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Bramber Parish Council Housing Needs Assessment (HNA)

August 2018

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List of acronyms used in the text:

AH	Affordable Housing (NPPF definition)
AHNMU14	Northern West Sussex Housing Market Area – Affordable Housing Needs Model Update 2014
AMH	Affordable Market Housing
BPC	Bramber Parish Council
CtCLEP	Coast to Capital Local Enterprise Partnership
CtCSEP14	Coast to Capital Strategic Economic Plan 2014
MHCLG	Ministry for Housing, Communities and Local Government
HDC	Horsham District Council
HDEP16	Horsham District Economic Plan 2016
HDPF15	Horsham District Planning Framework 2015
HEP16	Horsham Economic Profile, December 2016
HMA	Housing Market Area
HNA	Housing Needs Assessment
HNHD15	Housing Need in Horsham District, March 2015
HNSR	Housing Needs Survey Report
LPA	Local Planning Authority
MAR	Mean Affordability Ratio
MH	Market Housing
NDP	Neighbourhood Development Plan
NPPF 2012	National Planning Policy Framework 2012
NPPF2018	Draft National Planning Policy Framework 2018
OAN	Objectively Assessed Need
ONS	Office for National Statistics
PPG	Planning Practice Guidance
PRS	Private Rented Sector
SHLAA	Strategic Housing Land Availability Assessment
SHMA09	Northern West Sussex Strategic Housing Market Assessment, May 2009
SHMAU12	Northern West Sussex – Horsham Strategic Housing Market Assessment Update, October 2012
UKHPI	UK House Price Index

1. Executive Summary

Headlines

1. Our objective assessment of unconstrained housing need in Bramber is 60 homes until 2031, or approximately 5 dwellings per annum. Of these, 8 homes should be within the SNDP itself. There is no requirement for all of these dwellings to be accommodated within Bramber however, as local constraints may make this unfeasible. The calculation is based on a fair share principle of growth across Horsham, although the adopted Local Plan for the area puts forward a minimum of just 21 dwellings for Bramber.
2. Given that Bramber has about ¾ of the proportion of smaller housing under 3 bedrooms than across Horsham, there is a case for attempting to rebalance the existing housing stock by building new, two bedroom homes, particularly given the changing demographic profile of the Neighbourhood Area. The Parish council should consider developing policies which encourage smaller housing, in the context of the trade off this may bring in terms of the current character of the housing stock of the village. However, influencing the type and size of housing to be delivered will best be done via a consideration of design issues, and possibly by the creation of a set of design codes which can guide developers in this respect.
3. There may be a need for 7 specialist housing units to be built in Bramber over the plan period, split 40/60 into affordable and market housing. Further survey work of residents in Bramber, as well as partnership working with specialist developers, is recommended to introduce a greater degree of choice into the housing options for elderly people.

Introduction

4. Bramber Parish Council (BPC) is designated as a Qualifying Body (QB) and has decided to prepare a Neighbourhood Plan for the Parish area, referred to here as the Neighbourhood Area (NA). The 2011 Localism Act introduced neighbourhood planning, allowing parishes, town councils or neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area. We have been asked to prepare a Housing Needs Assessment by the Parish Council based on a robust methodology, local data, and focussed on a number of research questions agreed with the Parish Council.
5. As more and more towns and parish councils and forums seek to address housing growth, including tenure and type of new housing, it has become evident that housing policies need to be underpinned by robust, objectively assessed housing data.
6. In the words of the national Planning Practice Guidance (PPG), establishing future need for housing is not an exact science, and no single approach will provide a definitive answer¹. The process involves making balanced judgements based on the qualitative and statistical evidence gathered as well as having regard for relevant national and local planning policies and guidance.
7. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority average, reflecting the fact that a single town, village, or neighbourhood almost never constitutes a housing market area on its own and must therefore be assessed in its wider context.
8. The guidance quoted above on housing needs assessment is primarily aimed at local planning authorities preparing their own evidence base to support their housing policies, for example Strategic Housing Market Assessments (SHMAs) which in recent years have been used to determine housing need at a local authority and/or housing market area level. However, it helpfully states that those preparing Neighbourhood Plans can use the guidance to identify specific local needs that may be relevant to a neighbourhood, but that any assessment at such a localized level should be proportionate.
9. Our brief was to advise on data at this more local level to help BPC understand the tenure, type, and size of housing needed to inform Neighbourhood Plan policies.

PPG-based assessment

10. This objective and independent housing needs advice note follows the PPG approach where relevant. This ensures our findings are appropriately evidenced. The PPG advises that assessment of development needs should be thorough but proportionate and does not require planners to consider purely hypothetical future scenarios, only future scenarios that could be reasonably expected to occur.²

¹ PPG Paragraph: 014 Reference ID: 2a-014-20140306 Revision date: 06 03 2014

² PPG Paragraph: 003 Reference ID: 2a-003-20140306

Summary of methodology

11. Housing Needs Assessment (HNA) at Neighbourhood Plan level can be focused either on quantity of housing needed, type of housing needed, or both. In most cases, there is a need to focus on quantity where the housing target for the area is unclear, for example where the local authority has not set a specific target for the area, or where there is no Local Plan in place.
12. The rationale for this approach is that Neighbourhood Plans need to meet the basic conditions, the fulfilment of which is tested through an independent examination. One of these, Basic Condition E, requires the Neighbourhood Plan to be in ‘general conformity with the strategic policies’ of the Local Plan. The Government’s Planning Practice Guidance indicates that the level of housing development is likely to count as a strategic policy.³
13. As such, this HNA investigates specific local needs that are relevant to the neighbourhood whilst supporting the strategic development needs set out in the Local Plan. This means a Neighbourhood Plan can propose more housing where there is demonstrable need, but not less than the Local Plan.
14. In terms of the types of housing needed, there is generally more flexibility on what Neighbourhood Plan can cover. In order to understand the types of housing needed in Bramber, we have gathered a wide range of local evidence and distilled this into policy recommendations designed to inform decisions on housing characteristics.

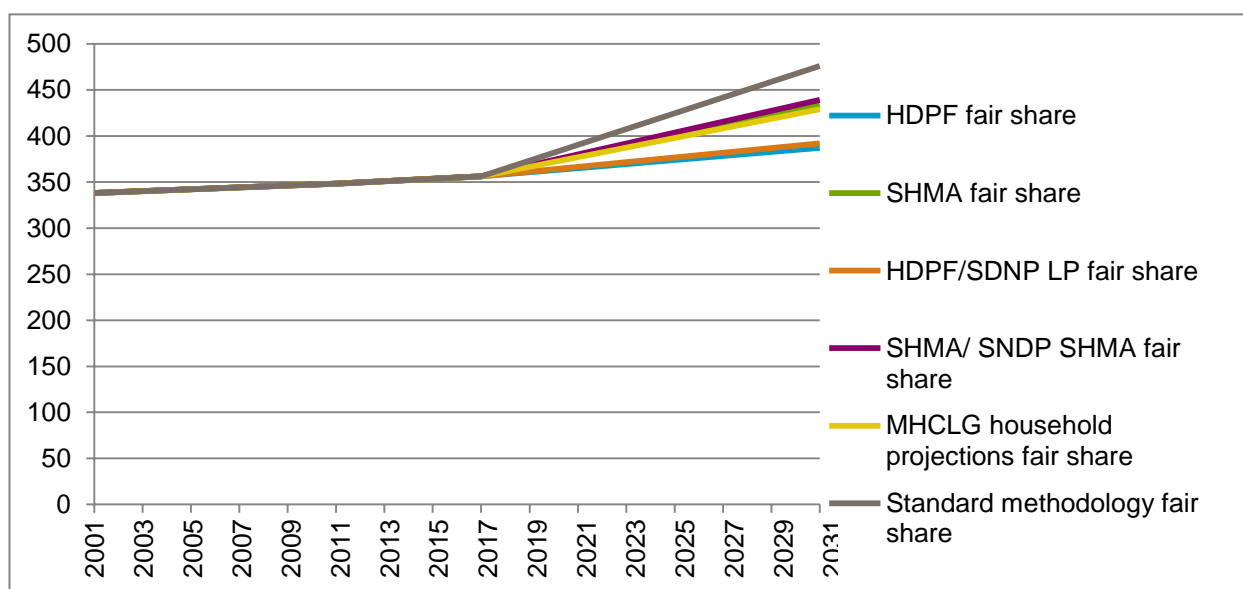
Focus on demand rather than supply

15. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that ‘the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.’⁴
16. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on exercise⁵.

Quantity of Housing Needed

17. The graph below sets out the total number of homes factoring in each of the projections we have identified in Bramber, starting from 2001, in 2011, in 2018, and at the end of the plan period, in 2031.

Figure 1-1: Range of housing need figures for Bramber NA



³ PPG Paragraph: 006 Reference ID: 2a-006-20140306

⁴ See Planning Practice Guidance, Paragraph: 004 Reference ID: 2a-004-20140306 Revision date: 06 03 2014

⁵ Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release ‘Councils must protect our precious green belt land’ (DHCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

Source: AECOM

- 18. The starting point for arriving at a projection of future housing need to be delivered in the NA over the Plan Period is the average of the projections set out above. This best-practice approach has been established both in SHMAs and in HNAs, and has been tested at Neighbourhood Plan and Local Plan examinations. We depart from this best-practice approach if we have reason to believe a given projection should be awarded more weight than others, or should be excluded. For example, if the Local Plan was out of date in planning terms, or another projection was a clear outlier.
- 19. The table below shows these projections and their average, and we have excluded the HDPF fair share, and SHMA fair share as these exclude the SNDP quantities. We have also excluded the Standard Methodology fair share, as this has not been made policy as yet.

Table 1-1: Range of housing projections for Bramber

	Projection	Total housing need in Bramber
1	HDPF fair share	31
2	SHMA fair share	78
3	HDPF/SDNP LP fair share	36
4	SHMA/ SNDP SHMA fair share	83
5	MHCLG household projections fair share	73
6	Standard methodology fair share	120
6	Average of 3, 4 and 5	64



Source: AECOM

- 20. We note that of these 64 homes, 8 have already been built. Below we have summarised our conclusions regarding the impact of market signals on the quantity of housing needed in Bramber. On this basis, we recommend that a 10% uplift should be applied to the initial figure of 64 dwellings by the end of the plan period. This results in a total housing need of 70 dwellings in Bramber to the end of the plan period. Rounding off the 8 dwellings that have been completed so far, this would imply the need for 60 homes until 2031 or approximately 5 dwellings per annum.
- 21. We have applied our professional judgment on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates ‘some impact’, two arrows ‘stronger impact’ and three arrows indicates an even stronger impact. Factors are set out in the table below in alphabetical but no other order.

Table 1-2: Summary of factors specific to Bramber with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 8)	Possible impact on future housing need	Rationale for judgement
Jobs Growth	SHMAU18	↓	Given that a large proportion of Bramber’s residents are retired, we do not consider jobs growth to have any notable impact on demand for housing in Bramber, and therefore a single down arrow is considered appropriate, with the economy of the area likely growing less than that across Horsham.
House Prices	Land Registry Price Paid Data for 2008-2017, UKHPI	↑↑↑	House prices in Bramber are significantly higher than the average for Horsham, although this may partly be as a result of the size and quality of the stock in question. Rises in house

prices have been very pronounced however, and as such, three up arrows is deemed appropriate.

Rate of development	Land Registry Data/AECOM Calculations, SHMA		Data at both the NA and Local Authority level suggests that the rate of development has been significantly constrained in recent years. As such, three up arrows has been deemed appropriate to reflect the likelihood of under-delivery.
Overcrowding and Concealment	Census Data 2001, 2011		There have been decreases in overcrowding in Bramber between 2001 and 2011; however there is a significant presence of concealed families, with a higher rate of concealment than across Horsham. As such, one up arrows is considered necessary.

Types of Housing Needed

22. Below we have summarised our conclusions on the possible impact of the evidence presented in this study on the types of housing needed. These factors are summarised below in alphabetical order.

Table 1-3: Summary of local factors specific to Client NP with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s)	Summary of Analysis	Conclusions
Affordable Housing⁶	Census 2001/11, Land Registry PPD, HNHD15, HNSR	The vast majority of housing in Bramber, about 88%, is owner occupied, versus just 75% across Horsham, and 63% across England. However, there have been very significant increases in recent years in the private rented sector, the growth of which was greater between 2001-2011 than the overall growth in households. Furthermore, of 10 dwellings built recently in the Parish (since 2011), 5 have entered the private rented sector. Average house prices in Bramber have been about 40% higher than the average across Horsham over the past 10 years, and this has stayed fairly steady. However, of more concern has been the very high increase in the lower quartile price of housing, particularly as these are typically considered to be entry level housing suitable for younger families. Such housing is now 22 times local incomes, putting it far out of reach of those on all but the highest incomes of close to £130,000. Many of those in housing need are single adults, or young people living with their parents, who typically earn between £18,000-£24,000 per annum demonstrating the severe need for more affordable forms of housing in Bramber.	Horsham’s policies could deliver up to 21 affordable homes over the plan period in Bramber (35% of 60). This is far higher than the 11 affordable units identified as being needed by the HNSR, as well as the 17 from the proportional share of the housing waiting list. As such, the Bramber Neighbourhood Plan is not likely to need to set its own affordable housing policies. However we recommend that the Parish consider how its policies might encourage both build to rent development, that might provide more affordable accommodation to you people who cannot afford to buy in Bramber, as well as some smaller accommodation, as discussed in more detail in the following chapter, which would prove more affordable housing for younger people, and would also offer opportunities for older people to downsize.
Demand/need for smaller dwellings	Census 2011, MHCLG Household Projections	Given that the majority of homes in Bramber are detached (close to twice as many as in Horsham), it is hardly surprising that the number of homes of 1-2 bedrooms is relatively small, making up approximately ¼ of all homes in the	There is a case for attempting to rebalance the existing housing stock by building new, two bedroom homes, particularly given the changing demographic profile of the NA. We note

⁶ The term ‘Affordable Housing’ denotes the planning definition set out on page 50 of the National Planning Policy Framework, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

Factor	Source(s)	Summary of Analysis	Conclusions
	, ONS Population Projections , HNSR, ONS Mid-Year Population Estimates	parish. Indeed the most common size of home in the NA is 4 bedrooms. Furthermore, many homes are likely to have been expanded over the years, with the long term impact being increases in the size (and usually the value) of these properties.	that Bramber has just 26% of its stock under 3 bedrooms, verses 35% across Horsham. In this context, and given the very severe affordability issues in the area, we would recommend that new housing be of two bedrooms or less. Indeed, based on household surveys, the majority of those in housing need are single adults, providing further incentive to develop smaller homes.
Dwelling type	Census 2011, HNHD15, HNSR	There are almost twice as many detached houses in Bramber as in Horsham proportionate to the stock, totalling 64%, by far the most common type of dwelling in the NA. However, survey results suggest that residents feel the most appropriate type of housing for the village is semi-detached. We also note that a recommendation for smaller housing types is likely to have implications for the type of housing which is likely to be built, not least due to viability issues. However, there seems to be a clear conflict between the types and sizes of housing required by residents of Bramber.	The Parish council should consider developing policies which encourage smaller housing, in the context of the trade off this may bring in terms of the current character of the housing stock of the village. Were future development to conform to the desire for semi-detached housing, the likely result would be more 3-4 bedroom homes, which would be unlikely to meet local housing needs in the long term, whether in terms of the size of housing required by demographic projections, or the price of new housing required by younger people on lower incomes, as well as the needs of older people wishing to downsize.
Housing for independent living for older people	Census 2011, MHCLG Household Projections , ONS Population Projections , HNSR, ONS Mid-Year Population Estimates	We project how the overall number of older people in Bramber is likely to change in future based on the ONS' sub-national population projections for the year 2031. This suggests a very significant increase of more than 50% over the period, which aligns with the notable ageing of the population described throughout the study. Indeed, our calculations suggest there may be up to 139 people aged 75+ in the NA by 2031.	Our calculations suggest the need for up to 7 specialist housing units in Bramber over the plan period, split 40/60 into affordable and market housing. Further survey work of residents in Bramber, as well as partnership working with specialist developers, is recommended to introduce a greater degree of choice into the housing options for elderly people who wish to leave their family homes in their old age. It is likely that issues of viability and suitability mean that such specialist provision is better provided in larger settlements nearby, such as Steyning.

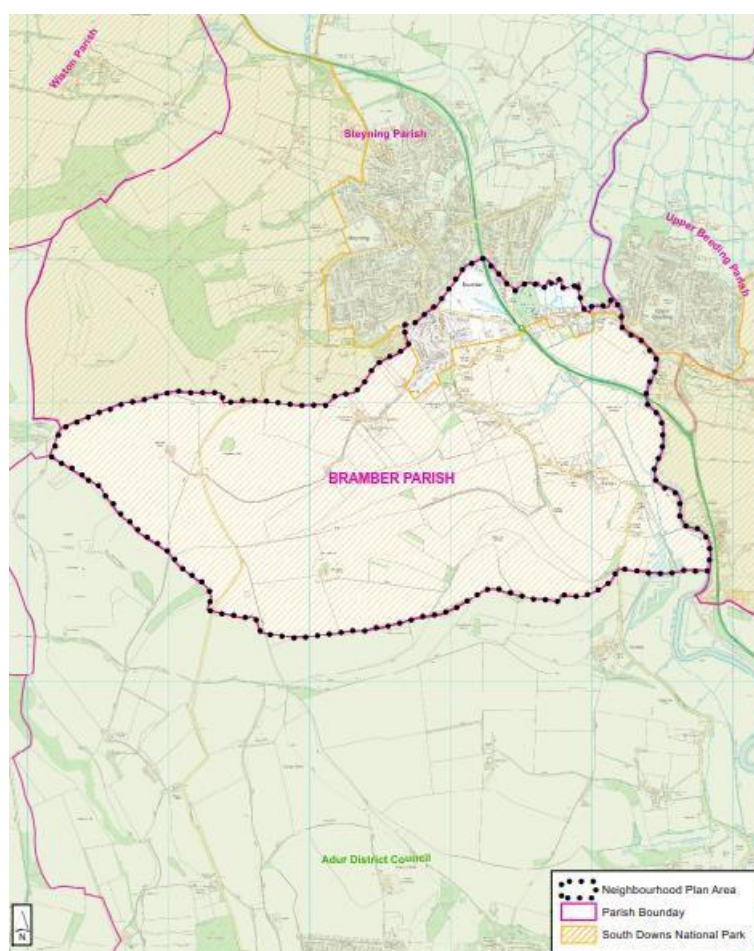
Source: AECOM

2. Context

2.1 Local context

23. Bramber is a village and civil parish in Horsham, encompassing portions of the South Downs National Park, and sitting alongside the River Adur, which forms its eastern boundary, between the settlements of Upper Beeding and Steyning and Botolphs, the last of which forms part of the parish.
24. Bramber benefits from a close connection to the A283 road, which connects it to Shoreham-by-Sea to the south and to the A24 to the west. However, the area continues to host significant agricultural activity, as well as fisheries.
25. The village of Bramber itself contains numerous historic buildings, including in particular Bramber Castle, the Church of St. Nicholas, and St. Mary's House. The settlement is centered around the main high street, with only a small number of subsidiary roads leading off this into cul-de-sac developments of different eras, including neighbourhoods such as Muadlyn and Annington, and the Old Tollgate and Castle Hotels.

Figure 2-1: Map of Bramber NA



Source: HDC

2.2 Planning policy context

26. In line with the basic conditions of Neighbourhood Planning, Neighbourhood Development Plans (NDPs) are required to be in general conformity with the adopted strategic local policies. Consequently, there is a requirement for the relevant Local Plan to be reviewed as part of this HNA.

2.2.1 Horsham District Planning Framework (HDPF) 2015

27. The HDPF (excluding South Downs National Park), adopted in 2015, is the most up to date local plan for the area, and the emerging Horsham District Local Plan is at a sufficiently early stage of preparation, (with no drafts published) as to be disregarded for the purposes of this exercise, and is projected to be published in 2020⁷. The 2015 Framework replaced the Core Strategy and General Development Control Policies adopted in 2007.
28. The Horsham District Planning Framework 2015 sets out the planning strategy for the Horsham District outside of the South Downs National Park for the years up to 2031, and aims to deliver the social, economic and environmental needs of the plan area. This includes the provision of at least 16,000 homes at an average of 800 homes per annum between 2011-2031, with 1,500 homes allocated through Neighbourhood Planning in accordance with the settlement hierarchy (in addition to 750 windfall units, i.e. those arising without the need for allocations in the Local or neighbourhood plans). The following policies are relevant to this HNA:
29. **Strategic Policy 2 'Strategic Development'**, which sets out that the focus of development in the district will conform to the settlement hierarchy and be focused on the market town of Horsham. In this respect, Bramber is identified by the plan as being among the Small Towns and Larger Villages settlement types when considered in combination with nearby Upper Beeding. It supports development which protects the rural character and existing landscape, whilst providing for the varied housing needs of the community. In particular it looks to bring forward three strategic development sites, although none of these are within the NA.
30. **Strategic Policy 3 'Development Hierarchy'** which sets out the mechanism of built-up area boundaries to support the planned expansion of existing settlements through the Local Plan and Neighbourhood Planning processes. Within this boundary, development is accepted in principle, whereas outside of it, development will be more strictly controlled. Emphasis is placed on the use of a Settlement Sustainability Review⁸ to ensure that development is of a scale that both retains the character and role of the settlement in terms of the range of services and facilities there as well as community cohesion.
31. **Strategic Policy 15 'Housing Provision'** which establishes the need for 800 homes per year to be built, or 16,000 homes over the next 20 years. This is to meet the demand created by growth in the economy of the Gatwick Diamond economic area, centred around Gatwick Airport, and inward migration to Horsham, as a result of its attractive quality of life. This target will be supported by: completions between 2011 and 2015, when the plan was adopted, homes already permitted or agreed for release, three strategic sites, the allocation of "1500 homes...through Neighbourhood Planning", and 750 windfall units.
32. **Strategic Policy 16 'Meeting Local Housing Needs'**, which seeks to achieve a mix of housing sizes, types and tenures to meet established local housing needs, subject to the existing character of neighbourhoods and individual scheme viability. It does so by requiring all residential developments of between 5 and 14 dwellings to provide 20% affordable, or a financial contribution where this is not deemed achievable; and by requiring all developments of more than 15 dwellings or on sites over 0.5 hectares, to provide 35% affordable dwellings. These provisions will also apply to sub-divided sites in a way which ensures the same amount of affordable housing is achieved as if they were not sub-divided. All of these policies will be subject to viability, as well as assurances that local housing needs as set out in the latest SHMA are met. The framework also notes that "the council will support schemes being brought forward through Neighbourhood Plans".
33. **Policy 17 'Exceptions Housing Schemes'**, which enables rural, greenfield sites near to settlement boundaries to come forward for development to meet local housing needs. This is considered acceptable where no suitable alternatives exist within the locality to meet the need, that the need is in a single parish or its immediately adjoining parishes within Horsham District, and that the needs relate to existing residents in unsuitable accommodating or needing separate accommodation in area (excluding existing owner occupiers), people whose work provides important services and who need to live in the parish, people who may no longer be resident in the parish but have longstanding links with the local community, and people with the offer of a job in the parish who cannot take up the offer because of a lack of affordable housing. A further condition is that the development must "provide subsidised housing in perpetuity which will normally be managed by a provider that is registered with the Homes and Community Agency."
34. **Policy 18 'Retirement Housing and Specialist Care'**, which states that "proposals for development which provide retirement housing and specialist care housing will be encourage and supported" where they are accessible from existing settlements and where they cater to those on lower incomes. Large scale retirement communities will also be supported in appropriate locations, provided they accommodate a range of needs,

⁷ Horsham Local Development Scheme 2017

⁸ https://www.horsham.gov.uk/_data/assets/pdf_file/0016/9313/CD_GC_01_Settlement-Sustainability-Review2014.pdf

include some affordable provision or an appropriate financial contribution, and contribute “appropriate services and facilities”.

35. **Policy 19 ‘Park Homes and Residential Caravan Sites’** which states that provision of park homes and caravans will be supported so long as they meet local housing needs and are marketed locally for a reasonable period of time, that they are used for permanent accommodation, and that flooding, drainage and ground engineering are not significant barriers to their development. Proposals to convert these to permanent housing or holiday accommodation will not be supported in the face of housing need, whilst conversion of existing holiday accommodation will have to meet the same criteria as new building of this type, and must not harm nearby occupiers and users amenity or damage the environment.
36. **Policy 20 ‘Rural Workers Accommodation’** which takes the view that housing for rural workers to support the rural economy will be supported outside of the defined built-up area, provided that it is functionally required and its occupation supports the established business use, and that evidence is submitted to demonstrate the viability of the rural business for which the housing is required.
37. **Strategic Policy 21 ‘Gypsy and Traveller Sites Allocations’**, which states “Provision shall be made for 39 net additional permanent residential pitches for Gypsies and Travellers within the period 2011 – 2017”, and that the council will make provision for Gypsy, Traveller and Travelling Showpeople (GTTS) over the rest of the plan period. It allocates 4 sites for this purpose, delivering a total of 29 pitches, and notes sites with existing planning permission for a further 13 pitches.
38. **Policy 22 ‘Gypsy and Traveller Sites’**, which states that existing sites for GTTS will be safeguarded from development preventing their use for that purpose, unless they are no longer required to meet identified need. It notes that the provision of sites to meet that need beyond 2017 will be identified in a Site Allocations Development Plan Document, and that further sites may be provided: on windfall sites, by extending existing sites, by redeveloping existing sites, by allocating further sites within strategic developments sites or as standalone allocations, on publically owned land, both publically managed and for purchase by GTTS. The council also states that it will “work with neighbouring authorities to make appropriate provision to meet the requirements for Gypsies and Travellers.”
39. **Strategic Policy 23 ‘Gypsy and Traveller Accommodation’**, which sets out the criteria for determining the allocation of land for GTTS and assessing planning applications for this purpose, namely: barriers to development such as flooding or ground engineering issues; safe and convenient vehicle and pedestrian access; proper utility servicing and size of site to accommodate amenities; location in or near existing settlements, or part of an allocated strategic location within reasonable distance of local services; and that the development does not have an unacceptable impact on the character and amenities of neighbours and is sensitively designed. Furthermore, it takes the view that “in assessing sites for Travelling Showpeople, or where mixed uses are proposed, the site and its surrounding context must be suitable for mixed residential and business uses, including storage required and/or land required for exercising animals”, and does not have adverse impacts on neighbours in the same way as above.

2.3 South Downs Local Plan Pre Submission Version

40. Given that a large part of the NA falls within the South Downs National Park, below we review the relevant housing policy context which should apply to those parts of the NA. The plan puts forward an annual housing figure of 447 dwellings within the national park boundaries.
41. **Strategic Policy SD26: Supply of Homes**, sets out a target of 4,750 net additional homes between 2014-2033.
42. **Strategic Policy SD27: Mix of Homes**, sets out detailed requirements for residential development mix, including as follows:

Figure 2-2: Housing mix policy in the SNDP

- a) Proposals for affordable housing delivered as part of a market housing scheme should provide the following approximate mix of units:
- 1 bedroom dwellings: 35%*
 - 2 bedroom dwellings: 35%
 - 3 bedroom dwellings: 25%
 - 4 bedroom dwellings: 5%
- b) Proposals for market housing should provide the following mix of units:
- 1 bedroom dwellings: at least 10%
 - 2 bedroom dwellings: at least 40%
 - 3 bedroom dwellings: at least 40%
 - 4+ bedroom dwellings: up to 10%

Source: SNDP Local Plan

43. It goes on to state that where robust evidence supports a different mix of housing according to local need, this may be acceptable, as well as where site specific consideration make this necessary. In terms of specialist housing, developments of 5 or more homes will be permitted where there is evidence of local need for such housing.

3. Approach

3.1 Research Questions

44. Housing Needs Assessment at Neighbourhood Plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place. Research Questions, abbreviated to 'RQ;' are developed at the start of the project through discussion with the parish. They serve to direct our research and provide the structure for the HNA. The key research questions can be summarised as follows:

3.1.1 Quantity

45. Horsham District Planning Framework (HDPF) sets a figure for dwellings to be delivered over the Plan period (2011-31) of 'at least 16,000' homes. This will in part be achieved by 'the provision of at least 1,500 homes throughout the district in accordance with the settlement hierarchy, allocated through Neighbourhood Planning.' The purpose of this HNA is to quantify the need for new housing in Bramber taking an 'unconstrained' approach, and taking into consideration relevant Local Plan policies.
46. In addition, a significant portion of the designated area falls into the South Downs National Park (SDNP).

RQ1: What quantity of housing in the Neighbourhood Area (NA) is appropriate over the Plan period, taking into consideration relevant Horsham District and SDNP policies?

3.1.2 Tenure

47. BPC is aware of the need to deliver an increased supply of housing that is affordable (both that conforms to the planning definition of 'affordable housing' as well as low cost housing) to young people so they are able to remain in the area.

RQ2: What affordable housing (social housing, affordable rented, shared ownership, intermediate rented) and market tenures should be included in the housing mix?

3.1.3 Type and size

48. Community engagement activity has shown people are resistant to more large detached homes being built in the area. The focus of BPC is therefore smaller homes. This will enable older residents to down-size, releasing dwellings for younger households. In addition, given the older demographic the Parish is interested in types of home suited to the elderly, for example bungalows.

RQ3: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate in order to achieve a balanced demography and address the ageing population in future years?

3.1.4 Housing for specialist groups

49. Given the demographic profile of the area, BPC wishes to understand how the need for specialist dwellings for the elderly should be addressed.

RQ4: What provision should be made for specialist housing for the elderly within the NA?

3.2 Relevant Data

3.2.1 The Local Authority Evidence Base

50. The PPG states that those bringing forward a Neighbourhood Plan can refer to existing needs assessments prepared by the local planning authority as a starting point. As Bramber is located within West Sussex Housing Market Area, we approached HDC to understand the evidence base they have assembled to support the housing policies that appear in their Local Plan.
51. This produced the following documents:
- a. Northern West Sussex Strategic Housing Market Assessment, May 2009 (SHMA09);

- b. Northern West Sussex – Horsham Strategic Housing Market Assessment Update, October 2012 (SHMAU12);
 - c. Northern West Sussex Housing Market Area –Affordable Housing Needs Model Update (AHNMU14); and
 - d. Housing Need for Horsham District, 2015 (HNHD15).
52. The SHMA studies address the relevant housing market area and inform emerging housing policies at a local authority level, including affordable housing policy. While these are credible sources, and their statistical robustness can be assumed, their usefulness also depends on whether the Housing Market Area (HMA) that the SHMA studies treat as their subject area can be used as a proxy for the NA.
53. The LPA evidence base draws upon a range of data including population and demographic projections, housing market transactions and employment scenarios to derive the objectively-assessed housing need for the district. As such, it contains a number of points of relevance in understanding housing need within the NA.
54. This provides a strong starting point for policy development that aims to build on and add local specificity to those of the Local Planning Authority by enabling a comparison to be made with parish-level data (gathered as part of the preparation of this study), given that such an exercise reveals contrasts as well as similarities.

3.2.2 Other data

55. In addition to the LPA evidence base, we have gathered data from a range of other sources to ensure our study is robust for the purposes of developing policy at the neighbourhood plan level. These include Census data providing insights into demographic shifts, the affordable housing waiting list managed by HDC, and Land Registry house price data. In addition, a survey of local estate agents has been undertaken to understand trends within the area, and we have also incorporated data from the Housing Needs Survey Report (HSNR) undertaken by Action in Rural Sussex (AIRs) in 2014 and reported in 2015. This survey is considered to be fairly robust, not least because 28.9% of households in the parish returned the survey form.⁹

⁹ HSNR15, pp.5

4. RQ 1 Quantity

RQ1: What quantity of housing in the Neighbourhood Area (NA) is appropriate over the Plan period?

56. We have considered six sources for calculating housing figures for Bramber over the plan period. The calculations are set out below.

4.1 HDPF

57. Below we have considered two ways in which the Local Plan targets for housing may be cascaded down to the neighbourhood plan level.
58. To calculate the 'fair share' of the 1,500 dwellings that HDC expects to be delivered 'throughout the district in accordance with the settlement hierarchy'¹⁰ we have calculated the number of dwellings in the settlement as a proportion of all the settlements that come under the three different categories of 'small towns and larger villages, medium villages and smaller villages' (the 3 categories) set out in Policy 3.¹¹
59. It is important to note we have excluded the 'Main Town' of Horsham from this calculation as it does not form one Neighbourhood Area (NA). In addition, it is not anticipated that dwellings will come forward through neighbourhood planning due to the strategic nature of development in and around Horsham town. This should therefore be excluded from the 1,500 dwellings sought through section 4 of Policy 15.
60. The total number of dwellings in the three categories comes to 21,517 dwellings. This figure has been arrived at by accessing Census 2011 data relating to specific Middle and Lower Super Output Areas (M/LSOAs) and Output Areas (OAs) that focus on the spatial arrangement of each town and village (as opposed to the wider parish in which they sit). This is based on a reading of Policy 3 which specifically suggests that development will only be permitted within the defined built-up areas.
61. In 2011, there were approximately 298 dwellings in the built up area of Bramber, equating to 1.38% of all the dwellings in the 3 categories. On this basis we can calculate that the settlement's fair share of the 1,500 figure is 21 dwellings (rounded) to be delivered over the Plan Period.
- 62. This figure should be seen as a minimum, and does not include the 750 dwellings expected on windfall sites across the district. Adding Bramber's fair share of the windfall dwellings would add a further 10 dwellings, giving a total of 31 dwellings to the end of the plan period.**
63. A further approach is to consider the district minimum across Horsham. The HDPF puts forward a housing requirement for 'at least 16,000' for the whole district over the Plan Period between 2011 and 2031. The proportional share may be calculated for Bramber Parish based on the proportion of homes within the district that fall into the NA.
64. At the time of the last Census there were 348 dwellings in the NA and 56,516 in the district; this represents 0.62% of all homes in the district.
65. Therefore, a fair share of the entire district target without taking into account the Local Plan settlement hierarchy would be 99 homes (0.62% of 16,000).

4.2 SHMA

- 66. Below we consider the potential housing need arising from the SHMA 2009's assessment.**
67. It is important to remember that the SHMA presents a demand-side only, or 'unconstrained' assessment of need (often identified as Objectively Assessed Need, or OAN¹²), as opposed to a final housing target.
68. The final housing target will take into account a number of other important factors, including for example the availability of land, viability, infrastructure and environmental constraints and the results of consultation.

¹⁰ HDPF, page 56

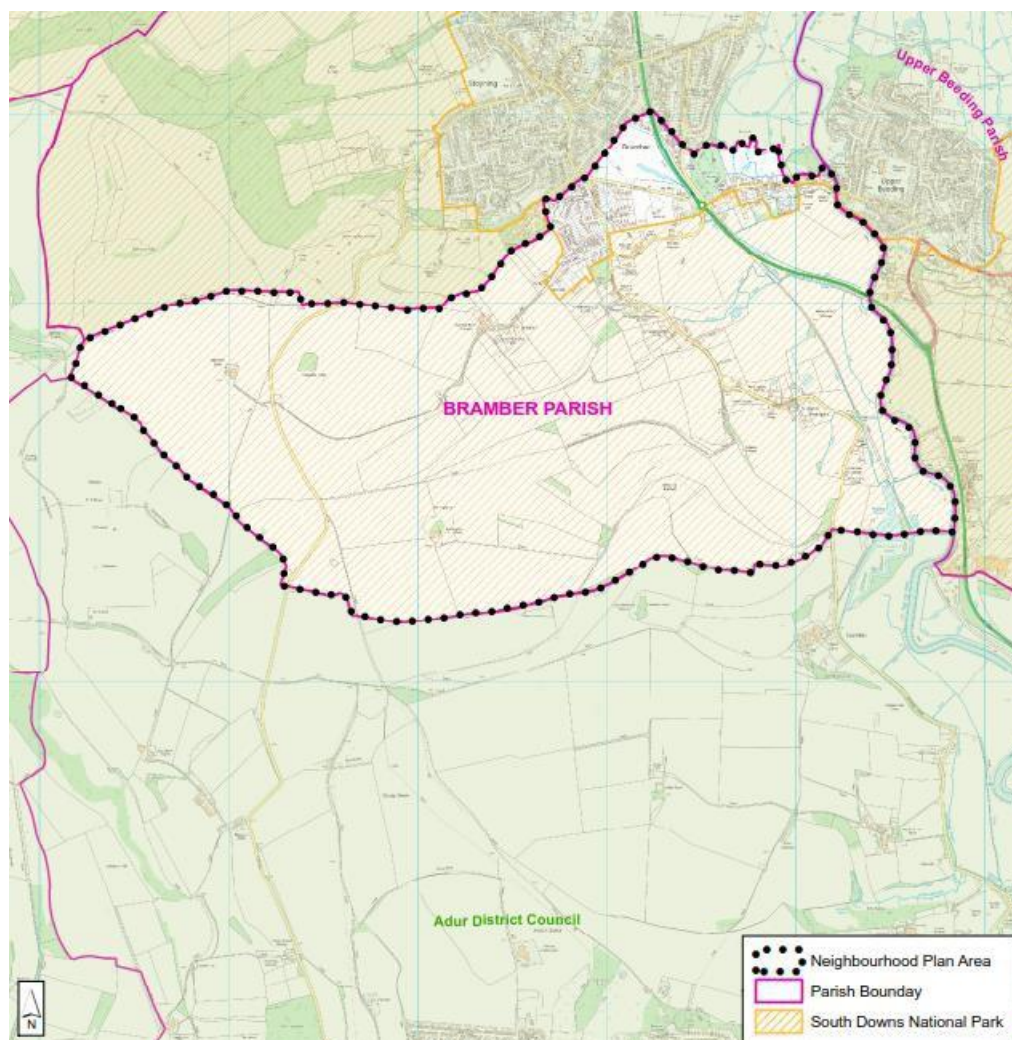
¹¹ HDPF, page 25

¹² The OAN includes the baseline demographic need, plus any adjustments made to official forecasts to account for projected rates of household formation post 2021, past suppression of the formation of new households, the effect of past under-supply, employment forecasts, market signals and affordable housing need (as set out in paragraph ID2a-004 of the PPG). This is sometimes described as 'policy off' because it does not take account of final policy responses as a result of taking into account capacity, environmental and infrastructure constraints.

69. Nonetheless, the SHMA presents an appropriate starting point for deriving need at the NP level, because it is an authoritative source of evidence, and importantly, because it takes into account population and household projections, as set out in the 2012 Sub-National Population Projections (SNPP). SNPP provide the basis for Household Projections which the PPG suggests should be taken as a 'starting point' in determining need at the local authority level.
70. The HNHD15 identifies an OAN for Horsham District over the period 2011 - 31 of 12,720 homes.¹³ This number has been selected from a number of options on the basis of the support it provides to employment growth of 275 jobs per annum as recommended by the Inspector following the examination of the HDC's Planning Framework.
71. It includes upward adjustments to household formation rates relative to trends, producing an increase in housing supply (of both market and affordable housing). This reflects a policy aim of improving affordability, thus enabling a growing number of younger households in their 20s and 30s to form.
72. **To calculate the NA's 'fair share' of this target, it is again possible to use the Bramber proportion of all housing in the district (0.62%). This produces a figure of 78 dwellings (rounded).**

4.3 South Downs National Park

Figure 4-1: Map of Bramber NA and area falling within the SDNP



Source: HDC

73. The map above shows that the vast majority of Bramber Parish falls within the boundaries of the South Downs National Park (SDNP). As such we have considered the total number of dwellings needed within the Park's boundaries which may reasonably be apportioned to the NA.

¹³ GL Hearn, Housing Need in Horsham District, March 2015, page 49

74. To calculate the number of new dwellings that Bramber should deliver to take on its fair share of housing required in future years within the South Downs National Park (SDNP), we start with the number of dwellings currently in the park. Using data derived from Census, SNDP authority has provided advice there were 50,049 dwellings in 2011¹⁴.
75. The Housing and Economic Development Needs Assessment (HEDNA) published in 2017 for the SDNP, put forward an OAN for housing in the SDNP of 447 homes per year, based on the blended approach to modelling household formation rates.¹⁵
76. The SNDP authority is currently in the process of producing a new Local Plan with a proposed Plan Period of 2014 -32¹⁶; the OAN therefore amounts to 7,560 dwellings over this period (we note this contrasts with the 'policy on' number of 4,750 that appears in the current draft of the emerging Local Plan.¹⁷)
77. In order to arrive at an estimate of the number of dwellings Bramber should take on, we take the number of existing dwellings in that part of the parish that falls into the park. Our estimate is that approximately 50 dwellings fall within the park, about 1/7th of the total in Bramber, with these covering a relatively large area of the parish on account of the rural nature of the Park. The figure of 50 dwellings represents approximately 0.01% of all 50,049 dwellings in the Park in 2011. Two forecasts may therefore be made:
- A projection derived from the OAN set out in the SHMA, a fair share of which would be 8 dwellings (rounded); and
 - A projection derived from the SDNP Authority's Local Plan figure, a fair share of which would be 5 dwellings (rounded).
78. It would be reasonable therefore to conclude BPC should support the delivery of between 5 and 8 dwellings in the SDNP section of the NPA over the plan period to 2032. We note the Plan Period for the neighbourhood plan only extends to 2031; to allow for this, one dwelling may be deducted from the final target agreed with the relevant authority, i.e. between 4-7 additional dwellings.
79. The SDNP SHMA makes the following caveat: 'it should be borne in mind that development potential in the SDNP is restricted, and the policy focus is on conserving the SDNP landscape; and meeting local need for affordable housing. Thus whilst the projections indicate what level of housing provision might be needed in the absence of development constraints, it may well be the case that housing provision falls below the projected level of need.¹⁸' The same caveat should apply to the SDNP within the Bramber NA.
- 80. The results of these calculations would be to slightly increase the figures described above, with the two Local Plans together providing a figure of 36 homes to the end of the plan period, and the two SHMAs together providing a figure of 83 dwellings.**

4.4 MHCLG household projections

81. MHCLG publishes household projections every two years. The most recent (2014-based) household projections were published in July 2016¹⁹, and extend to 2039.
82. These projections are an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase. They do not take into account political, economic, demographic or any other drivers that may in future influence the distribution of housing approved across the District.
83. However, the PPG recommends that these household projections should form the starting point for the assessment of housing need.
84. The 2014-based Household Projections suggest that by 2031, Horsham will have 66,854 households, entailing an additional 11,931 households above the 2011 baseline. Although population projections are only available at a local authority level, a calculation of the share for the NA is nevertheless possible for the household projections based on the NA's household numbers in the 2011 Census.
- 85. Based on a proportional 'fair share' of this household growth, Bramber would see a total growth of 73 households until the end of the plan period.**

¹⁴ Email from Chris Paterson Communities Lead, South Downs National Park Authority, dated 11/09/17

¹⁵ Housing and Economic Development Needs Assessment (G.L. Hearne, 2017)

¹⁶ Local Plan, page 132

¹⁷ Local Plan, page 132

¹⁸ Strategic Housing Market Assessment South Downs National Park Authority Final Report September 2015, pp 187

¹⁹ See 2014-based MHCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

4.5 The standard methodology

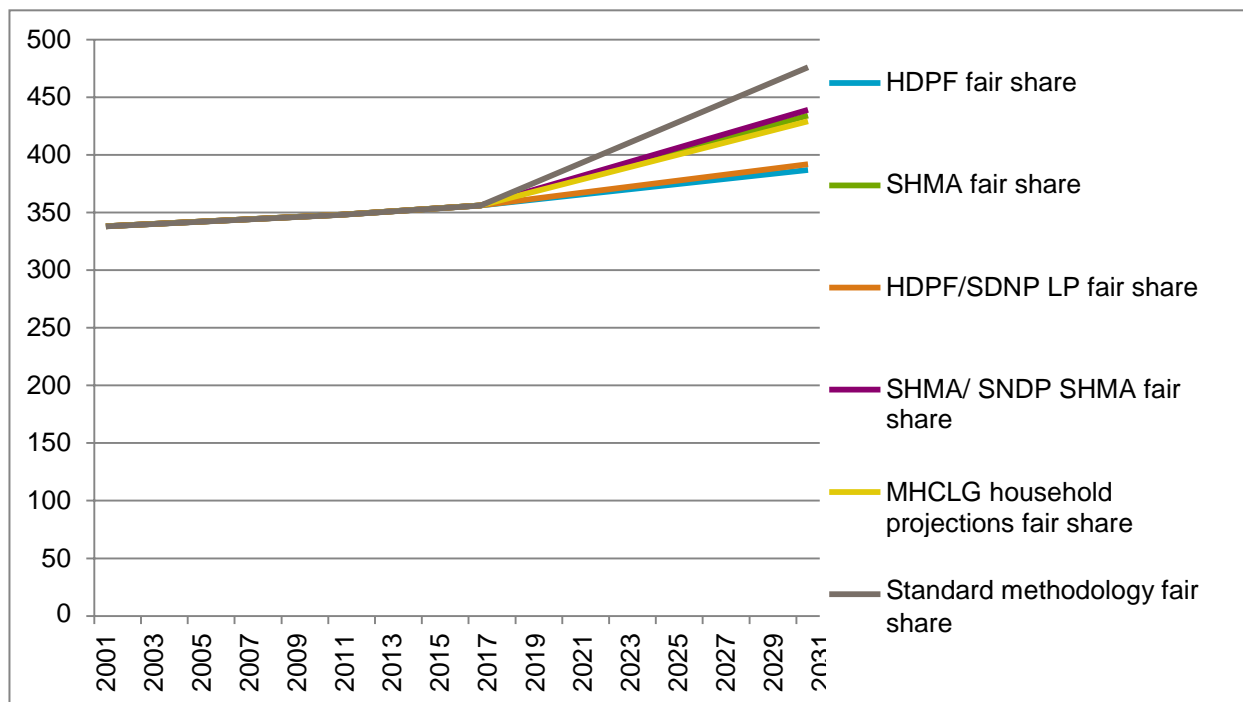
86. On 14th September 2017, MHCLG published “Planning for the right homes in the right places: consultation proposals” a consultation on a new proposed Standard Method for assessing housing need for arriving at the minimum number of homes needed for individual local authorities, thus avoiding both the expense of producing complex SHMAs and the disagreements surrounding their methodologies.
87. The consultation draft of the National Planning Policy Framework, published in March 2018, proposes to establish this as the method LPAs should use as the starting point for arriving at a housing target for their area.
88. It is important to consider the implications of this emerging policy guidance for potential housing need calculations in the NA. Therefore, what follows is an assessment of the NA’s housing need based on the new proposed methodology which, should the policy be put in place in its current form, provide the likely figures for housing need in the area.
89. This projection is included *for information only*, bearing in mind that the consultation makes clear that LPAs will have the option of using alternative methods for arriving at their housing target, so long as the number they arrive at exceeds that produced by the new standard method.
90. Proposed updates to the PPG include a requirement that LPAs provide a housing needs figure to neighbourhood planning groups, and that they may do this by making a reasoned judgement based on the settlement strategy and housing allocations in their plan, so long as the local plan provides a sufficiently up-to-date basis to do so.²⁰
91. The starting point for using the Standard Method for the neighbourhood level is therefore whether the current Local Plan was adopted before or after the introduction of the NPPF2012.
92. In the case of Horsham, the HDPF was adopted in November 2015, and therefore provides an up-to-date basis for arriving at a housing need figure for Neighbourhood Areas.
93. However, the indicative assessment using the Standard Method is 974 homes per annum, a significant uplift of approximately 22%. As this total falls well within the proposed 40% cap on any uplifts, it is reasonable to assume that this uplift will be applied in the case of Horsham.
94. **A proportional share of this target for Bamber would then be 120 dwellings over the period.**

4.6 Conclusions

95. The graph below sets out the total number of homes factoring in each of the projections we have identified in Bamber, starting from 2001, in 2011, in 2018, and at the end of the plan period, in 2031.

²⁰ MHCLG, [planning for the right homes in the right places: consultation proposals](#), page 31

Figure 4-2: Range of housing need figures for Bramber NA



Source: AECOM

96. The starting point for arriving at a projection of future housing need to be delivered in the NA over the Plan Period is the average of the projections set out above; we depart from this approach if we have reason to believe a given projection should be awarded more weight than others, or should be excluded. For example, if the Local Plan was out of date in planning terms, or another projection was a clear outlier. The table on the following page shows these projections and their average. We have excluded the DHDPF fair share and SHMA fair share as these exclude the SNDP quantities. We have also excluded the Standard Methodology fair share, as this has not been made policy as yet.

Table 4-1: Range of housing projections for Bramber

	Projection	Total housing need in Bramber
1	HDPF fair share	31
2	SHMA fair share	78
3	HDPF/SDNP LP fair share	36
4	SHMA/ SNDP SHMA fair share	83
5	MHCLG household projections fair share	73
6	Standard methodology fair share	120
6	Average of 3, 4 and 5	64

Source: AECOM

97. We note that of these 64 homes, 8 have already been built. This leaves 56 homes that are needed in Bramber by 2031, or approximately 4 per annum.

98. Furthermore, the PPG highlights the importance of taking market signals into account when assessing housing need, given they provide an indication of the balance between demand and supply. This is particularly important

to consider given the significant and well-documented changes in the housing market over recent years, which were exacerbated by the economic downturn and subsequent issues in obtaining mortgage finance.

99. The PPG states:

The housing need number suggested by household projections (the starting point) should be adjusted to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings. Prices rising faster than the national/local average may well indicate particular market undersupply relative to demand.²¹

100. These market signals relate to trends discernible within the housing market, and broader economic trends that have an impact on the housing market. The PPG goes on to assert that where there is evidence of an imbalance in supply and demand, an uplift in planned housing numbers – compared to those derived solely from household projections – is required in order to increase the supply of housing to meet demand and tackle affordability issues:

“This includes comparison with longer term trends (both in absolute levels and rates of change) in the: housing market area; similar demographic and economic areas; and nationally. A worsening trend in any of these indicators will require upward adjustment to planned housing numbers compared to ones based solely on household projections.

101. The following chapter contains our assessment of the market signals which are likely to impact on the quantity of housing needed in Bramber. These are then summarised, and the uplift applied to the figure derived above. In discussions with TNF and RBC as to the appropriate levels of market dwellings in the Plan Area it will be necessary to consider factors that suggest either an uplift or reduction. This study considers the following market signals: employment and commuting; house prices; recent rates of development; and overcrowding and concealment.

²¹ PPG Paragraph: 019 Reference ID: 2a-019-20140306

5. Market Signals

5.1 Employment and commuting

102. Local employment trends can greatly influence housing needs as employment opportunities can stimulate demand for housing in the plan area, particularly where long commuting distances are not feasible or sustainable for local employees. It is therefore important to establish the employment sphere of influence experienced by residents of Bramber.

103. The table below shows that residents of Bramber are fairly similar in their commute to those in the rest of Horsham in terms of average distance travelled, although this does not include those working mainly at or from home (with these accounting for a higher share of employees in the NA than in the district). Indeed, the majority of residents either work at home or less than 10km away, suggesting that the economy is to a great extent contained within Horsham itself (although clearly those working at home may be working for companies not based in Horsham for example).

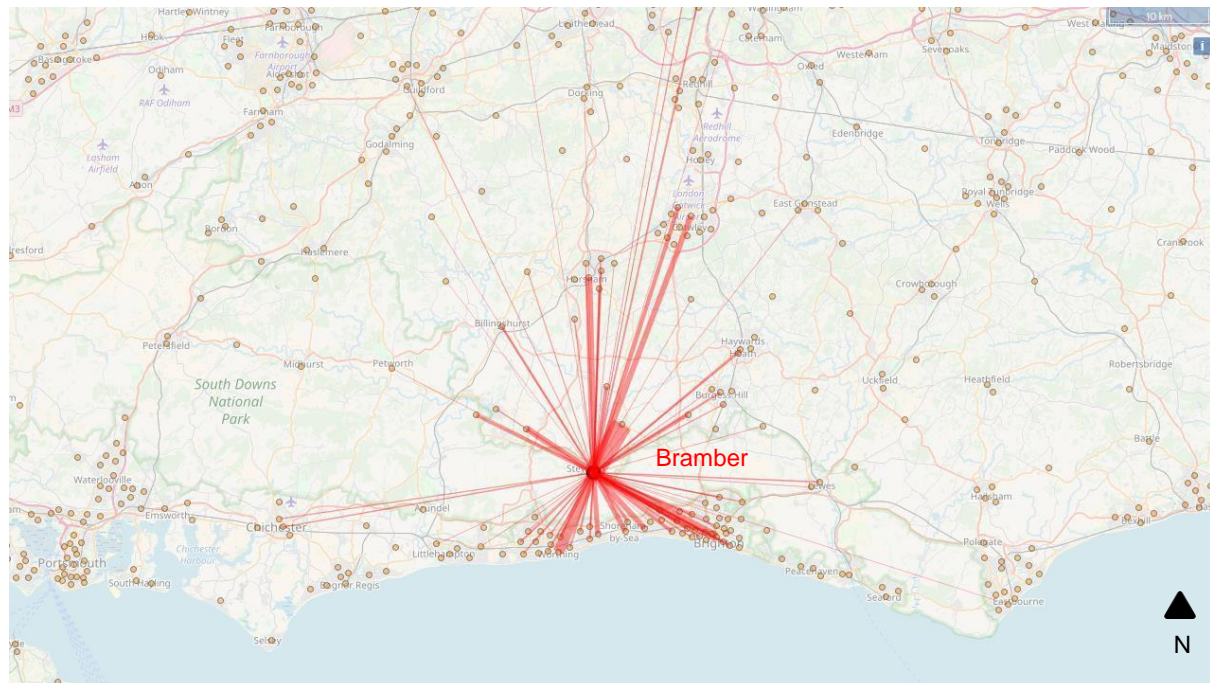
Table 5-1: Distance to work, 2011

	Bramber	Horsham	England
Less than 10km	31.2%	34.3%	52.3%
10km to less than 30km	25.7%	28.5%	21.0%
30km and over	13.0%	13.8%	8.0%
Work mainly at or from home	21.3%	14.6%	10.3%
Other	8.8%	8.7%	8.5%
Average distance travelled to work	20.8km	19km	14.9km

Source: Census, AECOM Calculations

104. Indeed, the figure below shows the actual commuting flow data from the census, and demonstrates that residents of the area work in a wide range of places, including surrounding towns and cities (particularly Henfield, Brighton and Worthing, but also Horsham and Gatwick/Crawley). Those commuting to London are a very small minority.

Figure 5-1: Commuting patterns of Bramber residents



Source: Datashine/Census 2011

105. The table below shows where Bramber residents worked in 2011. This confirms the fact that Bramber has many retired people, making up close to one quarter of the entire population. In this context, changes in employment are not likely to be as significant a factor in the demand for housing as in other places with fewer retired people,

as the primary driver of demand in the area is not related to its employment prospects, but as a result of other factors.

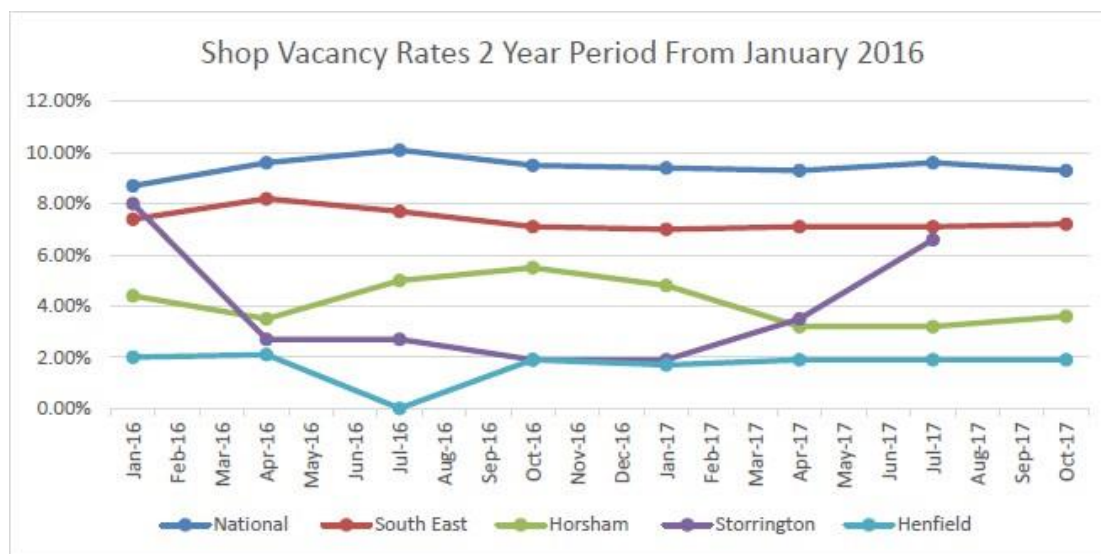
Figure 5-2: Economic activity in Bramber, 2011

Economic category		Bramber	Horsham	England
Economically active	Total	64.3%	73.4%	69.9%
	Employee: Full-time	28.1%	40.3%	13.7%
	Employee: Part-time	15.9%	14.8%	38.6%
	Self-employed	16.7%	12.9%	9.8%
	Unemployed	1.6%	2.7%	4.4%
	Full-time student	2.1%	2.7%	3.4%
Economically inactive	Total	35.7%	26.6%	30.1%
	Retired	25.0%	15.5%	13.7%
	Student	4.3%	3.5%	5.8%
	Looking after home or family	2.8%	4.2%	4.4%
	Long-term sick or disabled	2.6%	2.2%	4.1%
	Other	1.0%	1.3%	2.2%

Source: Census 2011

- 106. Indeed, given the relatively small numbers of people working outside Horsham District, we do not foresee significant employment effects beyond those which have already been taken into account by the SHMA projections. Growth in employment of those working at home would also be difficult to predict, and is similarly unlikely to increase demand for housing specifically within the NA.
- 107. Whilst growth in employment in nearby towns such as Henfield could increase the demand for housing in Bramber, we note that the Horsham Economic Profile (December 2017) suggests that shop vacancy rates are very low in Henfield in comparison with other parts for the district, as shown in the figure below. Whilst on the one hand, this points to the relative success of local businesses, it also suggests that there may be capacity issues in terms of further employment growth in the town and its ability to generate additional demand for housing in Bramber.

Figure 5-3: Percentage of retail units occupied in key Horsham high streets



Source: HDEP

5.2 House prices

108. The PPG suggests that mix adjusted house prices can indicate long term imbalances in supply and demand for housing²². The table below shows average house prices in the Bramber NA. What is immediately clear is that all types of houses save detached houses are relatively rare in Bramber, such that in some years, none of these types were sold (indicated below with N/A). Indeed, of 104 sales over the 10 year period, just 5 were terraced homes, 14 were flats and 19 were terraced houses, with detached homes making up 63% of all sales. The data shows that average house prices have risen fairly significantly in Bramber, by approximately 38% over the period.

Table 5-2: House prices in Bramber, 2008-2017

Type	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Detached	£461,786	£586,000	£550,833	£486,438	£427,917	£615,500	£508,250	£737,938	£626,200	£683,875
Semi-Detached	N/A	£290,000	£380,750	£445,417	£368,000	£453,333	£600,000	N/A	£716,500	N/A
Terraced	N/A	£289,167	N/A	N/A	N/A	£235,000	N/A	N/A	£677,000	N/A
Flats	£184,000	£167,000	£169,000	N/A	£179,000	£180,000	£191,750	£203,025	£230,000	£210,000
All Types	£427,063	£425,450	£365,125	£468,857	£386,944	£422,389	£484,400	£630,955	£615,900	£589,100

Source: Land Registry PPD

109. When comparing price growth over the period with price growth across Horsham, it is interesting to note that whilst prices grew at the same rate overall (i.e. using a weighted average in accordance with PPG), detached houses in Bramber actually rose significantly more in price than those in Horsham.

Table 5-3: Price growth in Bramber and Horsham, 2008-2017

Type	Bramber	Horsham
Detached	48%	32%
Semi-Detached	N/A	47%
Terraced	N/A	48%
Flats	14%	37%
All Types	38%	38%

Source: Land Registry PPD, UKHPI

110. We also note that, taking values for 2009 and 2016 for semi-detached and terraced homes, prices more than doubled. Whilst these figures represent single transactions, and therefore cannot be considered averages, they show that these types of homes, which are typically less expensive than detached homes, were not in fact any less expensive than the average detached house in 2016.

Figure 5-4: Price differences between Bramber and Horsham, 2008 and 2017

Type	2008			2017		
	Bramber	BN44	Horsham	Bramber	BN44	Horsham
Detached	£461,786	£421,926	£465,434	£683,875	£602,115	£614,188
Semi-Detached	N/A	£258,516	£263,570	£0	£419,894	£387,435
Terraced	N/A	£239,144	£226,815	£0	£341,878	£334,999
Flats	£184,000	£162,417	£170,153	£210,000	£203,506	£233,305
All Types	£427,063	£300,738	£305,334	£589,100	£423,070	£421,702

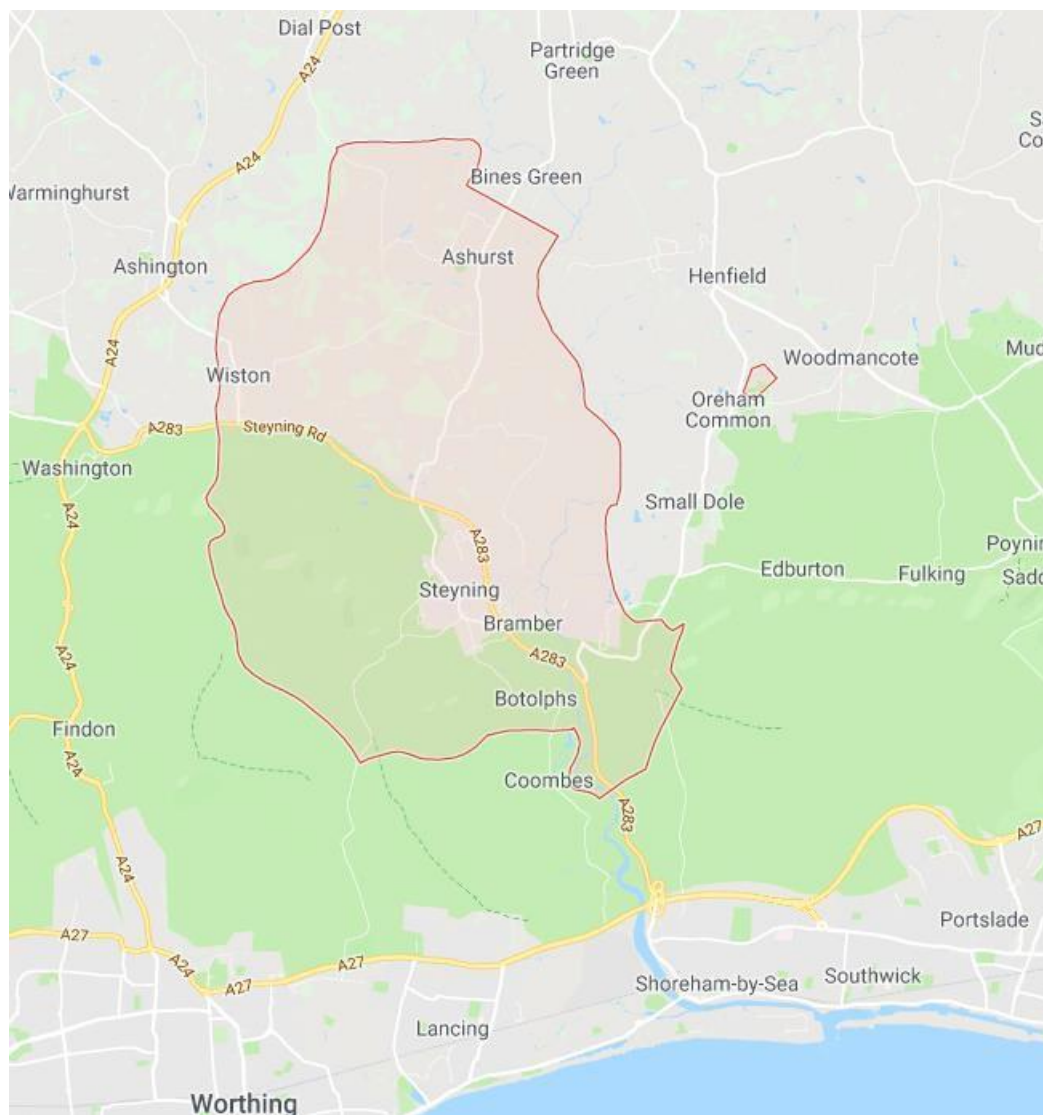
Source: Land Registry PPD, UKHPI

111. It is of course important to put these price changes into the context of actual prices, which were somewhat higher for all types in Bramber than in either the postcode area BN44 (shown in the figure on the following page, and covering Steyning as well as Wiston and Ashurst) or Horsham.

112. However, this is likely in part due to the mixture of homes sold, which were primarily detached. Still, even detached homes were on average more expensive in Bramber than in either the postcode area or Horsham in both years, although again, this may be as a result of the characteristics of the stock in question.

²² PPG Paragraph: 019 Reference ID: 2a-019-20140306

Figure 5-5: BN44 Postcode Area



Source: Google Maps

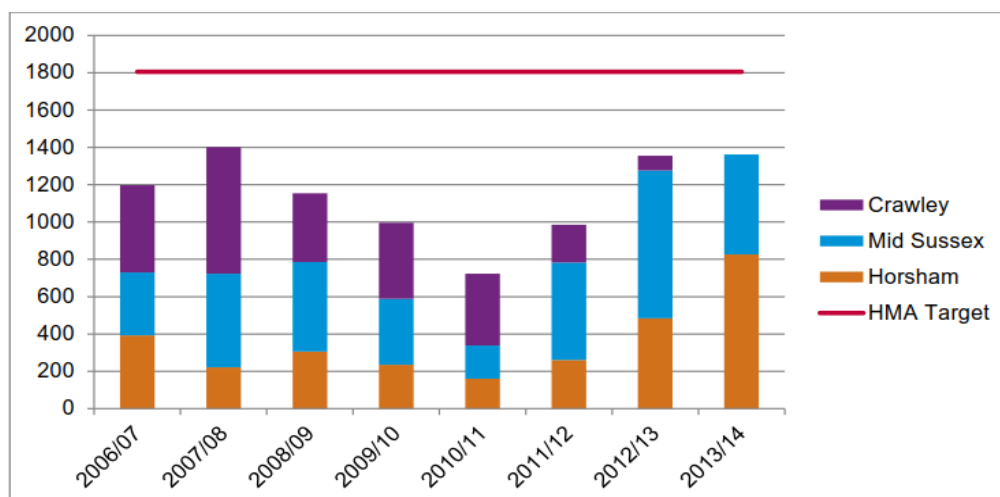
5.3 Rate of development

113. The PPG suggests that “if the historic rate of development shows that actual supply falls below planned supply, future supply should be increased to reflect the likelihood of under-delivery of a plan.”²³ As such, this section considers this market signal and its potential impact to uplift the projections discussed in Chapter 2.
114. Data from HDC suggests that there were 11 dwelling completions, and 3 dwelling losses in Bramber between 2011 and 2017, giving a net completion of 8 dwellings, i.e. 1 dwelling per annum. This was similar to the rate of development between 2001 and 2011, which was a net addition of 10 dwellings, representing a growth of approximately 3%. This can be set against the rate of growth across Horsham over that period, which was 10%.
115. Indeed, even across Horsham, housing supply has not, in the years for which data was available, surpassed more than 80% of projected need for the housing market area, as shown below, although in the year 2013/2014 Horsham did deliver more than the 800 homes set as an annual target in its 2015 District Planning Framework²⁴.

²³ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

²⁴ HDPF15, pp. 54

Figure 5-6: Housing delivery vs Housing Targets across the HMA



Source: SHMA

116. Furthermore, the effect of the financial crisis and the second dip of the recession can also be seen in the drop in housing supply focused on the year 2010/2011 across the entire Northern West Sussex Housing Market Area, as shown in the figure below. The chart also demonstrates the relative strength of Horsham’s housing market recovery, particularly when set against nearby Crawley, and the dip in supply in Mid-Sussex for 2013/14, the last year for which data is available.

5.4 Overcrowding and concealment

117. The PPG suggests that another indicator of demand in the housing market is the prevalence of overcrowding in the NA. This is because demand for housing in the area can manifest itself in the over-occupation of housing stock, with families unable to afford housing which is of a suitable size for all of their members to be adequately housed.

118. One of the most reliable indicators of overcrowding is the ‘persons per room’ data collected at the household level during the Census. The relative proportion of households occupying different amounts of space in the NA and the district is shown in Table 5-4 below. This data suggests that overcrowding is not common in Bramber, and that it has actually decreased in recent years.

Table 5-4: Trends in number of persons per room in Bramber, 2001-2011

Persons per room	Bramber	Horsham	England
Up to 0.5 persons per room	7.2%	10.9%	7.9%
Over 0.5 and up to 1.0 persons per room	-11.1%	5.8%	7.0%
Over 1.0 and up to 1.5 persons per room	0.0%	22.0%	27.3%
Over 1.5 persons per room	0.0%	29.5%	2.5%

Source: ONS 2011, AECOM Calculations

119. A further indicator of increased housing demand is the presence of concealed families in the NA. Table 5-5 below presents the number of concealed families in Bramber. A concealed family is a self-identified household unit living within another household’s dwelling and represented by a separate household reference person. The data shows that there were 5 concealed families in Bramber in 2011. This was the same as the national average, but higher than the average for Horsham. Whilst the larger housing stock in Bramber might go some way to explaining this situation, it is still of concern.

Table 5-5: Concealed families in Bramber, 2011

Concealed families	Bramber	Horsham	England
All families: total	262	38,935	14885145
Concealed families: total	5	451	275954
Concealed families as % of total	1.9%	1.2%	1.9%

Source: ONS 2011, AECOM Calculations

120. Whilst it is likely that there is an overlap between concealed families and those living in overcrowded conditions, this is not necessarily the case, with the difference being that concealed families represent an additional family unit living in the same home, whilst overcrowded households may consist of just a single family who are not adequately housed.

5.5 Conclusions on the quantity of housing needed

121. Below we have summarised our conclusions regarding the impact of market signals on the quantity of housing needed in Bramber. On the basis of our conclusions, we recommend that a 6% uplift be applied to the initial figure of 64 dwellings by the end of the plan period. This results in a total housing need of 68 dwellings in Bramber to the end of the plan period. Rounding off the 8 dwellings that have been completed so far, this would imply the need for 60 homes until 2031, or approximately 5 dwellings per annum. Of these, 8 homes should be within the SNDP itself.

122. We have applied our professional judgment on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates ‘some impact’, two arrows ‘stronger impact’ and three arrows indicates an even stronger impact. Factors are set out in the table below in alphabetical but no other order.

Table 5-6: Summary of factors specific to Bramber with a potential impact on neighbourhood plan housing quantity

Factor	Source(s)	Possible impact on future housing need	Rationale for judgement
Jobs Growth	SHMAU18	↓	Given that a large proportion of Bramber’s residents are retired, we do not consider jobs growth to have any notable impact on demand for housing in Bramber, and therefore a single down arrow is considered appropriate, with the economy of the area likely growing less than that across Horsham.
House Prices	Land Registry Price Paid Data for 2008-2017, UKHPI	↑ ↑ ↑	House prices in Bramber are significantly higher than the average for Horsham, although this may partly be as a result of the size and quality of the stock in question. Rises in house prices have been very pronounced however, and as such, three up arrows is deemed appropriate.
Rate of development	Land Registry Data/AECOM Calculations, SHMA	↑ ↑ ↑	Data at both the NA and Local Authority level suggests that the rate of development has been significantly constrained in recent years. As such, three up arrows has been deemed appropriate to reflect the likelihood of under-delivery.
Overcrowding and Concealment	Census Data 2001, 2011	↑	There have been decreases in overcrowding in Bramber between 2001 and 2011; however there is a significant presence of concealed families, with a higher rate of concealment than across Horsham. As such, one up arrows is considered necessary.

6. RQ 2 Tenure

RQ2: What affordable housing (social housing, affordable rented, shared ownership, intermediate rented) and market tenures should be included in the housing mix?

6.1 Background and definitions

123. Tenure refers to the legal arrangements in place that enable a household to live in their home; it determines their rights and influences the level of payments to be made in return for these rights. Broadly speaking, tenure falls into two categories, Affordable Housing and Market Housing, depending on whether the household benefits from a subsidy of some sort to enable them to live in their home.
124. The PPG states that HNAs should investigate household tenure in the current stock and recent supply, and make an assessment, based on a reasonable interpretation of the evidence gathered, whether continuation of these trends would meet future needs or whether, on account of significant misalignments between supply of housing falling into different tenure types and local need/demand, policies should support a change to the profile of tenure within the Neighbourhood Area's housing stock.²⁵
125. It is necessary at this stage of the study to make clear the distinction between Affordable Housing as planning terminology and the colloquial meaning of the phrase. In the course of this study, we refer to Affordable Housing, abbreviated to 'AH'. We mean by this those forms of housing tenure that fall within the definition of Affordable Housing set out in the current National Planning Policy Framework (NPPF): Social Rent, Affordable Rent, Affordable Private Rent (brought forward by Build to Rent schemes) and forms of AH designed to offer affordable routes to home ownership²⁶. To distinguish this from the colloquial definition, we refer to the latter as Affordable Market Housing (AMH).
126. The definition of Affordable Housing set out in the NPPF make clear the government's commitment to home ownership but recognise the important role of Social, Affordable and Private Rent tenures for those not currently seeking home ownership.
127. It is important to note however that the 2012 version of the NPPF refers to the 'national rent regime' not 'Government's rent policy'. It has been suggested that this change in wording may give central Government, and by extension local authorities, wider flexibility in arriving at rents. It may also lead to the abolition of Social Rent as it has been understood in recent years.²⁷
128. The revisions seek to broaden the definition of affordable housing to include a range of low cost housing opportunities for those aspiring to own a home, including Starter Homes.
129. In paragraph 64 of the new NPPF, Government introduces a recommendation that '*where major housing development is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership*'. In line with PPG²⁸, the assumption should be that 'major housing development' can be defined as sites of more than 10 units, and that affordable home ownership includes Starter Homes, shared ownership homes and homes available for discount market sale.
130. Below we consider the current tenure profile, and factors affecting the need for affordable housing including affordability (impacting the number of households who cannot afford to access suitable housing in the market) as well as other measures of current unmet gross need and the impacts of affordability on newly forming households.

6.2 Current tenure profile

131. It is necessary to present a picture of tenure in the NA based on the most recent reliable data. The table below presents Census data from 2011 that shows the dominant form of tenure is owner-occupation, much more so than across the district or indeed across England, with affordable tenures such as shared ownership and social rented housing much less common. It is interesting to note, however, that the proportion of housing in the private rented sector was fairly similar in Bramber to that across Horsham.

²⁵ PPG Paragraph: 021 Reference ID: 2a-021-20160401

²⁶ NPPF, July 2018

²⁷ McGready, B, Affordable Housing and Planning, MBL seminars, April 2018

²⁸ PPG 031 Reference ID: 23b-031-20161116

Table 6-1: Tenure (households) in Bramber, 2011

Tenure	Bramber	Horsham	England
Owned; total	87.6%	74.5%	63.3%
Shared ownership	0.0%	0.7%	0.8%
Social rented; total	0.6%	11.6%	17.7%
Private rented; total	10.7%	11.8%	16.8%

Source: Census 2011

132. Below we set out how tenure has shifted between the 2001 and 2011 Censuses; this shows how the tenure of housing stock has changed over time. As with many settlements in the UK, the proportion of dwellings privately rented has increased substantially, although this was significantly less than the increase seen across Horsham and also across England. This reflects its role as a form of affordable market housing, within reach of some people unable to buy a property, as well as lifestyle choices made by families wishing to remain flexible in their financial commitments.

Table 6-2: Rates of tenure change in Bramber, 2001-2011

Tenure	Bramber	Horsham	England
Owned; total	0.7%	4.2%	-0.6%
Shared ownership	0.0%	34.9%	30.0%
Social rented; total	0.0%	13.0%	-0.9%
Private rented; total	71.4%	97.6%	82.4%

Source: Census 2011, AECOM Calculations

133. Although the number of households renting privately only increased from 21 to 36, i.e. from a low base, it is worth noting that the dwelling stock overall increased by only 10 over the period despite the increased demand for rented housing. As a result, some homes likely to have formerly been owner occupied have likely been converted into rental homes.
134. Indeed, given the relative rarity of new homes purpose built for renting, it could be that all 10 additional homes were built initially for sale, and that fully 15 homes were converted from owner occupation into the private rented sector.
135. Furthermore, records maintained by the parish council suggest that of the 10 homes built since 2011, five have entered the private rented sector, whilst five are in owner occupation. This further indicates the scale of the shift towards the private rented sector in the village.
136. We also note that the social rented stock increased from 0 to 2 over the intercensus period, with these likely to have been delivered alongside market development in the form of planning obligations.

6.3 Affordability

137. In line with the Planning Practice Guidance, we have considered evidence of affordability by looking specifically at the relationship between lower quartile house prices and incomes, as expressed in the Lower Quartile Affordability Ratio (LQAR). While this is a relatively crude measure of affordability, as it does not take account of the cost of servicing mortgage debt, it is a useful basic measure for benchmarking affordability changes over time.

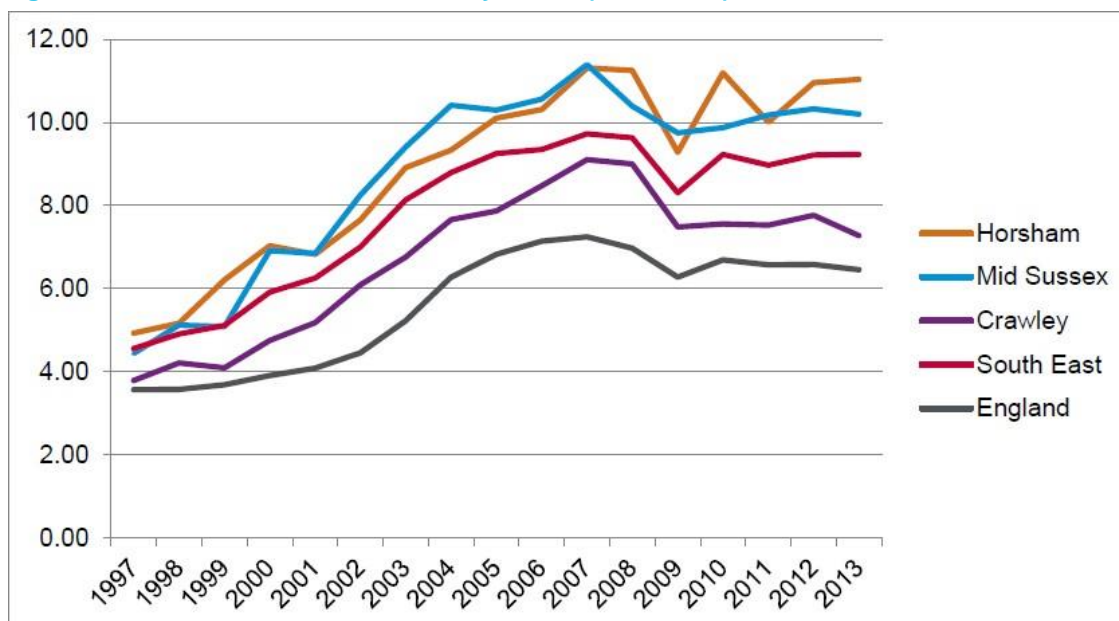
Figure 6-1: House prices in Bramber, 2008-2017, by type

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	GROWTH
Average (Detached)	£461,786	£586,000	£550,833	£486,438	£427,917	£615,500	£508,250	£737,938	£626,200	£683,875	48%
Average (All Types)	£427,063	£425,450	£365,125	£468,857	£386,944	£422,389	£484,400	£630,955	£615,900	£589,100	38%
Median (All Types)	£383,750	£377,500	£380,750	£443,500	£406,000	£375,000	£550,000	£505,000	£640,000	£573,000	49%
Lower Quartile (All Types)	£320,250	£237,500	£170,000	£393,000	£330,000	£235,000	£332,500	£414,375	£490,000	£572,500	79%

Source: Land Registry PPD

138. Across Horsham, the lower quartile gross annual residence-based earnings was £22,480 in 2016, according to ONS data. Whilst local income data is not available for individual parishes, we have assessed the affordability of housing based on these figures. The lower quartile house price in 2016 in Bramber was £490,000, giving an LQAR of approximately 22, i.e. lower quartile house prices were 22 times lower quartile earnings.
139. Indeed, we can see that Lower Quartile prices grew significantly more over the past 10 years than either average or median prices, likely reflecting very significant constraints on the supply of smaller and cheaper properties. So whilst average prices grew by 38%, the distribution of differently priced homes shifted, such that the lower quartile price increased by twice as much.
140. Using an income multiple of 4 (which approximately 75% of all mortgage lending ratios fell below in recent years²⁹), it is possible to assess what income would be necessary to afford an entry level (lower quartile) priced house in Bramber. Based on a 90% mortgage on a lower quartile priced house, a household income of approximately £129,000 per annum would be required to buy in Bramber, without significant existing equity or assistance.
141. This is quite extreme, even by the standards of Horsham, as shown below, where we reproduce HNHD15 Figure 18 as Figure 6-2 below which shows fluctuations in the Lower Quartile Affordability Ratio (LQAR) between 1997 and 2013; this assesses specifically the degree to which people on modest incomes (lower quartile earnings) are able to access market housing. This illustrates how house-prices have outstripped household incomes over the period, but that the situation is still more extreme in Bramber.

Figure 6-2: Lower Quartile Affordability Trend (1997-2013)



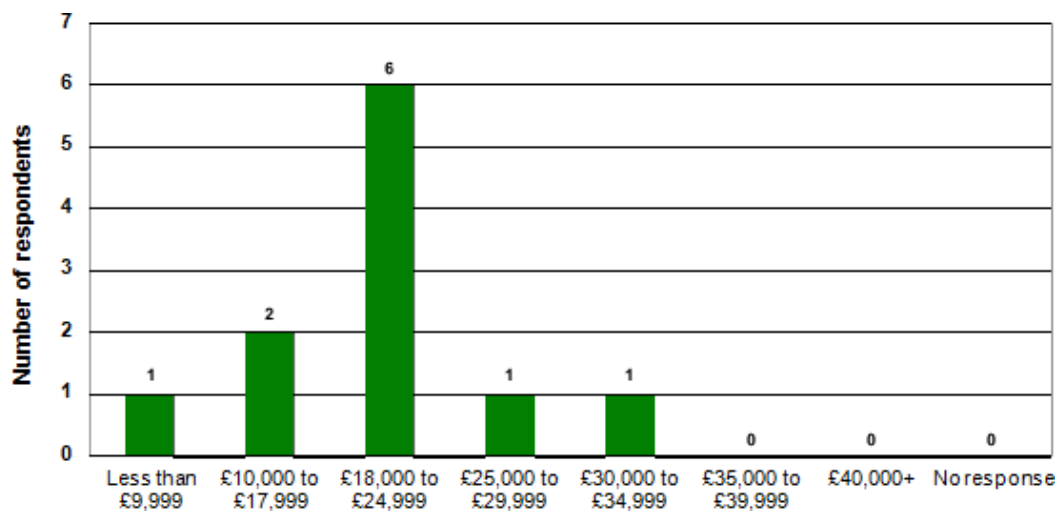
Source: HNHD15

142. However, this level of unaffordability is in many ways not surprising, not least because of large numbers of older households in Bramber, households who either bought prior to the significant worsening of affordability in the past 20 years, or households who have built up equity in previous properties and been able to afford to enter the housing market in the area.
143. The median house price in Bramber in 2016 was £645,000, whilst the median income across Horsham was £33,414 in the same year. This produces a MAR of 19.5, which is in practical terms equally as significant as the affordability challenges noted for those on lower quartile incomes.
144. Using the same income multiple as above in relation to a median priced house would require an income of approximately £144,000 per annum, without significant existing equity or assistance. It seems clear from this that the nature of the housing stock in Bramber is likely reinforcing the older profile of the population, with housing accessible only to older households who have built up very significant equity in existing properties, whether in the area or elsewhere, particularly given that those above age 65 would be relatively less likely than those of working age to have incomes as high as £144,000 per annum (although this is clearly not impossible).

²⁹ <https://www.which.co.uk/news/2017/08/how-your-income-affects-your-mortgage-chances/>

145. We also point to evidence from the HNSR15, which showed that, of those identifying themselves in housing need in Bramber, the most common income bracket was £18,000-£24,999 per annum. It is important to note that whilst such an income would likely be sufficient for someone already owning their house outright, as do many older households in Bramber, for younger households, such an income would prevent them from accessing housing in the village. This reflects the different costs of housing to those with differing levels of equity.

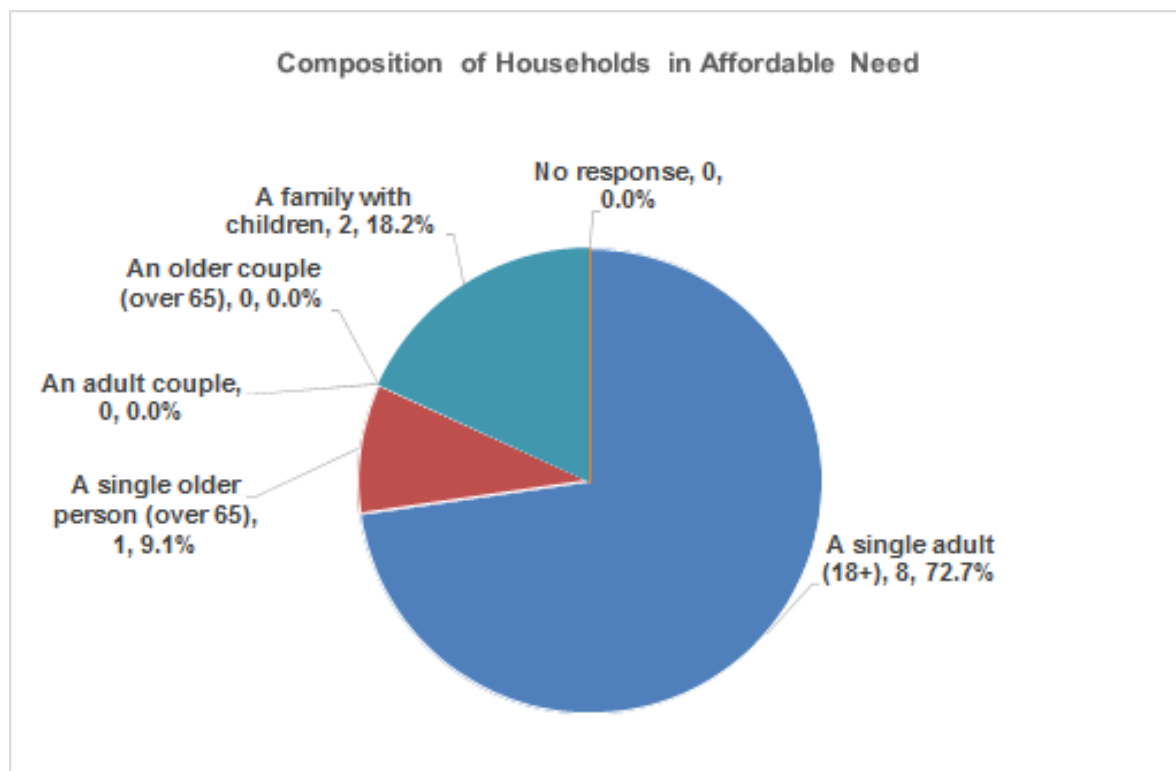
Figure 6-3: Annual incomes of households in housing need with a local connection



Source: HNSR

- 146. Indeed, the figure on the next page shows that the vast majority of those in need are actually single adults, who will likely have lower household incomes than couples. The survey identified 12 households self-identifying as being in housing need; crucially however, just 1 respondent of the 10 was on the housing register.
- 147. This points to the difficulties which the traditional system of affordable housing faces in addressing the needs of young people who may not be eligible for social rented properties, but are unable to purchase their own home (or indeed even to rent their own home) at market prices, and thus remain living with their parents.

Figure 6-4: Household composition of 11 households in housing need with a local connection



Source: HNSR

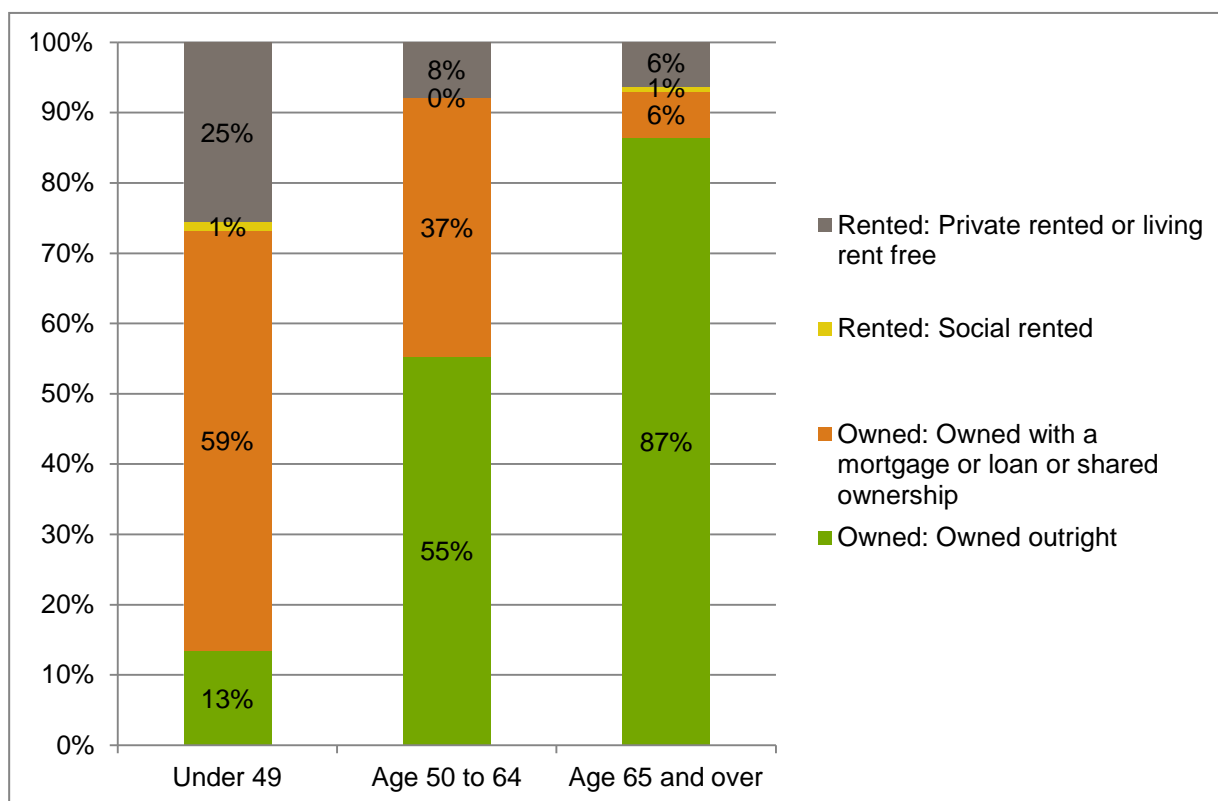
148. Indeed, in 2011, there were 29 households with children considered to be non-dependent, e.g. those over 18, still living with their parents. This contrasted with just 49 households with one person between the ages of 18-65. Were all children living with their parents able to access housing in the village and choosing to do so there would be a 50% increase in the number of people living alone overall in the parish.
149. Bringing together the evidence on affordability, we have seen that the affordability ratio in the area is very high, with house prices on average up to 20 times local incomes. Furthermore, those in housing need in Bramber are likely to earn approximately the lower quartile income across Horsham, with many of these being single adults, often young people, who may live with their parents.

6.4 Conclusions on tenures of housing needed

150. So far, we have considered housing need using a statistical understanding of affordability based on household income. It is also useful to consider need based on other measures. As such, we have considered identifiable demand expressed through entries on housing needs register. However, the register for Horsham does not include Bramber as a locational preference, given its proximity to Steyning and Upper Beeding (both of which those in need can express as a preference). This likely reflects the relatively small number of social rented homes in the Parish (53 in 2011).
151. We contacted HDC for their assessment of the number of households currently on the waiting list across Horsham. They reported back there are currently 605 applicants on the housing waiting list across the District. A simple proportional share of this would be 17 households in Bramber in housing need.
152. Clearly however, the make-up of the population in Bramber may mean that need as expressed formally via the housing register is lower than this. However, given that the HNSR found a significant need from younger households who were not on the housing register, there is likely to be need for a range of different affordable housing tenures. We have provided more detailed analysis of different tenures in Appendix A.
153. As we have seen, the quantity of housing needed in Bramber as set out in Chapter 5 is 62 dwellings to the end of the Plan Period. As noted earlier, policy 16 of the Horsham District Planning Framework requires all residential developments of between 5 and 14 dwellings to provide 20% affordable units, or a financial contribution where this is not deemed achievable; and by requiring all developments of more than 15 dwellings or on sites over 0.5 hectares to provide 35% affordable dwellings.

- 154. It is not possible to predict the actual make-up of different schemes according to their sizes to understand the overall percentage of affordable homes that might be delivered, and indeed, individual schemes will be negotiated between the applicants and the local authority on the basis of viability.
- 155. However, based on 35% of 60 dwellings, Horsham’s policies could deliver up to 21 affordable homes over the plan period in Bramber. This is far higher than the 11 affordable units identified as being needed by the HNSR, as well as the 17 from the proportional share of the housing waiting list.
- 156. On this basis, we recommend that the Parish consider how its policies might encourage both build-to-rent development, that might provide more affordable accommodation to young people who cannot afford to buy in Bramber, as well as some smaller accommodation, as discussed in more detail in the following chapter, which would prove more affordable dwellings to younger people, and would also offer opportunities for older people to downsize.
- 157. The figure below shows the tenures occupied by different age groups within Bramber at the 2011 Census. This shows that the private rented sector was most common for younger people, further giving impetus to the view that to increase the number of young people living in the village, the most appropriate tenure for new housing should be purpose-built rented dwellings. We have summarised our recommendations on the specific tenures of housing needed in more detail in Appendix B.

Figure 6-5: Tenure of households by age of household reference person, 2011



Source: Census 2011

7. RQ 3 Type and size

RQ3: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate in order to achieve a balanced demography and address the ageing population in future years?

158. As identified earlier in this study, PPG recommends a consideration of the existing housing provision and its suitability, having regard for demographic shifts in age and household composition as well as affordability, to address future as well as current community need. For this reason, we start with a consideration of type and size within the existing housing stock.

7.1 Background and definitions

159. Before beginning our consideration of type and size, it is important to understand how different types of households occupy their homes. Crucially, household 'consumption' of housing (in terms of housing size) tends to increase alongside wages, with the highest earning households consuming relatively more (i.e. larger) housing than those on lower incomes. Similarly, housing consumption tends to increase, alongside wealth and income, with age, such that older households tend to have larger homes than younger households, often as a result of cost and affordability³⁰.

160. In this context, even smaller households (those with smaller numbers of inhabitants, including just one or two people) may be able to choose to live in larger homes than their needs would suggest, and thus would be defined in census terms as under-occupying their homes. This is a natural feature of the housing market, and can even distort considerations of future housing needs, with market dynamics and signals giving a very different picture than demographics, household type and size suggest for future years.

161. In order to understand the terminology surrounding size of dwellings, it is important to note the number of rooms recorded in Census data excludes some rooms such as bathrooms, toilets and halls; and to be clear that data on dwelling size is collected on the number of rooms being occupied by each household. In the section that follows, 'dwelling sizes' should be translated as follows³¹:

- 1 room = bedsit
- 2 rooms = flat/house with one bedroom and a reception room/kitchen
- 3 rooms = flat/house 1-2 bedrooms and one reception room and/or kitchen
- 4 rooms = flat/house with 2 bedroom, one reception room and one kitchen
- 5 rooms = flat/house with 3 bedrooms, one reception room and one kitchen
- 6 rooms = house with 3 bedrooms and 2 reception rooms and a kitchen, or 4 bedrooms and one reception room and a kitchen
- 7+ rooms = house with 3, 4 or more bedrooms

162. It is also useful to clarify somewhat the Census terminology around dwellings and households spaces, which can be confusing in the context of flats, apartments, shared and communal dwellings, and houses in multiple occupation, types which may typically fall into the private rented sector. Dwellings are counted in the census by combining address information with Census returns on whether people's accommodation is self-contained³², and as such all dwellings are classified into either shared or unshared dwellings. Household spaces make up the individual accommodation units forming part of a shared dwelling.

163. The key measure of whether a dwelling is shared or unshared relates to the Census' definition of a household. A household is defined as "One person living alone or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area."³³ On this basis, where unrelated residents of a dwelling share rooms other than a kitchen, this would be considered a single household in an unshared dwelling, whilst where only a kitchen is shared, each resident would be considered their own household, and the dwelling would be considered shared.

164. Whilst it is unlikely that these issues are of particular relevance to Bramber, given that their main applicability is to students and other people likely to be sharing homes, it is still helpful to understand the terms as a background to the data in this chapter.

³⁰ SHMA15, pp.130, para 8.5

³¹ <https://www.nomisweb.co.uk/census/2011/qs407ew>

³² <https://www.gov.uk/guidance/dwelling-stock-data-notes-and-definitions-includes-hfr-full-guidance-notes-and-returns-form>

³³ Ibid.

7.2 Existing types and sizes

165. Below, we consider the existing types and sizes of dwellings in Bramber. It should be noted that the Census data does not capture the housing stock in its entirety, as only those households that are usually resident and return the Census are captured. Therefore, a small percentage of homes are not accounted for. The table below shows the relative split between types of houses, as defined by the Census in Bramber, Horsham and across England.

Table 7-1: Types of dwellings, 2011

Dwelling Type (excluding caravan and other temporary structures)	Bramber	Horsham	England
Whole house or bungalow: Detached	64.1%	38.7%	22.4%
Whole house or bungalow: Semi-detached	17.2%	26.5%	31.2%
Whole house or bungalow: Terraced (including end-terrace)	3.2%	17.0%	24.5%
Flat, maisonette or apartment: Purpose-built block of flats or tenement	5.7%	14.7%	16.4%
Flat, maisonette or apartment: Part of a converted or shared house (including bed-sits)	1.4%	1.6%	3.8%
Flat, maisonette or apartment: In a commercial building	0.0%	0.9%	1.0%

Source: Census 2011

166. This data shows the extent to which the housing stock in Bramber differs from that of Horsham as a whole, and indeed across England, with the vast majority of homes being detached. Most other types of home were comparatively rare in Bramber, although there are a fairly significant number of semi-detached homes, (sixty) which were much more prevalent across Horsham, and indeed are the most common type of home across the country.
167. The data below allows us to consider a broad picture of the size of the housing stock in Bramber in comparison with the district. Again, this data only covers homes and dwelling spaces (i.e. homes in a shared dwelling) that are occupied, and does not cover vacant or second homes. The data considers the total number of rooms in each household, that is, the self-reported count of the number of rooms available to each household in the census, including kitchens but excluding bathrooms.

Table 7-2: Household spaces by number of rooms, 2011

Number of Rooms	Bramber	Horsham	England
1 Room	0%	1%	1%
2 Rooms	3%	2%	3%
3 Rooms	6%	9%	10%
4 Rooms	11%	16%	19%
5 Rooms	13%	20%	25%
6 Rooms	20%	18%	19%
7 Rooms	13%	12%	10%
8 Rooms+	35%	22%	12%

Source: Census 2001/2011, AECOM Calculations

168. The table suggests that homes in Bramber are on average quite large, with the most common size of home being over 8 rooms (usually 4+ bedrooms and 3+ reception rooms). The number of homes in this size group was relatively large in Bramber both in comparison with the district and with England, reflecting the relative affluence of the community and a relative lack of historical constraints on space. In both Horsham and in England, the most common size of home was one of 5 rooms, usually a 3 bedroom home with one reception room and one kitchen.

169. In this context it is useful to consider how the number of rooms in dwellings has changed over the census period. This shows that the dwelling stock has shifted somewhat, with the number of smaller homes (of 5 rooms or less, equivalent to a 2-3 bed home) decreasing by about 14%, from 125 to 110, and the number of larger homes increasing by 5%.

Table 7-3: Households by number of rooms (including living spaces), and rates of change, 2001-2011

Number of Rooms	Bramber	Horsham	England
1 Room	0.0%	10.5%	-5.2%
2 Rooms	28.6%	18.8%	24.2%
3 Rooms	-13.6%	23.3%	20.4%
4 Rooms	8.8%	6.7%	3.5%
5 Rooms	-29.0%	-3.9%	-1.8%
6 Rooms	13.8%	7.0%	2.1%
7 Rooms	12.8%	13.8%	17.9%
8 Rooms or more	18.0%	22.1%	29.8%

Source: Census 2001/2011, AECOM Calculations

170. It is crucial to remember that these changes describe the way that households occupy or modify their dwellings. It would suggest that there may have been a general trend towards enlarging properties to 6 or more rooms, with the stock of smaller properties being lost as a result of additions and conservatories in particular being built. In this way the enlarging of properties by one generation has a long term impact on those from another generation seeking homes, as the size (and usually the value) of these properties increases.
171. However it is worth noting the cautionary note above that the way people categorised rooms has been prone to errors and may explain, at least in part, the differences seen above. Even so, it is still potentially significant that the smaller properties are the only sizes of homes that have actually declined in number in Bramber over the inter-census period.
172. It is particularly interesting to compare this data with Census estimates of the number of bedrooms for each household in Bramber and Horsham, using ONS estimates based also on the Census data. The table below summarises the proportion of households occupying each size of home in terms of number of bedrooms only.

Table 7-4: Number of bedrooms in household spaces, 2011

Number of bedrooms	Bramber	Horsham	England
1 bedroom/bedsit	9%	11%	12%
2 bedrooms	17%	24%	28%
3 bedrooms	30%	37%	41%
4 bedrooms	32%	21%	14%
5 or more bedrooms	11%	7%	5%

Source: Census 2011, AECOM Calculations

173. This data suggests that in fact the most common size of home in Bramber is actually just 4 bedrooms, followed closely by homes of three bedrooms, although overall the size of the housing stock tended to be significantly greater than in Horsham.
174. In terms of housing need however, it is relevant to consider whether it is the number of rooms overall that is the more important measure of housing size, or the number of bedrooms. On the one hand, additional reception rooms may be converted for use as extra bedrooms where necessary.
175. However, this is more likely to be true in larger homes where there is more flexibility, and the cumulative data above suggests that the vast majority of 1-3 room homes have only one bedroom, with relatively greater constraints on potential conversion to accommodate a second bedroom in a purpose-built living room for example.
176. These issues point towards the fact that, particularly for more affluent households, housing size is as much a matter of choice, preference and ability to afford housing as it is of 'need' as defined by the bedroom standard, which essentially sets a minimum number of bedrooms needed for different compositions of household.

177. On this basis, we think it more accurate to consider need on the basis of the number of rooms, given the size and character of the stock in Bramber, rather than bedrooms, as this allows for a more fine grained analysis of the housing stock.
178. In summary, Bramber's housing stock is very much dominated by detached houses, which clearly correlates to the fact that homes tend to be larger in the area than across the district. Over the inter-census period, the number of larger homes of 4+ bedrooms also increased by 13, with smaller homes decreasing by 15 homes, and 10 new homes added in total over the period.
179. It is helpful then to turn to actual demographic factors affecting housing needs to better understand how the future needs of Bramber's population might be met in terms of new housing. The evidence assembled below seeks to populate a series of 'key indicators'; these are the household composition and age structure of the population both now and how they are likely to change in future years. Through a consideration of these trends and how they interrelate to each other, it is possible to arrive at recommendations as to how the type and size of housing in Bramber could be influenced through planning policy.

7.3 Factors affecting size of housing needed: household composition

180. Household composition is a key factor driving the size of housing that will be needed in Bramber in future. As such, in Table 7-5 below we set out data from the Census that records household composition in Bramber, with data for the district and England for comparison. Data for the parish differs from that of the district in a variety of key areas.

Table 7-5: Household composition in Bramber, 2011

Type		Bramber	Horsham	England
One person household	Total	23.1%	28.2%	30.2%
	Aged 65 and over	14.5%	13.6%	12.4%
	Other	8.6%	14.6%	17.9%
One family only	Total	74.0%	66.8%	61.8%
	All aged 65 and over	19.2%	10.8%	8.1%
	With no children	23.4%	20.6%	17.6%
	With dependent children	22.8%	26.6%	26.5%
	All children Non-Dependent	8.6%	8.9%	9.6%
Other household types	Total	3.0%	5.0%	8.0%
Average Household Size		2.3 people	2.4 people	2.4 people

Source: Census 2011, AECOM calculations

181. What is immediately notable is the lower proportion of one person households in Bramber than in either Horsham or England, however, this masks the fact that there was in fact a slightly higher proportion of one person households aged 65 or over in the NA than in the district or the country, and a significantly lower proportion of one person households of other ages.
182. Still, Bramber is primarily a family-oriented community, although relatively similar numbers of households are aged 65+, have dependent children living at home, or have no children living at home. Indeed, the exact same number of households, 66, had dependent children under 18 (excluding those 16-18 in employment), as there were couples aged 65 and over. This points to the aging population of the area, and to some extent, the increasing shift pointing towards the need for smaller homes.
183. There are two notable points to be made with regards to this data and how it translates into housing needs: firstly, the housing needs of one and two person households are relatively similar, except in the context of specialist housing for the elderly, which is discussed in more detail in Chapter 6.

184. Having said this, many couples may sleep in separate bedrooms, or maintain other rooms for their sole use, and so in practice, and where there is market demand, couples may live in larger homes than one person households, with income also playing a part in this decision.
185. Secondly, households with no children living at home may stay in the same homes they occupied when their children still lived at home, with households with non-dependent children being in the transition period between these two states (children in school and living at home, and children having left the family home and formed their own household). This aligns with what has been discussed above about under occupation, i.e. families occupying large homes with more space than they might need according to the Bedroom Standard.
186. We then turn to trends and changes in household composition in Bramber, both in previous and in future years; as the PPG makes clear, changes should be used to determine whether, should such trends continue, future housing needs will be met by the existing housing stock.

Table 7-6: Rates of change in household composition in Bramber, 2001-2011

Household type				Percentage change, 2001-2011		
		2001	2011	Bramber	Horsham	England
One person household	Total	74	78	5.4%	16.0%	8.4%
	Aged 65 and over	43	49	14.0%	8.6%	-7.3%
	Other	31	29	-6.5%	23.9%	22.7%
One family only	Total	237	250	5.5%	6.3%	5.4%
	All aged 65 and over	66	65	-1.5%	8.5%	-2.0%
	With no children	82	79	-3.7%	4.8%	7.1%
	With dependent children	66	77	16.7%	4.0%	5.0%
	All children non-dependent	23	29	26.1%	14.8%	10.6%
Other household types	Total	7	10	5.4%	16.0%	8.4%

Source: Census 2011, AECOM Calculations

187. The table above shows that the most significant increases were in households with all non-dependent children, with an increase of 6 households over the period. Such households represent children who are independent but continue to live in the family home, as those with no children living at home decreased over the period.
188. This points to the affordability issues described in the previous chapter, with the consequent increase in children staying with their parents for longer. However, we do not consider this trend to provide evidence of the need for larger housing types, not least because such families tend to stay in the same home as when their children were dependent.
189. It is helpful then to consider how the population of Bramber is projected to change in the future. Unfortunately, detailed projections of future populations are not available for individual towns or parishes, so it is necessary to turn to projections for Horsham as a whole and to refine them based on other local data.
190. The Ministry for Housing, Communities and Local Government (MHCLG) publishes bi-annual household projections for all local authorities in England and Wales, broken down by household type, and also providing projections of the average household size.
191. It is notable that by 2039, the average household size across the district will have dropped from 2.32 to 2.15 household members. Based on these and current trends therefore, it is likely that the average household size in Bramber will also decline.
192. The projections for Horsham also consider increases in each type of household up to 2039, as well as a projection of the number of families with one, two and three or more dependent children. Clearly the greatest numerical increases projected for the district are of one person households, with much smaller absolute growth in households with dependent children and couples living with other adults.

Table 7-7: MHCLG Household Projections for Horsham by household type

	One person	Couple and no other adult	Couple and one or more other adult	Households with dependent children	Other
2014	16148	17703	4256	15865	2651
2039	22534	21916	5106	17857	3635
Change	6386	4213	850	1992	984
% Change	40%	24%	20%	13%	37%

Source: MHCLG 2014-based household projections

193. Similarly, the household projections show that the main demographic changes relate to one person households and those without children, only relatively small increases in those with one dependent child, and an even smaller increase in those with two or more. Indeed the projections show there will be a decrease in families with three or more dependent children. Furthermore, the increase in those with no dependent children is very much more significant than any other household type. These changes point towards a significant need to prioritise the delivery of smaller homes in Bramber, and no obvious need for new large family homes.

Table 7-8: MHCLG Household Projections for Horsham by number of dependent children

	With no dependent children	With one dependent child	With two dependent children	With three or more dependent children
2014	40759	6726	6961	2178
2039	53191	8384	7673	1801
Change	12432	1658	712	-377
% Change	31%	25%	10%	-17%

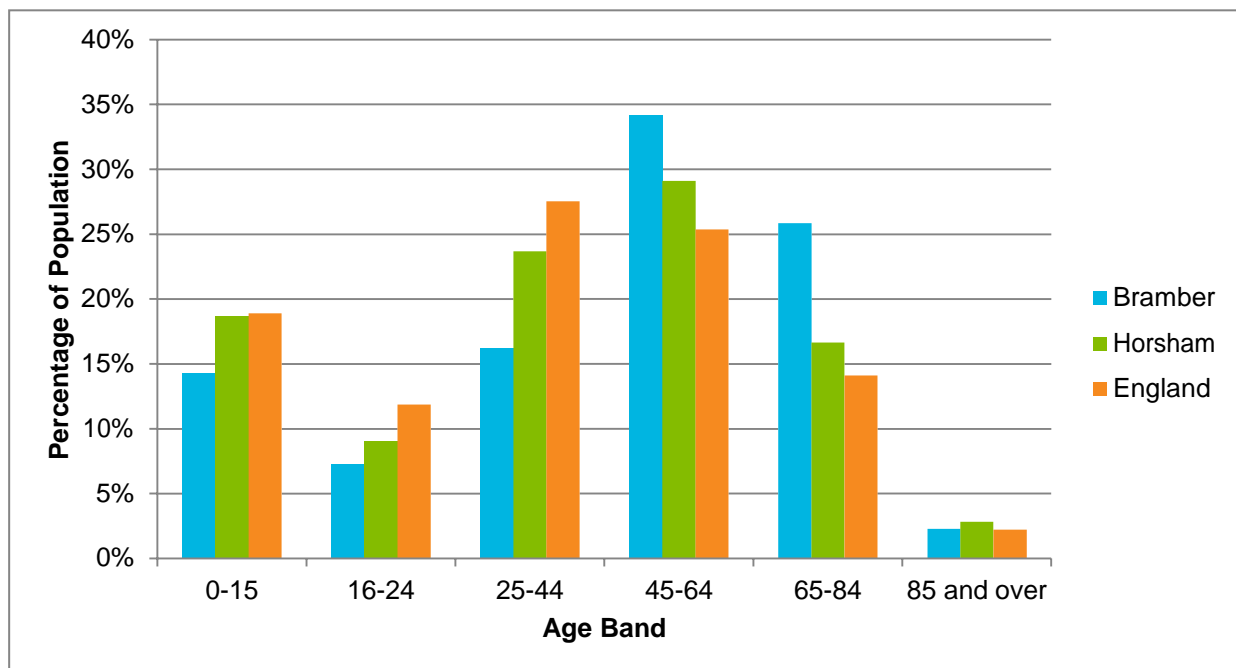
Source: MHCLG 2014-based household projections

194. Bringing the evidence together, we have seen that Bramber is dominated by detached homes that are relatively large, although three bedroom homes are still more common than four bedroom homes, in line with district and national trends. However, the average household size is shrinking in the area, and there were 144 households with no children at home or over 65, in comparison with 106 with children still living at home. Given these trends, it is helpful to understand how the age of households impacts the size of housing needed.

7.4 Factors affecting size of housing needed: age structure

195. The relative age of the population is a key underlying indicator of the size of housing needed, as age also affects household types and incomes. In general, older people tend to have larger homes, broadly reflecting household growth in later life as families grow.
196. So too, many households choose to downsize into smaller homes towards the end of their life, with most areas of the country showing at least some decline in the average number of bedrooms occupied by a household towards the end of their life, particularly as a result of the number of older single person households.
197. The following figure shows how the relative proportions of the population in Bramber fall into different age groups, in comparison with Horsham and England. The data makes exceedingly clear the extent to which Bramber is an older community, with in particular significantly fewer children and young people than the rest of Horsham and England, and far more people over 45, in particular those aged 65 and over.

Figure 7-1: Age structure



Source: Census 2011

198. The data suggests that Bramber has experienced quite different demographic shifts to Horsham, with in particular a significant increase in older households, but a decrease in those aged 45-64. To put this into context, whilst the population across all age groups in Bramber increased by only 15 people in the inter-census period, the number of people between 65 and 85 increased by 30.

199. Table 7-9 below presents how the age structure of the population has shifted during the inter-census period. The data suggests that Bramber has experienced quite different demographic shifts to Horsham, with in particular a significant increase in older households, but a decrease in those aged 45-64. To put this into context, whilst the population across all age groups in Bramber increased by only 15 people in the inter-census period, the number of people between 65 and 85 increased by 30.

Table 7-9: Rate of change in the age structure of the population of Bramber, 2001-2011

Age group	Bramber	Horsham	England
0-15	-0.9%	-2.6%	1.2%
16-24	16.3%	13.9%	17.2%
25-44	0.8%	-9.2%	1.4%
45-64	-3.2%	20.4%	15.2%
65-84	17.3%	24.0%	9.1%
85 and over	-18.2%	30.7%	23.7%

Source: Census 2001/2011 AECOM calculations

200. Needless to say, this shift will have had a significant impact on the community. The Planning Practice Guidance specifically notes the difficulties in planning terms where the share of the population that is of working age is declining.³⁴ Whilst many people are working longer into their old age than in the past, and the state pension age is planned to increase to 66 by 2020, and to 67 over the next decade,³⁵ the shifts shown above, particularly in the population aged 85+, are significant.

201. Bringing together the evidence related to age structure, Bramber shows strong evidence of an ageing population. These trends raise questions as to the long term viability of services in the NA, and given that the PPG suggests that “plan makers will need to consider whether they plan to attract a different age profile e.g. increasing the number of working age people,”³⁶it is reasonable to suggest that the existing size profile of

³⁴ Planning Practice Guidance Paragraph: 021 Reference ID: 2a-021-20160401

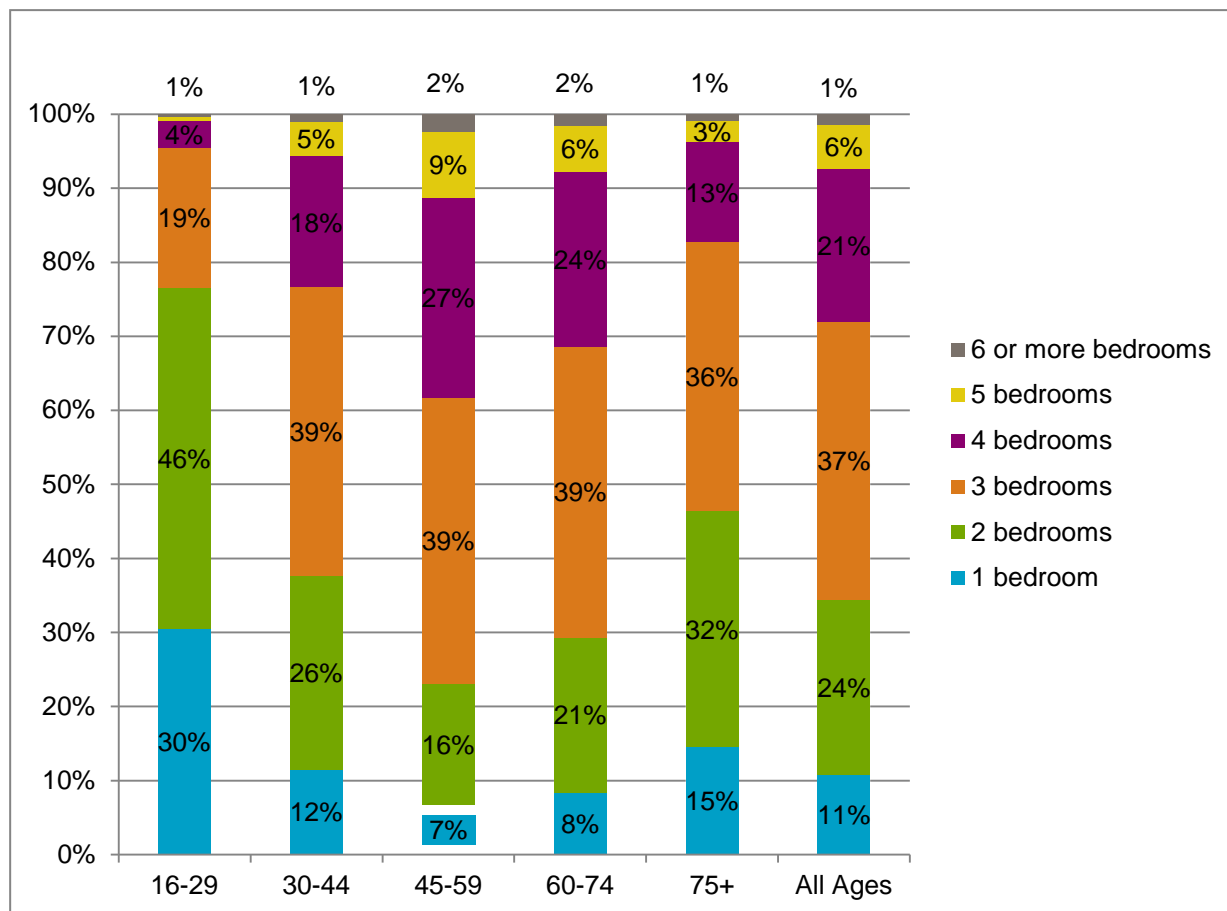
³⁵ <https://www.ageuk.org.uk/information-advice/money-legal/pensions/changes-to-state-pension-age/>

³⁶ Planning Practice Guidance Paragraph: 021 Reference ID: 2a-021-20160401

homes in the NA is likely to reinforce, rather than to alter, the demographic shifts towards an older population which are already occurring in Bramber.

202. The table below shows the number of bedrooms occupied by households headed by someone of each age group. This shows the extent to which households under 30 predominantly occupy homes of 1-2 bedrooms, whilst other age groups are most likely to occupy homes of three bedrooms. Indeed, although older households do tend to occupy smaller homes as they age, we note that the majority of those in the 75+ age group still occupied homes of 3 or more bedrooms.

Figure 7-2: Households by number of bedrooms and age of household reference person, 2011



Source: Census 2011

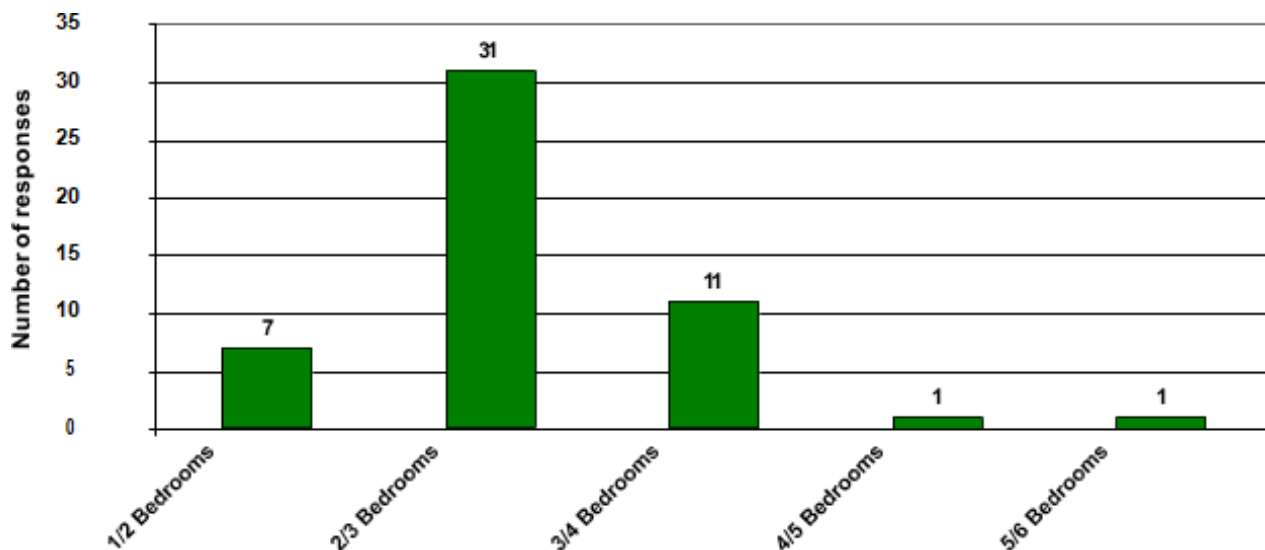
7.5 Conclusions on types and sizes of housing needed

203. The data above suggests that three bedroom homes serve the widest proportion of the population in the most appropriate way. However, given the current issues experienced by Bramber in relation to affordability, it does not seem appropriate to encourage more three bedroom homes if these will not meet local need going forward.

204. Indeed, there is a case for attempting to rebalance the existing housing stock by building new, two bedroom homes, particularly given the changing demographic profile of the NA.

205. It is important for neighbourhood plan policy to take into account objective evidence, such as that presented above, as well as the views of local people. The figure below shows views given in the HNSR regarding the size of housing to be considered in Bramber. This establishes that that vast majority of respondents thought homes of 2-3 bedrooms were most appropriate.

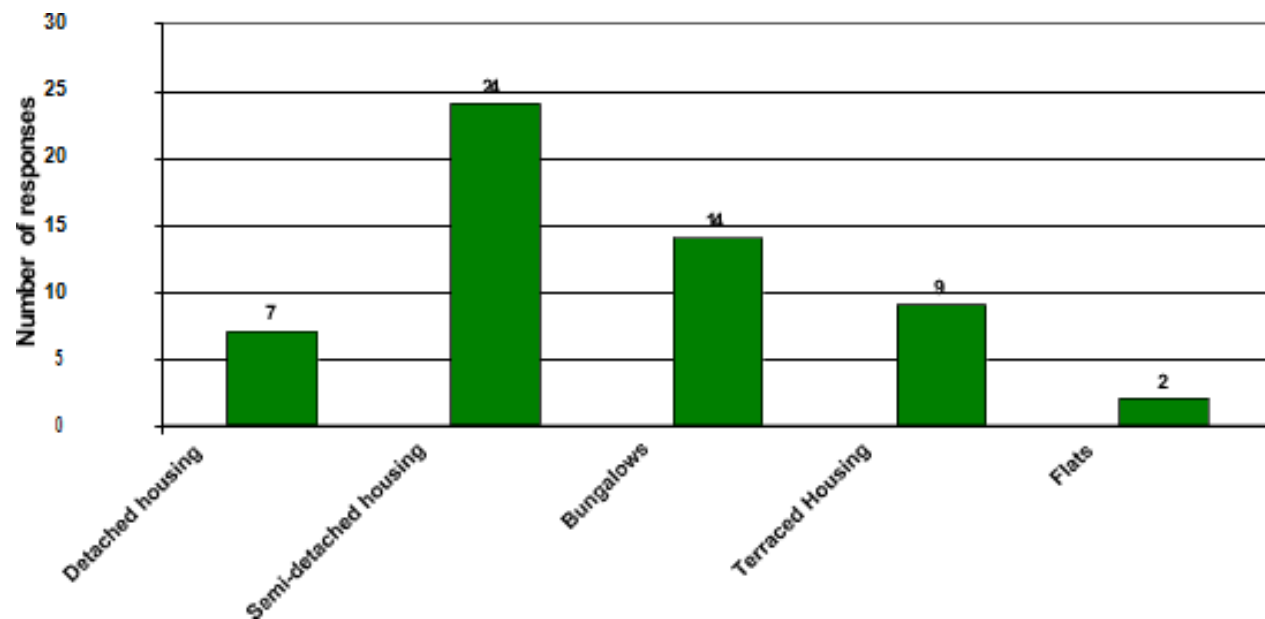
Figure 7-3: Size of open market housing to be considered



Source: HNSR

206. However, contrast this with the data below, and there is a degree of conflict, with the vast majority thinking detached and semi-detached housing (with bungalows included in this category given that they are typically either detached or semi-detached). However, two bedroom semi-detached and detached homes are relatively rare.

Figure 7-4: Types of market housing to be considered



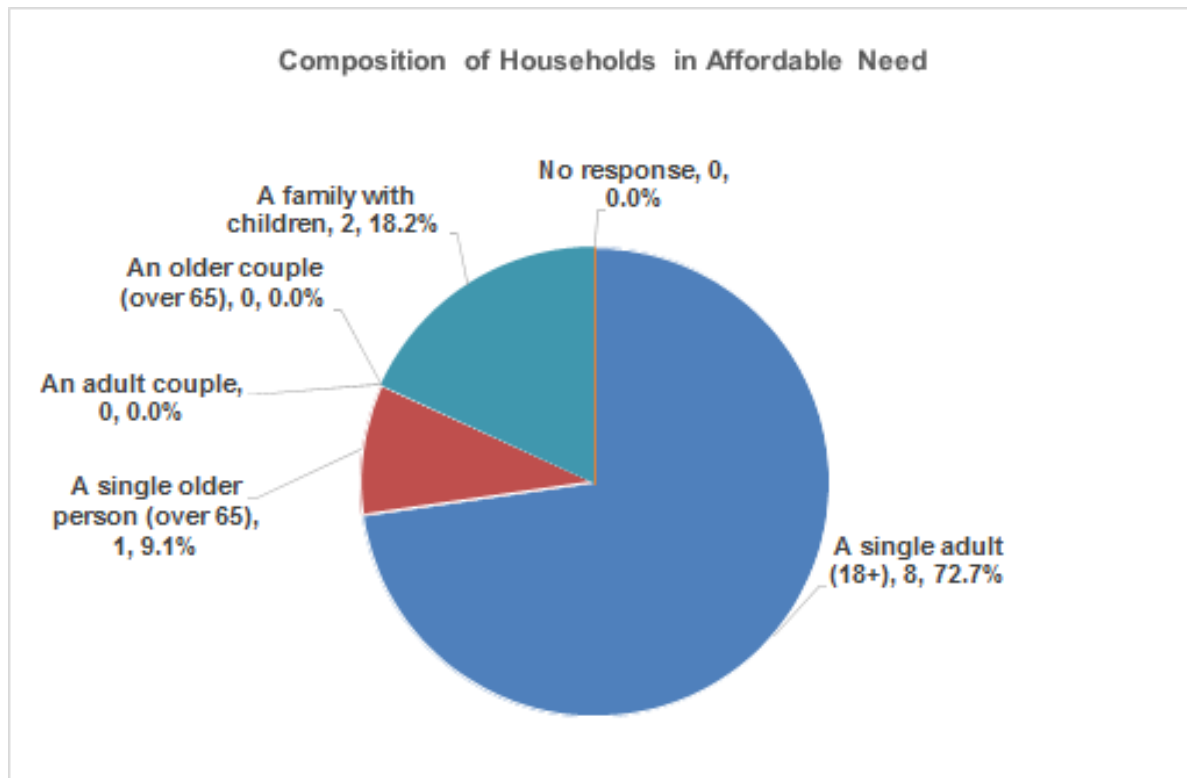
Source: HNSR

207. Furthermore, we note that Bramber has just 26% of its stock under 3 bedrooms, verses 35% across Horsham. In this context, and given the very severe affordability issues in the area, we would recommend that new housing be focused on homes of two bedrooms or less.

208. This will help to balance out the stock of the village, the relative size of which, although likely reflective of the architectural and historical characteristics of the village, may be preventing younger families, and indeed those living with their parents, from being able to purchase or even rent a home in the area.

209. Indeed, the figure below demonstrates that the vast majority of households in need in Bramber were single adults, for whom a 1-2 bedroom property would be suitable to meet their needs.

Figure 7-5: Composition of households in need



Source: HNSR

210. We note of course that a recommendation for smaller housing types is likely to have viability implications for any schemes coming forward in Bramber. It will be for the Parish Council to decide to what extent it is willing to develop policies which encourage smaller housing, and the trade off this may bring in terms of the current character of the housing stock of the village.

211. Were future development to conform to the desire for semi-detached housing, the result could be more 3-4 bedroom homes, which would be unlikely to meet local housing needs in the long term, whether in terms of the size of housing required by demographic projections, or the price of new housing required by younger people on lower incomes, as well as the needs of older people wishing to downsize.

8. RQ 4 Specialist Housing

RQ4: What provision should be made for specialist housing for the elderly within the NA?

8.1 Background

212. Before considering the need for specialist housing in Bramber in more detail, it is useful to understand the national context for specialist housing for the elderly across England (see Appendix A for definitions).
213. Between 1974 and 2015, the population aged 65 and over in England grew 47% and the population aged 75 and over grew by 89%.³⁷ A Demos survey of over 60s conducted in 2013 found a “considerable appetite” amongst this age group to move to a new property, with one quarter of all those surveyed suggesting they would be interested in buying a specialist property, and one quarter considering renting a specialist home.³⁸
214. Indeed, 76% of those in homes of three or more bedrooms wished to downsize, and this rose to 99% of those in homes of five or more bedrooms, with two bedrooms the preferred choice for both.³⁹ However, in spite of evidence of high demand, currently only 5% of elderly people’s housing is made up of specialist homes,⁴⁰ with Demos suggesting that “the chronic undersupply of appropriate housing for older people is the UK’s next housing crisis”,⁴¹ and local authorities often “accused of reluctance to approve development plans for specialist housing....out of fear of increased care costs”.⁴² Indeed, whilst many of those surveyed may consider moving, the percentage that ultimately does is likely to be relatively low, and many who do may move into general needs housing, for example market sale bungalows.
215. In 2014 there were approximately 450,000 units of sheltered social rented and private sector retirement housing in England, with approximately one quarter of these in private sector and the rest provided at social rent levels.⁴³ This situation reflects the significant constraints on the delivery of such housing in the market sector, as well as the improved health of older people today in comparison with previous generations.
216. Given that the vast majority of people over 75 live in their own homes, but that the current stock is primarily for social rent, AECOM has developed a “tenure-led” approach to calculating the need for specialist housing, which also takes into account the health and mobility of population of the NA so as to arrive at projections for future need for specialist housing provided with some level of care or other services.
217. The following section applies a three stage process to determine the potential incidence of need for specialist housing for the elderly, based on tenures, projections of the future population of elderly people in the NA, and census data relating to mobility limitations and overall health. These are then compared with rates of provision that have been recommended by the Housing Learning and Improvement Network (HLIN), as well as with existing rates of provision across Horsham.
218. Clearly, this calculation represents an assumption, with the actual decision for an elderly person to enter specialist housing highly dependent on individual circumstances. As already noted, the actual proportion of elderly people that can be considered in need of specialist housing is affected both by overall levels of health as well as by individual lifestyle choices, given that the vast majority of elderly people currently choose to continue to live in their homes into their old age.
219. The charity Age UK suggests that “inaccessible housing should not force anyone out of their home or local community against their wishes. It’s much better to have ‘pull factors’ that attract older people towards housing alternatives.”⁴⁴ By understanding the tenure breakdown of specialist housing need, we are able to better understand the extent to which demand will be a factor in this market segment.

³⁷ <http://researchbriefings.files.parliament.uk/documents/CBP-7423/CBP-7423.pdf>

³⁸ <https://www.demos.co.uk/files/TopoftheLadder-web.pdf?1378922386>

³⁹ Ibid.

⁴⁰ https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/for-future-living_Oct2014.pdf

⁴¹ <https://www.demos.co.uk/files/TopoftheLadder-web.pdf?1378922386>

⁴² <http://researchbriefings.files.parliament.uk/documents/CBP-7423/CBP-7423.pdf>

⁴³ https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/reports-and-briefings/safe-at-home/rb_july14_housing_later_life_report.pdf

⁴⁴ <https://www.ageuk.org.uk/documents/EN-GB/Political/Age%20UK%20ID201813%20Housing%20Later%20Life%20Report%20-%20final.pdf?dtrk=true>

8.2 Tenure-led projections

220. Firstly we review data on the tenure of households aged 55-75 across Horsham. We take this cohort approach because it is these households which, over the next 20 years, will be reaching the age of 75+, which is considered the typical threshold age for specialist housing provision, and thus form the basis for calculations of future housing need and provision within this age group using the HLIN toolkit. We will then use the tenure split within this cohort to project forward the need for specialist housing according to different tenure, based on the premise that those currently occupying their own home will wish to do so in future, even where downsizing or moving into specialist accommodation, and that those who currently rent, either in the private or social sectors, will need affordable rented accommodation of some kind.

Figure 8-1: Tenure of households aged 55-75 in Horsham, 2011

Owned	Owned outright	Owned with a mortgage/loan or Shared ownership	All Rented	Social rented	Private rented	Living rent free
84.4%	58.6%	25.8%	15.6%	8.9%	5.7%	1.0%

Source: Census 2011

221. Secondly we project how the overall number of older people in Bramber is likely to change in future based on the ONS' sub-national population projections for the year 2031. This suggests a very significant increase of more than 50% over the period, which aligns with the notable ageing of the population described throughout this study.

Table 8-1: Projections of elderly population in Bramber

	2011		2031	
	Bramber (Census)	Horsham (Census)	Horsham Projection (ONS SNPP 2014)	Bramber Projection (AECOM Calculation)
All ages	785 (0.6% of the district total)	131,301	149,978	
75+	93 (1.8% of the district total)	12,440	23,197	139 (0.6% of the district total)

Source: ONS SNPP 2014, AECOM Calculations

222. The results of this exercise provide us with a projection of the number of people living in each tenure in the 55-75 cohort in 2011 as shown in the table below.

Table 8-2: Projected tenure of households aged 75+ in Bramber to 2031

Owned	Owned outright	Owned with a mortgage/loan or Shared ownership	All Rented	Social rented	Private rented	Living rent free
109	76	33	20	11	7	1

Source: Census 2011

223. Thirdly we have considered the incidence of mobility limitations, as defined by the census, within each tenure group for those aged 65+ in Bramber. This allows us to link the levels of need (as defined by the levels of mobility limitations within the population) to tenure (based on the premise that such needs can be deemed a proxy for the need for specialist housing in this age group). The tendency for people in rented housing to have higher dependency levels is well established, and partly arises because people with higher dependency levels tend to have lower incomes and so are less able to afford to buy, even at earlier stages in their lives.

Table 8-3: Tenure and mobility limitations of those aged 65+ in Bramber MSOA

Tenure	Day-to-day activities limited a lot	Day-to-day activities limited a little	Day-to-day activities not limited
All categories: Tenure	5.4%	10.2%	84.3%
Owned or shared ownership: Total	4.8%	10.4%	84.8%
Owned: Owned outright	8.2%	16.4%	75.4%
Owned: Owned with a mortgage or loan or shared ownership	1.7%	5.1%	93.1%
Rented or living rent free: Total	8.8%	9.2%	82.0%
Rented: Social rented	18.8%	10.9%	70.3%
Rented: Private rented or living rent free	5.0%	8.6%	86.4%

Source: Census 2011

224. If we focus on those whose activities are limited a lot, the calculations suggest that of the 20 renters and 109 owners in Bramber in this age group, there could be need for 5 specialist homes for owner occupiers (4.8% x 109) and 15 for renters of all kinds (8.8% x 20), or 7 new specialist homes in total. These outputs are shown in the table below, based on the assumption that those whose day-to-day activities are limited a lot will need housing with care (e.g. extra care housing, with significant on-site services, including potentially medical services), whilst those with their day to day activities limited only a little may need adaptations to their existing homes, or sheltered or retirement living providing some degree of oversight or additional services for older people.

Table 8-4: AECOM estimate of specialist housing need in Bramber to 2031

	Affordable	Market	Total (rounded)
Housing with care (e.g. extra care)	2	5	7
Adaptations, sheltered, or retirement living	2	11	13
Total	4	16	20

Source: Census 2011, AECOM Calculations

225. Below are the equivalent HLIN recommendations, which produce a slightly higher figure weighted more towards affordable provision and in particular towards lower care needs. However, given the relatively low levels of those with only relatively negligible limitations to their day-to-day activities in Bramber, and thus the relatively low need for minor adaptations or retirement living in comparison with the HLIN figures (which provide an estimate of almost double the AECOM calculation), we consider the figures above to be appropriate.

Table 8-5: Housing LIN estimate of specialist housing need in Bramber to 2031

	Affordable	Market	Total
Housing with care (e.g. extra care)	4	6	10
Adaptations, sheltered, or retirement living	8	17	25
Total	13	22	35

Source: Housing LIN

8.3 Conclusions on the need for specialist housing

226. On this basis, we recommend that the parish take as its need figure for specialist dwellings a minimum of 10 dwellings, split approximately 40% affordable and 60% market. The parish should then consider whether further evidence, for example a survey of older people in the area, might support the need for further specialist dwellings for those whose day to day activities may be limited only a little, or whether Lifetime Homes-standard dwellings or adaptations to existing homes would be suitable to meet their needs.
227. Note that there is no obligation for these all to be provided within the parish itself and clearly in some cases, such as providing a single specialist dementia care dwelling, it would not be economically feasible to do so. As such, these 10 specialist dwellings need not be thought of as all needing to be provided within the neighbourhood plan housing target- rather, there will be some overlap between these dwellings and the target, depending on the number that could be provided within the parish itself.
228. This specialist dwelling need is likely therefore to be split between the parish and the rest of the district, which will enable the elderly to live either within or as close to the parish as possible, taking account of the fact that Bramber is unlikely to be able to provide many of the specialist housing types needed within its own boundaries- although there could be the potential for these to be provided at, for example in Steyning, taking account of their higher levels of accessibility to services and facilities, which will help in the recruitment and retention of specialist care staff and enable economies of scale (e.g. a centralised dementia care unit or enhanced sheltered development serving a widely dispersed rural population from a single location).
229. We note that the Government's recent consultation on housing need asked specifically for, "suggestions on how to streamline the process for identifying housing need for individual groups", particularly in reference to older people. This demonstrates the relative difficulty in estimating the housing needs of elderly people, particularly given that there may be significant variations in the existing provision of such housing, not least because it

crosses a range of sectors including housing, health and social care, the responsibilities for which are devolved at different geographical scales.

8.4 Types of specialist housing

230. New research undertaken by the Cambridge Centre for Housing and Planning Research (CCHPR) and the National House Building Council (NHBC) has shown that more than half of current homeowners are aged 55 or over, meaning that this group is extremely diverse and do not form a single market segment as such. The research overwhelmingly found that such people do not consider themselves to be 'old', and generally think of older people as being aged 85+. However, it was noted that the over 55s could be making up to 333,000 moves per annum, and may also be up to 20% more likely to consider new build homes than younger buyers.⁴⁵
231. An important finding of the research was that the view of older people 'freeing up housing' for younger families by moving is "misplaced", and does not reflect actual evidence or older people's aspirations. Only 33% of over 55s moving actually bought smaller homes, and only 40% bought cheaper homes, with only 20% buying homes that were both smaller and cheaper. Indeed for many, downsizing did not necessarily relate to a smaller number of bedrooms.
232. The research also found relatively little evidence of interest in specialist developments exclusively for over 55s: these were considered to be a very small niche market dominated by brand recognition, with buyers choosing a home based on previous knowledge of the provider. The conclusion was that in general the market for over 55s is not for specialist retirement housing, but rather for 3-5 bed properties of a high quality suitable for two person households, although it was noted that the lack of interest could be reflective to some extent of a lack of current supply. Indeed, size was not the primary concern of households over 55, with some buying smaller properties with the same number of bedrooms, or vice versa for example. Indeed, the CCHPR research showed that 80% of buyers in this age group bought detached houses, while 75% bought homes of three or more bedrooms. While 20% bought a two bedroom property, only 3% bought a one bedroom property, and slightly less than 20% bought a flat.
233. These findings have numerous implications, not least for the specialist developers targeting the older market, who should be mindful of the diverse aspirations of older people, many of whom wish to remain active and living in mixed communities. For neighbourhood planners developing housing policy to support independent living for older people, the findings reinforce the findings of HLIN above in suggesting that one bedroom properties are unlikely to be desirable for older people.
234. Such people may have become used to accessing larger amounts of space and additional bedrooms for hobbies and for family to stay, are relatively unlikely to wish to downsize to one bedroom homes, unless these are provided in the context of care or other services, or are specifically for single older people and provide a social environment.
235. Indeed, the NHBC's survey of older people moving into new properties suggested that 74% bought homes of three bedrooms or more, and 46% bought homes of four bedrooms or more. Whilst this did represent downsizing, with the proportion in homes of 2 bedrooms or less nearly doubling from 13% to 24%, this was still a minority of homeowners.

⁴⁵ A moving experience. Lemond, K. Savills. 2014. Available at: www.savills.co.uk/research_articles/186866/174521-0/ [accessed 30/09/15].

Figure 8-2: 1. Proportion of owner occupied households living in homes of different sizes

	Owners aged 55 or over (this study - people who moved)		Owners of all ages (NHBC data)
	Previous home (before latest move)	Current home (after latest move)	Home occupied in 2012-2014
1 bedroom	1%	3%	10%
2 bedrooms	12%	21%	34%
3 bedrooms	36%	29%	32%
4 bedrooms	36%	40%	20%
5 bedrooms	11%	6%	3%
6 bedrooms	4%	0%	<0.5%

Source: NHBC

236. As we have already noted, further survey work of residents in Bramber, as well as partnership working with specialist developers, is recommended to introduce a greater degree of choice into the housing options for elderly people who wish to leave their family homes in their old age. Surveys will also help to establish the extent to which smaller homes will also serve this market, or indeed specialist facilities with additional services, or whether these are best provided in Steyning or other nearby settlements where more comprehensive services and infrastructure may make their development more feasible.

9. Conclusions

9.1 Overview

237. Below we have summarised our conclusions on the types of housing needed in Bramber.

Table 9-1: Summary of local factors specific to Bramber with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s)	Summary of Analysis	Conclusions
Affordable Housing⁴⁶	Census 2001/11, Land Registry PPD, HNHD15, HNSR	The vast majority of housing in Bramber, about 88%, is owner occupied, versus just 75% across Horsham, and 63% across England. However, there have been very significant increases in recent years in the private rented sector, the growth of which was greater between 2001-2011 than the overall growth in households. Furthermore, of 10 dwellings built recently in the Parish (since 2011), 5 have entered the private rented sector. Average house prices in Bramber have been about 40% higher than the average across Horsham over the past 10 years, and this has stayed fairly steady. However, of more concern has been the very high increase in the lower quartile price of housing, particularly as these are typically considered to be entry level housing suitable for younger families. Such housing is now 22 times local incomes, putting it far out of reach of those on all but the highest incomes of close to £130,000. Many of those in housing need are single adults, or young people living with their parents, who typically earn between £18,000-£24,000 per annum demonstrating the severe need for more affordable forms of housing in Bramber.	Horsham's policies could deliver up to 21 affordable homes over the plan period in Bramber (35% of 60). This is far higher than the 11 affordable units identified as being needed by the HNSR, as well as the 17 from the proportional share of the housing waiting list. As such, the Bramber Neighbourhood Plan is not likely to need to set its own affordable housing policies. However we recommend that the Parish consider how its policies might encourage both build to rent development, that might provide more affordable accommodation to you people who cannot afford to buy in Bramber, as well as some smaller accommodation, as discussed in more detail in the following chapter, which would prove more affordable housing for younger people, and would also offer opportunities for older people to downsize.
Demand/need for smaller dwellings	Census 2011, MHCLG Household Projections, ONS Population Projections, HNSR, ONS Mid-Year Population Estimates	Given that the majority of homes in Bramber are detached (close to twice as many as in Horsham), it is hardly surprising that the number of homes of 1-2 bedrooms is relatively small, making up approximately ¼ of all homes in the parish. Indeed the most common size of home in the NA is 4 bedrooms. Furthermore, many homes are likely to have been expanded over the years, with the long term impact being increases in the size (and usually the value) of these properties.	There is a case for attempting to rebalance the existing housing stock by building new, two bedroom homes, particularly given the changing demographic profile of the NA. We note that Bramber has just 26% of its stock under 3 bedrooms, verses 35% across Horsham. In this context, and given the very severe affordability issues in the area, we would recommend that new housing be of two bedrooms or less. Indeed, based on household surveys, the majority of those in housing need are single adults, providing further incentive to develop smaller homes.

⁴⁶ The term 'Affordable Housing' denotes the planning definition set out on page 50 of the National Planning Policy Framework, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

Factor	Source(s)	Summary of Analysis	Conclusions
Dwelling type	Census 2011, HNHD15, HNSR	<p>There are almost twice as many detached houses in Bramber as in Horsham proportionate to the stock, totalling 64%, by far the most common type of dwelling in the NA. However, survey results suggest that residents feel the most appropriate type of housing for the village is semi-detached. We also note that a recommendation for smaller housing types is likely to have implications for the type of housing which is likely to be built, not least due to viability issues. However, there seems to be a clear conflict between the types and sizes of housing required by residents of Bramber.</p>	<p>The Parish council should consider developing policies which encourage smaller housing, in the context of the trade off this may bring in terms of the current character of the housing stock of the village. Were future development to conform to the desire for semi-detached housing, the likely result would be more 3-4 bedroom homes, which would be unlikely to meet local housing needs in the long term, whether in terms of the size of housing required by demographic projections, or the price of new housing required by younger people on lower incomes, as well as the needs of older people wishing to downsize.</p>
Housing for independent living for older people	Census 2011, MHCLG Household Projections, ONS Population Projections, HNSR, ONS Mid-Year Population Estimates	<p>We project how the overall number of older people in Bramber is likely to change in future based on the ONS' sub-national population projections for the year 2031. This suggests a very significant increase of more than 50% over the period, which aligns with the notable ageing of the population described throughout the study. Indeed, our calculations suggest there may be up to 139 people aged 75+ in the NA by 2031.</p>	<p>Our calculations suggest the need for up to 7 specialist housing units in Bramber over the plan period, split 40/60 into affordable and market housing. Further survey work of residents in Bramber, as well as partnership working with specialist developers, is recommended to introduce a greater degree of choice into the housing options for elderly people who wish to leave their family homes in their old age. It is likely that issues of viability and suitability mean that such specialist provision is better provided in larger settlements nearby, such as Steyning.</p>

9.2 Recommendations for next steps

238. This neighbourhood plan housing needs advice has aimed to provide BPC with evidence on housing trends from a range of sources. We recommend that the Parish Council should, as a next step, discuss the contents and conclusions with HDC.
239. This advice note has been provided in good faith by AECOM consultants on the basis of housing data and national guidance current at the time of writing (alongside other relevant and available information).
240. It is important to review any implications arising from forthcoming changes which have been published in the new draft NPPF, as well as the implementation of the Housing and Planning Act 2016, which will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
241. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by the District Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity with the adopted Local Plan is maintained.
242. At the same time, we recommend the group monitor available data on housing completions over the period in which the neighbourhood plan is being developed to help ensure relevance and credibility of its policies.
243. Below we summarise our recommendations regarding policies on the specific issues considered as part of this HNA. Such recommendations clearly relate to the future supply, rather than the future need or indeed demand for housing in Bramber.

Quantity of Housing

244. The national policy context for neighbourhood planning is currently in the process of changing. There is increasingly a duty on Local Planning Authorities to provide a housing figure to groups, not least in the draft version of the new NPPF, which they can then use as the basis for their plan. Furthermore the new Standard Methodology is likely to come into effect following the adoption of the NPPF.
245. It is also worth understanding that the provision of a larger number of dwellings overall could help to enable the delivery of Affordable Housing in your NA, as discussed in more detail below, as Affordable Housing is typically delivered by the market alongside market housing, which is used to cross subsidise its development.
246. You will likely already be aware that primary pathway for neighbourhood plans to begin to meet their housing need is through a site assessment exercise. This exercise will take into account supply-side considerations (such as infrastructure, landscape constraints, flood risk and so on) and the capacity of individual sites, so as to arrive at a series of site allocations (sites selected for future housing development by the neighbourhood plan).
247. These site allocations can then be written into the neighbourhood plan, helping to enable their development over the Plan period. In addition to assessing whether sites are feasible and likely to be developed, this process also allows the WCPC to engage with local landowners as to how housing should be delivered, and what type of housing would meet local needs.

Policies on Tenure

248. We have set out recommendations as to the most appropriate tenures of affordable housing in the NA in Appendix B. However requiring developers to provide a set proportion of affordable housing (or indeed any specific tenure of home) will likely be subject to viability considerations at applications stage as enshrined in the current NPPF, Paragraph 173, and is also likely to be considered a strategic matter for Local Planning Authorities. Whilst the Draft NPPF looks to establish the viability of Affordable Housing policies at the Local Plan making stage, so as to prevent the repeated testing of such policies at application stage, these provisions have not yet come into force yet.
249. Indeed, in rural areas, 68% of affordable homes are delivered via Section 106 agreements,⁴⁷ although smaller sites, typically those under 10 units, are usually less likely to support the provision of affordable housing on site, although in rural areas, schemes contributions may be sought on schemes of 6-10 homes⁴⁸.
250. Whilst we support ambitious neighbourhood planning groups to set challenging affordable housing policies to meet local need, a degree of pragmatism is also required to ensure that affordable homes are delivered rather than remaining a policy aspiration.

⁴⁷ HAPPI 4, pp. 41

⁴⁸ PPG Paragraph: 031 Reference ID: 23b-031-20161116

251. In particular, Local Plan policies on affordable housing may already provide for the framework under which contributions towards affordable housing will be negotiated with developers and landowners, with little value added by additional neighbourhood plan policies.
252. On this basis, we would recommend that policies on tenure consider specifically what types and sizes of housing developments they apply to, and ideally which sites they will relate to. This will allow a targeted approach to negotiations with developers regarding affordable housing contributions, whether these are on-site delivery of affordable housing units, or off-site payments.
253. The specific tenures delivered on specific sites is likely to relate as much to the nature of the site and its design and access as to issues of viability and land prices. More detailed advice can be found in the PAS Neighbourhood Planning Advice Note on Housing Needs Assessment for Neighbourhood Plans⁴⁹

Polices on Type and size

254. This HNA has set out AECOM's recommendations for the types and sizes of housing needed in future. Neighbourhood plan policies can specify types and sizes of homes that should be developed, however the extent to which these specifications will, much like the tenures of homes to be delivered, will be subject to the viability of individual housing schemes.
255. An alternative and often more effective approach than general policies on the type and size of dwelling applying to all development within the NA would be for neighbourhood planners to design specific guidance on the characteristics of housing on specific development sites which are allocated in the plan.
256. These should be developed according to the views of local residents, and also in consultation with other local stakeholders including developers and your local authority.
257. Such guidance would ideally be informed by both design code/masterplanning work exploring the impact of the proposals on the overall capacity of the sites, as well as by viability evidence showing that the requirements would not place undue burdens on developers seeking to deliver housing.
258. In developing more detailed guidance for specific sites, neighbourhood planners will be able to provide certainty and evidence in discussions with both the public and private sector as to the future of development sites. In addition, emerging Draft Planning Practice Guidance states that "Neighbourhood plan policies on the size or type of housing required should be informed by other local authority evidence as far as possible".⁵⁰

Policies on Housing for Specialist Groups

259. Specialist housing for the elderly is typically delivered either by specialist developers (who mainly provide market sale and rented products), and housing associations, who typically provide rented products. This market is still relatively underdeveloped in the UK, with the result being that such providers tend to buy only specific types of land in specific parts of the country. We also note that the revised NPPF suggests that such developments could be exempt from some types of affordable housing requirements, as this may impact both on their viability and their ability to deliver different tenures of specialist accommodation for the elderly⁵¹.
260. The evidence presented to the All Party Parliamentary Group on Housing and Care for Older People's inquiry HAPPI4 suggested that a policy link between Rural Exceptions Sites and specialist dwellings for the elderly could be made in Local Plan, and by extension Neighbourhood Plan policy⁵². We note in particular the support given to such housing by the emerging SNDP Local Plan, which will support the development of developments of 5 or more dwellings of this type to meet local needs. This provides a strong impetus for the Parish to consider whether some housing of this type might be brought forward within the part of the NA located within the National Park. A development of 5 dwellings would also meet the need apportioned to that part of the NA.
261. Indeed, the APPG inquiry called for Local Plans to allocate sites for specialist housing for the elderly, and this could undoubtedly also be extended to neighbourhood plans⁵³. We would encourage Bramber to explore the possibilities of such a policy, and whether it would be in conformity with the SNDP Local Plan Strategic Policies. In doing so, it will also be relevant to engage with providers of specialist housing to understand their requirements and their interest in building such housing in Bramber.

⁴⁹ <https://www.local.gov.uk/sites/default/files/documents/view-advice-note-here-cb3.pdf>

⁵⁰ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687239/Draft_planning_practice_guidance.pdf

⁵¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/685289/Draft_revised_National_Planning_Policy_Framework.pdf

⁵² http://www.housingandcare21.co.uk/files/8515/2508/3531/APPG_Rural_HAPPI_4_Housing_Care_Report...pdf

⁵³ Ibid.

Appendix A : Definitions of Specialist Housing

A.1 Sheltered Housing

Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They usually contain between 15 and 40 properties, and range in size from studio flats (or 'bedsits') through to 2 and 3 bedroomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden. Source: <http://www.housingcare.org/jargon-sheltered-housing.aspx> (accessed 11/11/17).

A.2 Extra Care Housing

New forms of sheltered housing and retirement housing have been pioneered in recent years, to cater for older people who are becoming more frail and less able to do everything for themselves. Extra Care Housing is housing designed with the needs of frailer older people in mind and with varying levels of care and support available on site. People who live in Extra Care Housing have their own self-contained homes, their own front doors and a legal right to occupy the property. Extra Care Housing is also known as very or enhanced sheltered housing, assisted living, or simply as 'housing with care'. It comes in many built forms, including blocks of flats, bungalow estates and retirement villages. It is a popular choice among older people because it can sometimes provide an alternative to a care home. In addition to the communal facilities often found in sheltered housing (residents' lounge, guest suite, laundry), Extra Care often includes a restaurant or dining room, health & fitness facilities, hobby rooms and even computer rooms. Domestic support and personal care are available, usually provided by on-site staff. Properties can be rented, owned or part owned/part rented. There is a limited (though increasing) amount of Extra Care Housing in most areas and most providers set eligibility criteria which prospective residents have to meet. <http://www.housingcare.org/jargon-extra-care-housing.aspx> (accessed 11/11/17).

Appendix B Tenures of Housing Needed

B.1 Housing tenure

262. Earlier in this study, we identified the various different tenures that constitute the new definition of Affordable Housing (AH) within the NPPF18: Affordable housing for rent, Starter homes, Discounted market sales housing, and other affordable routes to home ownership.
263. This variety of AH tenures reflects an ambition by the Government to provide a pathway to home ownership to those who seek it, as well as introducing market principles into the provision of subsidised housing for rent. The aim is to divide AH into a series of products designed to appeal to different sectors of the market and, by changing eligibility criteria, bring rents closer in line with people's ability to pay.
264. A good example is, in 2012, the introduction of affordable rented dwellings, rent for this tenure is set at up to 80% of market rent, with the additional income being used to help fund the development of new homes. Labelled an 'intermediate' product, this would be suitable for people with an income that precludes them from eligibility for the social rented dwellings (those dwellings where the rent is set in accordance with the Government's rent policy), but who cannot afford to access the private market.
265. The overall aim is to reduce the group who are eligible for social rented dwellings to those who have, relatively speaking, very low household incomes. However, within this segment, market principles also apply given the link between rents and size of dwelling, with a strong financial incentive for households to only occupy a dwelling deemed suited to their composition, based on an 'occupancy rating' formula set by the Government.
266. Data from the HNSA suggests that of the 11 people who were in housing need in 2015, 5 indicated they wished to rent from a housing association, 4 who wished buy a shared ownership property, and 2 wish to buy on the open market. This makes clear that there is a need for a range of affordable housing tenures, as discussed in more detail below.

B.2 Affordable rent

267. Commentators have repeatedly raised concerns about affordable rent not constituting a realistic form of AH given that in many areas this reduces rent to levels that are still beyond the means of the target group: those on incomes substantially below the mean.
268. Affordable rent is controlled at no more than 80% of the local market rent. Data from Home.co.uk suggests that the average rent for a two bedroom property was £1,028 pcm. Discounted to 80%, and based on a 40% income threshold, this would be suitable for a household with an income of £24,672 per annum, this would help to bring rental properties within reach of those on lower incomes, although it would still remain at the uppermost limit of those on lower quartile incomes, and those in housing need in Bramber.
269. Still, this would represent a significant opportunity for these households, particularly given that many may not have the savings sufficient to even consider a shared ownership property. As such, we recommend that affordable rent should be considered suitable for future development in Bramber.

B.3 Build to rent

270. Recent policy developments, not least through the updated NPPF, suggest a range of new rented products are becoming more common, and it may be that these offer more opportunities for housing for local people than affordable home-ownership products, particularly where built to rent developments offer housing at a range of price points, including some affordable rented housing.
271. As we have seen, there is strong evidence of growing demand for private rent accommodation in the NA, with a significant increase between 2001 and 2011, albeit from a low base. On-going changes to the benefit system, in particular 'Universal Credit',⁵⁴ and the way Affordable Housing is allocated, for example restrictions imposed by eligibility criteria, are likely to increase demand on the private rented sector, especially at the lower-cost end of the market.

⁵⁴ Reforms to the benefits system are likely to see payments made directly into recipients' bank accounts rather than housing benefit paid to landlords thus granting the individual greater choice in the nature of their housing arrangements.

272. Given the very substantial increases in PRS revealed by Census data, this trend is one shared by Bramber. The reason for the strength of this demand is that, for those households unable to access market housing to buy, and who do not qualify for affordable housing, private rented housing is the only remaining option.
273. On this basis we would recommend that the parish seek build to rent (BTR) development, which may include an element of Affordable Private Rented Housing (as defined in the introduction to this chapter and the draft revised NPPF) and is likely to be brought forward by specialist developers. This could help to provide housing options for those who cannot afford to buy in the area, including younger households, providing more affordable alternative to home-ownership in the current housing market.

B.4 Discounted market sales housing (starter homes and shared ownership)

274. As we have seen, Housing and Planning Act 2016 includes provisions to introduce a general duty on planning authorities in England to promote the supply of 'starter homes,' and a specific duty to require a minimum number or proportion of 'starter homes' on certain residential development sites. Indeed, in paragraph 65 of the NPPF18 Government introduces a recommendation that *'where major housing development is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership'*.
275. This is a fulfilment of the direction of travel set in the Housing White Paper. It states that, *'in keeping with our approach to deliver a range of affordable homes to buy, rather than a mandatory requirement for 'starter homes,' we intend to amend the NPPF to introduce a clear policy expectation that housing sites deliver a minimum of 10% affordable home ownership units. It will be for local areas to work with developers to agree an appropriate level of delivery of 'starter homes', alongside other affordable home ownership and rented tenures'*.
276. This is a substantial watering-down of the 'starter home' requirement as envisaged when policy contained in the Housing and Planning Act was first conceived. In effect, it leaves it to local groups, including neighbourhood plans, to decide an appropriate level of affordable home ownership products, while taking note of the 10% policy expectation.
277. The decision whether to treat Discounted Market Sale Homes as affordable housing should be determined by whether lowering the asking price of new build homes of a size and type suitable to first time buyers by 20% would bring them within reach of people currently unable to access AMH for purchase.
278. Based on a conservative assessment by the ONS, of entry level house prices in the area of £423,000 in 2017, a 20% discount would result in such a home costing exactly £324,000. As this would be more than the £250,000 capped price of Starter Homes outside of London, this type of development is unlikely to be viable in Bramber. However, households in need have expressed a clear desire to buy 'affordable' i.e. lower cost market housing. This is considered in more detail below.

B.5 Market housing

279. Given the very limited quantity of AH currently in the NA (just two dwellings), the needs of the great majority of the people are likely to continue to be served by the housing market rather than by the various forms of affordable housing. People on higher incomes will be able to access a variety of market dwelling, and their choices will be driven principally by how much they can afford to spend, as well as personal taste.
280. The operation of the housing market is the best means of addressing the demand for different types of housing for sale. It is important planning policy does not place unnecessary burdens on the market preventing its ability to respond to demand; this is after all the principal way equilibrium is achieved in the housing market and house price growth kept in check.
281. In this way the notion of viability is essential. It is important not to deter development in the context of clear housing need; to do so will not only frustrate the delivery of new housing but also may deprive the community of resources for infrastructure improvements. However, delivering market housing of an appropriate size, that meets the needs of residents as well as being viable, will help to provide more housing options for local residents. Our recommendations in Chapter 6 provide more detail on the types and sizes of housing needed in this respect, but the provision of smaller, 1-2 bedroom homes, which are likely to be provided as a mixture of terraced homes and flats. These could help to provide more affordable for sale housing options for people in Bramber, given the very significant increases seen in even lower quartile house prices in recent years, which suggests a lack of lower-priced homes suitable for entry-level households.

B.6 Social rented housing

282. Rents in socially rented properties reflect a 'formula rent' based on a combination of individual property values and average earnings in each area, maintaining substantial discounts to market rents. As such, it is suitable for the needs of those on low incomes, and is subject to strict eligibility criteria.
283. Given the significant constraints on grant funding to deliver social rented housing, as well as the removal of the definition of social rented housing from the draft NPPF in 2018, we do not see social rented housing as forming a key component of need in Bramber.

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