Greater Brighton & Coastal West Sussex Background Papers

Background Paper 2 Housing Market

May 2015

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Planning. Design. Economics.

Greater Brighton

COASTAL WEST SUSSEX and GREATER BRIGHTON STRATEGIC PLANNING BOARD

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Planning. Design. Economics.

Greater Brighton & Coastal West Sussex Background Paper

Background Paper 2 - Housing Market

In association with

Interfleet
Transport Advisory

May 2015

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1.0 Introduction

The Greater Brighton Economic Board ('the Economic Board'), working in partnership with the Coastal West Sussex and Greater Brighton Strategic Planning Board ('the Strategic Planning Board'), commissioned a series of background papers to provide evidence and inform decision-making within Greater Brighton and Coastal West Sussex ('GBCWS').

1.1 The three background papers focus on:

1 Economy

2 **Housing Market (this paper)**

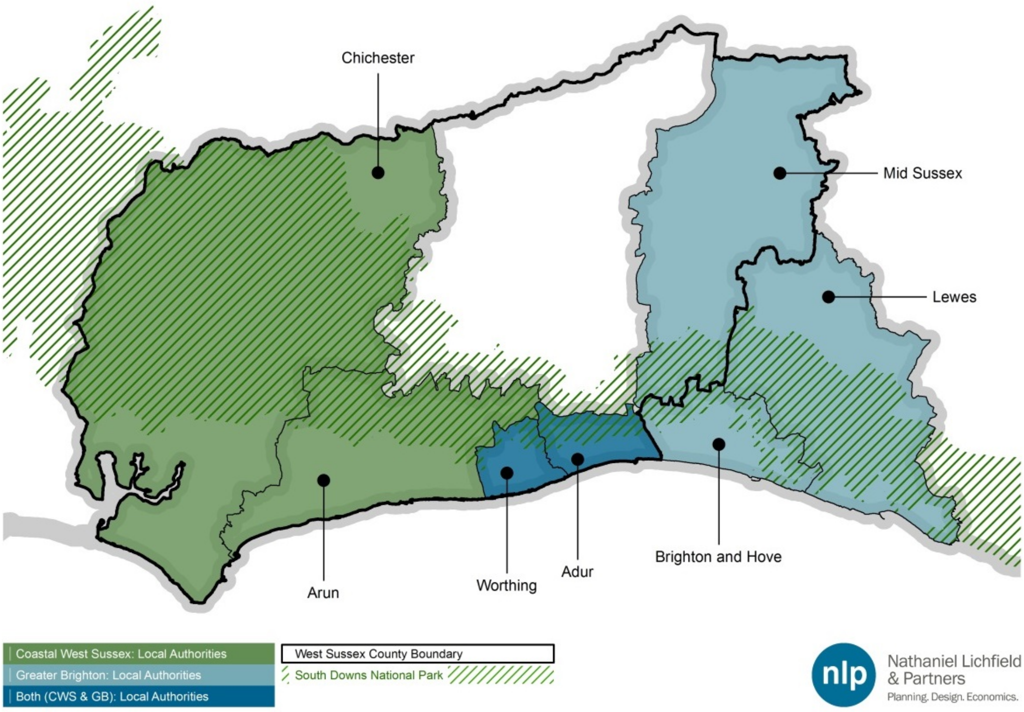
3 Transport System

1.2 The papers have been developed by Nathaniel Lichfield & Partners ('NLP') in association with Interfleet Transport Advisory ('ITA'). An overarching Executive Summary has also been produced to accompany the individual papers.

Background

1.3 Greater Brighton and Coastal West Sussex together comprise seven local authorities and parts of the South Downs National Park Authority (SDNPA) as shown in Figure 1.1. **'Greater Brighton'** includes Brighton & Hove, Adur & Worthing, Lewes and Mid Sussex. **'Coastal West Sussex'** refers to Adur & Worthing, Arun and Chichester. It should be noted that Adur & Worthing are included within both geographies.

Figure 1.1 Spatial Definition of Greater Brighton and Coastal West Sussex



1.4 The **Greater Brighton Economic Board** was established in March 2014 to bring together city region leaders, business partners, universities, further education partners and the Coast to Capital Local Enterprise Partnership (LEP) to unlock barriers to the economic prosperity of the Greater Brighton City Region. The Board has been formally recognised by Government and forms a key aspect of the LEP's distributed governance and accountability structure for the delivery of the LEP's Strategic Economic Plan and Growth Deal.[1]

1.5 The Local Planning Authorities within the Coastal West Sussex and Greater Brighton area formed the **Coastal West Sussex and Greater Brighton Strategic Planning Board** to identify and manage spatial planning issues that impact on more than one area, and support better integration and alignment of spatial and investment priorities.[2]

Purpose of the Background Papers

1.6 The brief for the project identifies that achieving long term sustainable growth across Greater Brighton and the wider Coastal West Sussex area will depend on addressing key strategic issues – notably employment land, housing, transport and other infrastructure – in an integrated and deliverable way.

1.7 At the 29 July 2014 meeting, the Economic Board agreed that three background papers should be commissioned which aim to support the Board to develop a greater understanding of the Greater Brighton and the wider Coastal West Sussex area around the three themes of economy, housing market and transport system.

1.8 Concurrent to this, the Strategic Planning Board is in the process of refreshing its Local Strategic Statement (LSS)[3] which sets out long term strategic planning and investment priorities for an overlapping (although not contiguous) geography. It is the intention that a new Coastal West Sussex and Greater Brighton Strategic Local Statement will be prepared jointly with the Economic Board (under the auspices of the Officer Programme Board). This will draw upon the background papers to define priorities for the period 2015-2025, and support future funding bids and Local Plans through helping to facilitate meeting the Duty to Cooperate.

Structure of the Paper

1.9 The remainder of this paper is structured as follows:

- Section 2.0 outlines the **approach and methodology**.
- Section 3.0 examines to the implications of a **growing and mobile population**.

[1] Greater Brighton City Deal, Deputy Prime Minister's Office, 12 March 2014, https://www.gov.uk/government/publications/city-deal-greater-brighton

[2] The Strategic Planning Board comprises Adur and Worthing, Arun, Brighton & Hove, Chichester, Lewes, Mid Sussex, West Sussex County Council and the South Downs National Park Authority.

[3] Local Strategic Statement, October 2013, http://www.coastalwestsussex.org.uk/wp-content/uploads/FINAL-Signed-LSS-for-CWS-Gtr-Brighton-30-Jan-14.pdf

- Section 4.0 explores the extent to which Greater Brighton and Coastal West Sussex is planning for **future housing requirements**.
- Section 5.0 considers the approach to **delivering planned housing supply**.
- Section 6.0 draws together the thematic analysis to conclude on the **future opportunities for action**.

2.0 Approach and Methodology

This section details the approach and methodology adopted by NLP and ITA for the purposes of preparing each of the background papers.

Approach

2.1 As noted in section 1.0, the purpose of the background papers is to help stakeholders within Greater Brighton and Coastal West Sussex consider how addressing strategic issues relating to the economy, housing market and transport can help achieve *"long-term sustainable growth"* for the area.

2.2 This analysis is being undertaken against the backdrop of significant change within the global economy, with a shift towards knowledge-based goods and services as the main drivers of productivity and economic growth. There is an increasing focus on innovation, flexibility and rapid adaptation to change so that economic assets can be used most efficiently and effectively (particularly in the context of competing locations).

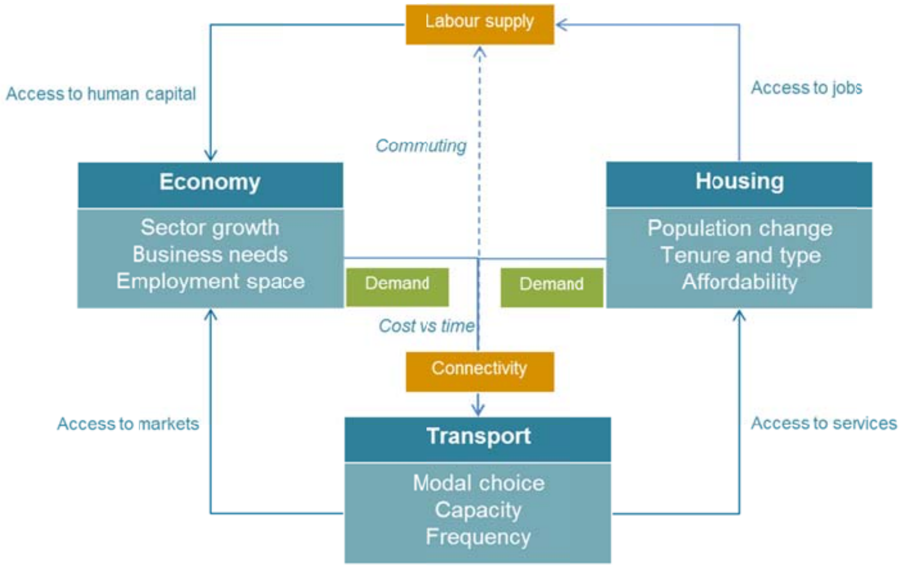
2.3 Markets tend to operate across administrative geographies, and there has been recent attention on assessing needs across functional economic market areas.[4] Sub-regions and greater metropolitan areas are identified as drivers of growth because of their role supporting clusters and agglomeration economies. The geographic proximity of economic assets and infrastructure can increase productivity through sustaining high-growth sectors and innovation, whilst the presence of universities and urban amenities tends to attract higher skilled workers and support new business creation.

2.4 This means growth of wider sub-regions is highly inter-dependent because they access shared labour and housing markets, transport networks and commuting patterns, and proximity to large institutions such as universities. Figure 2.1 outlines some of these inter-relationships to examine the role of the economy, housing market and transport system as drivers of economic growth:

- Economy – the scale and concentration of businesses and sectors, and particularly the extent to which clusters of related or complementary activities can drive support innovation and new business creation;
- Housing market – a major determinant of access to labour supply and human capital that supports economic growth, but also as a source of demand for goods and services;
- Transport system – transport is critical to determining the relative physical connectivity between businesses, suppliers, workers and consumers, and the costs, time and reliability of these connections.

[4] See for example Planning Practice Guidance, paragraph 13

Figure 2.1 Inter-relationships between Economy, Housing and Transport Drivers of Growth



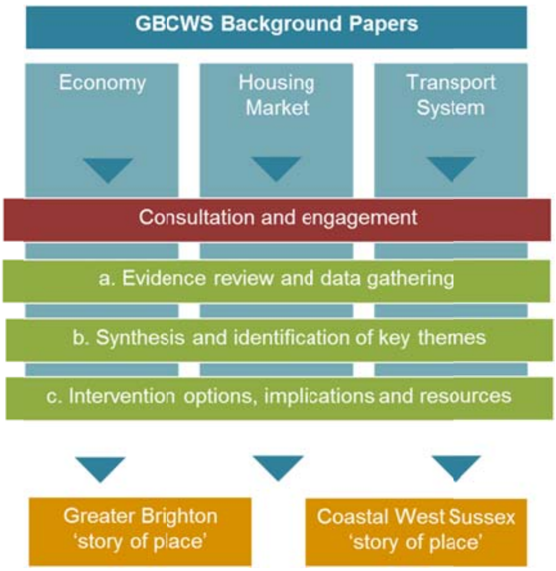
Source: NLP/ITA analysis

2.5 In combination, these drivers are major determinants of long-term growth. Analysing the local assets and dynamics related to each, as well as their interactions with each other, provides a basis for identifying actions and developing strategies that will help support an integrated approach to supporting long-term growth.

Methodology

2.6 The process for preparing the background papers has followed a three-stage methodology as set out in Figure 2.2, informed by stakeholder consultation and engagement at a number of stages.

Figure 2.2 Outline Approach for Background Papers



Source: NLP

a. Evidence review and data gathering

2.7 The preparation of the background papers has been underpinned by a series of key questions for the purposes of interrogating each of the economy, housing market and transport system topic areas:

- Economy: How big is the economy? What are the key sectors? How is the economy changing? What is the growth potential of the area? What is the skills profile of the area's labour force?
- Housing market: How is the housing market area defined? What are the migration patterns within and without the area? How do house prices and affordability ratios vary across the area? What is the planned future supply of housing across the area?
- Transport system: Where do people travel to work outside of the area? Where do people travel within the area? How do people travel, and how has this changed? What are the known transport constraints? Where is transport investment proposed?

2.8 The analysis draws upon existing evidence prepared at local authority, county and Local Enterprise Partnership scales supplemented by latest national datasets where available. It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance to the analysis at the strategic level.

2.9 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This paper has incorporated the latest data and other evidence available at the point of preparation. The accuracy and sources of data derived from third party sources have not been checked or verified by NLP or ITA.

b. Synthesis and identification of key themes

2.10 This stage involved drawing together the existing research alongside new analysis to identify a number of key 'themes' for the purposes of considering the dynamics of both Greater Brighton and Coastal West Sussex and the future growth potential of these areas individually and on a combined basis.

2.11 These themes have emerged from consideration of the economic position and potential of the area, and the factors most relevant to its economic performance. Across each topic this included an assessment of:

- the key features of Greater Brighton and Coastal West Sussex and the factors and trends that have influenced the area's position today;
- what strengths have driven the area's past economic success (including whether they will continue in the future) and what weaknesses or barriers challenge the area's economic success (and whether these challenges/barriers are likely to worsen or improve in the future);

- the inter-relationships between the Greater Brighton and Coastal West Sussex and their wider hinterland, in order to understand how these could affect the economic performance of the area and how this could change in the future.

c. Intervention options, implications and resources

2.12 From the review of key themes, the relevant intervention options, implications and resources have been identified. This involves describing potential economic growth ambitions for Greater Brighton and Coastal West Sussex and the priorities for action that might be required to deliver them. These relate to areas where there is a potential role for public sector intervention to address market failures or to leverage resources to help support sustainable growth, through to broader advocacy of an integrated approach to strategy on the economy, housing and transport.

2.13 An important consideration is that Greater Brighton and Coastal West Sussex do not function in isolation from surrounding areas, and these wider relationships are relevant to all of the economy, housing market and transport themes. It should therefore be noted that, while the analysis focuses on Greater Brighton and Coastal West Sussex, factors arising from adjoining areas will be also be relevant. This is particularly in the context of the future growth potential of areas including the Gatwick Diamond, South Hampshire and Greater London.

2.14 It should be noted that the evidence, analysis and implications set out within the three papers do not take account of any future decisions by national Government regarding a potential second runway at Gatwick Airport, a decision on which is currently anticipated in 2015.

Consultation and Engagement

2.15 Across each of the stages, consultation and engagement has been undertaken with a range of stakeholders from across Greater Brighton and Coastal West Sussex. Those consulted included relevant offices within each of the local authorities, including specialists within economic development, housing, planning policy and transport.

2.16 This consultation process was designed to ensure that each of the background papers benefited from access to latest evidence and data but also from qualitative inputs from relevant experts. Consultation took place through a number of formats, including presentations to Board and Officer Group meetings, roundtable discussions at a stakeholder workshop held in Worthing in February 2015, as well as some individual interviews. In addition, this work was coordinated through a Steering Group comprising representatives of the Economic Board and Strategic Planning Board.

Guide to Terminology

2.17 This paper contains references to objectively assessed housing needs, housing requirements and planned housing supply, the below sets out an explanation of the terminology used (this accords with the 2014 Solihull High Court Decision[5]):

- **Objectively assessed housing need** – the objectively assessed need for housing in an area broadly encompasses demographic needs, analysis of market signals, economic factors and provision for all types of housing (including affordable), not taking into account any policy considerations concerning the ability to meet these housing needs.
- **Housing requirement** – this figure reflects not only the objectively assessed need for housing, but also any policy considerations that might require that figure to be manipulated to determine the actual housing target for an area. For example, built development in an area might be constrained by the extent of land which is the subject of policy protection. Once these policy considerations have been applied to the figure for full objectively assessed need for housing in an area, the result is a housing requirement figure.
- **Planned housing supply** – this relates to the projected supply of housing as identified in the individual housing trajectories of each local authority for the period 2015 to 2025 only. It does not take account of planned housing supply over the entirety of a Local Plan period.

Time Horizons

2.18 This paper covers the ten year period 2015 to 2025, and therefore is shorter than the time horizons set out in the individual Local Plans being brought forward across Greater Brighton and Coastal West Sussex which generally extend beyond this timescale. References in this paper to housing needs, requirements and planned housing supply relate to this period only, and do not take account of the entirety of a Local Plan period.

2.19 Therefore fluctuations in the projected rate of housing delivery may not necessarily be identified when looking only over a ten year period and not the entirety of a Local Plan where delivery prior to 2015 and after 2025 will also be relevant.

[5] (1) Gallagher Homes Limited and (2) Lioncourt Homes Limited v Solihull Metropolitan Borough Council [2014] EWHC 1283

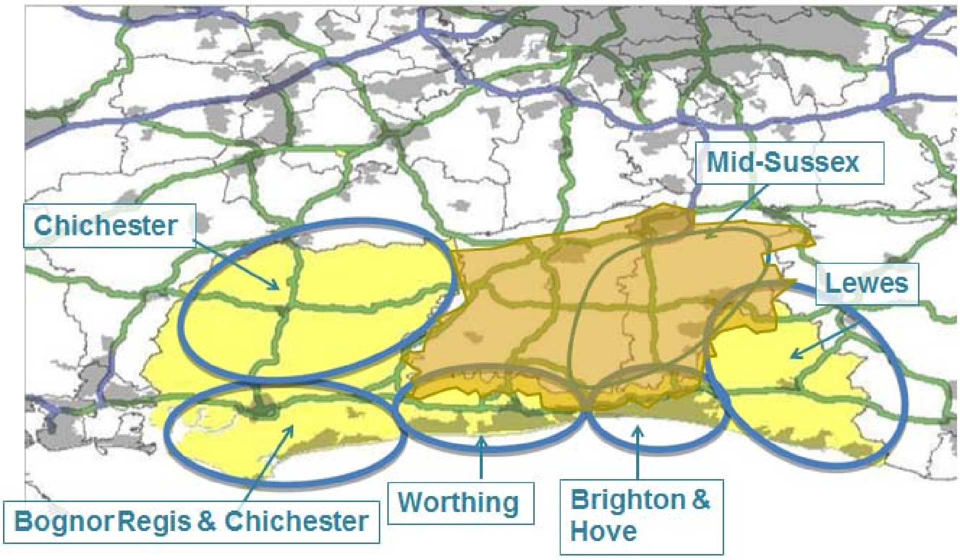
3.0 # A Growing and Mobile Population

The housing market of Greater Brighton and Coastal West Sussex is characterised by significant levels of recent population growth and movement of people both within and from outside of the area. The future availability and distribution of working-age population will be particularly important to meeting the area's economic needs.

Housing Market Areas

3.1 To begin analysis of housing in Greater Brighton and Coastal West Sussex, it is necessary to first consider which Housing Market Areas (HMAs) the sub-region relates to. Planning for housing must be undertaken across a HMA in accordance with government policy, but it is likely that a HMA will cross local authority boundaries, so cooperation is required. Figure 3.1 shows that Greater Brighton and Coastal West Sussex is defined by two HMAs, Mid Sussex falls within a separate (orange) HMA to the rest of Greater Brighton and Coastal West Sussex which falls in its own (yellow) HMA. Within these HMAs there are also a series of sub-area housing markets, for example there is a strong relationship between Bognor Regis and Chichester. As can be seen, each local authority does not necessarily fall within its own sub-area of a larger HMA.

Figure 3.1 Housing Market Areas across Greater Brighton and Coastal West Sussex

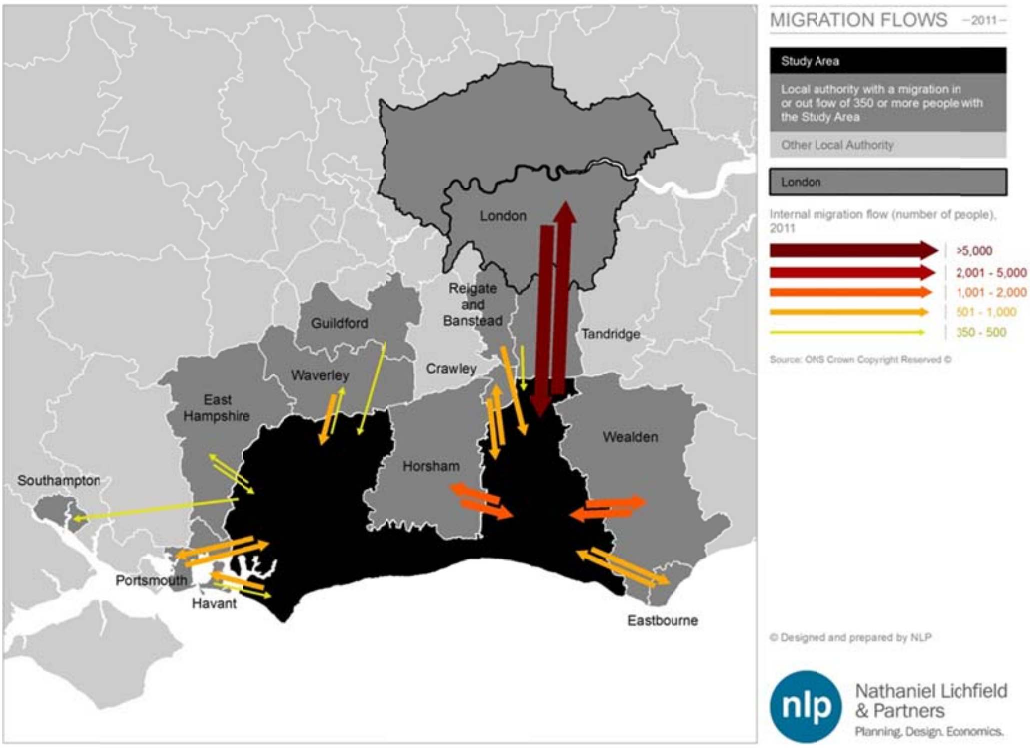


Source: Coastal West Sussex SHMA (2014); Northern West Sussex SHMA (2012)

Migration Flows

3.2 Greater Brighton and Coastal West Sussex experience significant migration patterns with its surrounding hinterland (such as Crawley and Horsham) as well internally, these migration patterns are set out below in Figure 3.2. As a combined area, Greater Brighton and Coastal West Sussex represents a net importer of people from elsewhere, particularly from Greater London. To illustrate this point, in 2011, there was net in-migration from Greater London to Greater Brighton and Coastal West Sussex amounting to nearly 3,000 people (2011 Census). There is no evidence to suggest that these patterns of migration into and out of Greater Brighton and Coastal West Sussex will not continue into the future, but it is likely there will be increasing competition for mobile population from other growth locations (for example the Gatwick Diamond or arising from the general expansion of Greater London).

Figure 3.2 Migration Flows 2011

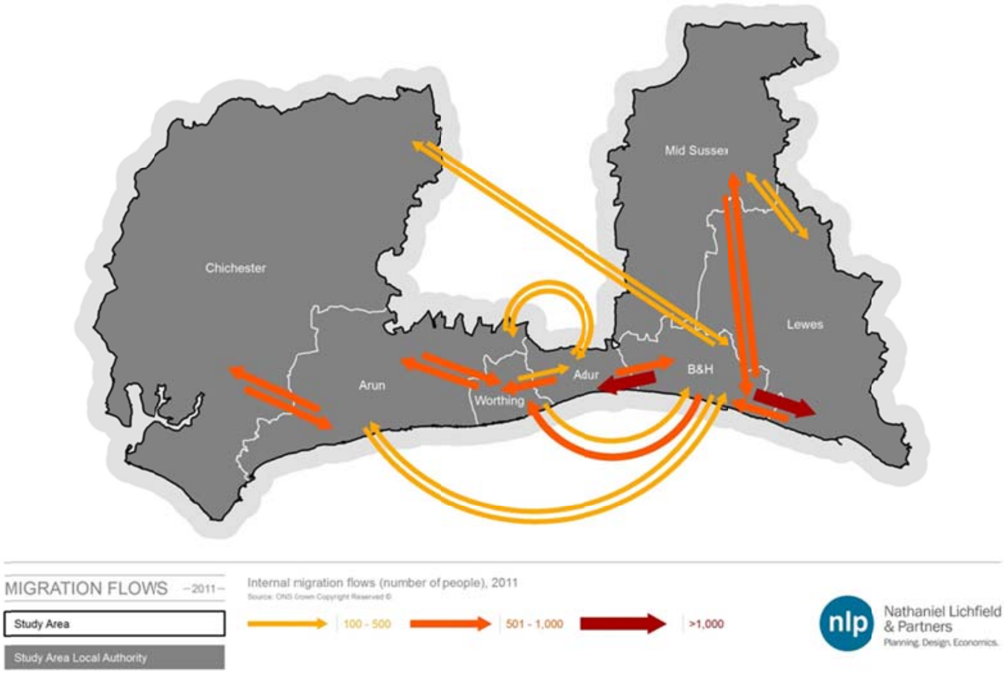


Source: 2011 Census / NLP analysis

3.3 Internal migration patterns within Greater Brighton and Coastal West Sussex show significant outward migration from Brighton & Hove to elsewhere in the area, notably Adur and Lewes. The 2011 Census net migration flows from within the area for each individual local authority are set out below, and indicate that only Arun and Chichester experience overall net in-migration. Furthermore, whilst the Greater Brighton area experiences annual net out migration equating to -4,450 people, Coastal West Sussex area experiences overall net in migration amounting to +1,030 people.

- Adur: -290;
- Arun: +365;
- Brighton & Hove: -1,795;
- Chichester: +1,505;
- Lewes: -470;
- Mid-Sussex: -1,345; and
- Worthing: -550.

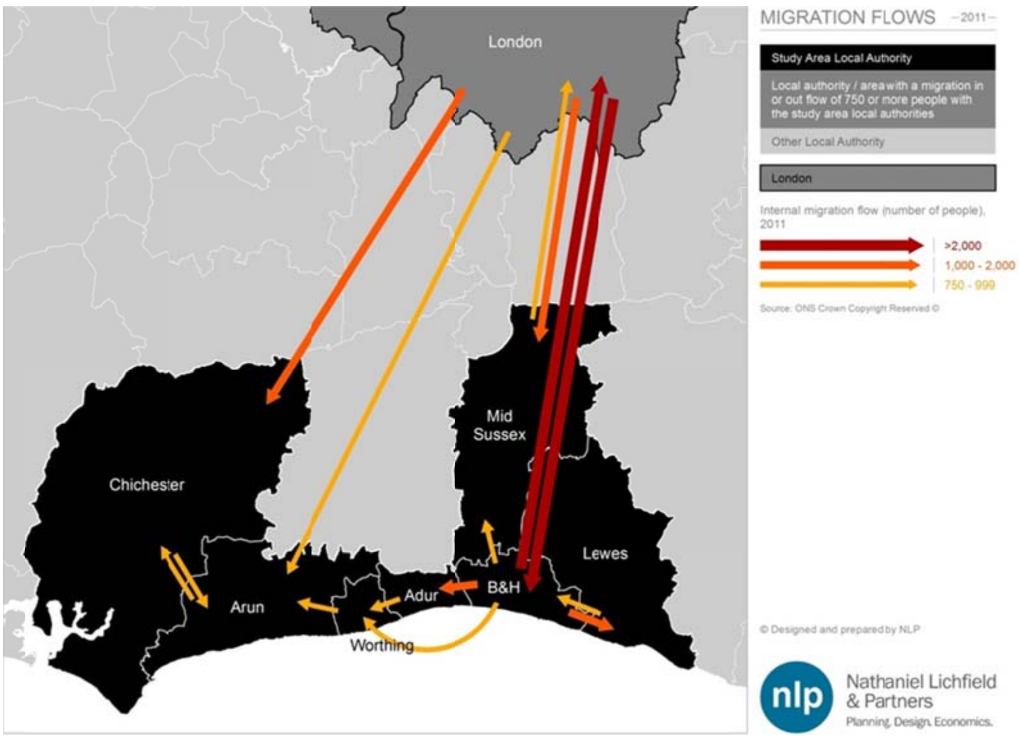
Figure 3.3 Migration Flows 2011



Source: 2011 Census / NLP analysis

3.4 The above two maps are combined in Figure 3.4 below. It is clear that Brighton & Hove acts as the main attractor of people into Greater Brighton and Coastal West Sussex, but some people then migrate outwards from Brighton & Hove to other parts of the area.

Figure 3.4 Migration Flows 2011



Source: 2011 Census / NLP analysis

3.5 One reason why these patterns of migration, particularly internally, are important in relation to housing market choices relates to affordability. Affordability in the Greater Brighton and Coastal West Sussex area varies by local authority, but affordability issues (due to the high cost of housing) are most pronounced in Brighton & Hove and Chichester. Table 3.1 below shows affordability ratios based on the cost of a median dwelling compared to median earnings in each local authority.

3.6 As set out above, although Brighton & Hove is the primary destination for migrants moving into Greater Brighton and Coastal West Sussex, the evidence suggests that people are unable to afford to stay within the City as their housing requirements change. This affects a number of different types of households including single people, couples and those starting a family for reasons of affordability, but also the types of housing required to accommodate their needs. As such, there is a pronounced pattern of people moving out of Brighton & Hove internally within the Greater Brighton and Coastal West Sussex area. It is of note that some 80% of those moving out of Brighton & Hove within the Greater Brighton and Coastal West Sussex area are of working age and many of these people may commute back to work in Brighton & Hove.

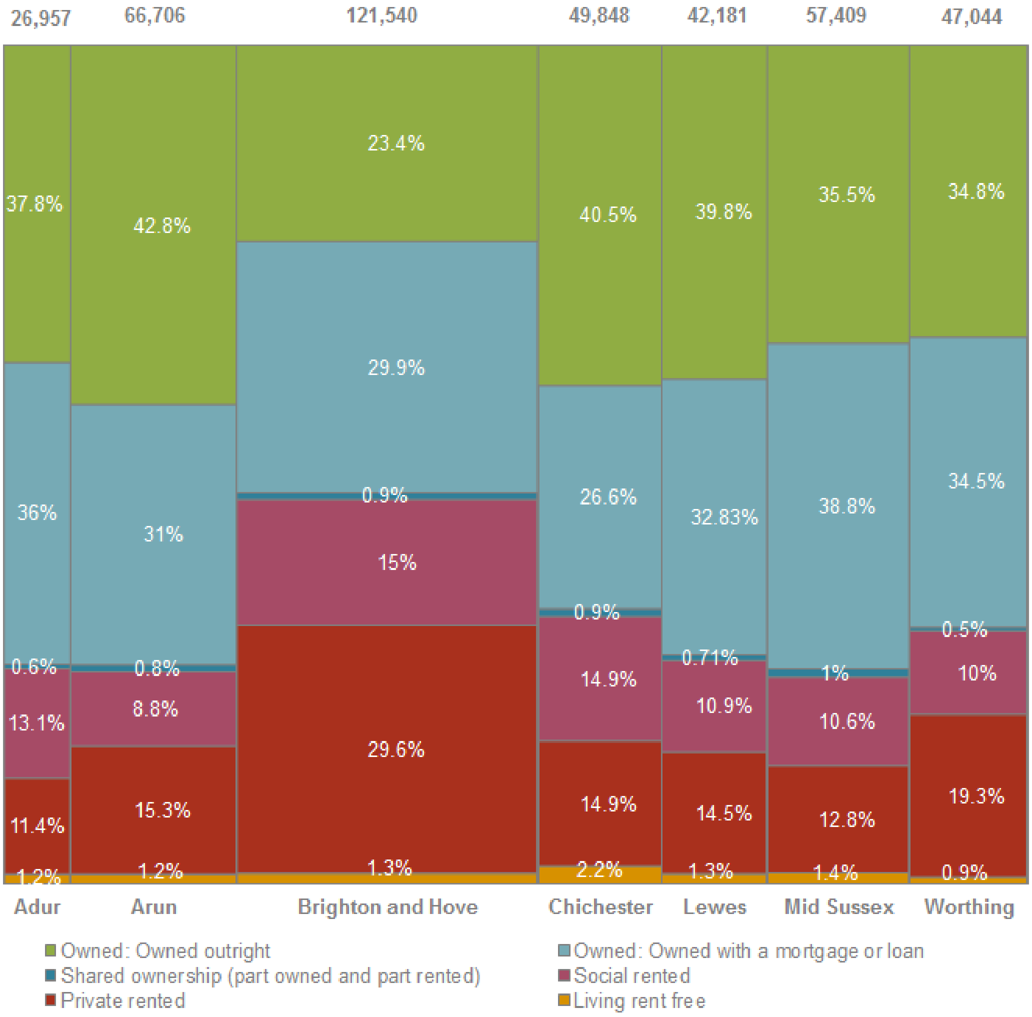
Table 3.1 Median Affordability Ratio by Local Authority (2013)

	Local Authority	Median Affordability Ratio (2013)
Worsening housing market outcomes	Chichester	10.55
	Brighton & Hove	10.09
	Mid-Sussex	9.76
	Arun	9.65
	Adur	9.64
	Lewes	9.01
Improving housing market outcomes	Worthing	7.78
	GBCWS Average	**9.50**
	England	**6.72**

Source: NLP analysis

3.7 Related to housing affordability, in Brighton & Hove the split between housing tenures is notably different to that in the rest of Greater Brighton and the wider Coastal West Sussex area. This is set out in Figure 3.5 below. In Brighton & Hove there is a lower proportion of owner-occupied housing (either outright of with a mortgage) and a higher proportion of private renters in comparison to neighbouring authorities. This could reflect that people who find it more difficult to access home ownership in Brighton & Hove are potentially looking to the private rental sector as an alternative. However, the cost of renting is not necessarily an affordable option because private renters tend to spend more on living expenses (circa 40%) than those with a mortgage (circa 20%).[6]

Figure 3.5 Tenure split across Greater Brighton and Coastal West Sussex



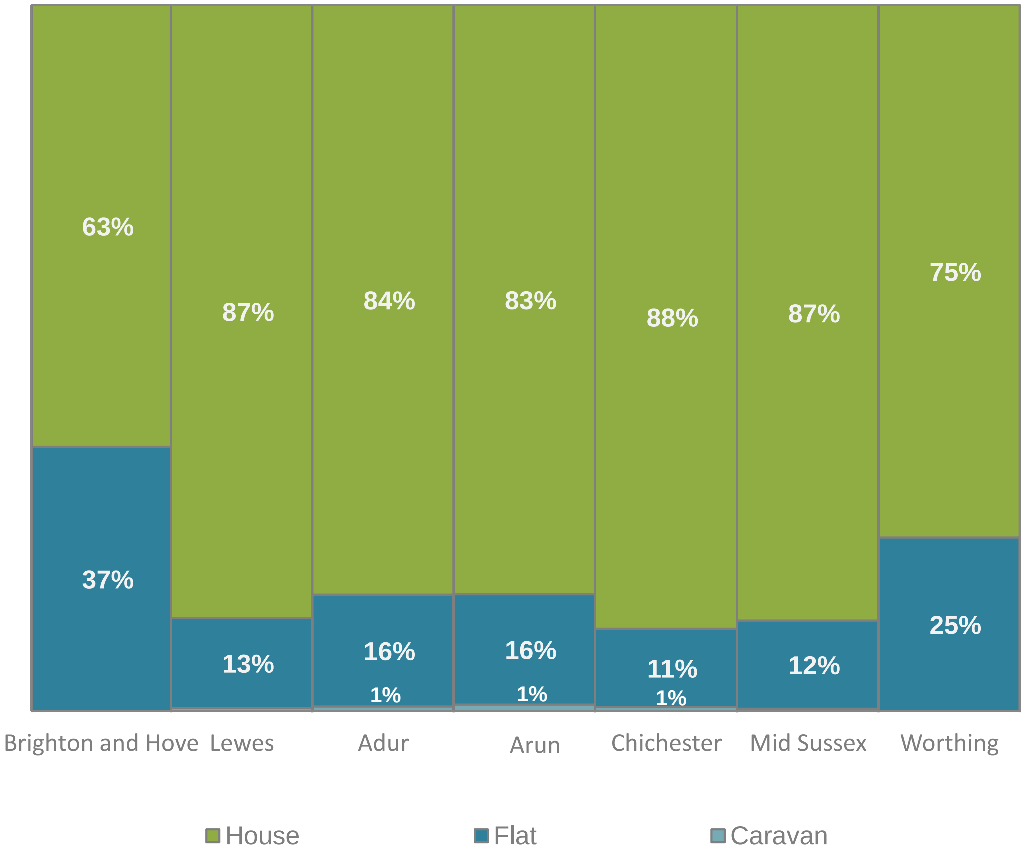
Source: Census 2011 KS402EW - Tenure

3.8 The above analysis identifies that Brighton & Hove has a different tenure split to the rest of Coastal West Sussex with a lower proportion of owner-occupied housing and a higher proportion of private renters, suggesting that affordability pressures are forcing people into the private rented sector. A similar pattern can be seen in Brighton & Hove in relation to the stock of housing. Brighton & Hove has the greatest proportion of flats compared to anywhere else in the Greater Brighton and Coastal West Sussex area with more than a third, this is followed by Worthing where a quarter of the dwelling stock is flats. This suggests that people may not move from Brighton & Hove elsewhere within Greater Brighton and Coastal West Sussex simply on the grounds of affordability, but potentially because housing aspirations cannot be met in the City.

[6] English Housing Survey (2013/14)

3.9 Greater Brighton and Coastal West Sussex needs to cater for different housing market needs to help retain population and workers at different stages of their lives through provision of flats, family homes and retirement accommodation. Currently, if residents of Brighton & Hove aspired to own a house, this is less likely to occur in the City due to affordability, but also because there is a more restricted supply of housing stock available compared to the rest of Greater Brighton and Coastal West Sussex.

Figure 3.6 Type of Stock in Greater Brighton and Coastal West Sussex



Source: Census 2011

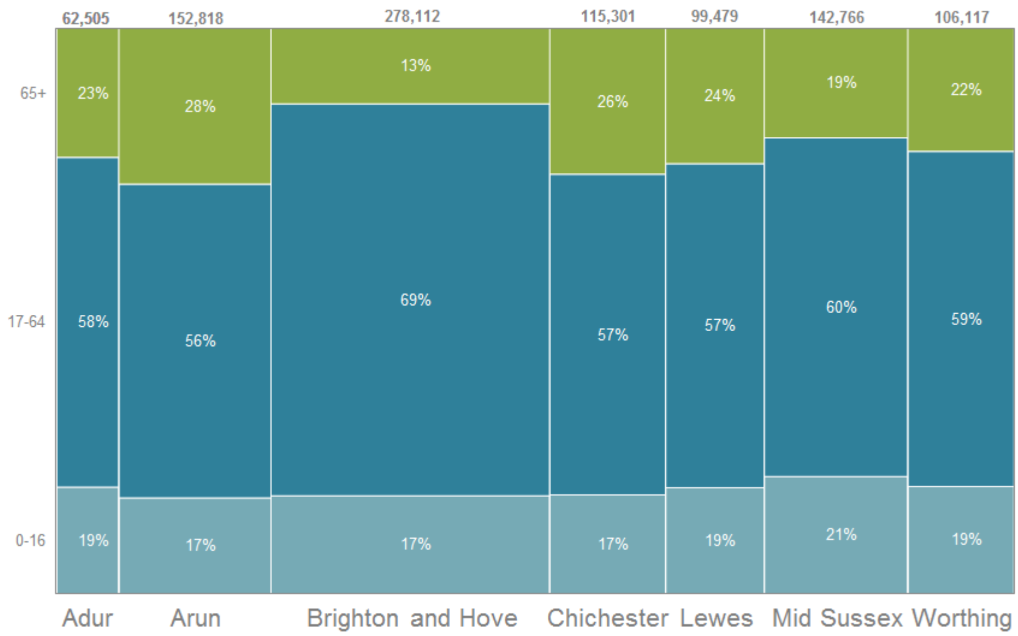
3.10 The above analysis identifies a clear pattern of people moving into Brighton & Hove from outside Greater Brighton and Coastal West Sussex, but identifies that pressures of affordability and more restricted stock availability leads to some people moving out into the wider Greater Brighton and Coastal West Sussex area (but often still retaining employment in the City). Overall, this internal pattern of movement out of Brighton & Hove but with continued commuting back into the City for work has strong implications for the economy with regards to retaining a workforce and the transportation network, notably east-west routes along the coast.

Age Profile

3.11 Looking at the population age structure of the individual local authorities in Greater Brighton and Coastal West Sussex (set out in Figure 3.7), it is apparent that Brighton & Hove is a relatively young location compared to other parts of Greater Brighton and Coastal West Sussex. By comparison Arun and Chichester have a greater proportionate share of residents over the age of 65 and a lower percentage of working age residents between 17 and 54 years old.

3.12 It should be noted that the population profile is not just about the relative proportions within different age groups. As set out previously, Greater Brighton and Coastal West Sussex needs to collectively cater for different housing market needs in order to help retain population and workers through what can be referred to as a “housing ladder” approach. This represents the typical cycle of housing types which people will reside in at different stages of their life, including starter flats, family homes and retirement accommodation. As discussed previously a high proportion of flatted accommodation in Brighton & Hove appears to be attracting younger workers, but affordability pressures combined with a lack of housing stock is making it difficult to retain these residents as their housing aspirations change.

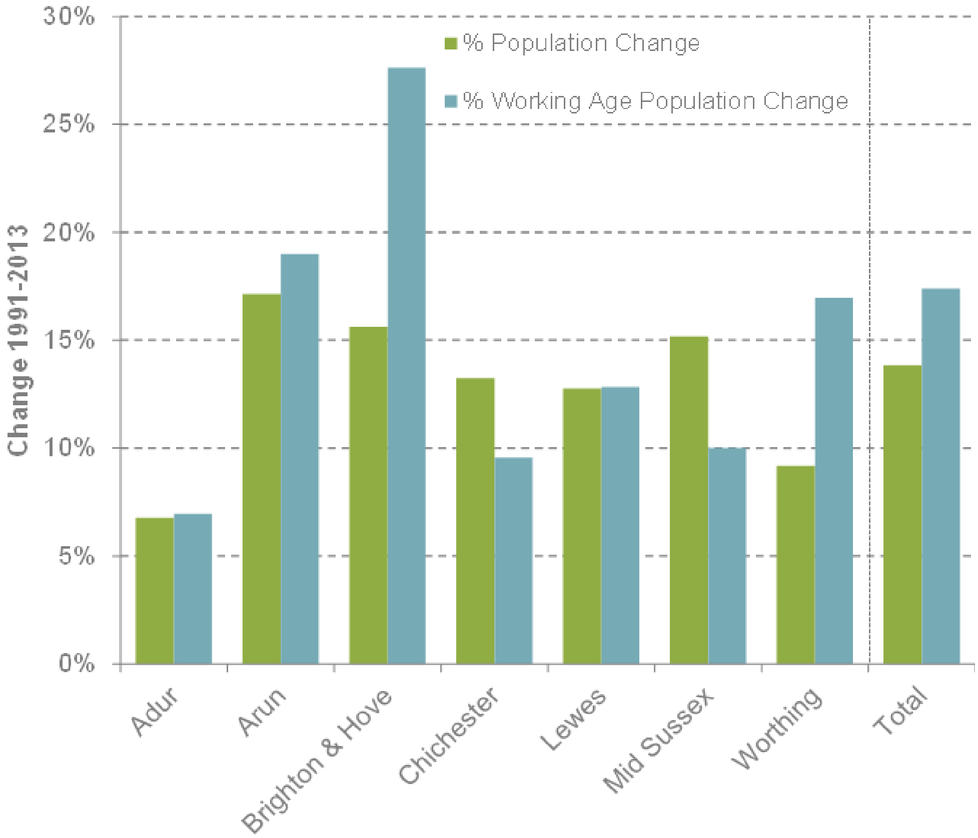
Figure 3.7 Population Age Structure 2013



Source: ONS 2013 Mid-Year Estimates / NLP analysis

3.13 Finally, as set out in Figure 3.8, the total population of Greater Brighton and Coastal West Sussex has been growing, but it is clear that some locations have a greater proportionate increase in the working age population than others. Between 1991 and 2013 the working age population increased at a greater proportion than the whole population of Greater Brighton and Coastal West Sussex. This is notably the case in Brighton & Hove. Elsewhere the working-age population has been growing at a slower rate by comparison, but still greater than the proportionate population increase, with the exception of Mid Sussex and Chichester.

Figure 3.8 Overall Population Growth and Working Age Population Growth – 1991-2013



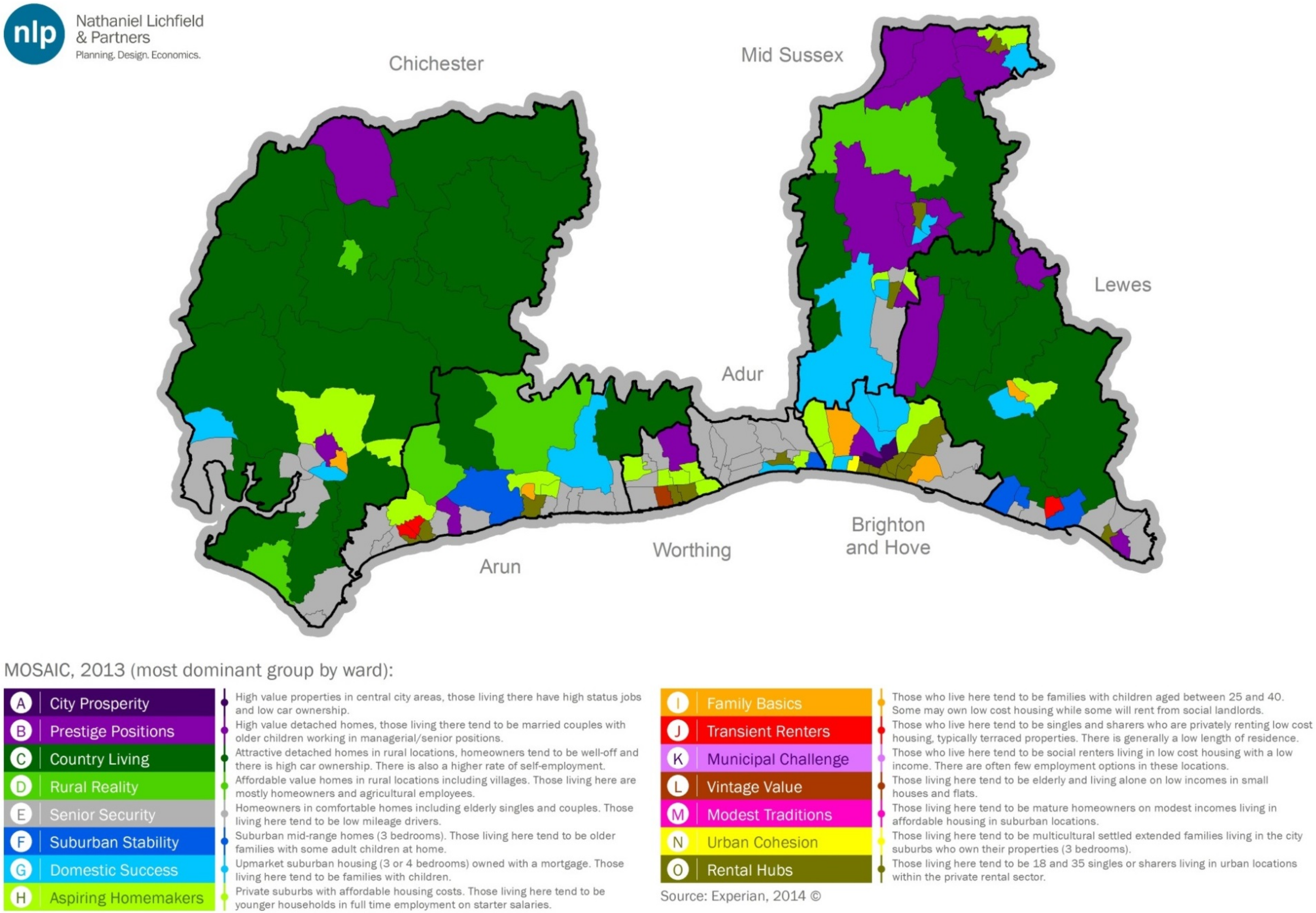
Source: ONS Mid-Year Estimates, 1991 and 2013 / NLP analysis

Housing Market Outcomes

3.14 A combination of the above analysis in relation to migration patterns, population profile and housing affordability, stock and tenure in the Greater Brighton and Coastal West Sussex area has led to a distinct pattern of housing market outcomes at present.

3.15 Mosaic is a tool complied by Experian which undertakes cross-channel consumer classifications designed to help understand the demographics, lifestyles, preferences and behaviours of the UK adult population in detail at small geographic levels. Mosaic classifies areas into one of fifteen categorises dependent on the prevailing patterns. This analysis has been undertaken for Greater Brighton and Coastal West Sussex and is set out below in Figure 3.9.

Figure 3.9 Mosaic Map of Greater Brighton and Coastal West Sussex



3.16 Figure 3.9 shows that Brighton & Hove, Adur and Worthing, as well as areas along the coast in other authorities, attract those on starter salaries (young workers) in the 'Rental Hubs' as well as 'Aspiring Home Owners' and 'Family Basics' who are looking for lower cost housing. This is explained by the higher proportion of private renters and flatted accommodation in Brighton & Hove compared to the remainder of Greater Brighton and Coastal West Sussex. There also seems to be a group of people in between the lower paid workers and those looking for low cost housing and well off home owners, this is the category 'Domestic' Success'. These people tend to be families with children and own suburban housing with a mortgage. These areas are most prominent in the north of Brighton & Hove moving into southern Mid Sussex and Arun.

3.17 This implies that as the young and highly skilled residents of Brighton & Hove (Aspiring Home Owners and those in Rental Hubs) get older and their housing choices change to include smaller houses, they are unable to meet these needs in Brighton & Hove. This cohort of residents is key to the success of the Brighton economy and the ability to retain them is important. The danger is that as people leave Brighton & Hove, almost in a concentric circle depending on the stage in the housing 'life cycle', they move physically further away from the City. If affordability becomes so pressing in Greater Brighton and Coastal West Sussex as a result of the ripple effect from Brighton & Hove specifically, people may move beyond the boundaries of Greater Brighton and Coastal West Sussex. Moving such a distance away from the City may mean that it is no longer feasible to remain employed in Brighton & Hove and commute a long distance daily, and therefore they may choose to work elsewhere.

Summary

3.18 The population of Greater Brighton and Coastal West Sussex has been growing over time, including from significant levels of in migration, notably younger working age people from Greater London. The population within Greater Brighton and Coastal West Sussex is highly mobile which is demonstrated by the internal migration flows within the area, notably outwards from Brighton & Hove.

3.19 This outward migration trend from Brighton & Hove is important to both the economy and transportation in Greater Brighton and Coastal West Sussex because 80% of those moving out of Brighton & Hove within Greater Brighton and Coastal West Sussex are of working age. Many of these groups commute back to Brighton & Hove from elsewhere in Greater Brighton and Coastal West Sussex, putting pressure on transportation into Brighton & Hove (e.g. parking provision is highly constrained and significant urban congestion).

3.20 Housing affordability issues in Brighton & Hove are compounded by a different tenure split compared to other local authorities in the Greater Brighton and Coastal West Sussex Area. A lower proportion of owner occupiers and higher proportion of private renters suggests that affordability pressures in the City are forcing people into the rental market. Furthermore, types of housing to fit all stages of a resident's life cycle are not necessarily attainable in the City itself.

3.21 Brighton & Hove is a relatively young city, and more generally across Greater Brighton and Coastal West Sussex the proportion of the working-age population has grown strongly except for in Mid Sussex and Chichester. However, if affordability does not improve or younger high skilled people are unable to meet their housing aspirations in Greater Brighton and Coastal West Sussex, there is evidence that they may relocate further afield. This could impact the economic potential of Greater Brighton and Coastal West Sussex as people find themselves commuting over such a distance that retaining the job is not viable.

4.0 Meeting Future Housing Requirements

This section considers future housing requirements based on existing published evidence and the emerging plans of each local planning authority within Greater Brighton and Coastal West Sussex, and examines the distribution of planned supply and implied rate of delivery over 2015-2025.

Identifying Future Housing Requirements

4.1 Section 3.0 analysed the current patterns and trends impacting the housing market within Greater Brighton and Coastal West Sussex, and the potential outcomes arising from these. This section considers future housing requirements within the area drawing on existing assessments of housing needs within the Housing Market Areas (HMAs) that cover GBCWS.[8]

4.2 The Coastal West Sussex Strategic Housing Market Assessment (SHMA) (August 2013)[9] is a housing evidence study commissioned by all authorities in Greater Brighton and Coastal West Sussex with the exception of Mid Sussex. It also included the areas of the South Downs National Park Authority (SDNPA) which fell within the study area, but not the entire area covered by the SDNPA.[10] In the case of Chichester, the report identifies housing needs for the entire District which includes the area covered by the SDNPA. Mid Sussex's most up to date housing evidence is contained in the Mid Sussex District Council Draft Housing and Economic Development Needs Assessment (HEDNA) (February 2015).

4.3 Based on the latest published position, the local planning authorities across Greater Brighton and Coastal West Sussex (excluding the South Downs National Park Authority) are currently planning for a housing requirement of 30,520 dwellings over the next decade. However, the existing technical evidence studies indicate that housing needs could collectively be higher taking account of future demographic and economic growth factors.

4.4 The SDNPA is at the early stages of producing its own Local Plan, with a SHMA currently being prepared. Housing figures for the National Park are therefore not currently available for inclusion within this paper. However, a housing requirement will be set out in the SDNPA's Preferred Options consultation due to take place later this year and will also contribute to meeting the housing need in this and three other HMAs.

[8] Excluding the South Downs National Park Authority. Data on housing needs, housing requirement and housing supply are not all available at this time, as such data on this authority has been omitted to avoid skewing the results. Albeit, some local authorities' housing requirements may make an allowance for the SNDPA.
[9] GL Hearn produced a further iteration of this study in April 2014 entitled '*Assessment of Housing Development Needs Study: Sussex Coast HMA'*, however this study does not update the modelling undertaken in the August study.
[10] The SDNPA will be publishing a SHMA in 2015, but this was not available at the time of writing.

Potential implications of a lack of housing

4.5 There are a number of potential implications if future planned housing requirements are not sufficient to meet identified needs and/or a sufficient rate of delivery is not sustained (see later section). When there is a greater demand for housing than supply can cater for, it is those with greater purchasing power who can obtain a property. People looking to buy or rent a home who cannot afford to do so in Greater Brighton and Coastal West Sussex (due to a lack of supply) may find themselves unable to remain in Greater Brighton and Coastal West Sussex and/or having to live with parents or moving into shared households until later in life (known as 'concealed households').

4.6 Some of these issues are already being experienced in Greater Brighton and Coastal West Sussex as housing affordability is a major issue and is most acute in Brighton & Hove and Chichester (see section 3.0). On the basis of someone earning a median salary compared to all other workers in Chichester and Brighton & Hove, the price of a house would be more than 10 times the median salary. The most affordable part of Greater Brighton and Coastal West Sussex is Worthing, but even there the median house prices are still nearly eight times median earnings.

Figure 4.1 Median Affordability Ratio across Greater Brighton and Coastal West Sussex (2013)

Source: CLG Live Tables / NLP analysis

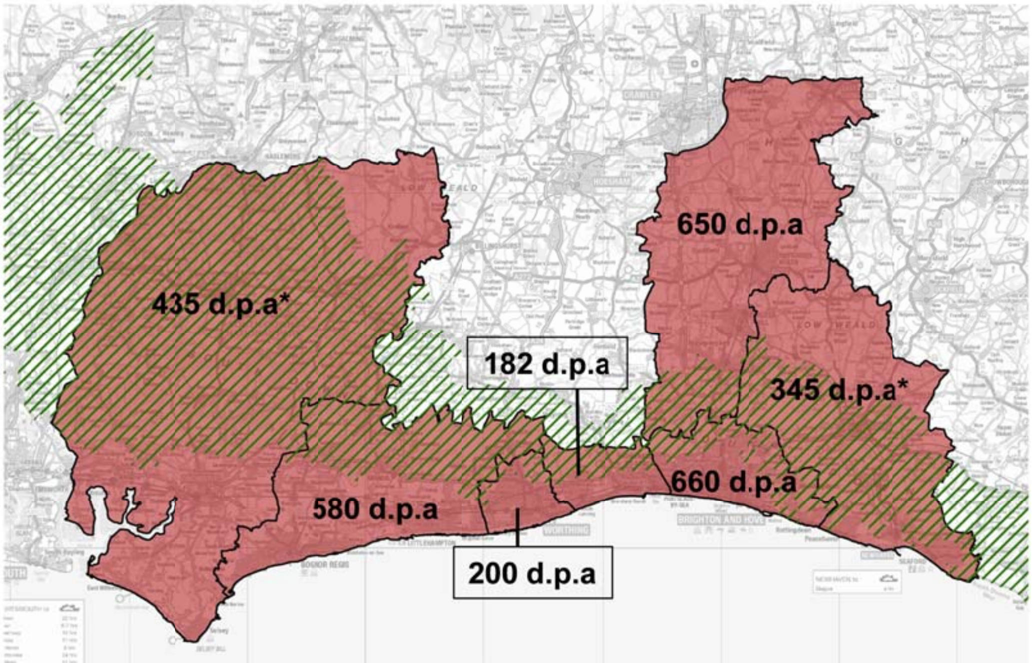
4.7 A typical basis for mortgage lending is within the range of three to four times salary levels, and against this measure it draws the scale of the affordability issue in Greater Brighton and Coastal West Sussex into sharp focus. As it stands, Greater Brighton and Coastal West Sussex overall (and Brighton & Hove and Chichester in particular) is at risk of 'pricing out' lower paid workers due to both housing affordability pressures and a lack of appropriate stock (see section 3.0).

4.8 According to the English Housing Survey, in 2013-14 almost half (48%) of all households aged 25-34 rented privately, up from 45% in 2012-13. The proportion in this age group living in the private rented sector has more than doubled from 21% in 2003-04. Over the same 10 years, owner occupation in this age group dropped from 59% to 36%. Private tenants spend more of their income on living expenses, with homeowners paying an average of 20% of their income on a mortgage compared to private tenants paying 40% of their income on rent. This creates a vicious cycle which makes it difficult to save for a deposit, leading to even fewer young adults becoming homeowners. These circumstances may not make Greater Brighton and Coastal West Sussex an attractive location for lower paid earners, notably younger cohorts of the population, which in turn impacts the economy if Greater Brighton and Coastal West Sussex cannot retain or attract workers.

Spatial Distribution of Housing Requirements

4.9 As noted above, housing requirement figures at March 2015 in draft or emerging Local Plans, adopted Local Plans or Local Plan Inspector's reports identify that local authorities within Greater Brighton and Coastal West Sussex are collectively planning to deliver 3,052 dwellings per annum to 2025. The spatial distribution of planned housing growth across Greater Brighton and Coastal West Sussex every year is set out below in Figure 4.2.

Figure 4.2 Annualised Rate of Planned Housing Growth in Local Plans (adopted and emerging)



Source: NLP review of adopted and draft Local Plans at time of preparation.

Note: Figure for Lewes based on Inspector's initial findings, February 2015, and includes both Lewes District and the South Downs National Park (area which falls within Lewes District) because a

Joint Core Strategy is being prepared. The figure for Chichester excludes the areas within the District that fall within the South Downs National Park.

Planned Housing Supply

4.10 The housing trajectories proposed by each local authority in Greater Brighton and Coastal West Sussex at March 2015 in draft or emerging Local Plans, adopted Local Plans or Local Plan Inspector's reports (see Appendix 1) indicate that the housing requirement figure currently being planned for across Greater Brighton and Coastal West Sussex can be accommodated. Compared to the 30,520 dwellings currently planned for by 2025, potential capacity for 35,998 dwellings is set out in trajectories to be delivered by 2025. However, because this does not reflect the full extent of the time horizon for Local Plans, this effectively includes some 'front loaded' capacity which will contribute to meeting needs beyond 2025 up until the end of the respective Local Plan periods of individual authorities.

4.11 The total identified supply of new dwellings in each local authority up to 2025 is set out below. Noting that Adur and Worthing fall into both Greater Brighton and Coastal West Sussex, Greater Brighton is providing the greatest supply of housing at 22,490 (65%)[11] units compared to Coastal West Sussex which is providing 17,511 (51%) units.

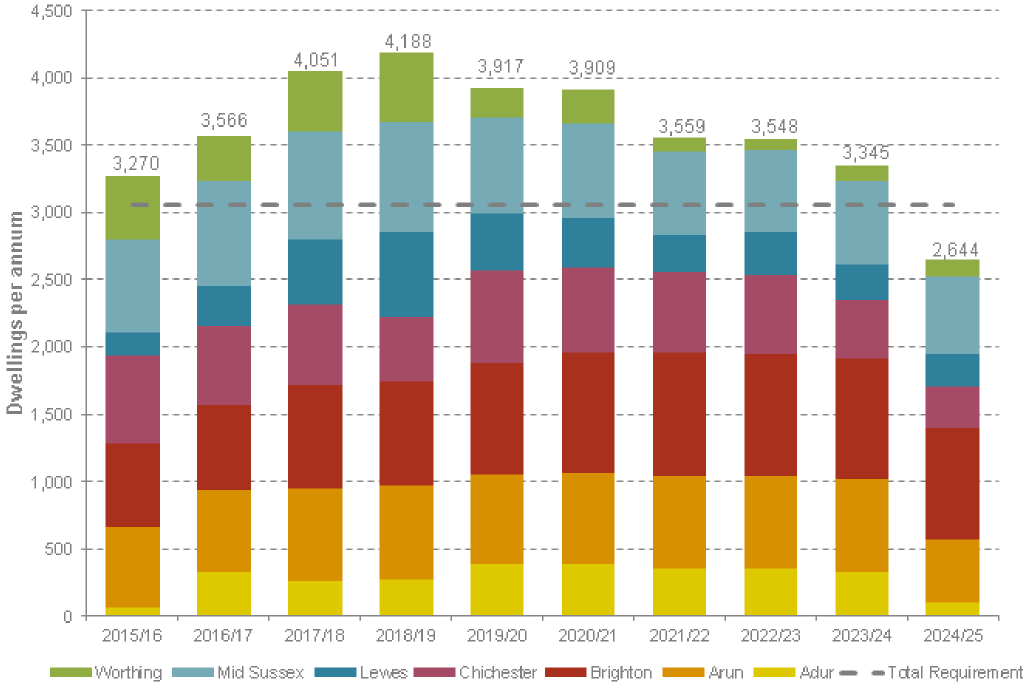
- Adur - **2,844** dwellings (7.90% of total supply);
- Arun - **6,455** dwellings (17.93% of total supply);
- Brighton - **8,065** dwellings (22.41% of total supply);
- Chichester - **5,551** dwellings (15.42% of total supply);
- Lewes - **3,489** dwellings (9.69% of total supply);
- Mid Sussex - **6,933** dwellings (19.26% of total supply); and
- Worthing - **2,661** dwellings (7.39% of total supply).

4.12 On an annual basis, over the next ten years Figure 4.3 shows that cumulatively across Greater Brighton and Coastal West Sussex there are projected peaks in delivery in years 2017/18 and 2018/19. These peaks may relate to monitoring assumptions (for example outstanding planning permissions which have not yet commenced would generally be phased in years three and four). By 2024/25 delivery will fall below the annual housing figure currently being planned for across Greater Brighton and Coastal West Sussex, albeit this is made up cumulatively over the ten year period by higher assumed rates of delivery in earlier years.

4.13 As noted above, a Local Plan for the South Downs National Park Authority is currently being prepared. This will include a housing figure for the National Park, which includes parts of the local authorities in the Greater Brighton and Coastal West Sussex Area.

[11] Because Adur and Worthing appear in both locations the percentages will not sum to 100%

Figure 4.3 Housing Trajectory of Greater Brighton and Coastal West Sussex 2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

4.14 Table 4.1 compares the projected housing delivery rates implied by the local authority housing trajectories for the 2015-2025 period with past completion rates for each authority within Greater Brighton and Coastal West Sussex.[12] In overall terms, this shows that future housing delivery rates will have to be 53% higher compared to past trends, delivering 3,599 dwellings p.a. compared to 2,360 dwellings p.a. historically. The implied uplift in housing delivery for Greater Brighton is 55%, and 48% for Coastal West Sussex. The highest uplift within an individual authority arises in Adur (+118%), although this reflects the presence of a number of large scale sites within the trajectory for this location.

[12] Based on local authority Annual Monitoring Reports for the period 2006/07 – 2013/14

Table 4.1 Average past housing completions compared to average projected future housing delivery in Greater Brighton and Coastal West Sussex

	Average Past Completions p.a. (2006/07 – 2013/14)	Average Projected Future Completions p.a. (2015/16 – 2024/25)	% change
Adur	131	284	118%
Arun	496	645	30%
Brighton and Hove	483	807	67%
Chichester	313*	555	77%
Lewes	235	349	48%
Mid Sussex	457	693	52%
Worthing	245	266	9%
Coastal West Sussex	**1,185**	**1,750**	**48%**
Greater Brighton	**1,551**	**2,399**	**55%**
Greater Brighton and Coastal West Sussex	**2,360**	**3,599**	**53%**

Source: Local authority Annual Monitoring Reports and NLP analysis

Note: Adur and Worthing included within figures for Greater Brighton and Coastal West Sussex

* The average past completion figures for Chichester relate only to completions within the District outside of the South Downs National Park based on 'best fit' Parish-level data. This allows for direct comparison with the average projected future completions which also exclude parts of the District that are within the National Park.

Housing Types

4.15 As set out earlier in the paper, there is a need to cater for different housing market needs to help retain population and workers at different stages of their lives through the provision of flats, family homes, and retirement accommodation. Younger working-age population groups appear to be clustered in Brighton & Hove and some areas of Adur and Worthing, largely in rental accommodation and low cost housing. The next stage in the Experian Mosaic categories for these people could be considered to be 'Domestic Success' whereby young families move to suburban housing. Currently this group is located to the north of Brighton & Hove, Mid Sussex and parts of Adur, Arun and Lewes. This represents people moving out almost in a concentric circle to meet their housing choices.

4.16 As such, those locations immediately surrounding Brighton & Hove should consider meeting the types of housing needed in the future by the current highly skilled residents of Brighton & Hove. Ultimately if housing aspirations cannot be met close by, these people will be increasingly forced to move further away which may impact on the ability to support jobs within Brighton & Hove.

Summary

4.17 Local authorities within Greater Brighton and Coastal West Sussex are collectively seeking to provide 30,520 dwellings over the next 10 years, which is potentially lower than the level of housing growth required to meet identified demographic and economic growth needs.

4.18 An insufficient future supply of new housing could have significant housing market implications: worsening affordability pressures (which are already significant) may not make Greater Brighton and Coastal West Sussex an attractive location for lower earners, notably younger cohorts of the population, which in turn impacts the economy if Greater Brighton and Coastal West Sussex cannot retain or attract workers. It may also be harder to retain new graduates when they leave higher education, but also the housing choices of existing residents.

4.19 In this context, 35,998 dwellings are set out in trajectories developed by local authorities to be delivered by 2025. The trajectories imply a significant increase will be required in annual housing completion rates compared to past trends, on average 53% higher across Greater Brighton and Coastal West Sussex. The type, scale and timing of this supply is considered in more detail in the next section.

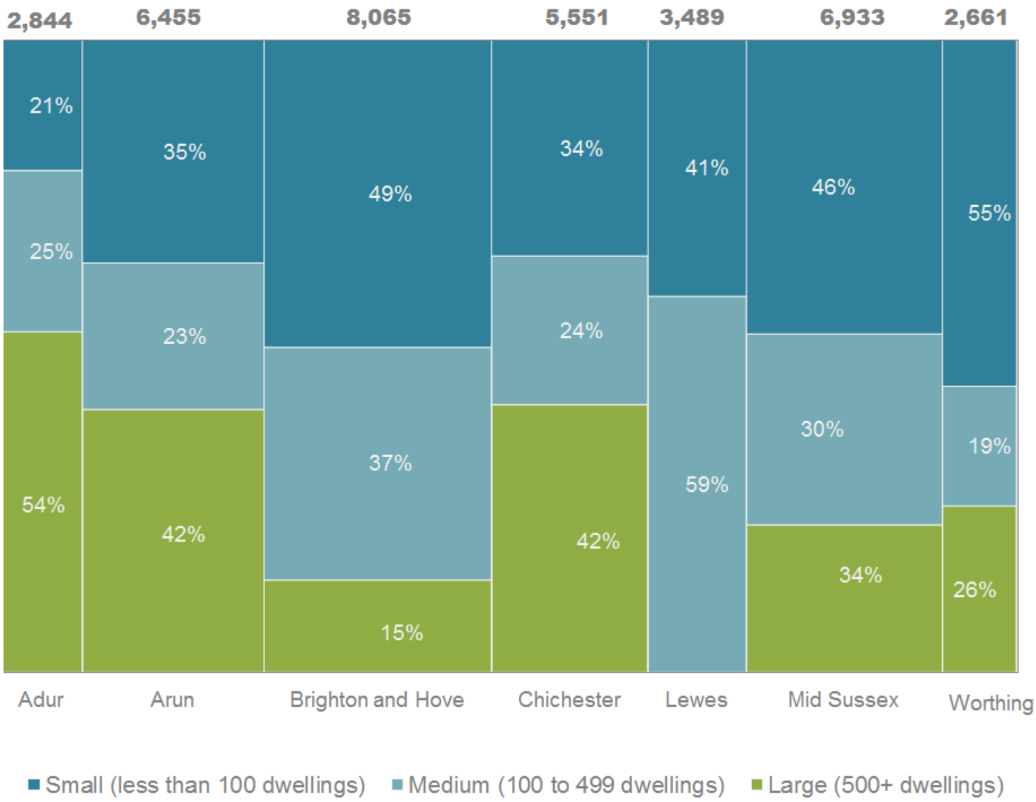
5.0 Delivering New Housing Supply

Authorities across Greater Brighton and Coastal West Sussex are currently planning to supply c.36,000 dwellings between 2015 and 2025. This section looks in more detail at the components of planned housing supply, notably the size of individual sites as well as factors relevant to their delivery.

Size Profile of Identified Housing Sites

5.1 The sites identified by local authorities within their housing trajectories have been broadly categorised in terms of, 'small' sites which amount to less than 100 units, 'medium' sites for between 100 and 499 units and 'large' sites which are set to deliver 500 or more units. As shown in Figure 5.1 below, this indicates that a fairly significant proportion of Greater Brighton and Coastal West Sussex planned supply of housing over the next decade is on large sites, with Adur, Arun and Chichester demonstrating the largest proportionate delivery on sites of this scale in Greater Brighton and Coastal West Sussex.

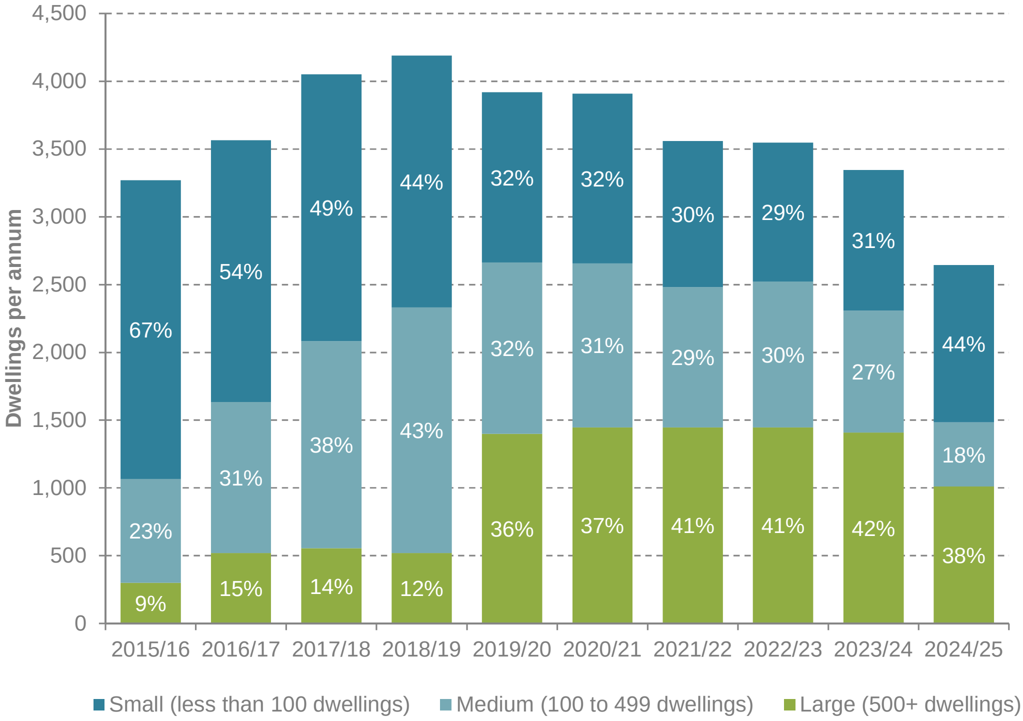
Figure 5.1 Total Housing Supply across Greater Brighton and Coastal West Sussex by Local Authority 2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

5.2 Nearly 60%[13] of planned future housing supply is on medium and large sites, with the majority focused in the eastern part of Greater Brighton and Coastal West Sussex. Figure 5.2 shows that delivery on medium and large sites increases considerably towards the latter end of the ten year period.

Figure 5.2 Components of Housing Supply across Greater Brighton and Coastal West Sussex2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

Delivery Factors

5.3 Although a high proportion of delivery on medium and large scale sites is not, in itself, a concern for the future delivery of housing in Greater Brighton and Coastal West Sussex, this profile will require a concerted effort to support delivery if this level of new supply is to be achieved over the next decade. This is particularly relevant because the projected delivery of housing across the Greater Brighton and Coastal West Sussex area requires a nearly 50% increase on the rate of housing completions achieved in recent years.

5.4 The perception that sites are 'oven-ready' may not always be reflected in reality. Significant work is required well before the first dwelling can be built on site, and it is not until this point that the site can count towards completions in the trajectory. An application on strategic scale sites can take many years and stages of applications to complete. Discharge of condition applications and site assembly works can extend the period even longer before any dwellings are actually under construction. Where major infrastructure is required to enable the delivery of the site the process can be lengthened further.

[13] 58.97%

Why is it important to maintain realistic assumptions about delivery of larger sites?

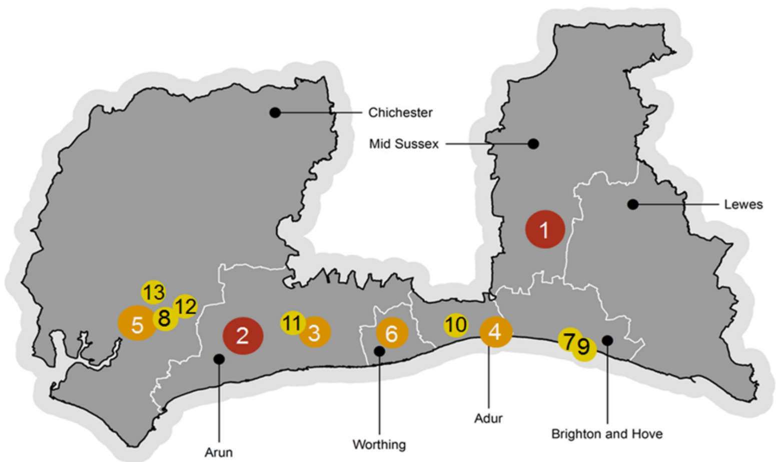
5.5 If the delivery of a strategic site begins to slip away from its intended start date either through a longer planning period than expected (the time it takes between submitting a planning application and ultimately achieving the relevant consent) or delays to upfront works required, this leaves a gap in the trajectory at the local authority level to be filled. Not only does this delay delivery of new housing, but also can provide an opportunity for other housing developments to come forward in the interim particularly where an authority is unable to demonstrate a five-year housing land supply as required by the NPPF. In turn, these may impact on infrastructure capacity ahead of other planned housing developments.

5.6 To ensure delivery of these medium and large sites in a timely manner there is a need to engage with a wider range of developers/housebuilders in Greater Brighton and Coastal West Sussex, this will improve capacity and create competition to drive delivery of planned housing sites.

Site Specific Constraints to Housing Delivery

5.7 Figure 5.3 indicates the locations of the 13 sites in Greater Brighton and Coastal West Sussex which are projected to deliver the most housing between 2015 and 2025. The figures in Figure 5.3 do not relate to the total capacity of the sites, but just their projected delivery to 2025. All of these sites are projected to deliver 500 dwellings or more in the next ten years. The largest site is Burgess Hill (Northern Arc) in Mid Sussex which is projected to deliver 1,614 dwellings by 2025. The only other site projected to deliver more than 1,000 units by 2025 is the Barnham/Eastergate/Westergate site in Arun.

Figure 5.3 Large sites 500+ units in Greater Brighton and Coastal West Sussex 2015 - 2025



1. Burgess Hill (northern arc) (1,614)
2. Barnham/ Eastergate/ Westergate (1,200)
3. Hollyacre Phase 2 (965)
4. Shoreham Harbour (932)
5. West of Chichester (750)
6. West Durrington (700)
7. Brighton Marina Outer (634)
8. Tangmere (600)
9. Brighton Marina Inner (583)
10. New Monks Farm (600)
11. Courtwick Lane (517)
12. N. Shopwhyke Road (500)
13. Westhampnett (500)

Source: NLP analysis

Note: The totals indicated may not reflect total site capacities, but the number of dwellings projected to be delivered between 2015 and 2025 only.

5.8 The greatest site specific constraints to the delivery of these large sites of 500 or more dwellings include works to 'A' roads, flood defences and improvements to Waste Water Treatment Facilities. Table 5.1 sets out the identified constraints to the delivery of each individual site under the categories 'Fewer Constraints', 'Some Constraints' and 'More Constraints'.

5.9 In January 2015, the Coast to Capital Local Enterprise Partnership (LEP) set out that as part of its Growth Deal with the Government, improvements to the A2300 Burgess Hill Link Road would be undertaken to unlock the delivery of up to 3,000 new homes and 5,000 jobs. As such, the delivery of the Burgess Hill site is now considered to have 'Fewer Constraints'. Other sites in this category have either already commenced development or do not have major constraints which it is considered will slow their delivery.

5.10 Sites with 'Some Constraints' are considered to have constraints which can be overcome. These include the improvement of flood defences and more minor road works including new junctions/accesses.

5.11 Those sites with 'More Constraints' are considered to require major infrastructure work for which there is not currently a finalised plan in place for their delivery, limiting the certainty of its delivery and therefore the certainty of the delivery of these schemes in accordance with the timescales set out. This includes expansion/upgrade of the Lidsey and Tangmere Waste Water Treatment Works (WWTW) as well as A29 realignment including a new bridge over a railway.

Table 5.1 Constraints to the delivery of large sites of 500+ units across Greater Brighton and Coastal West Sussex

Fewer Constraints	Some Constraints	More Constraints
Burgess Hill A2300 widening and new link road.	**Shoreham Harbour** Improving flood defences and access to and from the A27 and A259.	**Barnham/Eastergate/ Westergate** A29 realignment including bridge over railway and upgrade to Lidsey Waste Water Treatment Works.
Hollyacre Phase 2 Some/More constraints not identified.	**New Monks Farm** New access from the A27 and some flood risk issues.	**West of Chichester** Expansion of Tangmere Waste Water Treatment Works (WWTW).
West Durrington Approved and groundwork's have commenced.	**Brighton Marina (inner)** Landownership issues.	**Tangmere** Expansion of Tangmere WWTW.
Courtwick Lane Approved and delivering units.		**Westhampnett** Expansion of Tangmere WWTW.
North of Shopwhyke Road Outline permission approved but awaiting detailed planning permission.		
Brighton Marina (outer) Infrastructure improvements and flood defences needed, but not deemed unviable.		

Source: NLP analysis

Summary

5.12 In summary, nearly 60% of planned future housing supply in Greater Brighton and Coastal West Sussex is on medium and large sites, with a significant proportion of this supply coming forward in the latter years of the ten year period 2015 to 2025.

5.13 Large sites can have significant lead in times between being identified and actually delivering dwellings on site, and may be reliant on addressing constraints or new infrastructure delivery. As such it is important for Greater Brighton and Coastal West Sussex to ensure that any constraints or other pre-requisites to the delivery of these sites are addressed early so that any delays in delivery can be mitigated.

5.14 It is important for local authorities within Greater Brighton and Coastal West Sussex to work towards overcoming these constraints because, as set out above, when the timescales for strategic sites begin to slip, the local planning authority can end up having to accept forms of development they do not wish to, either through an application or at appeal, when a five year supply of housing land cannot be demonstrated. To achieve the delivery of housing as planned, it is imperative to ensure constraints to delivery are overcome in a timely manner.

6.0 Future Opportunities for Action

This section draws together the implications from the preceding analysis to identify future opportunities and actions in support of promoting long-term sustainable growth across Greater Brighton and Coastal West Susses with particular reference to the delivery of housing.

Exploring Long-Tem Opportunities to Meet Unmet Housing Needs

6.1 As noted in section 4.0, local planning authorities across Greater Brighton and Coastal West Sussex are currently planning for c. 36,000 dwellings over the period 2015-2025. Evidence contained within existing Strategic Housing Market Assessments and related studies indicates that future housing needs may be higher taking into account demographic and economic growth factors across Greater Brighton and Coastal West Sussex. These figures exclude the South Downs National Park Authority which will set a housing requirement as part of Preferred Options consultation later in 2015 which will also contribute to meeting future housing needs.

6.2 Local authorities within Greater Brighton and Coastal West Sussex will need to continue and further develop discussions under the auspices of the duty-to-cooperate to explore long-term opportunities to meet unmet housing needs. This may include considering options for developing an over-arching spatial framework to guide future delivery. These discussions will need to take account of the position within the GBCWS area but also potential to explore opportunities with neighbouring authorities outside of the area.

Widening the Choice of Housing Supply

6.3 There is a need to consider what types of housing should be delivered within the Greater Brighton and Coastal West Sussex area. Analysis has identified that Brighton & Hove has significant affordability issues as well as the greatest proportion of private renters in the Greater Brighton and Coastal West Sussex area. There is a strong pattern of young working age people moving into Brighton & Hove from outside of the Greater Brighton and Coastal West Sussex boundary (a significant proportion of which come from Greater London), but internal migration patterns show that they do not tend to stay in Brighton & Hove.

6.4 There is an established link between an increase in the housing supply and an improvement in affordability. As such, affordability can be improved to some degree through the provision of a greater supply of housing. There will likely also be a need for initiatives to aid affordability pressures which are related to housing strategy more generally. For example, Brighton & Hove's Housing Strategy 2015[15] states that it will prioritise support for new housing

[15] http://www.brighton-hove.gov.uk/content/housing/general-housing/housing-strategy-2015

development that delivers a housing mix the City needs with a particular emphasis on family, increase housing supply through the conversion of unused and unneeded properties and support buildings and higher density development in appropriate locations of the City.

6.5 Prioritising housing development which meets the needs of certain types of housing, maximising densities and bringing properties back into use are important in maximising the potential supply of constrained authorities. In addition, an increase in affordable housing provision on schemes (whilst still being viable) might also be considered to aid affordability pressures.

6.6 Analysis of both stock in Greater Brighton and Coastal West Sussex and Experian Mosaic categorisation at ward level shows that Brighton & Hove has a lesser proportion of houses in its stock compared to the rest of Greater Brighton and Coastal West Sussex, but has comparatively more flats. Furthermore, the Experian Mosaic data indicates that when young highly skilled workers move onto the next housing stage in their lives (e.g. seeking a family home), they have to move to the outskirts of Brighton & Hove and beyond to do this. As such, the type and location of housing that is delivered, supported by access to both car and non-car transport modes, is important to retain highly skilled workers close to their place of employment.

6.7 Analysing the types of housing needs from constrained locations is important for adjoining authorities who may be able to specify the types of units required to assist in providing for a broader range of housing choices within Greater Brighton and Coastal West Sussex. This would likely be easiest to do on strategic sites whereby there is sufficient scale to allow for a mix of house types, and where transport options can be developed which maximise the potential for both car and non-car journeys (e.g. pump priming bus connections between major employment hubs and housing).

6.8 In addition, although it is generally easier to provide specific types of housing when a local authority has a greater housing requirement, there is no reason why even more constrained authorities cannot introduce measures through their housing strategies to broaden new housing supply.

Ensuring Early Delivery of Sites

6.9 A significant proportion of Greater Brighton and Coastal West Sussex's planned future housing supply is on medium and large sites. Although this is not necessarily a problem in itself, large sites have significant lead in times between being identified and actually delivering dwellings on site and tend to have to overcome constraints to delivery. It is important for Greater Brighton and Coastal West Sussex to ensure that any constraints to the delivery of these sites are dealt with early so that any delays in delivery can be mitigated.

6.10 This is particularly relevant because the projected delivery of housing across the Greater Brighton and Coastal West Sussex area is ambitious; this quantum of housing delivery would require a circa 50% increase on past completion rates across the area.

6.11 As far as is practical on behalf of the local planning authorities, it is beneficial to ensure the strategic sites delivering at their projected rates that the need for any technical evidence or the delivery of major infrastructure, including necessary funding, is in place as early as possible. To ensure that all of these factors remain on track with the projected delivery of these strategic sites, it may be helpful to identify dedicated resources to support delivery of strategic sites and other key development areas and to help co-ordinate the process. The Burgess Hill Development Board established in 2015 (and its predecessor Steering Group established in 2006) is an example of a strategic initiative already underway to set priorities, co-ordinate projects and funding, and to monitor progress.

6.12 Even if every effort is made on behalf of the local authority to ensure the delivery of strategic sites happens as quickly as possible, these sites will have long planning periods including conditions to discharge and site enabling works. If a strategic site does not deliver as quickly as is projected, local authorities should consider if there is a supply of smaller sites in the trajectory to ‘fill the gap’ in the event of a delay. For some local authorities this may mean identifying more small or medium sites in their trajectories to allow for this eventuality.

6.13 One of the advantages of a significant proportion of future housing provision being delivered on strategic sites is that the larger scale of development provides the opportunity to put in place up-front infrastructure in a coordinated and phased way, including scope for public sector investment. This is particularly important in respect of potential improvements to the transport network that can help improve the connections between new strategic sites (as noted earlier, many are in more peripheral locations) and existing centres of employment and services. For example, this might allow for additional bus services or increased frequency on some existing routes due to higher patronage. Authorities and transport planning bodies should ensure that opportunities to work with developers of strategic sites to provide new or improved public transport provision are explored in order to improve connectivity by non-car modes for residents commuting within Greater Brighton & Coastal West Sussex.

Engaging with Developers and Investors

6.14 A further way of increasing delivery of planned supply could be undertaken through engagement with a wider range of developers and house builders who operate both within and outside of Greater Brighton and Coastal West Sussex. Such measures could help to encourage delivery of stalled sites and improve capacity to help support delivery.

6.15 Local authorities could consider compiling a number of Council-owned sites within the local authority into a portfolio which could be delivered through a public/private sector partnership (e.g. through Joint Ventures or a Local Asset Backed Vehicle).

Opportunities and Actions

6.16 Table 6.1 overleaf draws together the strategy elements outlined above and identifies specific opportunities and actions for each. These are also considered in terms of the extent to which they would potentially deliver improved outcomes against each of the overall themes considered in this paper.

Table 6.1 Potential Opportunities to Support the Delivery of Housing Needs

Strategy element	Opportunities and actions	Relevant Themes		
		1: A Growing and Mobile Population	2: Meeting Future Housing Requirements	3: Delivering New Housing Supply
1. Explore long-term opportunities to meet unmet housing needs	• Continue and develop duty to cooperate discussions to explore long-term opportunities to meet unmet housing needs • Consider options for developing an over-arching spatial framework to guide future delivery • Explore opportunities with local planning authorities outside of the GBCWS boundary	X	XX	X
2. Widening the choice of housing supply	• Analyse the housing needs of those unable to meet their housing choices in constrained locations • Consider the potential to broaden the range of stock and tenure on strategic sites in conjunction with pump-priming of new public transport provision (e.g. more frequent bus connections) • Although it is easier to widen types of supply when there is greater physical capacity, opportunities to specify the types of housing to be delivered even in constrained authorities should be considered	XX	X	X
3. Ensuring early delivery of housing sites in GBCWS	• Put in place measures to necessitate technical evidence to improve prospects of projected delivery rates being achieved • Increase delivery coming from smaller sites should the delivery of strategic sites take longer than currently projected • Work either alone or with developers to ensure that major infrastructure/other constraints are delivered at the earliest opportunity. This may include identifying funding. • Potential to identify dedicated resources to support delivery of strategic sites and key development areas to help co-ordinate the process (linked to 4 below)	X	X	XX
4. Engaging with developers and investors to help support delivery	• Engage with a wider range of investors and developers within and outside of the region to encourage delivery of stalled sites and improve capacity to help support delivery • Explore potential scope for public private sector partnerships to deliver portfolios of smaller sites (e.g. joint ventures, Local Asset Backed Vehicles)		X	XX

Source: NLP analysis

6.17 The above potential opportunities to support the delivery of housing needs are broadly applicable to all of the local authorities within Greater Brighton and Coastal West Sussex, with the exception of element 2 which has different opportunities and actions for Greater Brighton and Coastal West Sussex. It is more appropriate for the local authorities within Greater Brighton to analyse how the housing choices of those from Brighton & Hove can be accommodated in a complementary way to the City. This would include providing the types of accommodation that people living in Brighton & Hove might seek to aspire to in the future, but are currently less able to access in the City.

6.18 This is not to preclude consideration of the same issue within the wider Coastal West Sussex area. However, the relative distances and east-west transport connectivity from Greater Brighton to Arun and Chichester (and the implied journey times for people commuting back into Brighton for employment), means that the focus is likely to be within Greater Brighton in the first instance.

Appendix 1 Local Authority Housing Trajectories (at April 2015)

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Adur											
windfalls	0	0	32	32	32	32	32	32	32	32	**256**
<6	23	15	3	0	0	0	0	0	0	0	**41**
up to 49	22	39	29	29	0	0	0	0	0	0	**119**
50-99	24	24	24	24	38	37	0	0	0	0	**171**
100-199	0	172	40	33	0	0	0	0	0	0	**245**
200-299	0	0	0	0	0	0	0	0	0	0	**0**
300-399	0	0	0	0	0	0	0	0	0	0	**0**
400-499	0	0	25	80	80	80	80	80	55	0	**480**
500-599	0	0	0	0	0	0	0	0	0	0	**0**
600-699	0	40	75	75	75	75	75	75	75	35	**600**
700-799	0	0	0	0	0	0	0	0	0	0	**0**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	35	35	0	165	165	165	165	165	37	**932**
1000+	0	0	0	0	0	0	0	0	0	0	**0**
Totals	**69**	**325**	**263**	**273**	**390**	**389**	**352**	**352**	**327**	**104**	**2,844**
Arun											
windfalls	16	42	78	89	91	91	91	91	91	91	**771**
<6	1	1	1	1	0	0	0	0	0	5	**9**
up to 49	152	152	152	152	28	28	28	28	28	55	**802**
50-99	121	121	121	121	40	40	40	40	40	7	**694**
100-199	61	61	91	91	99	114	129	129	129	34	**934**
200-299	111	111	111	111	24	24	24	24	24	0	**563**
300-399	0	0	0	0	0	0	0	0	0	0	**0**
400-499	0	0	0	0	0	0	0	0	0	0	**0**
500-599	64	64	64	64	52	52	52	52	52	0	**517**
600-699	0	0	0	0	0	0	0	0	0	0	**0**
700-799	0	0	0	0	0	0	0	0	0	0	**0**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	66	66	66	66	126	126	126	126	126	73	**965**
1000+	0	0	0	0	200	200	200	200	200	200	**1,200**
Totals	**591**	**617**	**683**	**694**	**660**	**675**	**690**	**690**	**690**	**464**	**6,455**

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Brighton & Hove											
windfalls	48	48	48	48	100	100	100	100	100	85	**777**
<6	53	53	53	53	0	0	0	0	0	182	**393**
up to 49	441	154	177	197	144	126	127	121	138	196	**1,817**
50-99	35	185	175	130	50	75	105	100	65	10	**930**
100-199	0	116	146	125	100	100	100	100	100	65	**952**
200-299	0	0	0	0	120	120	120	120	120	30	**630**
300-399	0	20	120	120	120	120	120	120	120	80	**940**
400-499	0	0	0	50	70	70	70	70	70	50	**450**
500-599	0	0	0	0	50	100	100	100	100	92	**542**
600-699	50	50	50	50	80	80	80	80	80	34	**634**
700-799	0	0	0	0	0	0	0	0	0	0	**0**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	0	0	0	0	0	0	0	0	0	**0**
1000+	0	0	0	0	0	0	0	0	0	0	**0**
Totals	**626**	**625**	**768**	**772**	**834**	**891**	**922**	**911**	**893**	**824**	**8,065**
Chichester											
windfalls	1	15	40	48	48	48	48	48	48	48	**392**
<6	55	34	8	0	0	0	0	0	0	0	**97**
up to 49	406	163	67	37	80	78	42	42	42	41	**998**
50-99	0	109	169	105	26	0	0	0	0	0	**409**
100-199	96	143	150	127	10	0	0	0	0	0	**526**
200-299	0	0	0	0	0	0	0	0	0	0	**0**
300-399	0	0	50	50	75	75	60	50	0	0	**360**
400-499	68	54	50	50	50	50	50	47	0	0	**419**
500-599	20	65	65	65	165	165	165	165	125	0	**1000**
600-699	0	0	0	0	100	100	100	100	100	100	**600**
700-799	0	0	0	0	125	125	125	125	125	125	**750**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	0	0	0	0	0	0	0	0	0	**0**
1000+	0	0	0	0	0	0	0	0	0	0	**0**
Totals	**646**	**583**	**599**	**482**	**679**	**641**	**590**	**577**	**440**	**314**	**5,551**
Lewes											
windfalls	37	37	37	37	37	37	37	37	37	37	**370**
<6	25	25	25	25	25	0	0	0	0	0	**125**
up to 49	83	135	140	56	45	74	30	15	15	13	**606**
50-99	30	52	50	60	31	19	19	18	17	17	**313**

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
100-199	0	50	147	201	71	50	50	83	102	80	**834**
200-299	0	0	0	0	0	45	44	44	44	43	**220**
300-399	0	0	80	255	222	136	102	123	52	51	**1021**
400-499	0	0	0	0	0	0	0	0	0	0	**0**
500-599	0	0	0	0	0	0	0	0	0	0	**0**
600-699	0	0	0	0	0	0	0	0	0	0	**0**
700-799	0	0	0	0	0	0	0	0	0	0	**0**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	0	0	0	0	0	0	0	0	0	**0**
1000+	0	0	0	0	0	0	0	0	0	0	**0**
Totals	**175**	**299**	**479**	**634**	**431**	**361**	**282**	**320**	**267**	**241**	**3,489**
Mid Sussex											
windfalls	0	0	0	0	0	0	0	0	0	0	**0**
<6	0	0	0	0	0	0	0	0	0	0	**0**
up to 49	0	0	0	0	0	0	0	0	0	21	**21**
50-99	399	399	421	421	273	273	273	273	268	201	**3201**
100-199	153	153	153	153	0	0	0	0	0	0	**612**
200-299	0	0	0	0	0	0	0	0	0	0	**0**
300-399	135	135	135	135	85	85	85	85	85	40	**1005**
400-499	0	100	100	100	90	90	0	0	0	0	**480**
500-599	0	0	0	0	0	0	0	0	0	0	**0**
600-699	0	0	0	0	0	0	0	0	0	0	**0**
700-799	0	0	0	0	0	0	0	0	0	0	**0**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	0	0	0	0	0	0	0	0	0	**0**
1000+	0	0	0	0	260	260	260	260	260	314	**1614**
Totals	**687**	**787**	**809**	**809**	**708**	**708**	**618**	**618**	**613**	**576**	**6,933**
Worthing											
windfalls	0	0	81	81	81	81	81	81	81	81	**648**
<6	51	34	7	0	0	0	0	0	0	0	**92**
up to 49	180	95	31	62	20	29	0	0	0	0	**417**
50-99	0	0	0	50	65	85	25	0	35	40	**300**
100-199	144	0	0	0	50	50	0	0	0	0	**244**
200-299	0	0	130	130	0	0	0	0	0	0	**260**
300-399	0	0	0	0	0	0	0	0	0	0	**0**
400-499	0	0	0	0	0	0	0	0	0	0	**0**
500-599	0	0	0	0	0	0	0	0	0	0	**0**

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
600-699	0	0	0	0	0	0	0	0	0	0	**0**
700-799	100	200	200	200	0	0	0	0	0	0	**700**
800-899	0	0	0	0	0	0	0	0	0	0	**0**
900-999	0	0	0	0	0	0	0	0	0	0	**0**
1000+	0	0	0	0	0	0	0	0	0	0	**0**
Totals	**475**	**329**	**449**	**523**	**216**	**245**	**106**	**81**	**116**	**121**	**2,661**

Source: Individual local authorities / NLP analysis

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