impact on delivery in Mitcham in addition to the northern neighbourhoods. Two schemes in particular - at Clock House, Willow Lane Industrial Estate and Brook House, Cricket Green - have contributed the majority of homes approved under prior approval in Mitcham.

Figure A1.8: Completions from Prior Approval Development by Neighbourhood



- A1.22** The number of homes delivered through prior approvals in Mitcham and Wimbledon peaked in 2015/16 at around 280 homes and has gradually fallen. The total number of completions through prior approvals over the last two years combined is equal to 122 homes which is substantially lower when set against the 2015/16 peak.
- A1.23** Following the introduction of Permitted Development Rights in 2013, an Article 4 Direction came into effect in Merton from 3rd April 2015 onwards which reintroduced the need for planning permission for the conversion of offices to dwellings in Wimbledon town centre and a number of industrial estates in Merton which is likely to have slowed interest.
- A1.24** Although delivery from prior approval applications in Wimbledon and Raynes Park is broadly similar to delivery in Mitcham, delivery from this source of supply has accounted for a large proportion of the total supply in these northern neighbourhoods. As prior approval schemes are not required to deliver affordable housing, the volume of completions through this form of development has influenced affordable housing delivery rates.
- A1.25** This source of supply is however expected to continue; and may even make an enhanced contribution given further changes to permitted development and Use Class Order. The Government introduced a new Permitted Development Right that enables the construction of up to two storeys as an upwards extension to create additional dwellings; which came into force on 31st August 2020.
- A1.26** A number of changes to the Use Class Order has also been introduced from 1st September 2020 to allow flexibility between certain uses through the creation of Class E (commercial, business and service) enabling complete flexibility between former retail and business uses.

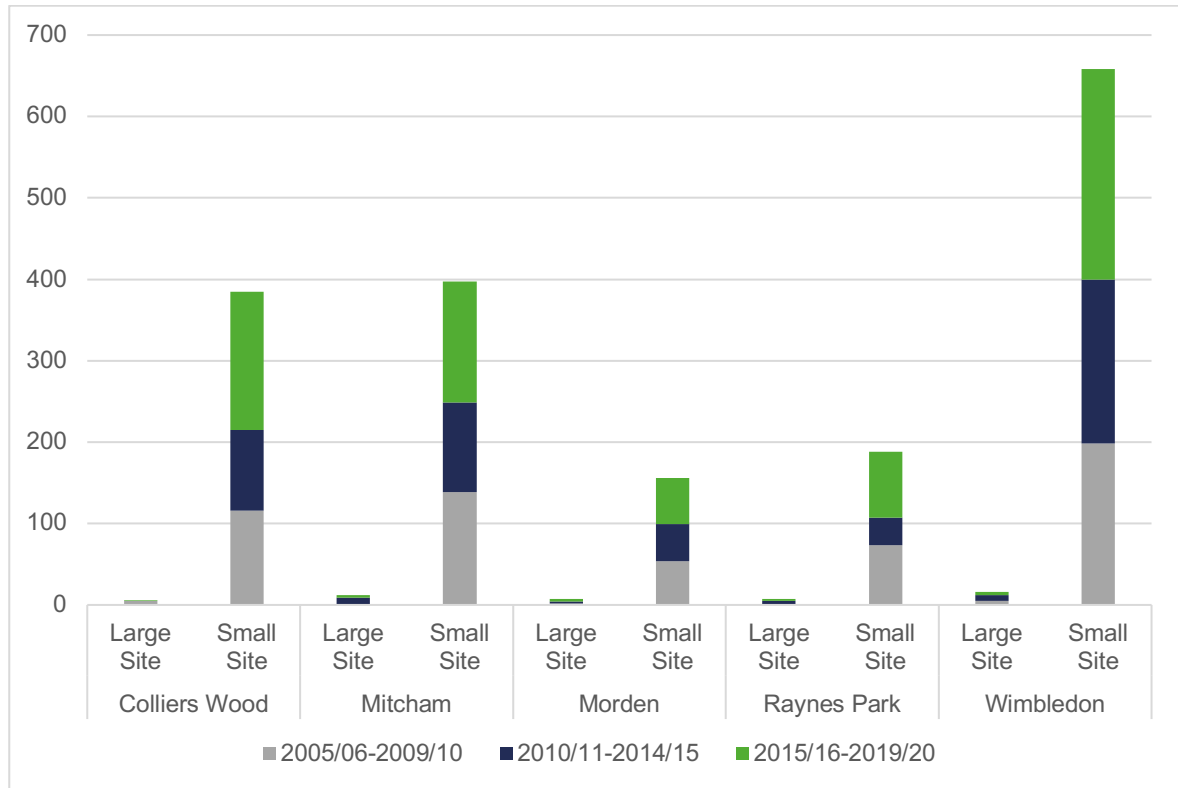
The Dynamic between Small and Large Sites and Schemes

- A1.27** In simple terms, Merton is constrained, there is a lack of additional development land; and therefore, where large sites are brought forward, these sites drive overall housing delivery. These larger schemes principally comprise

the redevelopment of employment land, the development of open space and estate regeneration schemes have a significant influence on overall delivery rates in Merton, and the distribution of housing completions by neighbourhood.

A1.28 The influence of these large sites varies over time depending on availability and phasing and this is clear from the fluctuation in which neighbourhood sees the highest growth in different time periods. The Figure below shows the geography of planning applications by size looking over the last fifteen years.

Figure A1.9: Geography of Planning Applications for Small¹ and Large Sites, 2005-2020



A1.29 Over the last fifteen years, small sites have accounted for 62% of total completions Borough-wide but account for 97% of planning applications which are approved. Small sites across Merton contribute only 2.4 homes per application on average and therefore a significant upward shift in small site development will not be enough on its own.

A1.30 Across each of the neighbourhoods, the proportion of small sites –accounts for between 56% in Mitcham and Wimbledon up to 71% of all delivery in Colliers Wood. However, as the Figure below shows, larger sites contribute significantly to overall housing delivery despite being brought forward in small numbers and have ultimately contributed to the profile of delivery in the five year periods. Over the last five years, growth in Colliers

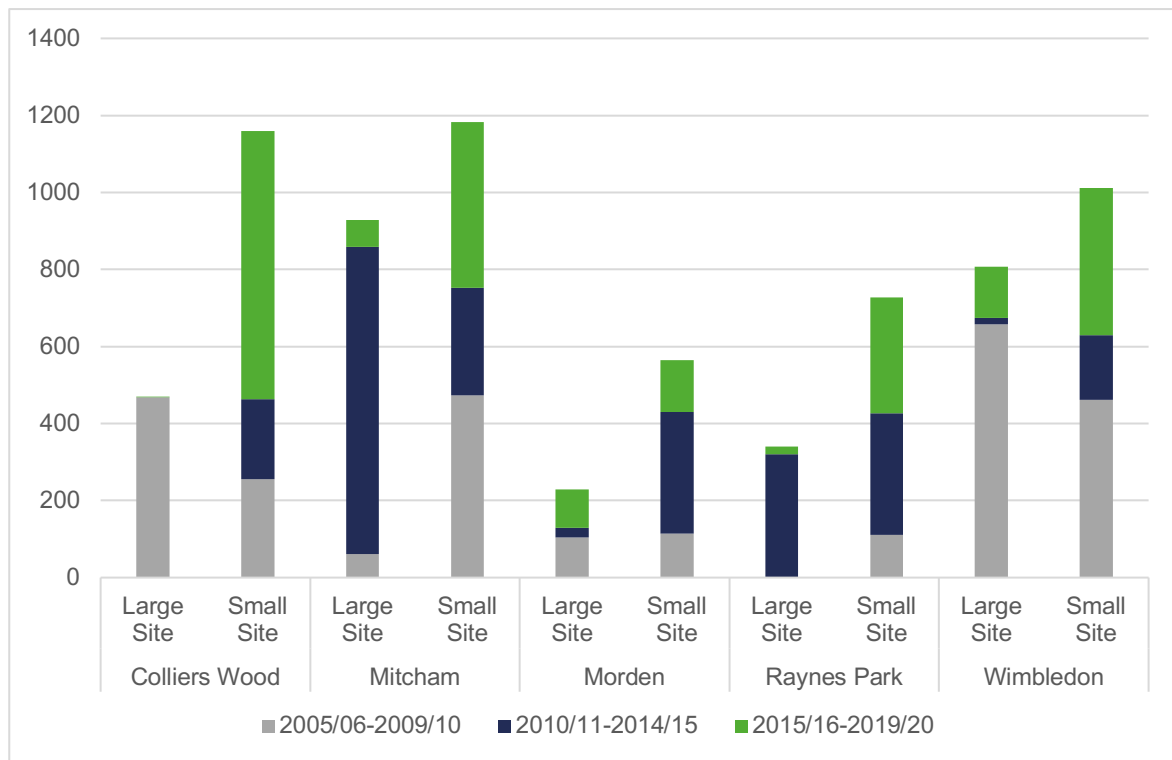
¹ A small site/scheme has been defined as a site which is less than 0.25 hectares

Wood has been driven by higher density flatted schemes which, although not on sites greater than 0.25 ha, have allowed all delivered in excess of 50 homes.

A1.31 The proportion of net housing completions that have come forward on large sites or large development schemes (i.e. exceeding 0.25 ha) is equal to 37% in Merton over the last fifteen years but only 14% over the last five. Ultimately, there has been relatively modest levels of larger development sites which have been approved and come forwards and the availability of additional larger sites are not on the table.

A1.32 The large schemes of note in Merton which have come forward include the redevelopment of Haslemere Industrial Estate, Former Thames Water Merton Works, Merton Sixth Form College, Atkinson Morley Hospital and a number of estate regeneration schemes.

Figure A1.10: Geography of Housing Delivery on Small and Large Sites, 2005-2020



Delivery by Bedroom Size and Type

A1.33 This sub-section also takes account of housing delivery by size and type of property. The starting point is to consider the current profile of housing in each neighbourhood which we have drawn from the Merton SHMA.

A1.34 The Table is reproduced below and shows that Wimbledon has a substantially higher proportion of larger four or more bedroom properties when compared with other neighbourhoods. Colliers Wood sees a high proportion of smaller properties; with the profile in the other three neighbourhoods focussed more so towards typical-sized family housing of 3 bedrooms.

Table A1.1 Housing Stock by Size by Neighbourhood, 2018

Neighbourhood	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms
Colliers Wood	26%	40%	22%	12%
Mitcham	18%	27%	44%	10%
Morden	9%	26%	48%	17%
Raynes Park	18%	28%	36%	18%
Wimbledon	18%	28%	20%	33%
Borough Total	18%	29%	36%	17%

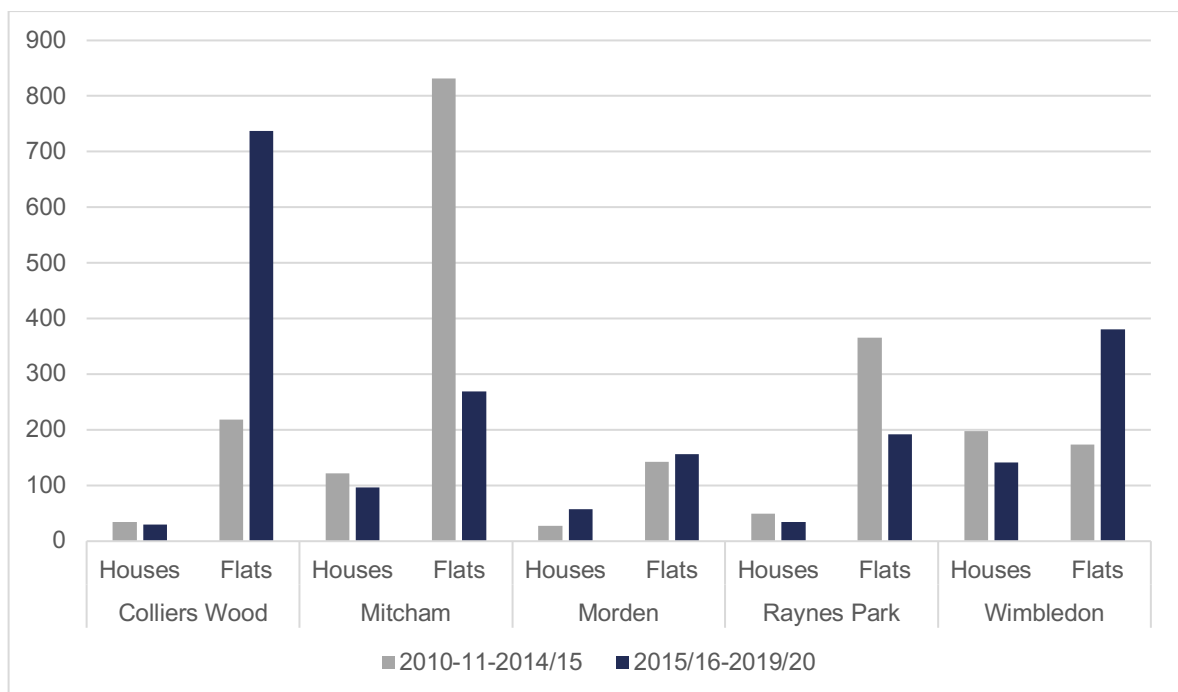
Source: Table 2 of Merton SHMA (July 2019)

- A1.35 The higher proportion of family housing and four or more bed homes in Wimbledon is largely due to the combination of good schools, a high quality of place attractive environment – which is attractive for those with higher earnings commuting into London – and the characteristics of the area and the area’s character.

- A1.36 Across Merton, a high proportion of housing that has been delivered has been flatted. The proportion of completions which are flats has also been rising from around 80% of completions between 2010-15 to 83% over the last 5 years. **Figure A1.11 below shows the split between homes and flats over the last two five year periods on the basis of gross completions.**

- A1.37 Our engagement with stakeholders has told us that many sales teams are nervous in suburban locations where flats are on offer owing to sites often being in a second rate location with a need for a private car; however, the volume of flats coming forward is significantly greater than homes.

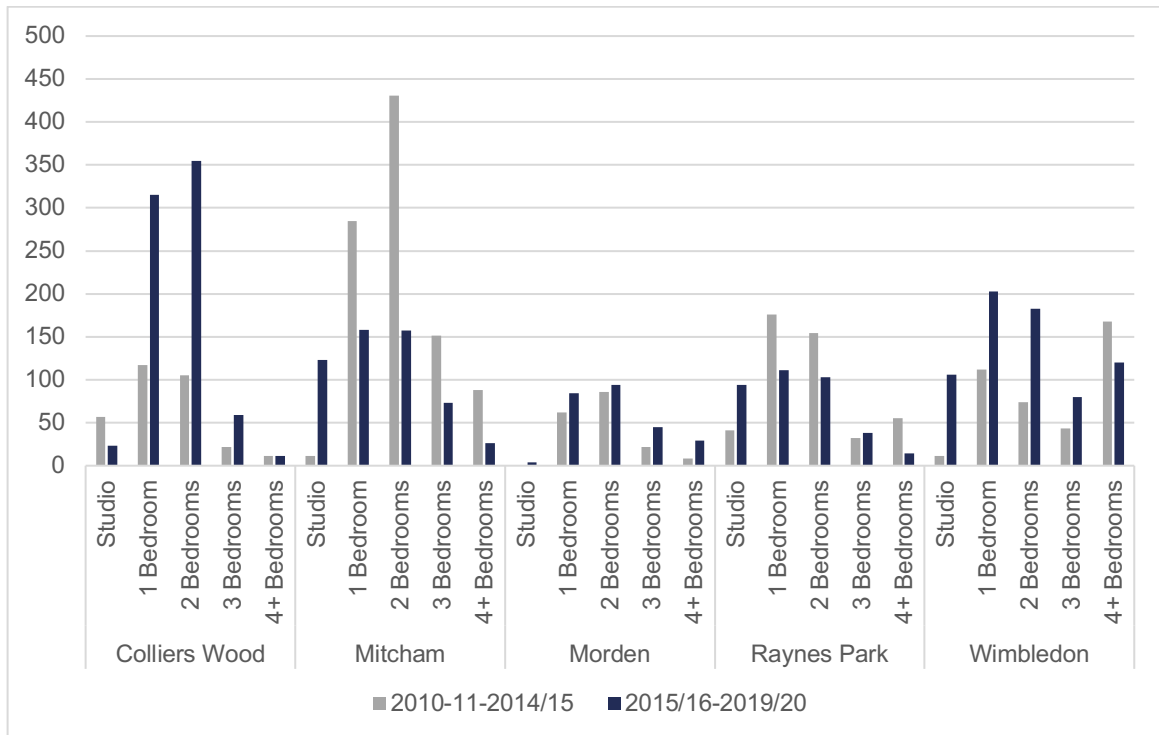
Figure A1.11: Completions by Dwelling Type



A1.38 It is no surprise that the areas which have seen the greatest delivery over the last two five year periods – Colliers Wood and Mitcham – have delivered a relatively substantial number of flats. Wimbledon and Raynes Park have also seen a number of flats delivered; however, this has been principally driven through the introduction of Permitted Development Rights and conversion schemes. It is only Wimbledon and to a lesser degree Mitcham where homes have been delivered.

A1.39 Filtering through into bedroom sizes, development trends have been focussed on a greater proportion of 1 and 2 bedroom properties across all neighbourhoods with the exception of Wimbledon which has also seen a relatively large proportion of larger family housing which have accounted for 37% of completions over the last 10 years.

Figure A1.12: Gross Completions by Size, 2010-2020



A1.40 The rate of 1 and 2 bed provision has been focussed in Colliers Wood – which has an existing concentration of these sizes of properties in its current stock profile – as well as Mitcham, which has seen a greater proportion of smaller properties delivered in comparison to the stock profile in the area. This is a product of land availability and the densification of this land through conversions and new build development.

A1.41 Wimbledon has continued to deliver larger four or more bedroom homes and there has been a notable impact from the development of Vantage House in Wimbledon Village on studio provision. The former **is coming forwards through the redevelopment of larger plots in Wimbledon Village - which don't exist in same way in other areas of Merton.** In Wimbledon, larger properties are also built because there are more smaller sites in that area where one home is demolished and a larger home is rebuilt.

A1.42 Outside of Wimbledon, development through prior approvals have generally increased the number of studios coming forward in Merton as well as smaller properties. The conversion of larger homes into self-contained flats has also driven the numbers of smaller properties in these northern neighbourhoods.

A1.43 Over the last ten years, the proportion of 3 bedroom housing delivered has been relatively low across the board. Through engagement with the development industry and other key stakeholders, we understand that many consider the aspirations of Merton for a greater quantum of 3 beds is unrealistic. The development industry considers the provision of this size of unit challenging as they struggle to make the scheme viable depending on the area. This is evidenced in the delivery trends over the last ten years.

Delivery by Typologies

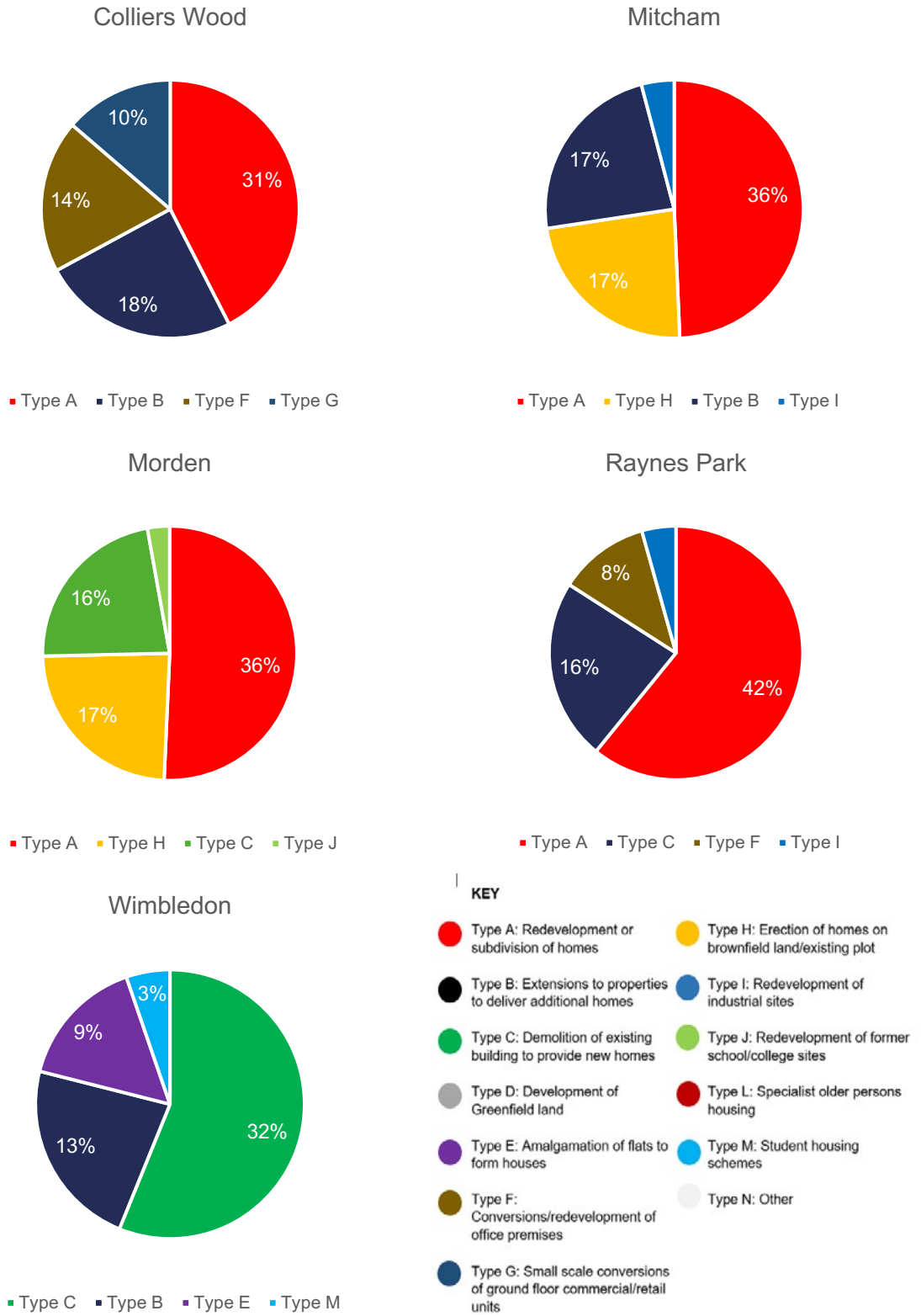
A1.44 Our analysis has also sought to define a number of typologies of development which helps us to understand the character of housing delivery in each neighbourhood. The typologies are wide ranging and recognise that in some neighbourhoods, the redevelopment of large family homes are more prevalent in comparison to the redevelopment of industrial sites.

A1.45 These typologies are set out below and shown in the Key on the Figures:

- **Type A: Redevelopment or subdivision of large family homes**
- **Type B: Extensions to properties to deliver additional dwellings**
- **Type C: Demolition of existing building to provide new dwellings**
- **Type D: Development on Greenfield land**
- **Type E: Amalgamation of flats to form houses**
- **Type F: Conversions/ redevelopment of office premises**
- **Type G: Small scale conversions of ground floor commercial / retail units**
- **Type H: Erection of Dwelling(s) on brownfield land / existing plot**
- **Type I: Redevelopment of industrial sites**
- **Type J: Redevelopment of school/ college sites**
- **Type K: Rationalisation of playing fields**
- **Type L: Specialist older persons housing**
- **Type M: Student housing schemes**
- **Type N: Other**

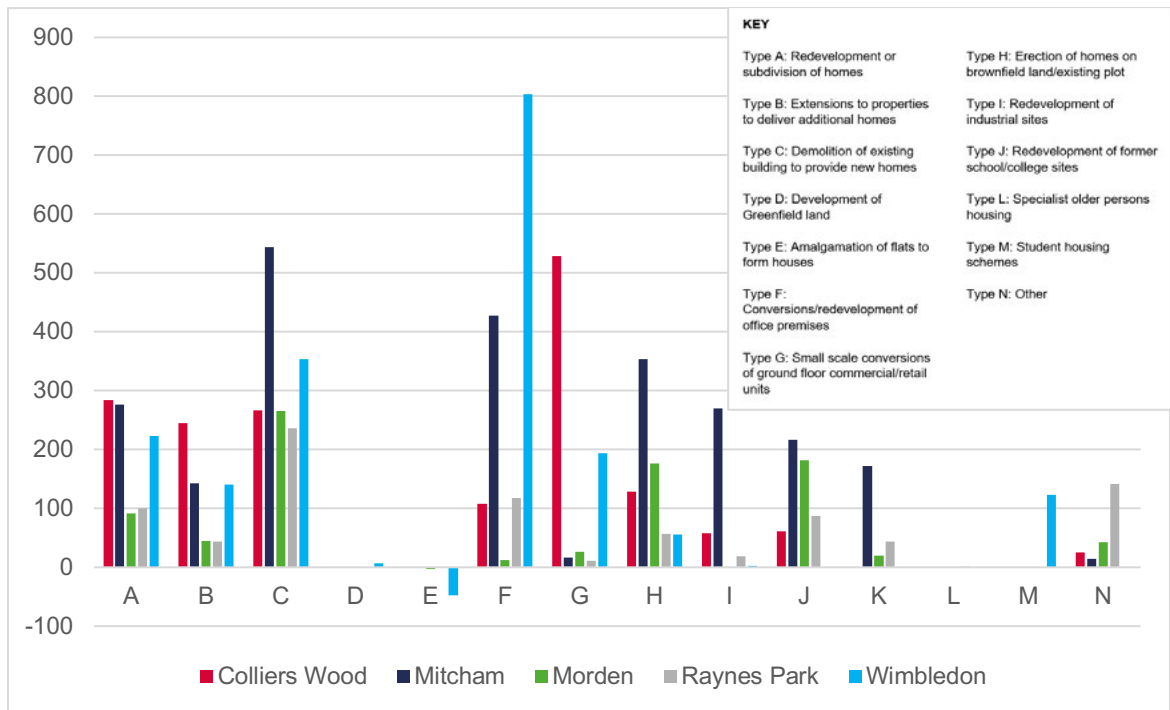
A1.46 In order to quickly understand the profile of each area, we have selected three to four typologies for each neighbourhood which are either most common or particularly unique to that neighbourhood. A series of charts are set out below which focus on the number of planning applications submitted under each typology which have been approved over the last fifteen years. The letter correspondences with the typology set out above.

Figure A1.13: Profile of Approved Applications by Typology, 2005-2020



- A1.47** As Figure A1.13 demonstrates, there is a very clear distinction between each neighbourhood in respect of the types of applications that are coming forward and being approved. Over the fifteen year period from 2005-2020, the redevelopment or subdivision of family homes is the most common type of development in all neighbourhoods except for Wimbledon as a proportion of all applications.
- A1.48** Instead, Wimbledon sees a greater proportion of new build development through demolitions and rebuilds on larger plots – demolishing a large dwelling and providing new dwellings. On the other hand, the neighbourhood also has a greater proportion of extensions to existing dwellings than some areas and the conversion of self-contained flats into larger family homes.
- A1.49** In Colliers Wood, there is a greater proportion of conversions including larger homes to self-contained flats as well as conversions of commercial and office premises. This area also has the highest proportion of extensions providing for new dwellings.
- A1.50** In Morden and Mitcham, we see a greater proportion – as expected – of brownfield redevelopment and the redevelopment of industrial land. There is also a number of schemes developed on former school sites and playing fields.

Figure A1.14: Net Completions by Typology, 2005-2020



- A1.51** The Figure above provides an overview of the contribution each type of development has made over the last fifteen years in each neighbourhood. It is clear that the majority of the housing delivery in Mitcham is centred around the redevelopment or development of brownfield sites, industrial land, playing fields and former school land as well as the redevelopment of former office buildings including sites such as Brenley Playing Fields (169 homes), Windmill Trading Estate (212 homes) and Seagas House (Mitcham Gas works) (137 homes). In effect, the neighbourhood has more land available for development.

- A1.52** In contrast, neighbourhoods such as Colliers Wood and Wimbledon is reliant more so on the redevelopment of larger family homes and the redevelopment of commercial space; as well as the demolition of existing buildings to provide a greater number of homes.

Delivery in Specific Types of Locations

- A1.53** This sub-section includes analysis of the nature and quantum of development coming forward around transport nodes and within town centres.

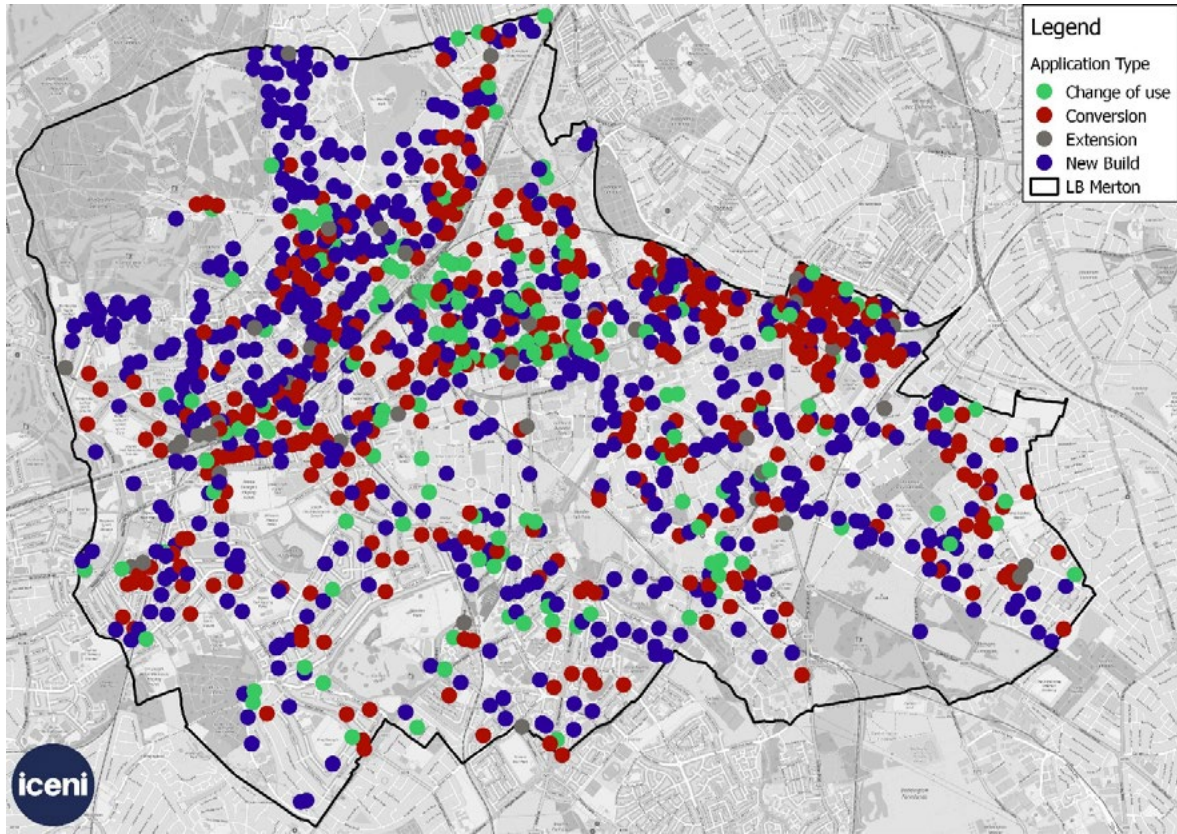
Delivery around Transport Nodes

- A1.54** The analysis is pointing towards differences in housing delivery between higher levels in Colliers Wood, Raynes Park and Wimbledon in and around transport nodes whereas out in Morden and Mitcham, development around stations and transport links is not as apparent.

- A1.55** This is owing to the fact that Colliers Wood, Raynes Park and Wimbledon benefit from high frequency transport links to higher value jobs in Central London; and a different socio-economic profile to other parts of Merton, including Morden which is more deprived and has more household groups with a lower socio-economic profile. The Wimbledon Loop line which serves the southern neighbourhoods has significantly lower frequency of services. For instance, Wimbledon Chase has a direct service to London only every 30 minutes.

- A1.56** The Figure below shows the geography of development schemes approved over the last ten years. Over this period, there were 863 residential applications totalling 3,588 dwellings within 800m walking distance of a train or tube station.

Figure A1.15: Approved Development within 800 Walking Distance from Stations



- A1.57 It is clear that the connectivity in the southern neighbourhoods of Lower Morden, St Helier and Pollards Hill is not as strong; and despite there being a number of stations with transport links, it is clear that development does not wrap around these nodes in the same way that parts of the northern neighbourhoods experience.

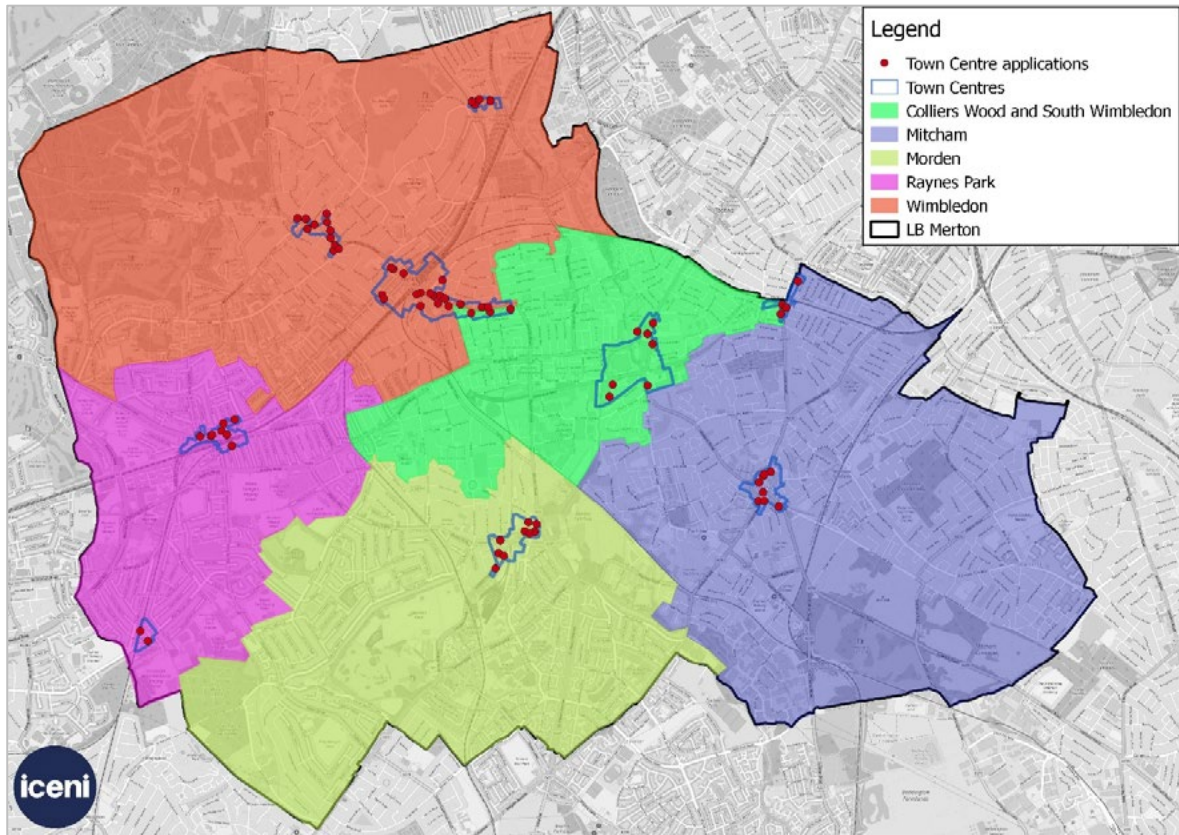
- A1.58 The transport links that exist are of lower frequency or do not connect to higher value jobs in Central London. This influences potential development values and absorption rates. However, it is recognised that Mitcham Eastfields station – which opened in 2008 - is likely to have a positive impact moving forward.

- A1.59 Feedback from stakeholders is suggesting that whilst developing at scale on complex sites is feasible, when developers look towards the southern neighbourhoods of Mitcham and Morden and in close proximity to tram link stops, values fall to levels in line with those outside of London and viability becomes an issue.

Town Centre Development

- A1.60 The role of town centres as a location for increasing housing delivery in Merton is evident when looking back over the last fifteen years. The analysis is suggesting that town centre development has contributed strongly to overall housing completions in Colliers Wood as well as Wimbledon and Raynes Park. However, over recent years, housing delivery in town centres has accounted for a relatively low proportion of overall development. The chart below shows approved planning applications in Town Centres.

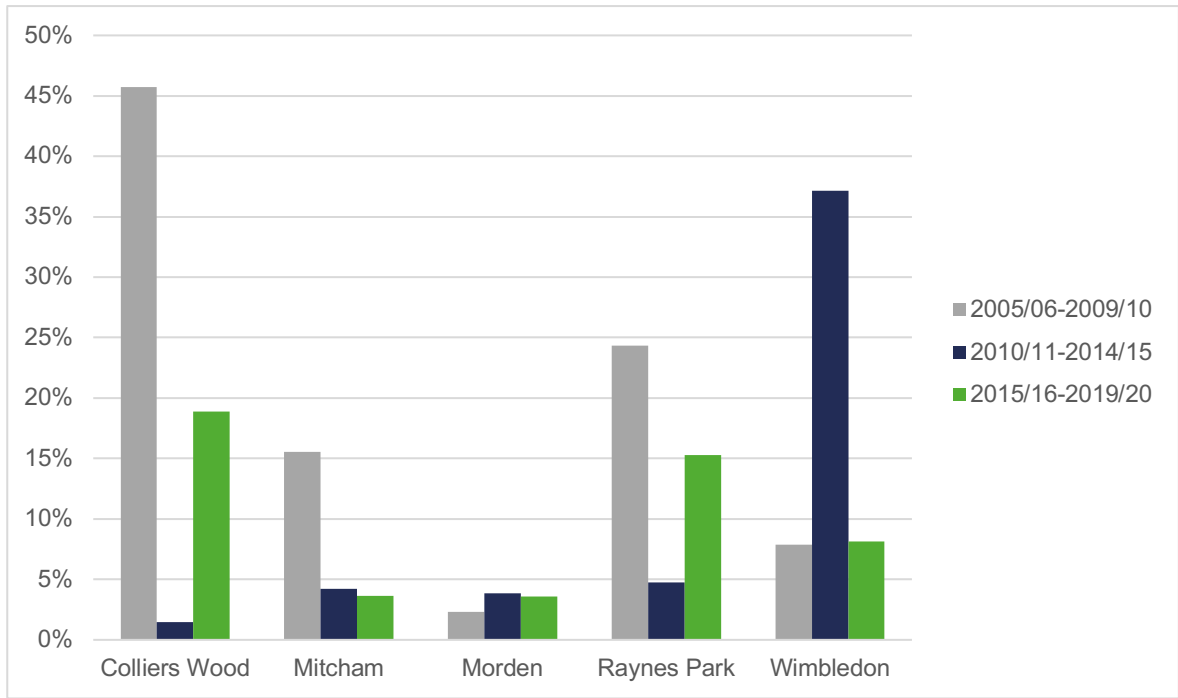
Figure A1.16: Approved Planning Applications in Town Centres



A1.61 In the last fifteen years there were over 150 residential applications approved within Town Centres totalling 563 dwellings. This accounts for over half (equal to 58%) of all applications submitted to the Council which included new homes. Of this total, 75% have been in Colliers Wood, 16% in Wimbledon and 9% in Raynes Park. Figure A1.17 below shows the proportion of housing delivery accounted for by town centre development.

A1.62 In Wimbledon, the impact of permitted development rights is apparent – particularly as a result of a high volume of prior approvals in Wimbledon Park – which has driven the high proportion of delivery in the town centre.

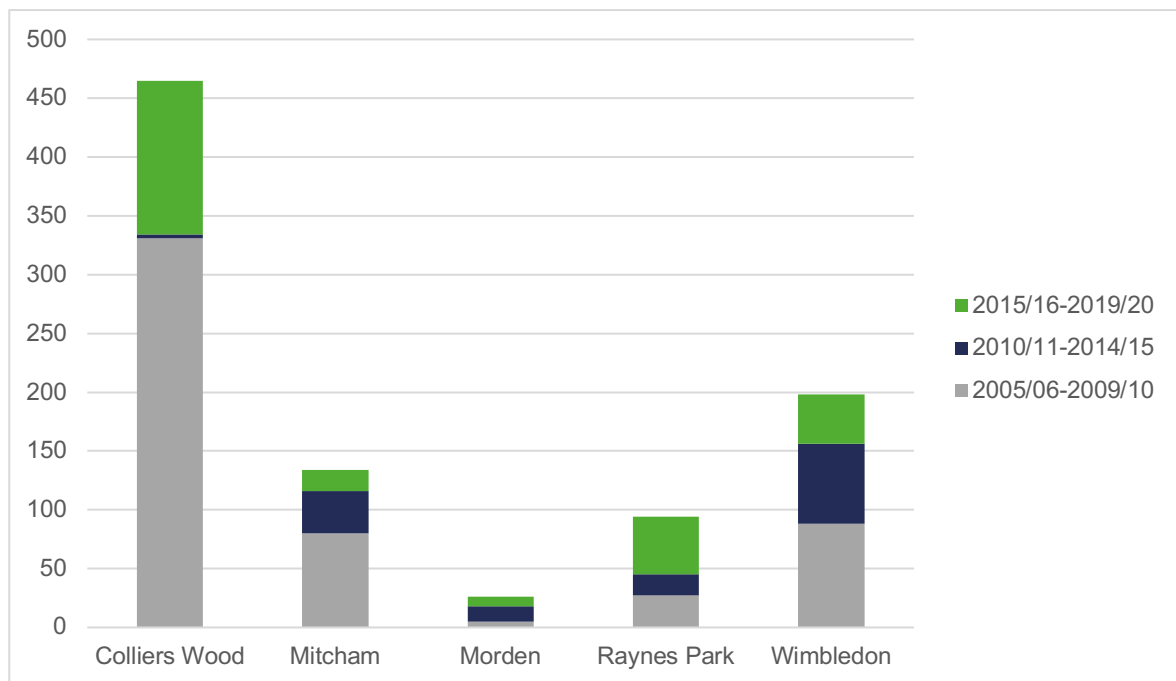
Figure A1.17: Proportion of Overall Housing Delivery in Town Centres, 2005-2020



A1.63

In Colliers Wood, there has been a particular concentration of delivery along High Street with a substantial proportion of this being Change of Use applications. However, the majority of completions have been driven by new build development including for instance the redevelopment of Brown & Root House which was completed in 2017/18. This is borne out in the Figure below.

Figure A1.18: Net Development in Town Centres, 2005-2020



A1.64 Town Centre development has been driven by flatted schemes with 92% of completions being 1- and 2-bed properties. A high proportion of change of use applications have been in Town Centres, reflecting the concentration of commercial space – both office and retail – in these areas.

A1.65 The development industry has been positive around the prospective of Town Centres delivering additional housing moving forward. It is however noted that the principle of no net loss of retail floorspace needs to be diversified in certain areas. For example, if a large retail store is out of use, it is questionable whether this level of provision should be re-provided.

Affordable Housing Delivery

A1.66 This sub-section includes an analysis of the dynamics associated with affordable housing provision in each neighbourhood. There has been a decrease in affordable housing over last 5 to 10 years and the analysis reviews the impact of the size of schemes and the impact of policy changes.

A1.67 First, in overall terms, it is important to recognise that the size of sites which comes forward in Merton have a significant influence on affordable housing delivered. The Council's adopted Local Plan Policy on affordable housing does not apply on sites which are less than 10 homes nor sites which are submitted under the prior approval process. Those schemes which are eligible should seek to provide a minimum of 40% of all homes as affordable.

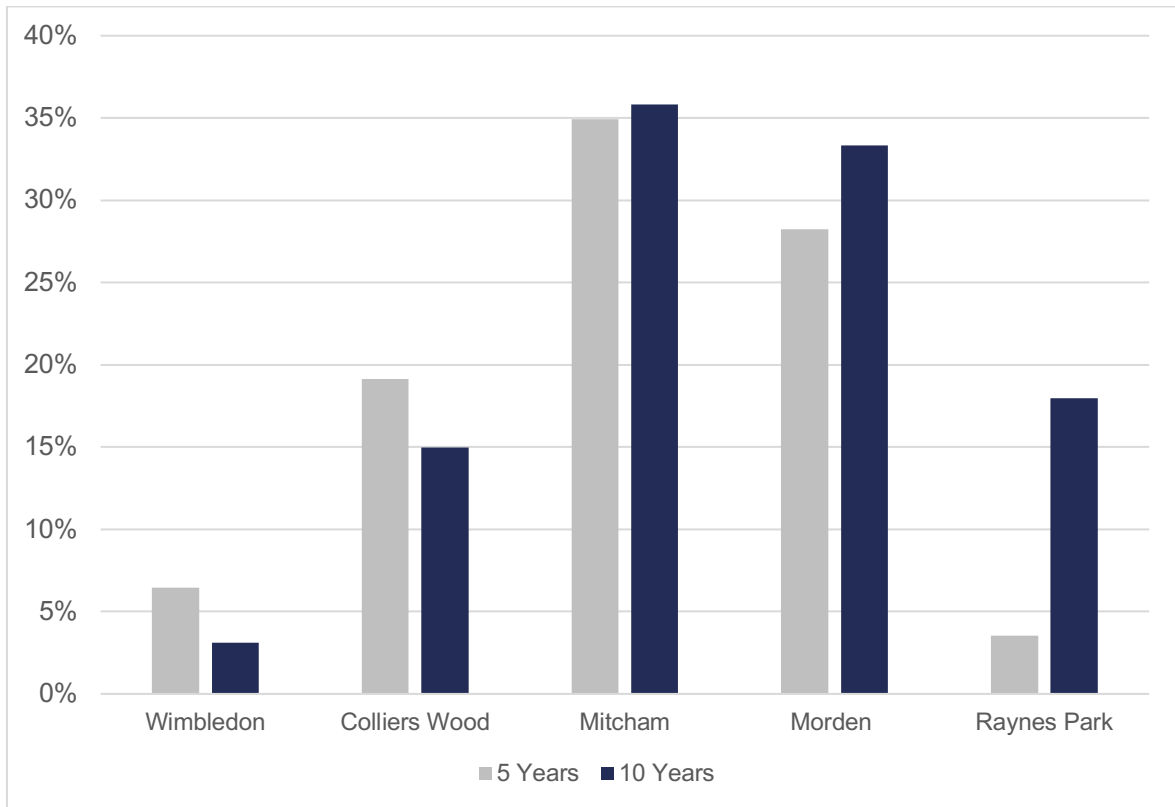
A1.68 A review of all schemes over the last fifteen years therefore shows that in neighbourhoods where these schemes – small sites and prior approvals - account for a greater proportion of overall development, lower levels of affordable housing delivery (as a proportion of total completions) can be expected as planning policies do not require affordable housing from these forms of development.

A1.69 It is also apparent that due to the higher proportion of smaller sites coming forward and the increase in schemes submitted under the prior approval process in recent years, there have been fewer opportunities to secure affordable housing across Merton. In 2018/19 for example, only one scheme was completed which was eligible to provide affordable housing which resulted in only five affordable homes.

A1.70 The analysis is showing that affordable housing levels have been particularly low in Wimbledon, Colliers Wood and Raynes Park. The number of sites delivering schemes of 10 homes or more are limited as a proportion of all development in these areas due to the nature of schemes coming forward with “new build” development largely representing the dominance of 1 for 1 replacement schemes, conversions of larger family homes and Change of Use applications.

A1.71 At a neighbourhood level, the Figure below provides an overview of the level of affordable housing secured. The higher rates of affordable housing delivery in Mitcham and Morden has been driven by the nature of development which has been focussed more so on estate regeneration schemes and the redevelopment of industrial sites. These schemes have supported higher levels of housing delivery due to their eligibility.

Figure A1.19: Affordable Housing Delivery by Neighbourhood



A1.72 In the northern neighbourhoods of Wimbledon, Colliers Wood and Raynes Park, schemes which do exceed the size threshold are largely Prior Approval applications are therefore not eligible. However, the level of affordable housing delivery coming forward is not only linked to the eligibility of schemes.

A1.73 If affordable housing delivery is analysed as a proportion of eligible schemes, stronger delivery is evident in Morden and Mitcham. This is reflective both of the greater proportion of schemes brought forwards through

estate regeneration schemes and by Registered Providers and existing use values. In respect of the latter, where existing use values are high, the ability of residential schemes to meet the policy requirement will be more constrained and the level of achievable residential sales values becomes a more critical factor. It should be noted that the figures set out below are gross figures however, and therefore a large proportion of affordable delivery in these areas will be replacement homes.

Table A1.2 Affordable Housing by Neighbourhood, 2010 – 2020

Neighbourhood	Total No. of Applications in last 10 years	Of which Applications for > 10 Homes	Of which Provided Affordable Homes	% Affordable Housing Achieved on Eligible Sites
Colliers Wood	217 (768 units)	12 (373 units)	5 (125 units)	34%
Mitcham	204 (1313 units)	18 (982 units)	11 (395 units)	40%
Morden	91 (361 units)	8 (199 units)	5 (109 units)	55%
Raynes Park	106 (316 units)	6 (124 units)	3 (26 units)	21%
Wimbledon	304 (1069 units)	12 (548 units)	6 (108 units)	20%

Source: LB Merton Monitoring Data

- A1.74** IcenI has undertaken a review of a number of viability appraisals relating to larger development schemes in Merton which are eligible to provide affordable housing. Our analysis has been corroborated with feedback from our initial stakeholder engagement.
- A1.75** It is apparent both through our review of past delivery trends and through stakeholder engagement that there are issues with Housing Associations being willing to provide the affordable housing on small sites. For example, the developer of the scheme at the former Sun Alliance Sports Club contacted almost 20 Registered Providers ("RP") with no positive responses. This is an issue on smaller schemes with less than 20 affordable units according to stakeholders.
- A1.76** It has also been reported that RPs have been asked to consider 20 to 50 unit schemes in Merton; however, this level is not viable with a need for 50 to 100 units as a minimum with a preference for 80 units or above.
- A1.77** Owing to the significant disparity in land and property values between the northern and southern neighbourhoods of Merton, there is discord between what is viable for a developer and a Registered Provider. Ultimately, Mitcham and Morden is more affordable for RPs to develop and their natural market; however, it is not as well connected and therefore less financially viable or commercially attractive for private developers – who note a substantial concern around sales volumes. This relates back to the relative transport accessibility of different areas.
- A1.78** Looking at affordable housing from the perspective of a developer, viability is more marginal in the southern neighbourhoods of Merton where land and property values are lower compared to development in Wimbledon and Colliers Wood where land values are higher. However from analysis of recent schemes in the Mitcham area, whilst viability is more marginal, RPs are investing in sites to deliver affordable homes themselves outside the planning system. Some examples of these are the former Windmill estate at Mitcham Common, 191-193

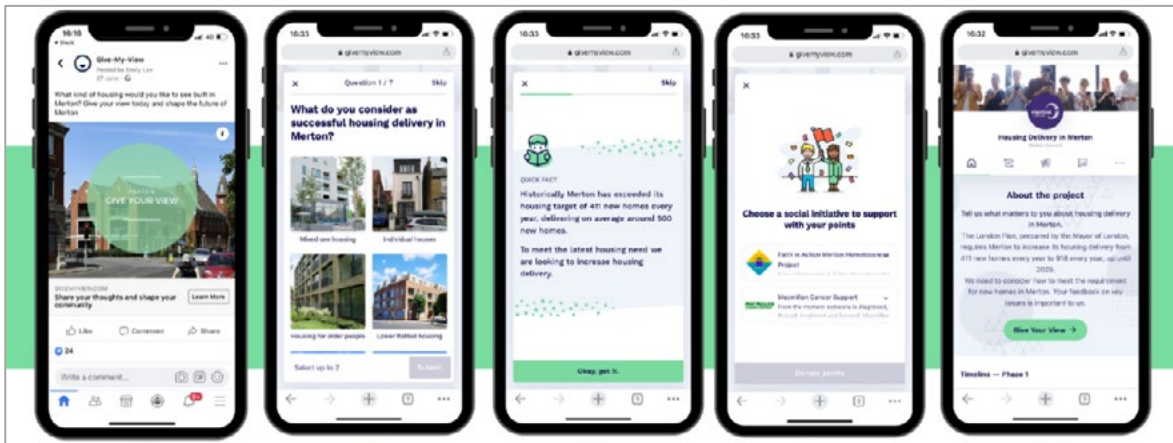
Western Road, 90 and 260 Church Road Mitcham, all of which were subsequently developed as 100% affordable homes by RPs. RPs delivering sites of 100% affordable homes is less common in the north west of Merton due to land values being higher. The evidence on land values is corroborated by the BNP Local Plan Viability Assessment which has been prepared as evidence to underpin the Local Plan.

- A1.79** It is also apparent that development schemes have been hindered by unexpected costs which have led to the reduction or removal of an affordable housing contribution. This includes examples of Brown & Root Tower and Spur House in South Wimbledon where additional costs arising from complications with the London Underground resulted in the removal of affordable housing provision.
- A1.80** Moving forward, through the redevelopment of Wimbledon Stadium and the identification of Wimbledon and Colliers Wood as an Opportunity in the New London Plan, there are opportunities to see an increase in affordable housing in the northern neighbourhoods through bringing forward larger new-build schemes which will be eligible. Merton's affordable housing delivery will be driven by the availability of large sites which are able to provide for 40% affordable homes.
- A1.81** However, it is notable that all three of the major estate regeneration schemes at the High Path Estate (South Wimbledon), Ravensbury Estate (Mitcham/Morden) and Eastfields Estate (Mitcham) do not see a net uplift in affordable housing provision – which brings the challenge into focus. The delivery model for these is associated with increasing densities and generating value through the inclusion of additional market housing in order to fund development.

A2. Public Engagement Exercise: Full Results

The Process

- A2.1 The targeted social media campaign ran for 4 weeks from 27th June to 21st July 2020. The platforms used included Facebook, Messenger, Instagram and Audience Network. The poll remained open after the 4-week period of online adverts to allow for any further responses through word of mouth. The poll closed on 31st August 2020, totalling 8 weeks.
- A2.2 The website achieved 9,097 visits with 2,096 members of the community completing the poll and providing 10,529 pieces of individual feedback.
- A2.3 The community left 1,394 pieces of 'free text' written feedback, in addition to the poll questions. 512 people provided contact details to say they would like to be involved in future discussions around housing delivery in Merton. An example of the user journey is shown in the Figure below.



Poll Results

- A2.4 The main findings from each question in the survey are set out below.



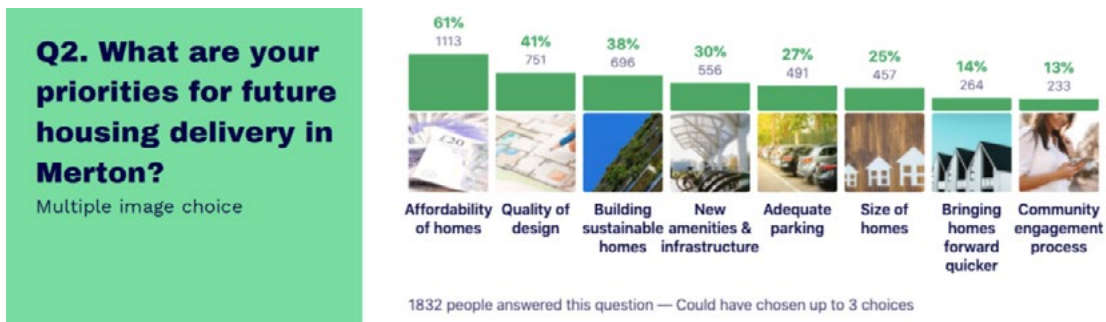
A2.5 Over half of voters in every area felt terraced housing was the most successful housing delivery. This sentiment was consistent across all voters, with voters from Colliers Wood & South Wimbledon favouring it the most at 59%. All followed by over a third favouring lower flatted development

Table A2.1 Q1 Area Breakdown: Successful Housing Delivery in Merton

Neighbourhood	Terraced housing	Lower flatted development	Individual houses	Mixed use housing	Housing for older people	Taller flatted housing
Wimbledon	53%	40%	24%	30%	16%	7%
Morden	58%	38%	24%	23%	19%	6%
Mitcham	57%	34%	30%	24%	11%	6%
Raynes Park	58%	45%	22%	28%	11%	5%
Colliers Wood	59%	39%	28%	26%	13%	10%
Other	52%	44%	22%	29%	20%	6%

A2.6 Across all age groups, the sentiment was consistent with what has been shown overall. All ages from 25 & under to 56-65 favoured 'Terraced housing' which consistently remained the community favourite, and 'Lower flatted housing' which also was consistently in second place.

A2.7 A key change was seen in the votes from the Over 65s where lower flatted development scored more highly with votes for 'Terraced housing' and 'Lower flatter housing' at 54% and 42% respectively. The over 65 group also prioritised 'Housing for older people' more highly, at 25% which would be expected from the age group.



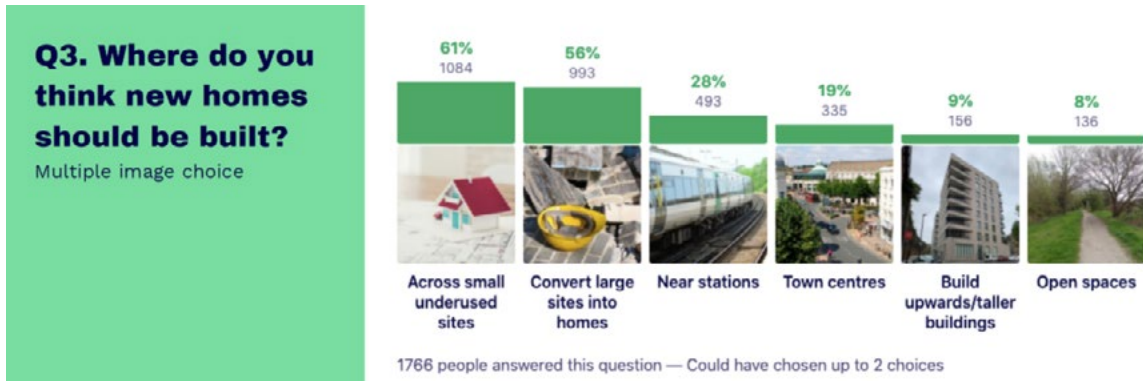
A2.8 Affordability of homes is the clear winner for this question, receiving votes from 61% of voters. It was the top choice across all areas of Merton. Quality of design and Building sustainable homes also received a large proportion of votes with 41% and 38% respectively. These were consistently represented at the top end for all areas. Bringing homes forward quicker & the community engagement process were at the bottom for all areas.

Table A2.2 Q2 Area Breakdown: Priorities for Future Housing Delivery

Neighbourhood	Affordability of homes	Quality of design	Building sustainable homes	New amenities and infrastructure
Wimbledon	57%	50%	44%	31%
Morden	63%	34%	35%	32%
Mitcham	66%	36%	31%	23%
Raynes Park	53%	44%	41%	39%
Colliers Wood	65%	41%	42%	33%
Other	56%	42%	34%	30%

Neighbourhood	Size of homes	Adequate parking	Bringing homes forward quicker	Community engagement process
Wimbledon	21%	20%	13%	14%
Morden	29%	32%	14%	14%
Mitcham	27%	32%	14%	9%
Raynes Park	23%	29%	16%	13%
Colliers Wood	21%	22%	18%	11%
Other	30%	31%	13%	18%

- A2.9** For Under 25s it is clear that 'Affordability of homes' is of utmost importance as it was the priority for 77% of voters. The 26-35 category followed a similar pattern to the overall votes however, placed the importance on 'Affordability of homes' at 65%. The age groups of 36-45 and 46-55 started to shift in priority from 'Affordability', to 'Quality of design' as for both age groups both options received almost equal votes.
- A2.10** Sustainability was a key priority for those who were 56-65 as 'Building sustainable homes' received 42% of votes. For over 65s affordability became almost an equal priority to 'Quality of design' and 'Building sustainable homes'.



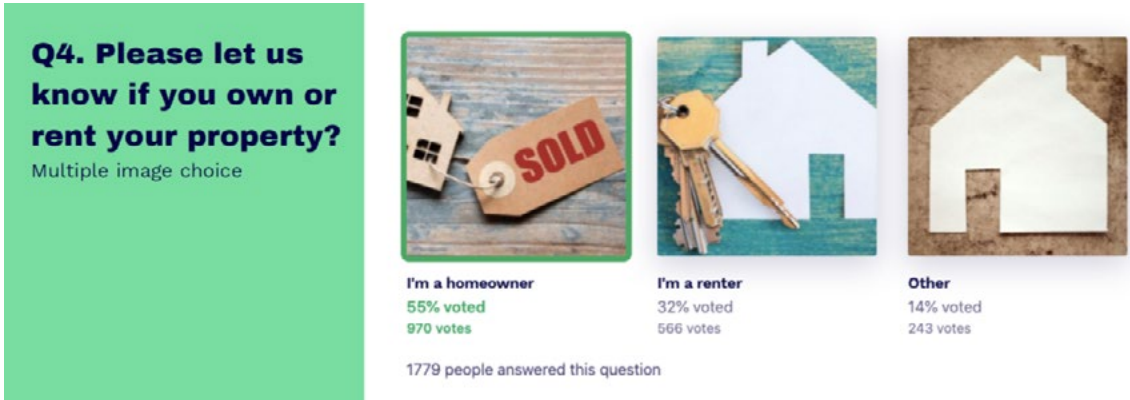
A2.11 There is a clear consensus with 61% of voters voting for new homes to be built across 'Small underused sites'. Converting large sites into homes was also another very popular choice with the community receiving support from 56% of voters respectively. This sentiment and order was consistent across all areas of Merton with all responses in the same order except for in Raynes Park & Mitcham where Built upwards/taller buildings had the lowest votes.

Table A2.3 Q3 Area Breakdown: Where Should New Homes be Built?

Neighbourhood	Across small, underused sites	Convert large sites into homes	Near stations	Town Centres	Build upwards/ taller buildings	Open spaces
Wimbledon	62%	57%	28%	20%	10%	5%
Morden	64%	57%	26%	21%	9%	6%
Mitcham	62%	58%	23%	15%	6%	13%
Raynes Park	63%	51%	27%	20%	8%	9%
Colliers Wood	57%	56%	36%	16%	12%	8%
Other	59%	54%	28%	25%	9%	5%

A2.12 For both Under 25s and 26-35 year olds their priorities were consistent with the overall figures however, the split between 'Small underused sites' and 'Converting large sites' was almost equal.

A2.13 Once again, the preference of 36-45 and 46-55 year olds was in line with the overall statistics but within these age groups, it was evident that 'Small underused sites' was preferred more in comparison to younger voters. Out of everyone, Over 65s preferred new homes being built 'Across underused sites' the most with a total of 65% of voters choosing this option.



A2.14

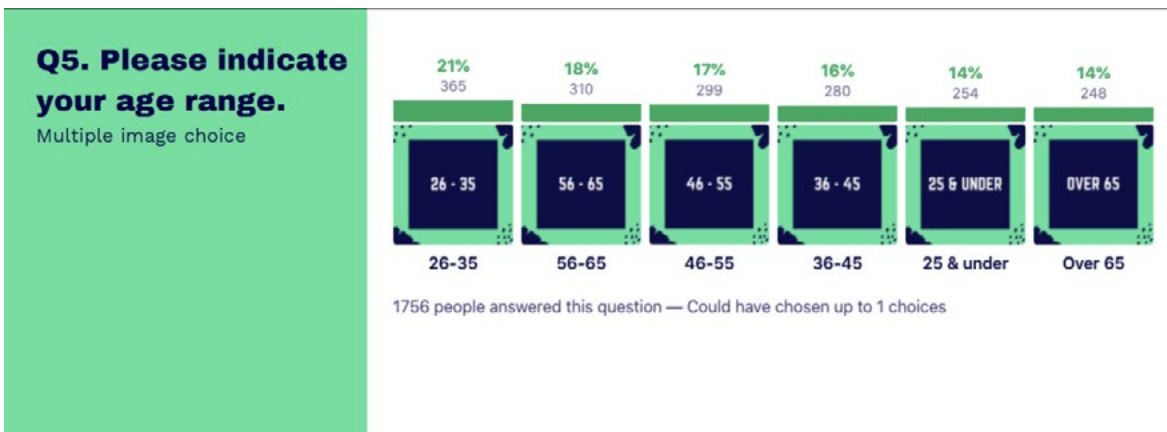
From this question we can see that overall, 55% of voters are homeowners. Home ownership was highest in Morden with 63% of voters, but homeowners were the top respondents in each area of Merton. Renters were most prominent in Colliers Wood & South Wimbledon with 42% of voters being renters in that area

Table A2.4 Q4 Area Breakdown: Please let us know if you own or rent your property?

Neighbourhood	Homeowner	Renter	Other
Wimbledon	56%	33%	11%
Morden	63%	20%	18%
Mitcham	47%	38%	15%
Raynes Park	60%	28%	11%
Colliers Wood	47%	38%	15%
Other	60%	28%	11%

A2.15

As would be expected, voters Under 25 voted more for 'I'm a renter' or 'Other' than any other age group. For 26-35 year olds, 46% of voters were still renters however, this was quite similar to the number of homeowners at 39%. The age groups from 36+ were all primarily homeowners with voters with Over 65s being the highest number of homeowners at 85%.



- A2.16** From this question, we can see that the poll had a strong proportion of votes from people of all ages. We heard most from 26-35 year olds and, 35% of voters were ‘young voters’. The most Under 25s were from Wimbledon, closely followed by Morden and Mitcham. Similarly, most 26-35 year old were from Wimbledon at 25% however, there was an almost equal representation from Colliers Wood and South Wimbledon at 24%.
- A2.17** The most 36-45 and 46-55 year olds were from Wimbledon, Morden and Mitcham. The highest population of 56-65 year olds were in Morden at 25%. The most Over 65s were located in Wimbledon at a high percentage of 30%.



- A2.18** There were 3 key themes when we analysed the open feedback question:
- A2.19** **Affordable housing:** Related to the need for affordable housing. People are vocal about the expense and difficulty to buy in Merton. A lot of comments were in relation to the need for affordable housing for young people & families to get on the property ladder.
- A2.20** A selection of comments received:
- “I want my (now adult) children to be able to live in this area. Even as professionals it is debatable whether they will ever be able to afford to do so. Housing help for young people and for key workers must be the priority.”
 - “Housing help for young people and for key workers must be the priority”

A2.21 Building and design: There were a number of different themes within this category the first being a requirement for quality design & builds. The second was related to thoughts on height which is steered towards an aversion to tall buildings.

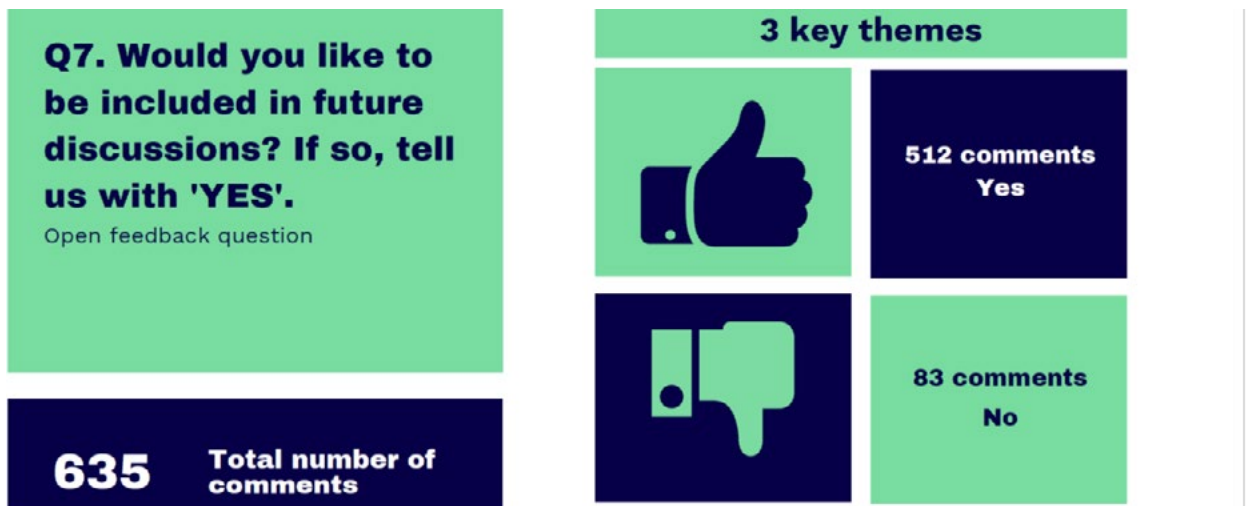
A2.22 A selection of comments received:

- “Lockdown has proven that only building small boxes for easy commuting doesn't work. Its been awful not having outdoor space and being in a small flat. The purpose and value of good design and not just squeezing things into small places that make them unusable.”
- “Low rise, sustainable and affordable properties for families should be the priority. Good design is crucial. So many of the new buildings look unattractive with little thought behind them. So is community involvement and consultation. And infrastructure. We may need new homes, but it shouldn't be to the detriment of existing residents or for developers to make a quick buck.”

A2.23 Environment and sustainability: There is a consensus from the community that house building in Merton should be sustainable - incorporating modern construction methods but also making the housing efficient in the coming years.

A2.24 A selection of comments received:

- “New Housing should be sustainable and should be built in harmony with its surroundings.”
- “Merton is a typical brick-built suburb. New housing should respect this whilst aiming for net-zero admissions.”



A2.25 A total of 512 people said they would like to be involved in future discussions around the development of Merton.

Archaeology | Built Heritage & Townscape | Design | Economics | Engagement | Icení Futures | Impact Management | Place | Planning | Transport

Edinburgh: 11 Alva Street, Edinburgh, EH2 4PH


Glasgow: 177 West George Street, Glasgow, G2 2LB

London: Da Vinci House, 44 Saffron Hill, London, EC1N 8FH

Manchester: This Is The Space, 68 Quay Street, Manchester, M3 3EJ

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