



IT'S ALL IN THE DETAIL

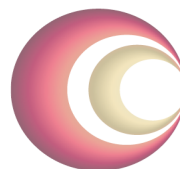
MARKET HOUSING MIX

Crawley Borough Council and Horsham
District Council

November 2016

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1. INTRODUCTION

Overview

- 1.1 In September 2016 Chilmark Consulting Ltd. (CCL) was instructed by Crawley Borough Council (CBC) and Horsham District Council (HDC) to undertake an assessment of the market housing mix characteristics and to establish an appropriate, future mix of market housing for both local authorities.
- 1.2 The Government's objectives to meet housing needs, including market and affordable housing are set out in the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG). There is a clear and unambiguous approach that housing needs are to be objectively assessed and that a choice and mix of high quality housing is to be provided to meet the needs arising.
- 1.3 National policy places an emphasis on meeting market (and affordable housing) needs and the NPPG sets out the importance of local level analysis of existing and future needs of households in order to support policies that seek to secure a mix.
- 1.4 Crawley Borough and Horsham District (together with Mid Sussex District) form the distinct Northern West Sussex Housing Market Area (NWS HMA). The HMA has been well-defined and is established over an extensive time period. While there are acknowledged overlaps between the HMA and neighbouring areas including Brighton & Hove, East Surrey and Greater London, the Northern West Sussex HMA remains a separate functional housing market area.
- 1.5 There have been a series of Northern West Sussex Strategic Housing Market Assessment (SHMA) studies and updates undertaken over the period from 2008/9 up to 2014 and this body of work has examined the nature, characteristics and operation of the housing market in detail. The SHMA has not, however, sought to set a specific or precise market housing mix to be applied across the NWS HMA (although it has established an affordable housing need and mix). Considerations of market housing mix were subject of general and qualitative commentary in the SHMA and its updates and details of more specific market mix requirements were left for the constituent local authorities to identify as necessary.
- 1.6 Both Crawley Borough and Horsham District have recently adopted Local Plans (December and November 2015 respectively) which confirm the level of objectively assessed housing needs and the requirements for the provision of affordable housing.
- 1.7 Both Local Plans set out policies that require new developments to offer a mix of housing in terms of sizes, tenures and types and the relevant policies qualify this approach indicating that the appropriate market housing mix is a matter of meeting identified needs (from the SHMA and its updates) aligned with design, character and viability considerations on a site by site basis.
- 1.8 The limitation in this policy approach is that the current Northern West Sussex SHMA and updates do not offer a current guide to market housing mix needs

now. The purpose of this Report is therefore to provide greater detail and clearer analysis of the market housing mix. It should therefore be read in conjunction with the relevant Local Plan policies and with the Northern West Sussex SHMA and updates.

Scope of Work

- 1.9 To support the robustness of the two local authorities adopted Local Plans and to aid future plan-making and planning decisions, the Councils are seeking an analysis of the existing and future market housing mix. To achieve this, three issues form the principal scope of work:
- **Assessment of the existing market housing mix and type** through a review of the mix in both local authority areas (excluding the South Downs National Park). This should be based on the existing data provided by the Northern West Sussex SHMA and updates;
 - **Assessment of deficiencies** in the existing mix and type analysing the projected future mix and type requirements arising using current household projection data. The scope also includes relating housing mix to different levels of density and scale; and
 - **Recommendations for the future market housing mix** and type drawing the analyses together.

Structure of the Report

- 1.10 Following this introductory section, the Report is set out as follows:
- **Section 2** – summarises the relevant national and local policy context for establishing the mix of market housing;
 - **Section 3** – sets out the existing market housing mix position in Crawley and in Horsham and considers local characteristics of recent housing delivery in terms of sizes and densities;
 - **Section 4** – looks forward to set out the likely future market housing mix requirements set against the composition of new household formation;
 - **Section 5** – draws the work together with relevant summary conclusions and recommendations; and
 - **Appendices** – provide relevant data analysis and technical information.

2. CONTEXT

Introduction

- 2.1 This section of the Report summarises the relevant national policy and practice guidance for the assessment of a market housing mix. It also offers an overview of the relevant local policies for Crawley Borough and for Horsham District.
- 2.2 It is not the intention of this section to provide a comprehensive recitation of all policy and legal requirements, but rather to aid the reader to understand the principal matters concerning the establishment of a market housing mix.

National Policy

National Planning Policy Framework

- 2.3 The National Planning Policy Framework (NPPF) sets out relevant national policies concerned with housing delivery including market (and affordable) housing.
- 2.4 Paragraph 7 of the NPPF sets out the three dimensions to sustainable development. Under the social role, there is explicit recognition that it is necessary to provide a supply of housing to meet the needs of present and future generations.
- 2.5 Paragraph 9 encourages sustainable developments that widens the choice of high quality housing.
- 2.6 Paragraph 17 deals with Core Planning Principles and notes that every effort should be made to objectively identify and then meet the housing (and other needs) of an area and to respond positively to wider opportunities for growth.
- 2.7 Section 6 of the NPPF then expands on the underlying sustainable development principles for housing. Paragraph 47 reiterates that development plans must meet the full objectively assessed market and affordable housing needs of their areas as far as it is consistent with policies in the NPPF.
- 2.8 Housing choice is considered at paragraph 50, which expects sustainable development to deliver a wide choice of high quality homes. It sets out the approach to achieve this including planning for a mix of housing based on current and future demographic trends and the needs of particular groups; and identifying the size, type and tenure of housing required.
- 2.9 In the section covering plan-making, paragraph 159 expects that Strategic Housing Market Assessments will assess the full housing needs of the Housing Market Area and identify the scale and mix of housing necessary and the range of tenures that the local population is likely to need over the plan period. This assessment is to include addressing the need for all types of housing and to cater for the scale of housing supply necessary.

National Planning Practice Guidance

- 2.10 The National Planning Practice Guidance (NPPG) offers additional information and guidance on the assessment of housing and economic development needs at Section 2a.
- 2.11 With respect to the assessment of market housing mix, the NPPG guides at paragraph 002 that the primary purpose of housing and economic needs assessments includes identify the future quantity of housing needed, including a breakdown by type, tenure and size;
- 2.12 Paragraph 003 identifies that the need for housing refers to the scale and mix of housing and the range of tenures that is likely to be needed.
- 2.13 In paragraph 021 the overall housing figure, once identified, is to be broken down by tenure, household type and household size. Plan makers are advised to look at the household types, tenure and size in the current stock and in recent supply and to assess whether continuation of these trends would meet future needs.

Local Policy

Planned Housing Requirements and Mix Policies: Crawley Borough

- 2.14 Crawley Borough adopted its *Crawley Borough Local Plan 2015-2030* on 16th December 2015.
- 2.15 The Plan identifies a planned housing requirement of **5,100** dwellings in the plan period (**340** dpa). The Plan's strategy for housing set out in Policy H1 (Housing Provision) is based on meeting housing needs in the Borough and then accommodating the acknowledged unmet needs (some **5,000** dwellings) within other local authority areas principally in the Northern West Sussex Housing Market Area that includes Horsham District and Mid Sussex District.
- 2.16 Policy H3 (Future Housing Mix) establishes that all housing development should provide a mix of dwelling types and sizes to address the nature of local housing needs and market demand. The appropriate mix of house types and sizes for each site will depend upon the size and characteristics of the site and the viability of the scheme. Consideration is also to be had to the Strategic Housing Market Assessment and its updates for market housing needs and demand in Crawley.
- 2.17 Paragraphs 6.58 and 6.59 of the Plan provide the supporting rationale for policy H3. Paragraph 6.58 notes that new housing needs to take account of local need to create neighbourhoods where there is genuine choice of the right housing in terms of size, type and tenure. At paragraph 6.59 the Plan confirms that the Council will expect new residential schemes to reflect the latest evidence of needs subject to density and character considerations. In particular, the paragraph states that the Town Centre mixed use development will be expected to be built at higher densities but that this may not be suitable for all sites.
- 2.18 A total affordable housing need of between **197** and **456** dpa (modelled for housing those groups in reasonable preference categories) has been identified through the *Northern West Sussex Affordable Housing Needs Update*

(October 2014) and confirmed in the *Objective Assessment of Crawley's Housing and Economic Needs* (March 2015) (OACHEN) which supported the Crawley Borough Local Plan.

- 2.19 The Plan confirms in Policy H4 (Affordable and Low Cost Housing) that **40%** of new residential development should be affordable housing with a **70:30** affordable rent and intermediate tenure split.
- 2.20 Policy H4 also requires **10%** low cost housing provision in addition to the 40% affordable housing requirement. Low cost housing is defined as offering up to 10% discount to first time buyers. Low cost housing as defined in this way lies outside the definition of Affordable Housing as set out in the NPPF at Annex 2.

Planned Housing Requirements and Mix Policies: Horsham District

- 2.21 Horsham District adopted its *Horsham District Planning Framework* (HDPF) on 27th November 2015.
- 2.22 Policy 15 (Strategic Policy: Housing Provision) has a housing requirement of 16,000 dwellings in the plan period from 2011-2031 (representing **800** dpa).
- 2.23 Meeting local housing needs are dealt with in Policy 16 (Strategic Policy: Meeting Local Housing Needs). This establishes that development should provide a mix of housing sizes, types and tenures to meet the needs of the District's communities. It confirms that the appropriate mix of different housing types and sizes for each site will depend on the established character and density of the neighbourhood and the scheme's viability. A **35%** affordable housing provision is anticipated on sites of more than 15 dwellings or over 0.5 Ha and a **20%** provision on sites of 5-14 dwellings. A tenure split of 70:30 affordable rent: intermediate tenures is sought.
- 2.24 The total affordable housing needs for Horsham were established through the *Northern West Sussex Affordable Housing Needs Update* (October 2014). This identified an affordable housing need range of between **225** and **382** dpa (for those groups in reasonable preference categories).

3. EXISTING MARKET HOUSING MIX

Introduction

- 3.1 In this section, the existing market housing mix is established and reviewed with respect to the mix of stock, tenures and sizes evident in Crawley and in Horsham. The purpose is to affirm the current position before going on, in Section 4, to consider the future market housing needs and mix in greater detail.

Data Sources and Assumptions

- 3.2 The analysis set out herein uses published secondary source data and information available from a variety of public sources including DCLG, ONS, and HMLR. All data sources are shown and the calculations or manipulations undertaken are described in each sub-section as necessary. Assumptions and limitations are detailed in the relevant sub-sections.

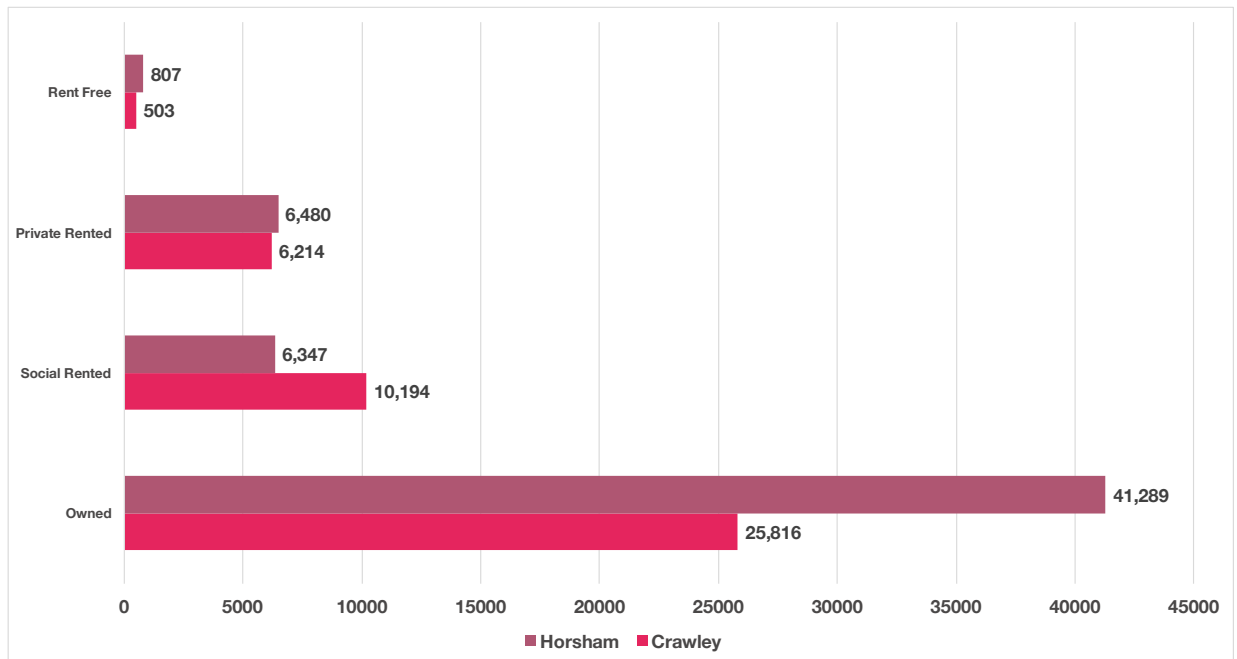
Existing Tenure Mix

- 3.3 Table 3.1 provides a breakdown of the dwelling stock in Crawley and Horsham by tenure, and compares this between 2001 and 2011. There was a net increase in the total number of dwellings in both Crawley and Horsham between 2001 and 2011, reflecting the population increase witnessed across the two authorities' areas.
- 3.4 In Crawley, the overall number of dwellings has increased but the number of owner-occupied dwellings has reduced in both absolute terms and as a proportion of the total. The other major evident change over the 2001 – 2011 period has been a significant increase in both the number and proportion of private sector rented dwelling stock. The social rented sector has remained at a broadly similar proportion of total stock, although with an increase in absolute numbers.
- 3.5 In Horsham, the proportion of owner-occupied dwellings has also reduced relative to total stock, but there has been an absolute increase in the number of such dwellings. The private rented sector has also seen an increase in the total number of such dwellings, resulting in a substantial increase in the share of the total dwelling stock in Horsham.

Table 3.1: Dwelling Stock by Tenure 2001-2011

	Crawley 2001		Crawley 2011		Horsham 2001		Horsham 2011	
	Total H/holds	%	Total H/holds	%	Total H/holds	%	Total H/holds	%
Owned	27,583	68%	25,816	60%	39,552	79%	41,289	75%
Social Rented	9,468	23%	10,194	24%	5,619	11%	6,347	12%
Private Rented	2,491	6%	6,214	15%	3,799	8%	6,480	12%
Rent Free	840	2%	503	1%	1,067	2%	807	1%
Total Households	40,382	100%	42,727	100%	50,037	100%	54,923	100%

Source: Census 2001 (Table UV63); Census 2011 (Table QS405EW)



3.6 Table 3.2 provides an update on how the dwelling stock in Crawley and Horsham has changed over the period 2011 to 2015. Whilst it is not directly comparable with Table 3.1 it does provide a reasonable indicator of the patterns of change, which reinforces the pattern seen over the period 2001 to 2011.

3.7 From Table 3.2 it can be seen that the stock of private sector dwelling provision has increased over the period 2011 to 2015 in Crawley, although at a relatively small scale. Private Registered Providers also increased provision over the 2011 to 2015 period, but still only represent approximately 5% of total dwelling stock. Meanwhile, the stock of local authority dwellings decreased in Crawley between 2011 and 2015.

- 3.8 In Horsham the stock of private sector dwelling provision increased in absolute numbers over the period 2011 to 2015, although the proportionate share of the total stock of dwellings remained unchanged. In fact, there was no appreciable change in the distribution or balance of dwelling stock in Horsham between 2011 and 2015, despite the increase in stock over this period.

Table 3.2: Dwelling Stock by Provider 2011-2015

	Crawley 2011		Crawley 2015		Horsham 2011		Horsham 2015	
	Total H/holds	%	Total H/holds	%	Total H/holds	%	Total H/holds	%
Private Sector	33,010	76%	33,890	77%	50,130	89%	52,240	89%
Local Authority	8,267	19%	7,840	18%	49	0%	60	0%
Private Registered Provider	2,173	5%	2,400	5%	6,326	11%	6,620	11%
Other Public Sector	19	0.0%	-	0.0%	15	0.0%	30	0.1%
Total Stock	43,469	100%	44,130	100%	56,520	100%	58,950	100%

Source: CLG Live Table 100 (April 2016)

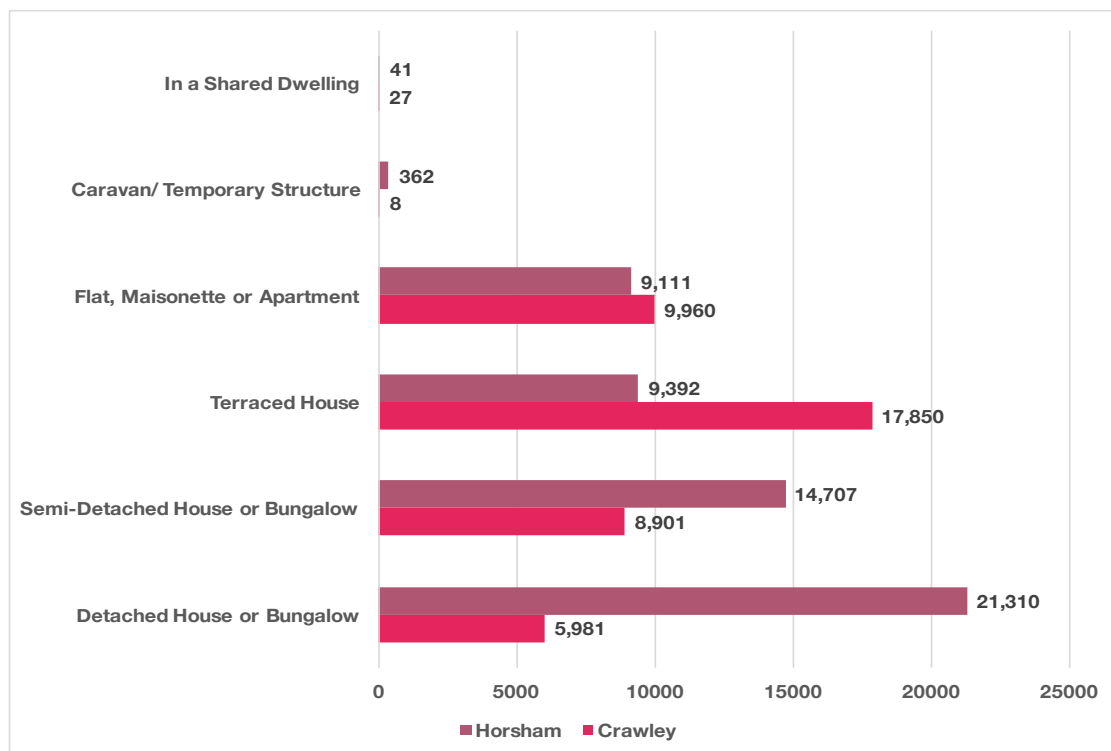
Existing House Types

- 3.9 Table 3.3 illustrates the change in dwelling stock (for all stock) in Crawley and Horsham in terms of building type between 2001 and 2011. The overall total of dwellings as at 2011 is consistent with the figures in Table 3.1, although the 2001 figures are not identical due to the different calculation process used in the Census. Even so, the data provides a robust basis for comparison.
- 3.10 In terms of Crawley, Table 3.3 indicates an absolute and proportionate decline in terraced housing over the period 2001 to 2011. This contrasts with a significant increase in flats over the same period. The number of semi-detached properties has increased slightly between 2001 and 2011, but the broad proportionate split remains unchanged. There has been a marginal decline in the total number of detached properties between 2001 and 2011 in Crawley, probably reflecting conversion to flats and apartments.
- 3.11 In Horsham there has been an absolute and proportionate increase in flats and apartments between 2001 and 2011. The proportionate share of the other building types has remained broadly unchanged, although there have been relatively small increases in the total stock of detached semi-detached and terraced houses across this period.
- 3.12 The trends in building type change in Crawley and Horsham reinforce the trends evident from Table 3.1 and 3.2 in terms of increased private sector provision of dwellings, notably in the private rented sector.

Table 3.3: Dwelling Stock by Building Type 2001-2011

	Crawley 2001		Crawley 2011		Horsham 2001		Horsham 2011	
	Total H/holds	%	Total H/holds	%	Total H/holds	%	Total H/holds	%
Detached House or Bungalow	6,185	15%	5,981	14%	20,633	40%	21,310	39%
Semi-Detached House or Bungalow	8,577	21%	8,901	21%	13,950	27%	14,707	27%
Terraced House	18,756	46%	17,850	42%	8,842	17%	9,392	17%
Flat, Maisonette or Apartment	7,284	18%	9,960	23%	7,398	14%	9,111	17%
Caravan/ Temporary Structure	28	0.1%	8	0.0%	349	0.7%	362	0.7%
In a Shared Dwelling	105	0.3%	27	0.1%	169	0.3%	41	0.1%
All Household Spaces	40,935	100%	42,727	100%	51,341	100%	54,923	100%

Source: Census 2001 (Table UV56); Census 2011 (Table QS402EW)



Existing Stock Size

Bedroom Spaces

- 3.13 A further perspective on the change in dwelling stock provision in Crawley and Horsham is provided from Table 3.4. This looks at the dwelling stock by size, specifically in terms of the number of bedrooms.
- 3.14 There is a similar profile in terms of proportionate split of the housing market between Crawley and Horsham in terms of one and two bed units, which comprise just over a third of the total dwelling stock.
- 3.15 Crawley has a greater provision of three bed dwellings (almost half of all provision). The three bedroom property is also the largest category in Horsham. There is also a greater level of provision of four and five+ bedroom units in Horsham relative to Crawley, with the four bedroom stock being of a similar proportion to the two bedroom stock in Horsham.

Table 3.4: Dwelling Stock by Size - Number of Bedrooms

	Crawley 2011		Horsham 2011	
	Total H/holds	%	Total H/holds	%
1 Bed	5,620	13%	5,880	11%
2 Bed	9,732	23%	13,053	24%
3 Bed	20,718	48%	20,591	37%
4 Bed	5,598	13%	11,327	21%
5+ Bed	1,059	2.5%	4,072	7.4%
Total Households	42,727	100%	54,923	100%

Source: 2011 Census Table QS411EW

Total Number of Rooms

- 3.16 Table 3.5 provides a breakdown of dwelling stock by size in terms of the total number of rooms. It is not directly comparable with the data in Table 3.4 as it focusses on the total number of rooms rather than the number of bedrooms (which is of more relevance in understanding how supply meets potential demand). Nevertheless, it is useful in showing trends as it covers the period 2001 to 2011. The most recent trends are discussed further from paragraph 3.40 onwards.
- 3.17 The data in Table 3.5 reinforces the point that there has been increased growth in the smaller unit market in Crawley (four or fewer rooms). The proportion of properties in these categories has increased from **30%** in 2001 to **34%** in 2011. In contrast, there has been a relative decline in Crawley between 2001

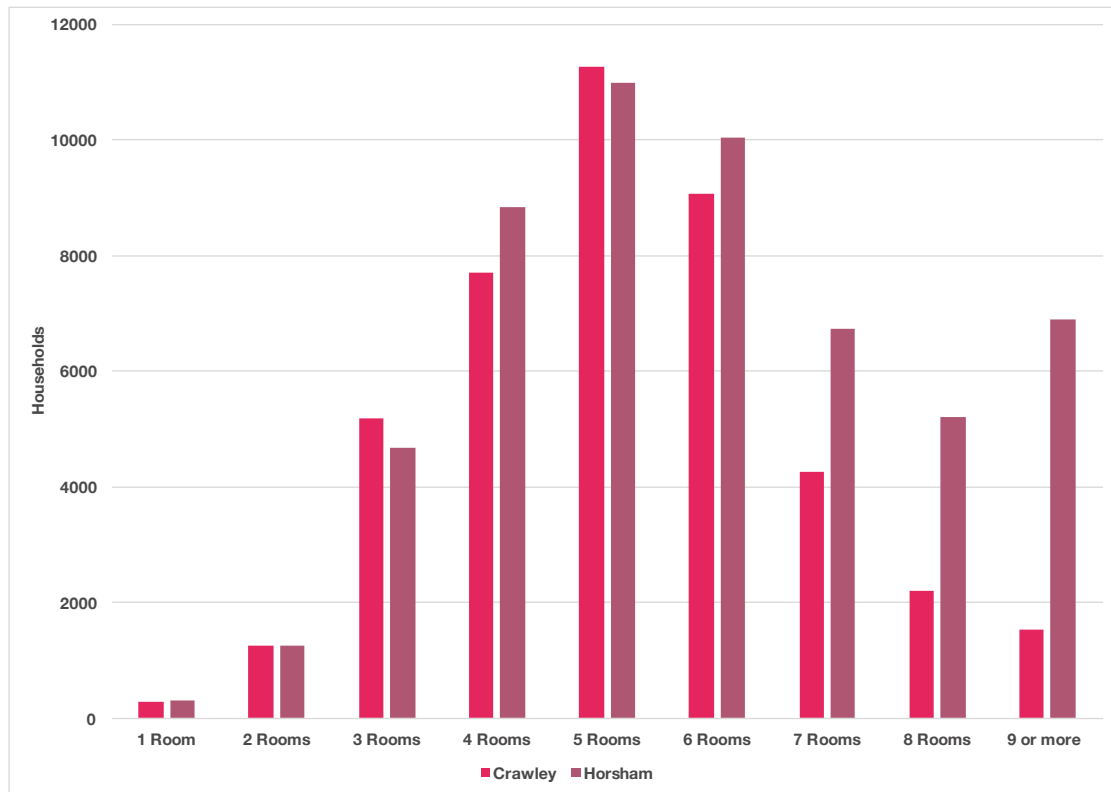
and 2011 in units with more than four rooms. These trends have continued in the most recent years up to 2015 as paragraph 3.33, et seq. explore further.

- 3.18 Horsham has seen the overall proportion of properties with four or fewer rooms remain broadly constant between 2001 and 2011, although there have been absolute increases in numbers in each of the categories. Interestingly, there has been a relative and absolute decline in the number of dwellings with 5 rooms, which typically relates to a two bedroom unit.
- 3.19 Dwellings with six and seven rooms have increased in number but the share of overall dwelling stock remains broadly the same between 2001 and 2011. In contrast, properties with eight rooms witnessed a significant reduction between 2001 and 2011, potentially representing conversions to smaller properties. A particularly noticeable feature has been the development of properties with nine or more rooms in Horsham between 2001 and 2011. These are typically likely to be represented by dwellings with four or more bedrooms.

Table 3.5: Dwelling Stock by Size - Number of Rooms

	Crawley 2001		Crawley 2011		Horsham 2001		Horsham 2011	
	Total H/holds	%	Total H/holds	%	Total H/holds	%	Total H/holds	%
1 Room	370	1%	286	1%	277	1%	306	1%
2 Rooms	961	2%	1,250	3%	1,057	2%	1,256	2%
3 Rooms	4,130	10%	5,179	12%	3,791	8%	4,676	9%
4 Rooms	6,767	17%	7,702	18%	8,280	17%	8,833	16%
5 Rooms	11,712	29%	11,269	26%	11,435	23%	10,988	20%
6 Rooms	9,289	23%	9,056	21%	9,377	19%	10,038	18%
7 Rooms	4,033	10%	4,251	10%	5,916	12%	6,730	12%
8 Rooms	3,120	8%	2,203	5%	9,904	20%	5,212	9%
9 or more	0	0%	1,531	4%	0	0%	6,884	13%
Total	40,382	100%	42,727	100%	50,037	100%	54,923	100%

Source: Census 2001 (Table UV57); Census 2011 (Table QS407EW)



Existing Household Composition and Tenure

3.20 Table 3.6 provides a breakdown of household composition by tenure in Crawley and Horsham as at 2011. It offers a further insight into the data provided in Tables 3.3 to 3.5 above.

3.21 In Crawley the following characteristics are observed:

- there are a similar number of households owning a property in the one person household, family without children, and family with dependent children categories.
- the largest category within the social rented sector is that catering for one person households and families with dependent children.
- the private rented sector is spread fairly evenly between one person households, family without children, family with dependent children and 'other'.

3.22 In Horsham the household composition and tenure shows:

- the largest categories of owners are in the one person household, family without children, and family with dependent children, although the family with no children is the largest individual category in this tenure.
- the social rented sector in Horsham is catering mainly for one person households and the family with dependent children category.

- the largest category in the private rented sector in Horsham is the one person household, although there are sizeable proportions in the family with no children, and family with dependent children categories.

Table 3.6: Household Composition by Tenure, 2011

Household Composition - Crawley 2011	All Tenures	Owned	Shared ownership	Social rented	Private rented	Living rent free
All categories	42,727	25,228	588	10,194	6,214	503
One person household: Total	12,129	6,483	205	3,707	1,456	278
Couple/Single Parent: No children	9,594	6,994	140	1,221	1,162	77
Couple/Single Parent: Dependent children	12,568	6,665	158	3,734	1,937	74
Couple/Single Parent: Non-dependent children	4,217	2,995	37	955	206	24
Others: Dependent children	1,505	809	11	293	377	15
Others	2,714	1,282	37	284	1,076	35
Household Composition - Horsham 2011	All Tenures	Owned	Shared ownership	Social rented	Private rented	Living rent free
All categories	54,923	40,926	363	6,347	6,480	807
One person household: Total	15,476	10,156	144	2,706	2,095	375
Couple/Single Parent: No children	17,195	14,405	89	847	1,668	186
Couple/Single Parent: Dependent children	14,608	10,629	105	1,917	1,820	137
Couple/Single Parent: Non-dependent children	4,876	3,903	12	621	288	52
Others: Dependent children	921	629	1	116	159	16
Others	1,847	1,204	12	140	450	41

Source: ONS (Table DC4101EW - Tenure by household composition, 2011 Census)

3.23 Tables 3.7 and 3.8 provide a comparison between tenure and dwelling size (as measured by number of bedrooms) for both Crawley and Horsham. It should be noted that the tenure categories are a more condensed version of those in Tables 3.1 and 3.2 above.

3.24 For Crawley:

- the largest overall category is the three bedroom owner-occupier grouping, followed by four bedroom owner occupiers and then two bedroom owner-occupiers;
- there is a much lower level of one bedroom owner-occupied properties and even fewer five+ bedroom owner occupiers;
- the three bedroom section of the market is also significant in the social rented sector, although the social rented sector also provides for the largest proportion of one bedroom properties;
- the private rented sector is particularly focussed on the two and three bedroom market, although there is still a sizeable number of one bedroom units.

3.25 In Horsham:

- the largest overall category is the three bedroom owner-occupier grouping, followed by four bedroom owner occupier and two bedroom owner-occupiers, and then the five bedroom or more owner-occupier;
- there is a much lower level of one bedroom owner-occupied properties;
- the social rented sector is primarily focussed on the one and two bedroom sectors;
- the private rented sector in Horsham is particularly focussed on the two bedroom market, although there is still a sizeable number of one and three bedroom units.

Table 3.7: Tenure by household size by number of bedrooms - Crawley 2011

Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	42,727	25,816	6,717	10,194
1 bedroom	5,620	1,503	1,649	2,468
2 bedrooms	9,732	4,292	2,224	3,216
3 bedrooms	20,718	14,450	2,173	4,095
4 bedrooms	5,598	4,735	511	352
5 or more bedrooms	1,059	836	160	63
Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	100%	100%	100%	100%
1 bedroom	13%	6%	25%	24%
2 bedrooms	23%	17%	33%	32%
3 bedrooms	48%	56%	32%	40%
4 bedrooms	13%	18%	8%	3%
5 or more bedrooms	2%	3%	2%	1%
Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	100%	60%	16%	24%
1 bedroom	100%	27%	29%	44%
2 bedrooms	100%	44%	23%	33%
3 bedrooms	100%	70%	10%	20%
4 bedrooms	100%	85%	9%	6%
5 or more bedrooms	100%	79%	15%	6%

Source: ONS (Table DC4405EW - Tenure by household size by number of bedrooms, 2011 Census)

Tenure by household size by number of bedrooms – Owned/Shared Ownership and Private Rented - Crawley

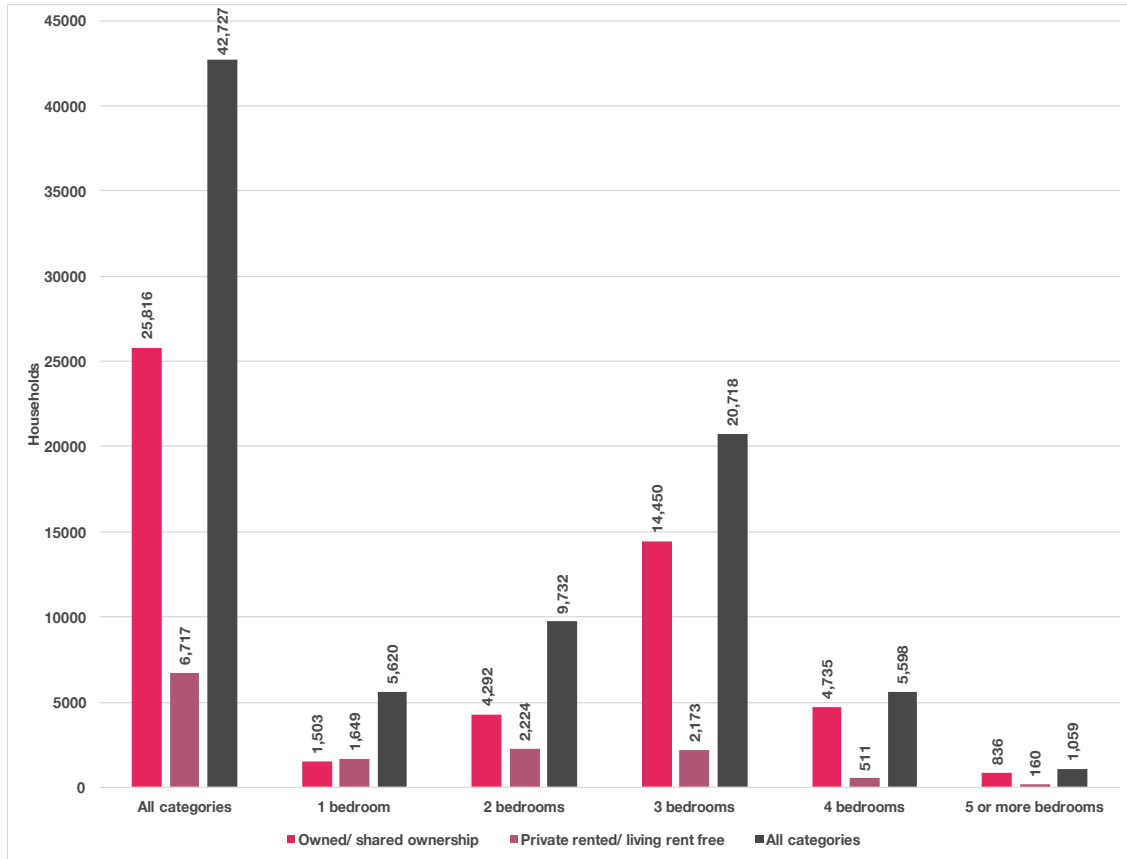
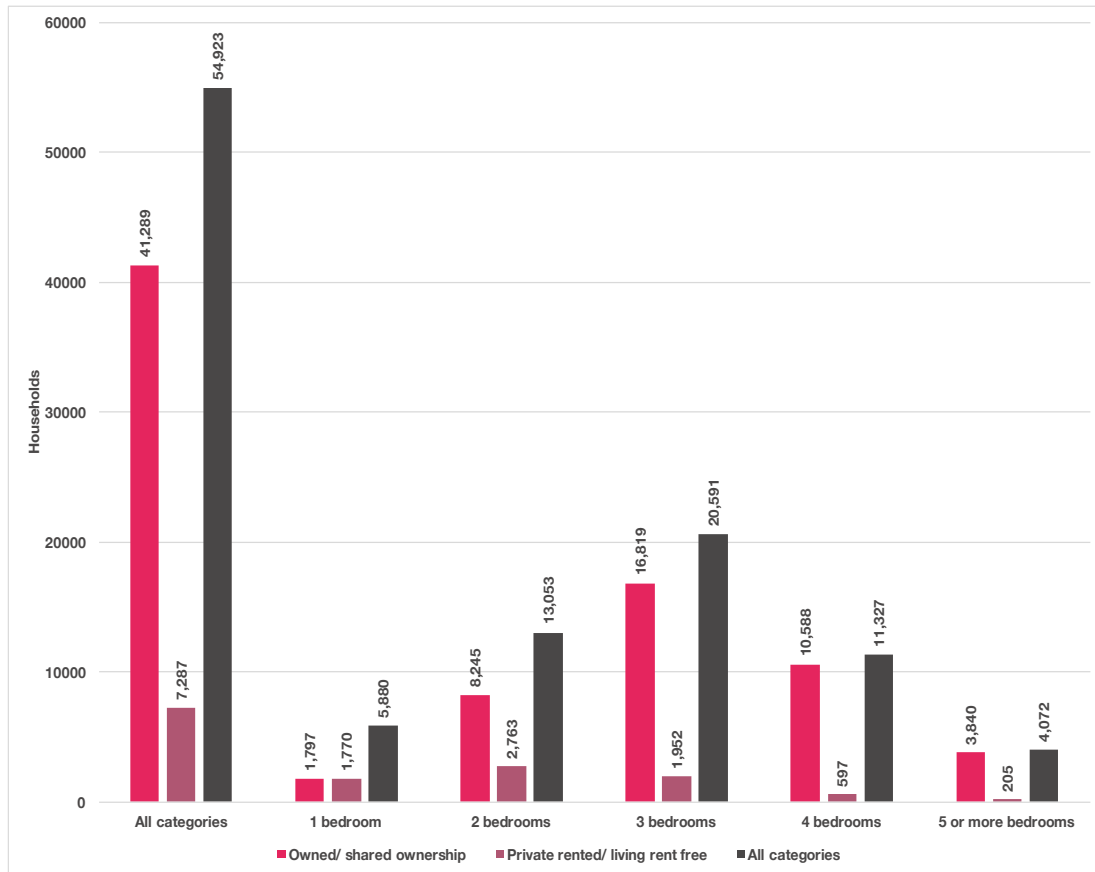


Table 3.8: Tenure by household size by number of bedrooms - Horsham 2011

Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	54,923	41,289	7,287	6,347
1 bedroom	5,880	1,797	1,770	2,313
2 bedrooms	13,053	8,245	2,763	2,045
3 bedrooms	20,591	16,819	1,952	1,820
4 bedrooms	11,327	10,588	597	142
5 or more bedrooms	4,072	3,840	205	27
Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	100%	100%	100%	100%
1 bedroom	11%	4%	24%	36%
2 bedrooms	24%	20%	38%	32%
3 bedrooms	37%	41%	27%	29%
4 bedrooms	21%	26%	8%	2%
5 or more bedrooms	7%	9%	3%	0%
Bedrooms	All categories	Owned/ shared ownership	Private rented/ living rent free	Social rented
All categories	100%	75%	13%	12%
1 bedroom	100%	31%	30%	39%
2 bedrooms	100%	63%	21%	16%
3 bedrooms	100%	82%	9%	9%
4 bedrooms	100%	93%	5%	1%
5 or more bedrooms	100%	94%	5%	1%

Source: ONS (Table DC4405EW - Tenure by household size by number of bedrooms, 2011 Census)

Tenure by household size by number of bedrooms – Owned/Shared Ownership, Private Rented – Horsham



3.26 It is also important to consider tenure by age groups. Table 3.9 therefore provides a further breakdown of tenure, this time in terms of age group cohorts for Crawley as at 2011. Table 3.10 shows the same analysis for Horsham.

3.27 In Crawley, the 35-39 age group is the largest proportion of owner-occupiers, followed closely by the 50 to 64 age group. These age groups make-up almost two thirds of the owner-occupier market. A similar situation emerges in the social rented sector, although the proportion of 25-34 age group individuals is similar to the 50-64 age group category. The private rented sector contrasts to these trends, with a greater proportion of 25-34 age group individuals making-up this sector, although closely followed by the 35-49 age group category.

Table 3.9: Tenure of Dwellings by Age Group - Crawley 2011

	All categories		Owned/ shared ownership		Social rented		Private rented/ living rent free	
	No.	%	No.	%	No.	%	No.	%
Age 24 and under	1,256	3%	236	1%	550	5%	470	7%
Age 25 to 34	7,734	18%	3,220	12%	1,925	19%	2,589	39%
Age 35 to 49	14,022	33%	8,591	33%	3,053	30%	2,378	35%
Age 50 to 64	10,773	25%	7,726	30%	2,191	21%	856	13%
Age 65 to 74	3,720	9%	2,624	10%	947	9%	149	2%
Age 75 to 84	3,655	9%	2,547	10%	957	9%	151	2%
Age 85 and over	1,567	4%	872	3%	571	6%	124	2%
All categories	42,727	100%	25,816	100%	10,194	100%	6,717	100%

Source: ONS (Table DC4201EW - Tenure by ethnic group by age - Household Reference Persons, Census 2011)

- 3.28 Table 3.10 shows that in Horsham (in contrast to Crawley), the 50 to 64 age group is the largest proportion of owner-occupiers, followed closely by the 35 to 49 age group. These age groups make-up almost two thirds of the owner-occupier market. There is also an appreciable proportion of people aged above 64 in the owner-occupier market.
- 3.29 In the social rented sector, the 35-49 age group are the largest proportion of occupiers, followed by the 50-64 age group category. The private rented sector has a particular focus on the 35-49 age group, followed by the 25-34 age group category.

Table 3.10: Tenure of Dwellings by Age Group - Horsham 2011

	All categories		Owned/ shared ownership		Social rented		Private rented/ living rent free	
	No.	%	No.	%	No.	%	No.	%
Age 24 and under	877	2%	146	0%	320	5%	411	6%
Age 25 to 34	5,110	9%	2,441	6%	840	13%	1,829	25%
Age 35 to 49	16,196	29%	11,665	28%	1,837	29%	2,694	37%
Age 50 to 64	16,221	30%	13,536	33%	1,289	20%	1,396	19%
Age 65 to 74	7,750	14%	6,520	16%	810	13%	420	6%
Age 75 to 84	6,089	11%	4,993	12%	763	12%	333	5%
Age 85 and over	2,680	5%	1,988	5%	488	8%	204	3%
All categories	54,923	100%	41,289	100%	6,347	100%	7,287	100%

Source: ONS (Table DC4201EW - Tenure by ethnic group by age - Household Reference Persons, Census 2011)

Recent Housing Completions – Mix, Sizes and Densities

- 3.30 To complement the analysis of existing (and future) market housing mix in Crawley and Horsham, a review of recent housing completions that have been undertaken, based on the monitoring data collated by West Sussex County Council’s Residential Land Availability Survey.
- 3.31 This information provides a direct measure of the type, mix and density of housing development coming forward in both local authority areas. While it represents a snapshot indicator as at March 2016, the recent completions represent the immediate housing stock that is or will shortly be available on the market.
- 3.32 The analysis confirms distinct patterns of development activity with respect to market dwelling sizes and densities which reflects the findings of the statistical evidence set out previously in this section of the report.

Crawley Borough

Recent Completions

- 3.33 Analysis of the latest completions data for Crawley Borough confirms a total of **551** completions in the year to 31st March 2016. Of this total, **33%** (**182** dwellings) are houses, with the remaining **66%** (**369** dwellings) were flats. A summary of the completions is provided at **Appendix A1**.

- 3.34 A major contribution to recent new market housing supply in Crawley can be attributed to a significant number of prior approvals associated with the Permitted Development Rights (PDR) for change of use from offices (Use Class B1a) to residential (Use Class C3). Overall, some **48%** of total completions in Crawley Borough were derived from PDR conversions, concentrated at eight schemes in Broadfield, Northgate and Southgate. The vast majority of this supply (**98%**), relates to flatted developments (**296** dwellings).
- 3.35 Elsewhere in the Borough, the major focus for housing completions and committed supply is concentrated at the large-scale Forge Wood scheme (also known as North East Sector of Crawley), as the residential elements of Phase 1A and 1C come forward.
- 3.36 In addition, a number of completions have occurred at the former Bewbush Leisure Centre site, and land adjacent to Langley Green Primary School, Langley Drive.
- 3.37 The contribution of smaller sites is also evident in Crawley although the overall net contribution of these sites in housing terms is limited.

Density and Market Mix

- 3.38 To further refine the nature of the existing housing mix, an analysis of the density and specific type/mix of recent completions in Crawley has been undertaken.
- 3.39 With regard to the housing mix, attention has focused on the market housing element only given the focus of this study (although it is recognised that many of the larger schemes provide significant levels of new affordable housing in addition). Full details are set out in **Appendix A1** and the findings are summarised as follows:
- The majority of recent completions in the Borough have a density in the range of **40-60** dwellings per hectare (dph). This accords with good practice to secure an efficient use of land within sustainable urban locations. For example, the schemes at the former Bewbush Leisure Centre site, land adjacent to Langley Green Primary School and Phase 1C at Forge Wood, all achieve this level of housing density for market stock.
 - The urban character of the Borough is reflected in the relatively high density levels secured in Crawley town centre. The significant number of Permitted Development Rights conversions to residential use supports significantly higher density levels (based on 1 and 2 bed flat conversions from former office buildings in the centre). The extent to which this trend will continue in future is however debatable as the availability of further, suitable office stock capable of conversion under PDR rights has been substantially reduced.
 - Analysis of the mix and type of open market completions in Crawley confirms:
 - the continued dominance of one and two bed flatted developments through PDR conversions and via planning permissions granted. It is notable that there are no larger flatted (three bed+) completions that have occurred recently.

- For houses, the most significant housing type are three bed semi-detached, followed by four bed semi-detached properties, and to a lesser extent, two bed detached properties. The completions data further indicates a growth in the role of terraced development in new development, particularly for two bed terrace provision. This has positive implications for overall scheme densities as traditionally terraced stock can be developed at higher densities and make efficient use of available land.

Horsham District

Recent Completions

- 3.40 The latest completions data for Horsham District (excluding the South Downs National Park) identifies a total level of housing completions of **1,230** dwellings in the year to 31st March 2016.
- 3.41 New housing supply is characterised by housing, rather than flatted developments, accounting for circa **74%** (**909** dwellings), with flats accounting for **317** dwellings (**26%**). A summary of the level of completions in the District is provided at **Appendix A1**.
- 3.42 Analysis of the completions data confirms an extensive variety of housing type completions across the District, ranging from the large, multi-phased Wickhurst Green scheme at Broadbridge Heath, together with Kilnwood Vale, and land east of the A24 Worthing Road schemes; to specific smaller-scale development sites such as the RMC Engineering Services Ltd Workshops (Washington Pulborough), the Novartis Pharmaceuticals site (Horsham), various sites in Billinghamurst, and Itchingfield County Primary School (Barns Green).
- 3.43 Alongside such schemes, the District has seen a substantial number of small residential developments.
- 3.44 Overall, completions supply in Horsham is attributed to new build activity as opposed to significant levels of housing arising from change of use (and Permitted Development Rights) in contrast to the position evidenced in Crawley. In addition, a total of 65 flats for pensioners were completed and counted within the overall total of flat completions in the annual monitoring period to end March 2016.

Density and Market Mix

- 3.45 The analysis of recent residential completions in the District confirms a lower level of scheme density closer to **30-40 dph** (in contrast to the higher average densities found in Crawley). This is not, however, surprising given the extensive rural nature of much of the District outside the main urban settlements.
- 3.46 Details of the density and market housing mix of recent completions in the District are attached at **Appendix A1** and the findings can be summarised as follows:
- Many of the market housing completions have a density in the range **25 – 45 dph**, with schemes typically offering an average density of around **30-**

35 dph. This evidence indicates the importance of the considerations of scale and character of surrounding uses.

- A number of larger housing development schemes, such as that at Wickhurst Green, are influenced by site specific density guidelines to ensure an appropriate balance that ensures an efficient use of land alongside design and amenity considerations.
- Analysis of the mix and type of open market completions in Horsham confirms:
 - open market flatted development is dominated by two bed flats, but with some larger three bed flats. The number of one bed flats is approximately 25% of the number of two bed flats developed, representing a significant element in the overall provision of one bed dwellings.
 - within larger housing schemes, there is increasing evidence of Flats Over Garages (FOG's) that increase the overall density of development on such sites.
 - there is evidence of an increase in two and three bed terrace development alongside the traditional semi-detached and detached forms of house type. However, the new build housing stock is focused towards three bed (and to a lesser extent) four bed semi-detached properties. There is virtually no new one bed housing.
 - there is also evidence of the continued provision of larger market properties, particularly for detached four and five bed houses, and also some six bed houses. While these larger properties have implications for overall development densities there is a need to offer larger properties to meet existing (and future market needs).

Previous Evidence on the Market Mix in Crawley and Horsham

- 3.47 The analyses of existing and current market mix, sizes and types of development set out in the preceding sub-sections can be aligned to the findings of the Strategic Housing Market Assessments for Northern West Sussex that have examined the provision and needs for market housing over a number of years.
- 3.48 The *Northern West Sussex SHMA* (2009 and update in 2012) both considered the existing characteristics of market housing that exist and which would be needed in future, in the HMA area.
- 3.49 Section 7 of the 2009 NWS SHMA characterised the overall housing market as focused towards larger, more expensive properties and noted that while two and three bedroom properties are most abundant, there are a higher proportion of larger dwellings (four+ bedrooms) relative to regional and national profiles.
- 3.50 Crawley Borough was characterised at paragraph 7.6 in the 2009 NWS SHMA as having a housing offer biased towards three bedroom terraced properties and flats overall. Paragraph 7.13 identified that there had been a shift towards the delivery of smaller dwellings in the past decade, with one and two

bedroom dwellings rising as a proportion of total completions. The SHMA highlighted that this was most notable in Crawley.

- 3.51 For Horsham District, the 2009 NWS SHMA (paragraph 7.7) noted that the housing offer is characterised by a high proportion of larger, detached and semi-detached properties (>60% of stock) which attracts middle-aged families with children.
- 3.52 The 2009 NWS SHMA concluded that there needed to be a greater mix of housing delivered. In Section 8 (8.108, et seq.) the SHMA identified that market signals emphasise a focus of demand for two and three/four bedroom housing. The SHMA also noted that there are plans for significant levels of development in town centre areas to expand the 'urban living' (flatted and mixed use developments) in such locations. Opportunities for infilling of smaller properties in Crawley were also identified in the SHMA.
- 3.53 Finally, the 2009 NWS SHMA concluded that there is a role for the proposed urban extensions to play in providing larger and higher value housing in support of the Gatwick Diamond economy (and as paragraph 8.110 noted, to redress the current imbalance of housing offer in Crawley).
- 3.54 The conclusion from the 2009 NWS SHMA (at paragraph 8.112 and in the overall conclusions in Section 12) was that the market was predominantly for houses, rather than flatted stock. The market for flats has developed over time and (at the time of the 2009 SHMA was considered to be facing a challenging market downturn). The role of flatted developments in the future housing mix and particularly as part of regeneration initiatives focused on the HMA's various town centres was supported but not forming the principal type of future housing stock.
- 3.55 The recommendations of the 2009 NWS SMA set out in Section 12 included R.29 (Provision of Market Housing) which emphasised:
- Broadening the mix towards family focused housing delivered in infill developments, new urban extensions, rural settlement expansion and town centre regeneration;
 - Developing an urban living offer through a continued focus on regeneration and higher density development in the town centres. The recommendation highlighted the need to consider the opportunities to create family sized housing as well as flatted developments.
 - Phasing market housing to create stable populations.
- 3.56 The 2012 NWS SHMA Update reiterated and reaffirmed the conclusions on existing and future housing mix and type characteristics. This was not unsurprising given the relatively short period between the completion of the 2009 work and its update in 2012.

Existing Market Gaps and Deficiencies

- 3.57 The analyses set out above offers a clear picture of the current situation in both Crawley Borough and Horsham District concerning the tenure mix, size, household composition and age cohort profiles for all housing stock and specifically for the market sectors (owner occupied and private rental).

3.58 The assessment highlights a number of clear characteristics currently evident in each local authority area.

Crawley Borough

- An increase in the overall dwelling stock between 2001 and 2011, but a shifting balance from owner-occupation towards greater levels of private rental within the overall tenure mix. This follows wider, national trends evidenced in the NWS SHMA and updates;
- A drive towards smaller dwelling units (one and two-bed size in particular) specifically driven from the implementation of Permitted Development Rights office to residential conversions in Crawley town centre;
- An absolute and proportional decline in terraced housing stock coupled with a significant increase in flatted apartments stock;
- A marginal decline in the number of detached properties likely due to conversion through sub-division to smaller flats and apartments;
- Three bedroom size stock dominates the existing provision (48% of total stock), with two and one bedroom size stock also comprising significant components of overall provision (23% and 13% of stock respectively);
- A smaller proportion of larger four and five+ bed size dwellings which together represent only 15% of the total stock;
- There are a similar number of owner occupier households in the one person household, family without children, and family with dependent children categories;
- The largest overall category is the three bedroom owner-occupier grouping, followed by four bedroom owner occupier and two bedroom owner-occupiers. There is a much lower level of one bedroom owner-occupied properties;
- The 35-39 age group is the largest proportion of owner-occupiers, followed closely by the 50 to 64 age group. These age groups make-up almost two thirds of the owner-occupier market;
- The private rented sector is characterised by the 25-34 age group, although closely followed by the 35-49 age group category.

3.59 Crawley's existing market mix remains skewed towards three-bedroom size properties which have been characteristic of the Borough's housing stock for many years.

3.60 There is, however, a shift emerging with a rise in the provision of smaller one and two bed size dwellings through flatted development arising from PDR conversions. These are largely concentrated in Crawley town centre and while this trend has introduced some wider choice and greater size mix, there remains a gap in terms of ensuring that there is a broader choice of market accommodation available in the town centre and in locations that are easily accessible to the centre.

3.61 As the NWS SHMA and its updates identified, there also remains a need to spread the range of market housing sizes and to offer a wider choice of types of stock given the existing market mix characteristics.

- 3.62 In addition, the relative lack of larger four and five bedroom properties limits the choice and flexibility for larger households wishing to live in the District. While there is some evidence of recent, larger size housing completions, the need for larger stock remains. This remains a key issue as identified in the NWS SHMA, particularly in relation to ensuring Crawley's role in supporting the wider Gatwick Diamond and Coast to Capital Local Enterprise Partnership economic objectives.
- 3.63 A further existing gap or deficiency (and one that will become more important over time) is the availability of market housing that effectively meets the needs of an increasingly older population and especially where many of those age cohorts are already owner occupiers and have existing housing wealth. The age cohort analysis of existing tenures matched to the sizes of property for each age group shows a need to address this gap and as the following section of the report highlights this will become more significant in the period to 2031.

Horsham District

- The proportion of owner-occupied tenure dwellings has reduced relative to the total stock (which has increased over the 2001 – 2011 period);
 - A rise in the extent of the private rental sector with an increase in the total number of such dwellings;
 - A rise in the level of flatted apartments in the housing stock;
 - The proportionate share of other types of housing has remained broadly unchanged although there are small increases in the total stock of detached, semi-detached and terraced stock;
 - Three bedroom size stock is the predominant size in Horsham (37% of total stock). There are significant levels of two and four bedroom sized properties (24% and 21% respectively); and a significant level of stock is five+ bedroom size (7%);
 - The largest categories of owner occupiers are in the one person household, family without children, and family with dependent children, although the family with no children is the largest individual category in this tenure;
 - The largest overall category is the three bedroom owner-occupier grouping, followed by four bedroom owner occupier and two bedroom owner-occupiers, and then the five bedroom or more owner-occupier;
 - There is a much lower level of one bedroom owner-occupied properties;
 - The 50 to 64 age group is the largest proportion of owner-occupiers, followed closely by the 35 to 49 age group. These age groups make-up almost two thirds of the owner-occupier market. There is also an appreciable proportion of people aged above 64 in the owner-occupier market;
 - The private rented sector has a particular focus on the 35-49 age group, followed by the 25-34 age group category.
- 3.64 While there has been a shift towards more stock being within the private rental tenure there remains a pre-dominance of owner-occupied and larger housing in the District.

- 3.65 The market housing offer has therefore evolved over the decade to 2011 especially with an increase in flatted apartments that has driven growth in smaller accommodation (particularly two-bed sized market stock). There is evidence of some PDR office to residential conversions that have increased the flatted stock in town centre locations but this has not been at the scale witnessed in Crawley to date.
- 3.66 Evident market gaps and deficiencies are therefore ensuring there is an adequate provision of smaller stock, including one-bed size dwellings as well as continuing to support two-bed size market provision. This is to support the existing household composition in the District which shows a strong level of one person and two person (no dependent children) households.
- 3.67 In addition, and similar to Crawley Borough, there is a need now (and expected in future as Section 4 details) for market housing that adequately meets the needs of an aging population and particularly one that includes many existing households with significant housing equity. Older age cohorts are already the largest proportion of owner occupiers and this is expected to increase.
- 3.68 The market mix in Horsham District is more broadly based than that in Crawley and it is not therefore immediately clear from the existing situation where there are significant market housing deficiencies. The position is therefore more nuanced in Horsham than perhaps seen in Crawley.
- 3.69 Nevertheless, there are existing characteristics and trends evident that indicate how the market housing mix might need to be refined in future.

4. FUTURE MARKET HOUSING MIX

Introduction

- 4.1 Establishing the likely future market housing mix is an important consideration in understanding the potential housing needs of an area. The future mix is related to the identified scale and needs of future households as well as drawing on an understanding of the existing market mix as Section 3 has set out previously.
- 4.2 The future market housing mix for both Crawley and for Horsham is established in this section of the report.

Approach

- 4.3 The approach to assessing the future mix involves the following stages of analysis:
 - **examination of household projections** - using both CLG 2012 and CLG 2014-based household projections over the period 2011, 2016 and 2031. This was used to assess overall household change in Crawley and Horsham across these different time periods. An assumed vacancy rate (based on the 2011 Census) was applied to this household growth to indicate the potential change in the total stock of dwellings required.
 - **identification of the change in households and age cohorts** - the change in the total number of households in each age cohort was used to identify the age group structure in Crawley and Horsham between 2011, 2016 and 2031.
 - **assessment of future tenures by age group** - 2011 Census data was used to identify the tenure breakdown between age groups in Crawley and Horsham. This identified that 60% of household in Crawley were owner occupied, 24% social rented and 16% private rented. In Horsham the figures were 75% of household owner occupied, 12% social rented and 13% private rented. These ratios were assumed to remain over the period 2011 to 2031 for modelling purposes.
 - **distribution of households by tenure by age group** - the tenure split was applied to the total number of households in age group at 2016 and 2031 to identify the distribution of household by tenure by age group.
 - **household structural changes** - the change in the structure of household types (e.g. 'one person household: male' etc.) between the assessment periods by age group was identified. This was used as the basis of distributing the number of households in each tenure category by each age group category in 2016 and 2031.
 - **household type by bedroom size** - the likely distribution of each household type by bedroom size was assessed. This varied between the

owner occupied, social rented and private sector market to reflect their different characteristics. The outcome of this analysis provides the likely distribution of housing change between 2016 and 2031 by tenure and by dwelling size.

- 4.4 The following sub-sections set out the results of the various analyses.

Overall Household Formation and Change

- 4.5 In order to understand the likely future market housing mix, it is essential to examine the level and characteristics of household change and formation.
- 4.6 Table 4.1 establishes the overall pattern of household change for both Crawley and Horsham in the period 2016 to 2031. The analysis uses the CLG 2014-based Household Projections (published in July 2016) as they represent the most recent official projections.
- 4.7 The table shows a total increase of **8,631** households in Crawley (noting that Crawley’s adopted Local Plan makes new housing provision for around 50% of the total new households in the Borough, with the remainder needs housing outside the Borough) and **9,049** households in Horsham between 2016 and 2031; equating to **575** and **603** households per annum increase respectively.

Table 4.1: Household Change in Crawley Borough and Horsham District, 2016 - 2031

	Crawley	Horsham
	No. of Households	No. of Households
2011	42,873	55,036
2016	45,587	57,805
2031	54,218	66,854
2016-31	8,631	9,049
2016-31 (p.a.)	575	603
Assumed Vacancy Rate	585	627

Source: CLG 2014-based Household Projections and CCL calculation

Household Change by Age Cohort

- 4.8 Having established the total household growth, Tables 4.2 and 4.3 set out the household change by age cohort over the period 2016 to 2031.

Crawley

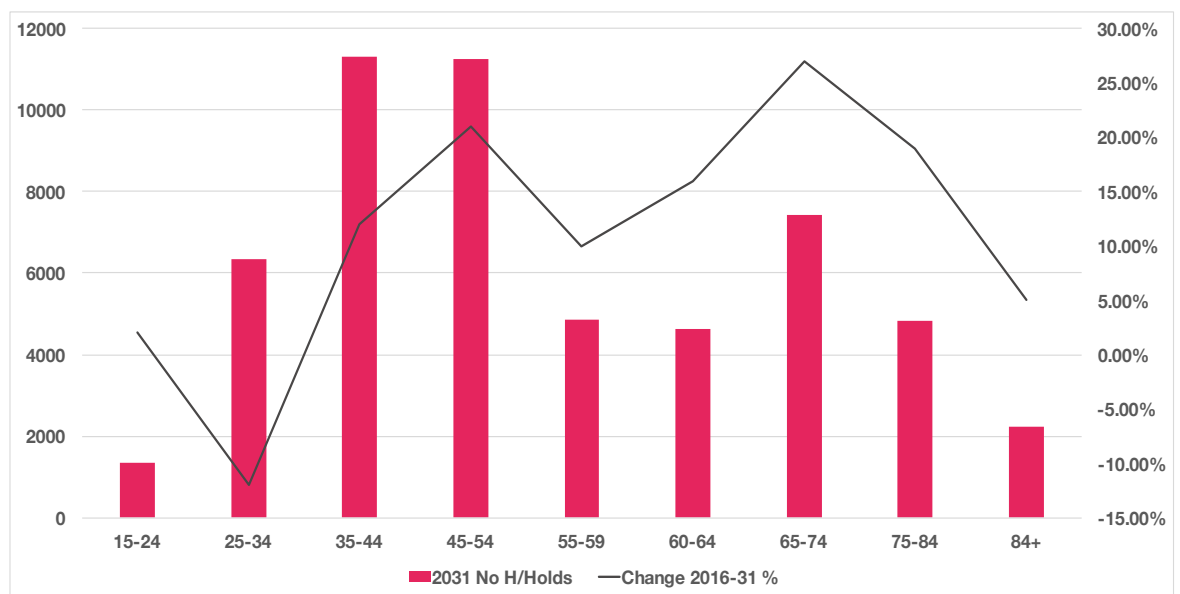
- 4.9 Household change by age group for Crawley Borough is shown in Table 4.2. The greatest projected changes are to the 45-54 cohort (**+21%** over the period) and to the 65-74 cohort (**+27%**), with significant increases projected in the 75-84 age cohort (**+19%**) and the 60-64 year cohort (**+16%**).
- 4.10 The projected household changes also identify a reduction in the 25-34 age cohort (**-12%**) over the period to 2031.

- 4.11 The household change is therefore characterised by an absolute increase in all age groups (other than 25-34 years) but with an increasingly aged household population particularly for those in pensionable age cohorts (65 years and above).

Table 4.2: Household Change by Age Cohort, Crawley 2016 – 2031 (CLG 2014-based)

Age Group	2016		2031		Change 2016-2031	
	No H/Holds	%	No H/Holds	%	No H/Holds	%
15-24	1,213	3%	1,351	2%	138	2%
25-34	7,420	16%	6,347	12%	-1,073	-12%
35-44	10,278	23%	11,322	21%	1,044	12%
45-54	9,402	21%	11,237	21%	1,835	21%
55-59	4,024	9%	4,849	9%	825	10%
60-64	3,232	7%	4,620	9%	1,388	16%
65-74	5,076	11%	7,425	14%	2,349	27%
75-84	3,173	7%	4,836	9%	1,663	19%
84+	1,769	4%	2,231	4%	462	5%
Total	45,587	100%	54,218	100%	8,631	100%

Source: CLG 2014-based Household Projections and CCL calculation



Horsham

- 4.12 Table 4.3 looks at the composition of household changes by age cohort in a similar manner to Table 4.2 for Crawley.
- 4.13 The analysis indicates very significant projected increases in more elderly age groups with **52%** of the total household growth occurring in the 60+ years age groups. There are projected reductions in some of the younger age cohort

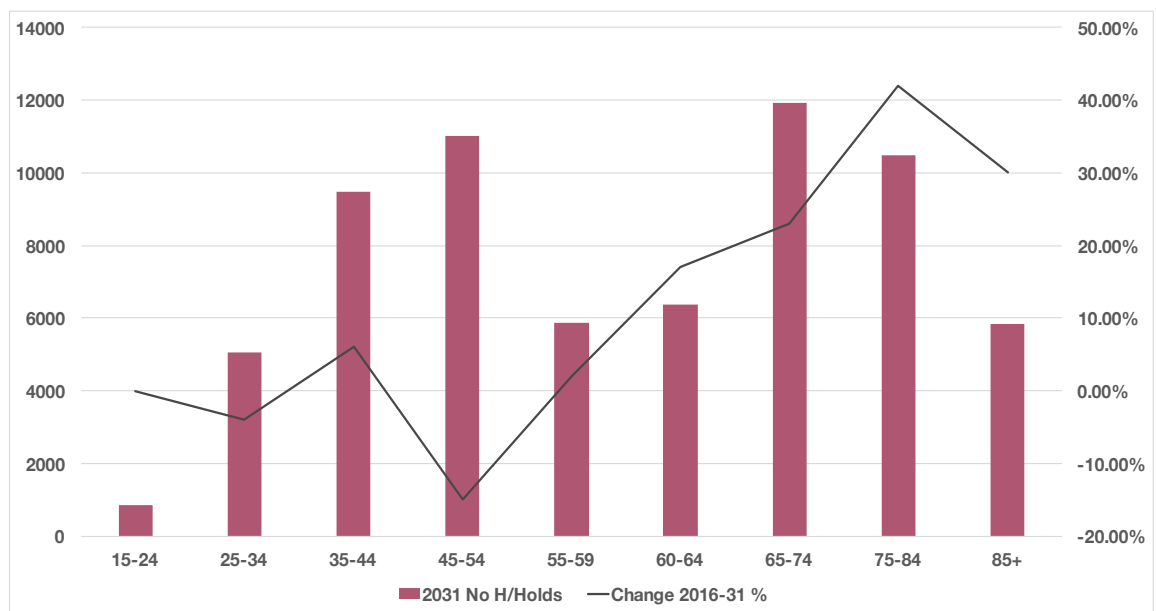
groups including the 25-34 years (-4% over the period) and 45-54 years group (-15%).

- 4.14 In summary, the household projections for Horsham show that by 2031 the growth in households will largely be in older age groups with limited growth in younger and working age cohorts. There will, however, remain significant, absolute numbers of households in younger age groups.

Table 4.3: Household Change by Age Cohort, Horsham 2016 – 2031 (CLG 2014-based)

	2016		2031		Change 2016-2031	
	No H/Holds	%	No H/Holds	%	No H/Holds	%
15-24	879	2%	847	1%	-32	0%
25-34	5,396	9%	5,059	8%	-337	-4%
35-44	8,942	15%	9,492	14%	550	6%
45-54	12,414	21%	11,012	16%	-1,402	-15%
55-59	5,691	10%	5,855	9%	164	2%
60-64	4,847	8%	6,369	10%	1,522	17%
65-74	9,835	17%	11,911	18%	2,076	23%
75-84	6,657	12%	10,475	16%	3,818	42%
85+	3,143	5%	5,835	9%	2,692	30%
Total	57,804	100%	66,855	100%	9,051	100%

Source: CLG 2014-based Household Projections and CCL calculation



Tenure Distribution

- 4.15 Having established the potential scale of the future households and the division by age cohorts, it is then possible to consider the distribution of the

future households in terms of the potential tenure split between owner occupation/shared ownership, private rental and social rental tenures.

- 4.16 For the purposes of these projections, the projected tenure distribution by age group is based on the distribution identified in the 2011 Census and applied to the CLG 2014-based Household Projections to derive the position in 2031.
- 4.17 The tenure splits at the 2011 Census for Crawley and for Horsham are different from each other and are described in the following sub-sections accordingly.
- 4.18 For the purposes of this report, the focus is on the market housing mix and therefore while the analysis has considered the division across tenures, the social rented tenure projections are included for reference only.

Crawley

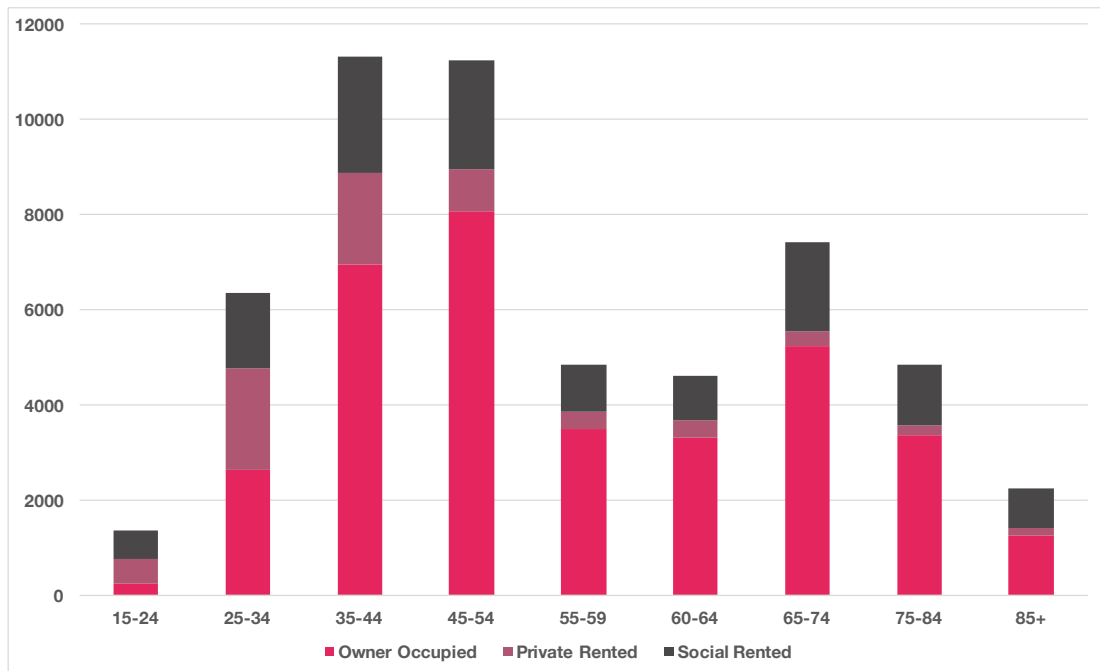
- 4.19 Table 4.4 looks at the potential tenure distribution in Crawley by age cohort in 2031. The table shows the broad splits between owner occupation/shared ownership, private rental and social rented markets. The table highlights the total tenure distributions, while Table 4.5 below sets out the tenure change by age group from 2016 to 2031.
- 4.20 Table 4.4 highlights the balance of tenure distribution towards owner occupation/shared ownership in all age groups, but with an emphasis on the older age cohorts. This is unsurprising given the opportunity to acquire housing equity and sufficient household incomes to support ownership in the older working age and pensionable age groups.

Table 4.4: Tenure Distribution by Age Group, Crawley at 2031

Age Group	2031	Owner Occupied	Private Rented	Social Rented
15-24	1,351	254	506	592
25-34	6,347	2,643	2,125	1,580
35-44	11,322	6,937	1,920	2,465
45-54	11,237	8,059	893	2,285
55-59	4,849	3,478	385	986
60-64	4,620	3,313	367	940
65-74	7,425	5,237	297	1,890
75-84	4,836	3,370	200	1,266
85+	2,231	1,242	177	813
Total	54,218	34,532	6,869	12,817

Source: CCL calculation

Note: 55-59 and 60-64 age groups assumed to have the same tenure split as 50-64 age group from Census 2011 position



- 4.21 In Table 4.5 the relative change (growth or reduction) in the number of households in the various tenures by 2031 is set out. Growth in the owner occupied/shared ownership tenure is greatest for the older age cohorts (particularly the 65-74 and 75-84 year groups). Growth is experienced in all other cohorts for owner occupation/shared ownership as well, other than the 25-34 age group where a modest decrease of **-447** households is projected (this accords with the reduction in total households in this age group as shown in Table 4.2 above).
- 4.22 Turning to the private rental market, the household projections show the relative increases in the number of households renting privately, with absolute growth most focused in the working age cohorts (particularly 35-44; 45-54 and 55-59 years).

Table 4.5: Tenure Distribution by Age Group, Crawley (Change 2016 to 2031)

Age Group	2031	Owner Occupied	Private Rented	Social Rented
15-24	138	26	52	60
25-34	-1,073	-447	-359	-267
35-44	1,044	640	177	227
45-54	1,835	1,316	146	373
55-59	825	592	66	168
60-64	1,388	995	110	282
65-74	2,349	1,657	94	598
75-84	1,663	1,159	69	435
85+	462	257	37	168
Total	8,631	6,195	390	2,046

Source: CCL calculation

Horsham

- 4.23 The distribution of tenures projected by age group in Horsham District is shown in Table 4.6 and the change from 2016 to 2031 is set out at Table 4.7 below.
- 4.24 The projection for Horsham was made on the same basis as that for Crawley, but using the 2011 Census tenure split of 75% owner occupied/shared ownership; 12% social rent; and 13% private rental.
- 4.25 The analysis signals the continuing presence and growth of owner occupation and shared ownership, particularly in the older age cohorts. Indeed, some of the largest levels of change in the owner occupied tenure are evident in the older age cohorts (60-64 years and older).

Table 4.6: Tenure Distribution by Age Group, Horsham at 2031

Age Group	2031	Owner Occupied	Private Rented	Social Rented
15-24	847	141	397	309
25-34	5,059	2,417	1,811	832
35-44	9,492	6,837	1,579	1,077
45-54	11,012	9,189	948	875
55-59	5,855	4,886	504	465
60-64	6,369	5,315	548	506
65-74	11,911	10,021	645	1,245
75-84	10,475	8,590	573	1,313
85+	5,835	4,328	444	1,062
Total	66,855	51,722	7,449	7,684

Source: CCL calculation

Note: 55-59 and 60-64 age groups assumed to have the same tenure split as 50-64 age group from Census 2011 position

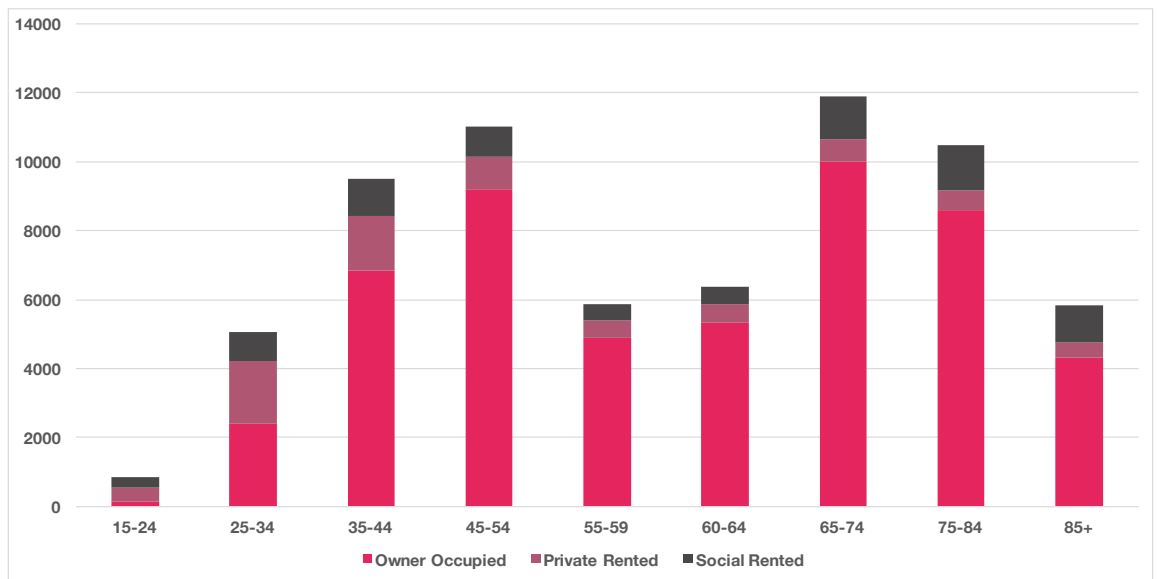


Table 4.7: Tenure Distribution by Age Group, Horsham (Change 2016 to 2031)

Age Group	2031	Owner Occupied	Private Rented	Social Rented
15-24	-32	-5	-15	-12
25-34	-337	-161	-121	-55
35-44	550	396	91	62
45-54	-1,402	-1,170	-121	-111
55-59	164	137	14	13
60-64	1,522	1,270	131	121
65-74	2,076	1,747	113	217
75-84	3,818	3,131	209	478
85+	2,692	1,997	205	490
Total	9,051	7,341	507	1,203

Source: CCL calculation

Future Housing Mix

- 4.26 From an understanding of the projected household growth and the composition of this in terms of both age structure and tenure status, it is then possible to examine the likely tenure distribution by dwelling size (with the number of bedrooms taken to represent the dwelling size).
- 4.27 The overall split in households in each tenure is drawn from the analyses shown above and is based on an overall forward projection in accordance with the position recorded in the 2011 Census of:
- **Crawley:** 60% owner occupation/shared ownership; 24% social rent and 16% private rent; and

- **Horsham: 75% owner occupation/shared ownership; 12% social rent; and 13% private rent.**

- 4.28 These tenure splits are projected forward on the basis that there is no Government ‘policy on’ change that effectively dampens or drives demand or access to rental or affordable products at the expense of home ownership (including shared ownership). The tenure splits projected are therefore to be considered as a base reference case.
- 4.29 In order to achieve this, the components of the 2014-based CLG household projections have been examined in greater detail. The household projections can be divided into a series of different household types defined by CLG (for example one person households; couple with no children; households with dependent children; etc.).
- 4.30 This detailed breakdown of the component household types is then matched to the likely size of property (in terms of number of bedrooms) that would be required to house each type of household. This matrix approach therefore aligns household types to the potential size of dwelling needed.
- 4.31 While assumptions have to be made in terms of the likely size of households and the number of bedrooms each would require, this method does allow a more detailed projection of the potential size needs matched against the types of households that are projected.

Crawley Dwelling Size by Tenure

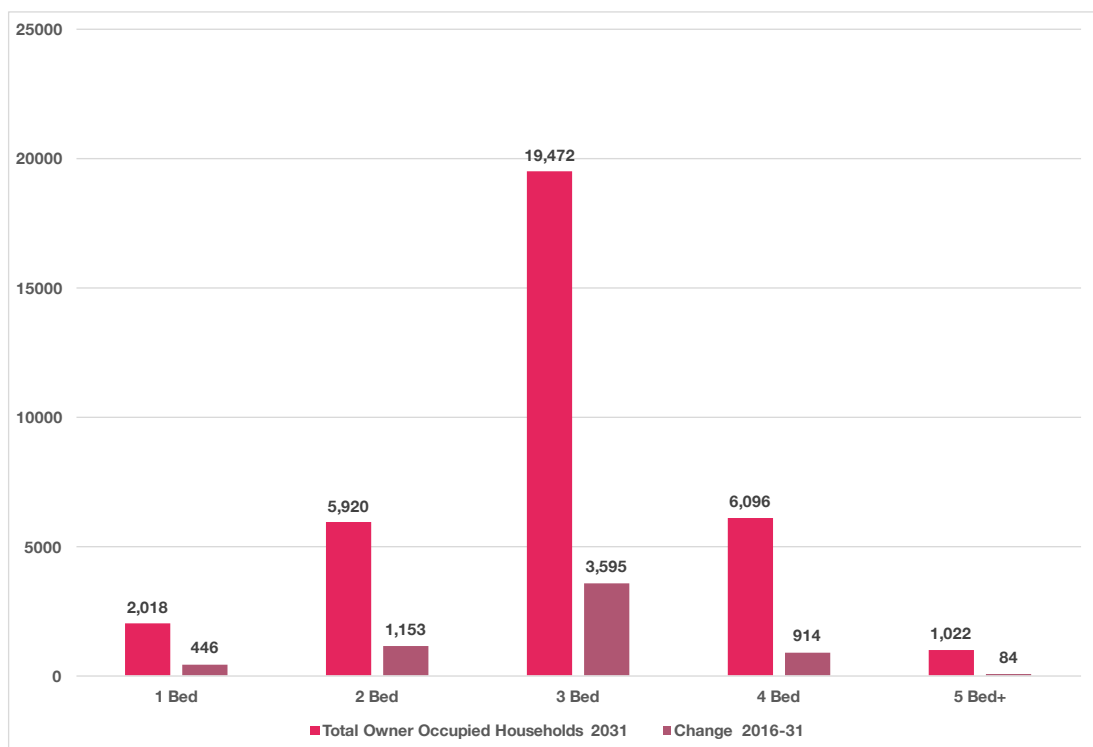
- 4.32 In Table 4.8 the future dwelling size requirements for the projected owner occupied/shared ownership households are shown together with the projected increase by bedroom size over the 2016 to 2031 period.

Table 4.8 offers a view of the scale of household growth in the owner occupier market and with a detailed distribution of dwelling sizes by age cohort and household type, results in a clear need for three-bedroom properties (**+3,595**) and also significant growth in smaller two-bedroom property (**+446** and **+1,153** respectively).

Table 4.8: Future Dwelling Size - Owner Occupied Market, Crawley, 2031

Owner Occupied	Crawley		
	2016	2031	2016-31
1 Bed	1,572	2,018	446
2 Bed	4,767	5,920	1,153
3 Bed	15,877	19,472	3,595
4 Bed	5,182	6,096	914
5 Bed+	938	1,022	84
Total	28,337	34,529	6,192

Source: CCL calculation



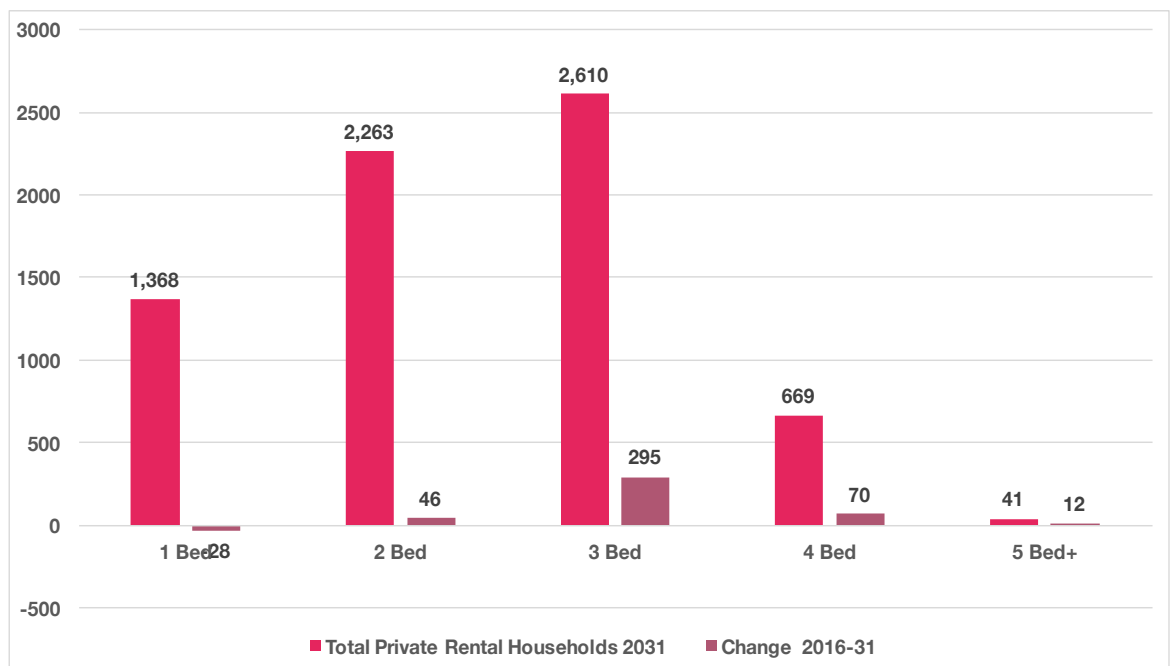
- 4.33 The private rental market is assessed in Table 4.9 which shows significant growth in the need for three and four bedroom properties to meet projected household types.

Table 4.9 identifies that one and two-bedroom households will remain critical in absolute terms and specifically reflect a rise in smaller households (particularly those where there are no children or other dependents).

Table 4.9: Future Dwelling Size – Private Rental Market, Crawley, 2031

Private Rented	Crawley		
	2016	2031	2016-31
1 Bed	1,396	1,368	-28
2 Bed	2,217	2,263	46
3 Bed	2,316	2,610	295
4 Bed	600	669	70
5 Bed+	28	41	12
Total	6,556	6,951	395

Source: CCL calculation



Horsham Dwelling Size by Tenure

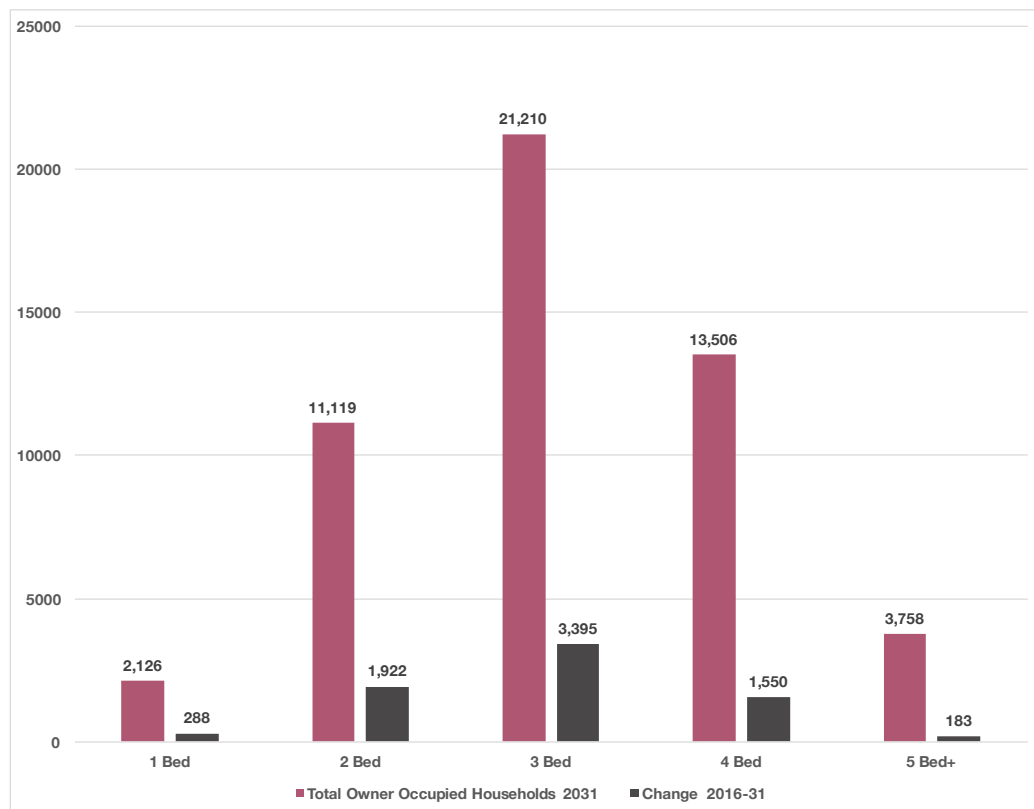
- 4.34 Future dwelling sizes for owner occupier and private rental markets in Horsham are detailed in Tables 4.10 and 4.11 below and described in the highlighted text boxes.

The greatest levels of growth in owner occupation and shared ownership tenure are projected to be for two and three-bedroom sized dwellings (+1,922 and +3,395 household growth respectively). Significant increases in the level of four-bedroom housing (+1,550) is also projected based on the future household types forecast. More modest growth in the need for one-bed sized market housing is projected (+288).

Table 4.10: Future Dwelling Size – Owner Occupied Market, Horsham 2031

Owner Occupied	Horsham		
	2016	2031	2016-31
1 Bed	1,838	2,126	288
2 Bed	9,197	11,119	1,922
3 Bed	17,815	21,210	3,395
4 Bed	11,956	13,506	1,550
5 Bed+	3,575	3,758	183
Total	44,381	51,719	7,338

Source: CCL calculation

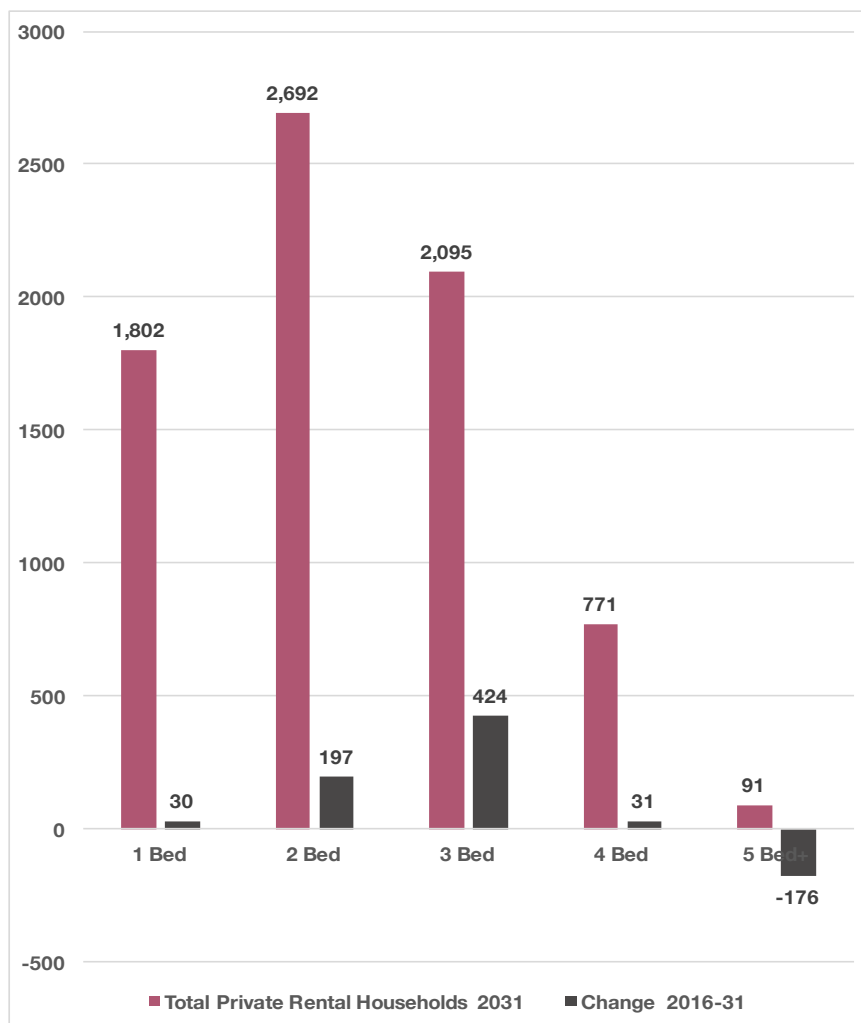


Turning to the private rental market, Table 4.11 examines the dwelling size needs for this sector. The table highlights the scale of the need in 2031, totalling some 7,450 households (across all bedroom sizes) but also shows clearly the balance towards growth of the two and three-bedroom private rental market. Similar to Crawley, this is anticipated as a result of the component household types that make up the overall CLG 2014-based future household projection.

Table 4.11: Future Dwelling Size – Private Rental Market, Horsham, 2031

Private Rented	Horsham		
	2016	2031	2016-31
1 Bed	1,771	1,802	30
2 Bed	2,494	2,692	197
3 Bed	1,671	2,095	424
4 Bed	739	771	31
5 Bed+	267	91	-176
Total	6,942	7,450	507

Source: CCL calculation



5. CONCLUSIONS & RECOMMENDATIONS

Introduction

- 5.1 This section of the report brings together the analysis and findings set out previously. It provides a brief summary of the main findings and then draws relevant conclusions and recommendations for your consideration.

Existing Market Mix

- 5.2 The analyses of existing and current market mix, sizes and types of development set out in Section 3 can be aligned to the findings of the Strategic Housing Market Assessments for Northern West Sussex that have examined the provision and needs for market housing over a number of years.
- 5.3 A clear and consistent picture of the current market mix in both Crawley and Horsham can be seen with respect to the tenure mix, size of stock, household composition and age structure in both local authority areas.
- 5.4 Section 3 summarised the existing position for each authority, finding:

Crawley Borough:

- the majority of recent completions in the Borough have a density in the range of 40-60 dwellings per hectare;
- the existing market mix remains skewed towards three-bed sized properties overall;
- there has been a notable shift towards the provision of smaller (one and two-bed dwellings), particularly driven by the effects of Permitted Development Rights conversions of B1 use class office space to C3 residential use via the Prior Approval process;
- there remain gaps and deficiencies in the existing market mix with a need for:
 - smaller sized market dwellings (one and two bed);
 - a wider choice of family-oriented and sized market housing, particularly in Crawley Town Centre and at other sustainable, accessible locations;
 - a wider choice and flexibility of market housing sizes due to the relative lack of larger four+ bed market dwellings;
- there is already a gap emerging in terms of the availability of market housing to meet the needs of existing, older age groups, many of whom are already owner occupiers. This is especially important when considered in the context of future household growth projections which indicate a significant growth in older age cohorts.

Horsham District

- significant gaps and deficiencies in the existing mix are not immediately apparent as there is a good spread of market housing choice in the District at present. There is however a need to refine the market mix to ensure that choice and access to appropriate housing remains in future;
- many of the market housing completions have a density in the range 25 – 45 dph, with schemes typically offering an average density of around 30-35 dph. This evidence indicates the importance of the considerations of scale and character of surrounding uses;
- the broader spread of existing market mix conceals a pre-dominance of three-bed sized properties and significant levels of four and five+ bedroom properties;
- there has been a shift towards the provision of smaller (two-bed) dwellings in the period 2001 – 2011 and through more recent completions. This has been supported by greater levels of completions in flatted apartment stock. At the current time, analysis of completions indicates that this has not been driven particularly by Permitted Development Rights conversions of former office stock. A rise in the number of conversions is anticipated for the future in Horsham Town Centre especially drawing on current prior approval and application information;
- there is a need therefore to maintain a spread of choice in market housing sizes, especially for smaller units (one and two bed);
- similar to Crawley Borough, there is a current (and future) need to ensure that the market housing needs of older age groups are met. This is critical given the large number of existing, older households who are owner occupiers and the future projected older age population in the District.

Future Market Mix

Future Households

- 5.5 Section 4 of the Report considered the scale and composition of projected future households for Crawley and Horsham over the period 2016 to 2031 based on the CLG 2014-based Household Projections (released in July 2015).
- 5.6 Both local authorities are projected to see significant household growth across most age cohorts and the analysis in Section 4 shows how the household growth is expected to change over time.

Age Structure and Market Housing

- 5.7 In both areas there is projected to be a very substantial increase in older age cohorts (65+) adding to an already ageing resident population in both authorities now. The growth in older age group households is particularly

marked in Horsham with pensionable age groups representing more than **43%** of total households by 2031 (**27%** in Crawley by comparison).

- 5.8 For the purposes of future projections, the projected tenure distribution by age group is based on the distribution identified in the 2011 Census and applied to the CLG 2014-based Household Projections to derive the position in 2031.
- 5.9 In both Crawley and Horsham, the analysis signalled the continuing presence and growth of owner occupation and shared ownership, particularly in the older age cohorts. Indeed, some of the largest levels of change in the owner occupied tenure are evident in the older age cohorts (60-64 years and older). Further household growth is expected in households seeking private rental accommodation.
- 5.10 From an understanding of the projected household growth and the composition of this in terms of both age structure and tenure status, it was then possible to examine the likely market tenure distribution (i.e owner occupation/shared ownership and private rental) by dwelling size (with the number of bedrooms taken to represent the dwelling size).
- 5.11 The components of the 2014-based CLG household projections were examined in greater detail and divided into a series of different household types (for example one person households; couple with no children; households with dependent children; etc.).
- 5.12 The detailed breakdown of the component household types was matched to the likely size of dwelling (in terms of number of bedrooms) that would be required to house each type of household. This matrix approach therefore aligned household types to the potential size of dwelling needed.

Establishing a Future Market Size Mix

- 5.13 To derive a future recommended market housing mix it is necessary to synthesise the position in terms of gaps and deficiencies in the existing mix and supply (as Section 3 set out) together with the characteristics of needs arising in future households (as concluded in Section 4).
- 5.14 In doing so, it is also important to consider the broad urban and rural context of both Crawley and Horsham as the future market mix needs to reflect the variations evident across both local authority areas. Such an approach accords with the evidence from the earlier Northern West SHMA work which looked in greater detail at the various housing markets and locational differences across the HMA.

Crawley Borough

- 5.15 Crawley can be divided into two broad areas: Crawley Town Centre; and the wider borough outside the centre.
- 5.16 The wider borough area continues to need to offer a wide mix of smaller and larger market dwellings to ensure a breadth of choice. It is considered that current market delivery outside of the Town Centre appears to largely be meeting this overall mix.

- 5.17 Crawley Town Centre is an important focus for regeneration and growth. Evidence of existing and current market housing developments in the central area have shown a significant growth in smaller (one and two-bed flatted dwellings). While this is welcomed, there is a clear need to ensure balance and flexibility in Crawley's town centre housing market, particularly securing some larger accommodation that broadens the choice which will require three-bedroom and larger properties.
- 5.18 It is not desirable for the Town Centre area to be dominated by studio, one and two-bed dwellings at the expense of a broader market mix. Without a wider mix there is a risk that the Town Centre will be dominated by a narrow range of small, flatted accommodation with little market choice and adverse implications for wider place-making and socially sustainable development.
- 5.19 While revealed market demand in the Town Centre now tends towards reinforcing the one and two-bed mix it is considered that there will be latent or hidden demand for larger properties in the Town Centre (as well as more widely in Crawley Borough) given the projected future household composition in Crawley and on the basis that there is little three+ bed accommodation available for purchase in the Town Centre which, if there were such stock available, might help drive future market demand for larger dwellings.

Horsham District

- 5.20 For Horsham District, similar to Crawley, there is a broad division of market characteristics between Horsham town itself and the wider, more rural, area of the District (including the smaller towns of Billingshurst, Henfield, Pulborough, Storrington and Steyning).
- 5.21 Much of the largest housing stock in the District is provided in the smaller settlements and in rural areas while Horsham town has tended to offer much of the three-bed stock.
- 5.22 With an increasing level of new one and two-bedroom market stock coming through the planning pipeline now in Horsham town, but less so outside of this area, there is need to ensure that market housing choice is supported and refined across the District. This includes encouraging some smaller sized stock to balance the market mix in more rural areas and smaller settlements (to support issues of rural affordability and rural economy identified previously in the Northern West SHMA); and to allow for smaller market accommodation to come forward within Horsham town itself.

Recommendations

Recommendation R.1: The Recommended Future Market and Private Rental Mix

- 5.23 Tables 5.1 to 5.4 below establish the recommended future market housing mixes for each area. The mixes proposed respond to both existing and future market signals and characteristics as well as reflecting the spatial vision and objectives of both local authorities to regenerate and growth the urban centres, support smaller settlements and to provide housing choice in rural and urban locations.

5.24 The market mixes are expressed in broad proportions as they are not intended to be entirely prescriptive as there will be site specific considerations, not least development viability, that will affect the precise market mix to be secured in individual cases. Nevertheless, the mixes proposed are established to give a clear indication of both local authorities expected market mix in bed-space sizes and to ensure that there is sufficient market housing choice, balance and flexibility available.

Table 5.1: Crawley Borough – Overall Future Market and Private Rental Mix

Dwelling Size	Owner Occupier Market Housing	Private Rental Market Housing
1 Bed	10%	5%
2 Bed	30%	30%
3 Bed	35%	40%
4+ Bed	25%	25%
Total	100%	100%

Source: CCL modelling and analysis

Table 5.2: Crawley Town Centre Area – Future Market and Private Rental Size Mix

Dwelling Size	Owner Occupier Market Housing	Private Rental Market Housing
1 Bed	15%	20%
2 Bed	45%	40%
3 Bed	35%	35%
4+ Bed	5%	5%
Total	100%	100%

Source: CCL modelling and analysis

Table 5.3: Horsham Town – Future Market and Private Rental Size Mix

Dwelling Size	Owner Occupier Market Housing	Private Rental Market Housing
1 Bed	15%	15%
2 Bed	40%	40%
3 Bed	30%	40%
4+ Bed	15%	5%
Total	100%	100%

Source: CCL modelling and analysis

Table 5.4: Horsham Rural Areas/Smaller Towns – Future Market and Private Rental Size Mix

Dwelling Size	Owner Occupier Market Housing	Private Rental Market Housing
1 Bed	15%	15%
2 Bed	45%	40%
3 Bed	35%	40%
4+ Bed	5%	5%
Total	100%	100%

Source: CCL modelling and analysis

Recommendation R.2: Viability Testing

- 5.25 The analyses, testing and conclusions drawn in this report have been prepared on the basis of evidence from existing published data and from current household projections. There is a need to ensure that the recommended market housing mixes set out in recommendation R.1 are subject to appropriate viability and deliverability testing and that the mixes may need to be refined following that analysis.
- 5.26 Viability testing has been outside the scope of this report and needs to be undertaken in the context of understanding the effects of securing particular market mixes on development deliverability in a variety of urban and rural locations and scenarios. Sensitivity testing is also recommended to consider

the flexibility of development schemes to meet different potential market mixes in combination with meeting affordable housing and wider infrastructure needs in accordance with CIL regulations. Indeed, it is recommended that the market size mixes set out here form an input to any future CIL charging schedule testing and any other Local Plan review or relevant planning policy development work being undertaken by the two authorities.

Recommendation R.3: Detailed Analysis of Housing Requirements for Ageing Households

- 5.27 The future household projections analysis identifies a significant level of growth in the older age cohorts for both Crawley and Horsham.
- 5.28 The *Northern West Sussex SHMA (2009)* covered the housing needs of various groups, including the elderly but that data and evidence is now some seven or more years old.
- 5.29 While this report has assessed the overall potential future requirements for market housing by age group it is recommended that more detailed work is undertaken to understand the implications for housing choice and availability of an ageing population and the various housing options that are available to those in the older age cohorts (including specialist and supported housing). This would need to include analysis of various forms of market housing provision but would sensibly be set in a wider review and update of older age housing across the Northern West Sussex HMA.

Recommendation R.4: Greater Monitoring of Market Housing Types

- 5.30 Monitoring data for housing completions is already available and collated on a regular basis by the local authorities and by West Sussex County Council.
- 5.31 Without seeking to add to the resource burden created by monitoring and data capture, it would be beneficial to have a more granular housing completions and commitments data-set that allows information on the size and type of market (and affordable) housing stock to be easily identified. The importance of this monitoring is both in enabling an easier and swifter understanding of how market size mix policies are performing, but also allowing a more detailed understanding of the relationship between different housing types, densities of development and locational factors to be explored over time. Put simply, with a more detailed data monitoring set it will be possible for the two local authorities to see, with clarity, what types of stock and what sizes of market housing are being delivered and how this fits with overall household growth and with other housing market pricing and supply signals.

Recommendation R.5: Continuing to Prepare Mix and Density Guidance for Larger Sites

- 5.32 Work to evaluate and establish preferred character, design and density mixes for strategic/larger housing development sites in Crawley and Horsham has already proved valuable in shaping the larger schemes as they come forward through the pre-planning and application process.

- 5.33 This approach which takes a site specific basis to consider the particular context and needs of individual locations and neighbourhoods/parishes represents a valuable and positive approach. Such work, whether through Supplementary Planning Documents or more informal masterplan/framework documents should continue and it is recommended that future guidance takes the recommended market housing mix set out herein under recommendation R.1 as the starting point for setting site-specific mixes and densities.

APPENDIX A1

Recent Completions and Densities Analysis – Crawley and Horsham

APPENDIX A1: HOUSING COMPLETIONS IN CRAWLEY BOROUGH, AS AT 31 MARCH 2016

Site Address	Planning Application Ref	Total Units	Houses	Flats	Total Built	Houses Built	Flats Built
Former Bewbush Leisure Centre Site, Breezehurst Drive, Bewbush, Crawley	CR/2013/0066/FUL	88	88	0	4	4	0
Maplehurst House, Broadfield Park, Brighton Road, Broadfield, Crawley	CR/2015/0374/PA3	69	0	69	69	0	69
Units 1-14 Pelham Court Business Centre, Pelham Place, Broadfield, Crawley	CR/2013/0332/PA3	28	28	0	6	6	0
Ashburn House, Broadfield Park, Brighton Road, Broadfield, Crawley	CR/2015/0090/PA3	92	0	92	92	0	92
Land at Church Road Nurseries, Church Road, Pound Hill, Crawley *	CR/2015/0204/FUL	5	5	0	0	0	0
Land west of Maidenbower Office Park, Balcombe Road, Maidenbower, Crawley		1	0	1	1	0	1
Land Adj to Langley Green Primary School, Langle Drive	CR/2014/0046/FUL	10	0	10	10	0	10
Land Adj to Langley Green Primary School, Langle Drive	CR/2014/0046/FUL	20	20	0	20	20	0
The Corn Exchange, 61-63 High Street, Northgate, Crawley	CR/2014/0005/PA3	11	0	11	11	0	11
DSS Crawley Benefits Office, The Treasury Valuer Crown Buildings, 5 The Boulevard, Northgate	CR/2013/0291/PA3	24	0	24	24	0	24
1st and 2nd floors, 28 - 32 The Boulevard, Northgate	CR/2015/0818/FUL	6	0	6	6	0	6
1st and 2nd floors, 2 The Pavement, Northgate	CR/2014/0412/FUL	2	0	2	2	0	2
Phase 1A, North East Sector Crawley	CR/2013/0610/ARM	42	0	42	37	0	37
Phase 1A, North East Sector Crawley	CR/2013/0610/ARM	162	162	0	137	137	0
Phase 1C, North East Sector Crawley	CR/2014/0062/ARM	50	0	50	28	0	28
Land Adj to Woodend, Forge Wood, Pound Hill, Crawley	CR/2012/0561/FUL	1	1	0	1	1	0
43 Milton Mount Avenue, Pound Hill, Crawley	CR/2014/0809/FUL	1	1	0	1	1	0
Adj to Greyhound Cottage, Tinsley Green, Pound Hill		2	2	0	2	2	0
Alpine Works, Oak Road, Southgate	CR/2012/0577/FUL	6	6	0	6	6	0
Central House, 11 - 13 Brighton Road, Southgate	CR/2015/0295/PA3	44	0	44	44	0	44
10 Goffs Park Road, Southgate *	CR/2014/0820/FUL	10	0	10	0	0	0
Bramletye House, 29 Brighton Road, Southgate	CR/2014/0343/PA3	7	0	7	7	0	7
Land at 12 Springfield Road Southgate Crawley	CR/2015/0686/FUL	5	0	5	5	0	5
168 Three Bridges Road, Three Bridges, Crawley		1	1	0	1	1	0
Kingsland Court, Three Bridges Road, Three Bridges, Crawley	CR/2012/0394/FUL	10	0	10	10	0	10
Land adj to 45 Mill Road, Three Bridges, Crawley	CR/2014/0175/FUL	1	1	0	1	1	0
The Office Building, Gatwick Road, Northgate	CR/2014/0543/PA3	22	0	22	22	0	22
Adj 132 Three Bridges Road, Crawley		1	1	0	1	1	0
34a Horsham Road, West Green, Crawley		1	1	0	1	1	0
45 Ifield Road, West Green, Crawley		1	0	1	1	0	1
6-9 Ifield Road, West Green, Crawley	CR/2015/0343/FUL	1	1	0	1	1	0
TOTAL					551	182	369

Notes:

No OAP units built in the monitoring period

Prior approvals

* Denotes loss(es) of unit(s) at site

Source: West Sussex County Council, Residential Land Availability Survey

APPENDIX A1: HOUSING DENSITY AND MIX OF COMPLETIONS IN CRAWLEY BOROUGH, AS AT 31 MARCH 2016

Housing Mix Type - Market Housing (Affordable Units not included)						Flats			Houses									
Scheme Address	Planning Application	Completions 2016	Total Approved	Site Area (ha)	Density (dph)	1B/Studio	2B	3B	1B	2B-Semi	2B-Terrace	2B-Det	3B-Semi	3B-Terrace	3B-Det	4B-Semi	4B-Det	5B-Det
Land Adj to Langley Green Primary School, Langley Drive	CR/2014/0046/FUL	30	30	0.55	55	2				2	4		10					
Fmr Bewbush leisure centre, Breezehurst Drive, Bewbush	CR/2013/0066/FUL	12	112	2.43	46						9		35					
Forge Wood - Phase 1A	CR/2013/0610/ARM	37 (flats)	204	8.6	24		26		4			35	84			44		13
Forge Wood - Phase 1A	CR/2013/0610/ARM	137 (houses)																
Forge Wood - Phase 1C	CR/1998/0039/OUT & CR/2014/0062/ARM	28(flats)	50	1	50		22											
Kingsland Court, Three Bridges Road, Three Bridges	CR/2012/0394/FUL	10	10	0.19	53	5	5											
1st and second floor,28 & 32 The Boulevard, Northgate	CR/2015/0818/FUL	6	6	0.1	60	5	1											
Alpine Works, Oak Road, Southgate	CR/2012/0577/FUL	6	6	0.13	46					2	2			2				
Land at Church Road Nurseries, Church Road, Pound Hill	CR/2015/0204/FUL	5	5	0.25	20												5	
12 Springfield Road, Southgate Road	CR/2015/0686/FUL	5	5	0.03	167	3	2											
1st and 2nd floors, 2 The Pavement, Northgate	CR/2014/0412/FUL	2	2	0.01	200	1	1											
43 Milton Mount Avenue, Pound Hill	CR/2014/0809/FUL	1	1	0.2	5												1	
Land adjacent Woodend, Forgewood	CR/2012/0561/FUL	1	1	0.11	9													1
Land adj 45 Mill Road, Three Bridges	CR/2014/0175/FUL	1	1	0.19	5										1			
TOTAL						16	57	0	4	4	15	35	129	2	1	44	6	14

APPENDIX A1: HOUSING COMPLETIONS IN HORSHAM DISTRICT, AS AT 31 MARCH 2016								
Site Address	Planning Application Ref	Total Units	Houses	Flats	OAP Units	Total Built	Houses Built	Flats Built
Jinkes Farm, Muttons Lane, Ashington Pulborough	DC/15/0575	1	1	0	0	1	1	0
Mill House Hotel, Mill Lane, Ashington Pulborough		1	1	0	0	1	1	0
Penn Retreat, Rectory Lane, Ashington	DC/14/0089	9	9	0	0	9	9	0
Penn Retreat, Rectory Lane, Ashington	DC/14/0089	6	0	6	0	6	0	6
Land East of Daux Avenue, Billingshurst	DC/11/2385	7	0	7	0	7	0	7
Station Works, Myrtle Lane, Billingshurst	DC/13/1346	12	12	0	0	12	12	0
South of Gillmans Industrial Estate, Billingshurst	DC/10/0939	90	90	0	0	29	29	0
South of Gillmans Industrial Estate, Billingshurst	DC/10/0939	42	42	0	0	24	24	0
Land Adjoining Blackthorne Barn, Marringdean Road, Billingshurst	DC/13/2379	30	30	0	0	30	30	0
Land Adjoining Blackthorne Barn, Marringdean Road, Billingshurst	DC/13/2379	20	20	0	0	12	12	0
Copped Hall Farm, Okehurst Lane, Billingshurst	DC/13/1001	1	1	0	0	1	1	0
Land west of Hammonds, East Street, Billingshurst		1	1	0	0	1	1	0
49-51 Station Road, Billingshurst		2	2	0	0	1	1	0
Land East of Daux Avenue, Billingshurst	DC/11/2385	11	11	0	0	11	11	0
Land west of Hammonds, East Street, Billingshurst		1	1	0	0	1	1	0
Greenfield Farm, Valewood Lane, Barns Green	DC/13/2457	4	4	0	0	4	4	0
Land at Daux Wood, Marringdean Road, Billingshurst	DC/14/1201	28	28	0	0	12	12	0
Land East of Daux Avenue, Billingshurst	DC/11/2385	28	28	0	0	27	27	0
Fairlight Cottage, Natts Lane, Billingshurst		2	2	0	0	2	2	0
Adj Stortford, Little Drove Bramber	DC/13/0701	2	2	0	0	2	2	0
Phase 4, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/1651	3	0	3	0	3	0	3
Phase 6, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/14/0109	55	55	0	0	17	17	0
Phase 1, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/11/2074	84	84	0	0	2	2	0
Phase 2, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/0814	105	105	0	0	31	31	0
Phase 4, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/1651	79	79	0	0	35	35	0
Phase 4, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/1651	17	17	0	0	17	17	0
Phases 7, 8 & 10, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/2202	236	236	0	0	119	119	0
Phases 7, 8 & 10, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/2202	20	0	20	0	13	0	13
Heath Barn Farmhouse, Billingshurst Road, Broadbridge Heath	DC/12/1172	6	6	0	0	3	3	0
Phases 9 & 11, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/13/1690	109	109	0	0	61	61	0
Phases 9 & 11, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/13/1690	7	7	0	0	6	6	0
Phase 6, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/14/0109	13	13	0	0	6	6	0
Phases 9 & 11, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/13/1690	20	0	20	0	10	0	10
4 Pinewood Close, Broadbridge Heath	DC/14/0770	1	1	0	0	1	1	0
Heath Barn Farmhouse, Billingshurst Road, Broadbridge Heath	DC/12/1172	7	0	7	0	7	0	7
Phases 7, 8 & 10, Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/12/2202	40	40	0	0	16	16	0
Phase 1 - Kilnwood Vale Colgate (west of Bewbush)	DC/10/1612	182	182	0	0	94	94	0
Phase 1 - Kilnwood Vale Colgate (west of Bewbush)	DC/10/1612	27	27	0	0	10	10	0
Phase 1 - Kilnwood Vale Colgate (west of Bewbush)	DC/10/1612	51	0	51	0	21	0	21
Phase 1 - Kilnwood Vale Colgate (west of Bewbush)	DC/10/1612	31	0	31	0	6	0	6
Pavello, Forest Road, Colgate	DC/13/2145	1	1	0	0	1	1	0
Phase 3A, Land East of A24 Worthing Road, Horsham	DC/12/2389	30	30	0	0	10	10	0
Fivash House, 9 Denne Parade, Horsham	DC/13/0714	13	0	13	0	13	0	13
Part of Lifestyle Ford Bishopric, Horsham *	DC/13/2126	17	0	17	0	0	0	0

Phase 1, Land East of A24 Worthing Road, Horsham	DC/10/0006	120	120	0	0	8	8	0
Phase 1, Land East of A24 Worthing Road, Horsham	DC/10/0006	44	0	44	0	18	0	18
Phase 2, Land East of A24 Worthing Road, Horsham	DC/12/1259	46	46	0	0	40	40	0
3 The Courtyard, London Road, Horsham	DC/15/0418	4	0	4	0	4	0	4
14 - 16 Market Square, Horsham	DC/13/1171	9	0	9	0	9	0	9
28 Wimblehurst Road, Horsham		1	1	0	0	1	1	0
Fivash House, 9 Denne Parade, Horsham	DC/13/0714	1	1	0	0	1	1	0
51 London Road, Horsham	DC/13/2226	2	2	0	0	2	2	0
The Firs, Farthings Hill, Horsham	DC/13/0429	6	0	6	0	6	0	6
The Firs, Farthings Hill, Horsham	DC/13/0429	5	5	0	0	1	1	0
The Firs, Farthings Hill, Horsham	DC/13/0429	16	16	0	0	15	15	0
49A Carfax, Horsham		4	0	4	0	1	0	1
112 Brighton Road, Horsham *	DC/13/1794	6	6	0	0	0	0	0
Heatherdene, Shoreham Road, Small Dole	DC/14/0751	5	5	0	0	5	5	0
Upper Westlands, Station Road, Henfield	DC/14/0985	2	0	2	0	2	0	2
Fulfords Farm, Fulfords Hill, Itchingfield	DC/11/2275	2	2	0	0	2	2	0
Itchingfield County Primary School, The Hordens, Barns Green, Horsham	DC/12/1894	62	62	0	0	46	46	0
Laundry Cottage, Mill Lane, Lower Beeding, Horsham	DC/14/0314	1	1	0	0	1	1	0
Land North of 23 and 28 Ringley Road, Horsham	DC/13/1890	20	20	0	0	20	20	0
Land North of 23 and 28 Ringley Road, Horsham	DC/13/1890	7	7	0	0	7	7	0
Novartis Pharmaceuticals UK Limited, Parsonage Road, Horsham	DC/14/1624	72	72	0	0	22	22	0
14 Peary Close, Horsham		1	1	0	0	1	1	0
Land North of 23 and 28 Ringley Road, Horsham	DC/13/1890	6	0	6	0	6	0	6
13 The Birches, Mannings Heath, Horsham	DC/13/0631	1	1	0	0	1	1	0
Oakdene, Blackgate Lane, Pulborough	DC/12/2093	3	3	0	0	1	1	0
1st floor 64 Lower Street, Pulborough		1	0	1	0	1	0	1
Harwood House, Kings Road, Horsham	DC/14/0725	14	14	0	0	14	14	0
Horsham Gates, North Street, Horsham	DC/14/1895	85	0	85	0	85	0	85
57 Park Terrace East, Horsham	DC/14/2047	2	0	2	0	2	0	2
1 Grove House, Foundry Lane, Horsham	DC/14/2540	1	1	0	0	1	1	0
7 Station Road, Horsham *	DC/11/1970	11	0	11	0	0	0	0
51 Macleod Road, Horsham	DC/12/1848	1	1	0	0	1	1	0
Three Trees, Loxwood Road, Rudgwick	DC/13/2095	1	1	0	0	1	1	0
Martlett Corner, Church Street, Rudgwick	DC/13/1385	6	0	6	0	6	0	6
Millfields Cottage, Horsham Road, Rowhook Rudgwick		1	1	0	0	1	1	0
The Gate Inn, Rusper Road, Ifield	DC/14/0300	1	1	0	0	1	1	0
Wayside Nursing Home, High Street, Rusper Horsham		5	5	0	0	5	5	0
Development Site, Rusper Road, Ifield *	DC/14/1971	25	25	0	0	0	0	0
Former Agates Sawmill, Faygate Lane, Faygate	DC/10/0088	58	0	58	57	22	0	22
Former Agates Sawmill, Faygate Lane, Faygate	DC/10/0088	91	91	0	91	18	0	18
Clover,s Brighton Road, Shermanbury		1	1	0	0	1	1	0
The Lodge, Wineham Place, Wineham Lane, Wineham	DC/15/0971	1	1	0	0	1	1	0
Land West of Rascals Close, Southwater	DC/13/0937	20	20	0	0	9	9	0
Land West of Rascals Close, Southwater	DC/13/0937	13	13	0	0	2	2	0
Bridge Hill Farm, Thakeham Road, Coolham	DC/15/1884	1	1	0	0	1	1	0
Brooks Green Park, Emms Lane, Brooks Green	DC/15/0674	11	11	0	0	8	8	0

The Annexe, Lane End, Lyons Road, Slinfold		1	1	0	0	1	1	0
3 & 4 Lydwicke Farm Cottages, Hayes Lane, Slinfold		2	2	0	0	1	1	0
The Cottage, Park Street, Slinfold, Horsham	DC/14/0700	1	1	0	0	1	1	0
Annexe St Ouens, Worthing Road, Horsham	DC/14/1607	1	1	0	0	1	1	0
Blakes Farmhouse, Southwater Street, Southwater	DC/14/2271	1	1	0	0	1	1	0
Wedgewood, Sedgwick Lane, Horsham	DC/14/0558	1	1	0	0	1	1	0
Londis, Worthing Road, Southwater	DC/15/0090	2	0	2	0	2	0	2
Lorna Doone, Worthing Road, Horsham		2	2	0	0	2	2	0
R/O Rossbank, Worthing Road, Horsham	DC/14/0840	1	1	0	0	1	1	0
Land Rear of Tirie Little Twynham and Tenure House, Worthing Road, Southwater	DC/13/1474	7	7	0	0	3	3	0
Sunningdale, Horsham Road, Steyning		1	1	0	0	1	1	0
The Old Tannery, Tanyard Lane, Steyning	DC/14/1572	7	0	7	0	7	0	7
The Oaks, Hampers Lane, Storrington		1	1	0	0	1	1	0
S/O Sandown, Amberley Road, Storrington		1	1	0	0	1	1	0
Angells Sandpit, Washington Road, Storrington		4	4	0	0	1	1	0
Catholic Sanctuary, Fern Road, Storrington	DC/13/0541	1	1	0	0	1	1	0
Silhill House, Kithurst Lane, Storrington Pulborough		1	1	0	0	1	1	0
Old Field Stables, Fryern Road, Storrington	DC/15/2815	2	2	0	0	1	1	0
The Pines, New Town Road, Storrington		3	3	0	0	3	3	0
Land North of Brook Close and Rother Close, Storrington	DC/15/2126	46	46	0	0	2	2	0
Townhouse Farm, Coolham Road, Thakeham	DC/14/1652	1	1	0	0	1	1	0
Caravan 2, Picketty Corner, Coolham Road, Thakeham		1	1	0	0	1	1	0
Steeton Rock Road, Storrington Pulborough		1	1	0	0	1	1	0
St Johns House, 1A Springfield Road, Horsham	DC/14/1612	11	0	11	0	11	0	11
Hadley High Street, Upper Beeding Steyning	DC/14/0959	1	1	0	0	1	1	0
Adur View, Dawn Crescent, Upper Beeding	DC/13/0753	25	0	25	25	25	0	25
Noordwyjk, Pound Lane, Upper Beeding Steyning	DC/09/2117	5	5	0	0	5	5	0
RMC Engineering Services Ltd Workshops, Storrington Road, Washington Pulborough	DC/13/0609	60	60	0	0	35	35	0
Adj Silver Halt, Heather Lane West, Chiltington		1	1	0	0	1	1	0
Old Oaks, Spinney Lane, West Chiltington Pulborough	DC/15/1172	1	1	0	0	1	1	0
Elephant and Castle, Church Street, West Chiltington Pulborough	DC/12/2054	3	3	0	0	3	3	0
Walnut Copse, West Chiltington Lane, Broadford Bridge, Billingshurst	DC/13/0516	1	1	0	0	1	1	0
Peacocks Hunters, Mead Partridge Green	DC/13/0316	6	0	6	0	6	0	6
2 Wilton Close, Partridge Green	DC/15/1358	1	1	0	0	1	1	0
Peacocks Hunters Mead, Partridge Green	DC/13/0316	3	3	0	0	3	3	0
Big Plant Nursery, Hole Street, Wiston		1	1	0	0	1	1	0
Annies Baskets Limited, Henfield Road, Albourne Hassocks	DC/13/1554	1	1	0	0	1	1	0
TOTAL						1230	909	317

Notes:

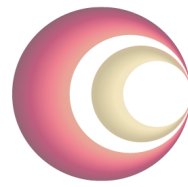
* Denotes loss(es) of unit(s) at site

Residential schemes providing units for the elderly

Source: West Sussex County Council, Residential Land Availability Survey

APPENDIX A1: HOUSING DENSITY AND MIX OF COMPLETIONS IN HORSHAM DISTRICT, AS AT 31 MARCH 2016

Housing Mix Type - Market Housing (Affordable Units not included)						Flats			Houses										
Scheme Address	Planning Application	Completions 2016	Total Approved	Site Area (ha)	Combined Density (dpl)	1B/Studio	2B	3B	1B	2B-Semi	2B-Terrace	2B-Det	3B-Semi	3B-Terrace	3B-Det	4B-Semi	4B-Det	5B-Det	6B-Det
Penn Retreat, Rectory Lane, Ashington	DC/14/0089	15	15	0.43	35					2		2	6						
Land East of Daux Avenue, Billingshurst	DC/11/2385	18	49	3.04	16					7		7	14				8		
Lamina Dielectrics Station Works, Myrtle Lane, Billingshurst	DC/13/1346	12	12	0.4	30					6		6	6						
South of Groomsland Drive & Gillmans Industrial Estate, Marringdean Road,	DC/10/0939	53	150	6.1	25					7		7	33			34		16	
Land Adjoining Blackthorne Barn, Marringdean Road, Billingshurst	DC/13/2379	42	50	3.26	15					10		10	6			14			
Land South of Broadbridge Heath, Old Wickhurst Lane, Broadbridge Heath	DC/09/2101 & DC/14/0109	17	70	1.8	39		1			1		1	39			15			
Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/12/0814	31	135	3.5	39					8		8	9			28			
Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/12/1651	52	101	4.17	24		2			4		4	39			22		9	5
Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/12/2202	139	320	7.69	42	4	16			31		31	151			54			
Heath Barn Farmhouse Billingshurst Road Broadbridge Heath Horsham	DC/12/1172	10	34	0.89	38								16			5			
Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/13/1690	77	136	3.85	35					28		28	69			5		7	
Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/14/0109	6	70	1.8	39		1			1		1	39			15			
Phase 2.1A and 2.1B, Kilnwood Vale Crawley Road Faygate	DC/10/1612 & DC/15/2087 &	131	300	4.4	68		21			8		8	26						
Land East of A24 Worthing Road Horsham	DC/12/2389	10	42	1.55	27		12						11			13		6	
Fivash House 9 Denne Parade Horsham	DC/13/0714	13	13	0.13	100	5	8												
RMC Engineering Services Ltd, Workshops, Storrington Road, Washington Pulborough	DC/10/1457 & DC/13/0609	35	78	10.6	7					9		9	4			23		24	
Bishops Weald House Albion Way Horsham	DC/13/2126	0	70	0.58	127	16	34	3											
Land East of A24 Worthing Road Horsham	DC/10/0006	26	196	9.71	21					47		47	47			56			
Land East of A24 Worthing Road, Horsham	DC/12/1259	40	46	1.17	41						17	17		27			2		
The Firs, Farthings Hill, Horsham	DC/13/0429	22	27	1.14	24												9	7	
Itchingfield County Primary School, The Hordens, Barns Green, Horsham	DC/12/1894	46	69	2.98	23		2		1	25		26	24			13		4	
Land North of 23 and 28 Ringley Road, Horsham	DC/13/1890	27	33	0.89	37								14			6			
Novartis Pharmaceuticals UK Limited, Parsonage Road, Horsham	DC/14/1624	22	160	3.3	48	6	18						29			39		6	
Harwood House Kings Road Horsham	DC/14/0725	14	14	0.4	35					7		7	2			2	3		
Land West of Rascals Close, Southwater	DC/13/0937	11	33	0.93	35								17				3		
Land North of Brook Close and Rother Close, Storrington	DC/13/1265 & DC/15/2126	2	75	4.47	17					4		4	2	3	14	6	15	2	
Plot 1 Land South of Broadbridge Heath Old Wickhurst Lane Broadbridge Heath	DC/09/2101 & DC/11/2074	2	105	3.05	35		20						20			35		9	
TOTAL						31	115	3	1	205	17	223	603	30	14	350	40	81	5



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