Wealden Local Plan

Duty to Cooperate
Background
Paper - Appendix DHS

Submission Document

January 2019
How to Contact Us

Planning Policy
Wealden District Council
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Office hours Monday, Tuesday, Thursday, Friday 8.30am to 5.00pm and Wednesday 9.00am to 5.00pm

You may also visit the offices Monday to Friday, to view other Local Plan documents.

A copy of the Wealden Local Plan and associated documents can be downloaded from the Planning Policy pages of the Wealden website, www.wealden.gov.uk/planningpolicy or scan the QR code below with your smart phone.

If you, or somebody you know, would like the information contained in this document in large print, Braille, audio tape/CD or in another language please contact Wealden District Council on 01323 443322 or info@wealden.gov.uk
-----Original Message-----

From: [email]
Sent: 20 August 2014 11:31
To: [email] [email] [email] (GVA)
CC: [email] [email]

Subject: RE: Powerpoint presentation

Hi [name],
that sounds great – I will await your amendments.

Overall we were pleased with how the sessions went. I think that we were particularly pleased with how the LA workshop went and felt that there was particularly good feedback from this session. The second session also provided good feedback but the only thing that we felt was that this was dominated to some extent by developers/agents focussing very much on arguing that LA’s in the area generally are trying to avoid delivering housing to meet identified needs. We felt that perhaps other attendees either did not have or did not take the opportunity to express their views on the wider picture. I think that it was slightly disappointing that we were not able to address in any detail the issues which appear under the heading “Workshop 2” in the Agenda and speaking to one or two delegates after the meeting, they did raise this point.

We agree though that the sessions provided feedback which we will be able to incorporate and that the LA session was a very useful starting point for the DTC process.

Kind regards,

[Signature]

Wealden District Council

email:[email]@wealden.gov.uk

-----Follow-Up Message-----

From: [email]
Sent: 20 August 2014 10:31
To: [email]

Subject: RE: Powerpoint presentation

Hi [name]
We were happy to attend yesterday and return journeys were fine thanks. I hope you were happy with how the sessions went. We felt the presentation of the baseline information went well and there were some useful points and insights from the Local Authorities and private sector stakeholders which we will be able to consider, and in some cases incorporate, within our work going forward. The Local Authority session also acted as a good starting point for the DTC process and the steps you will be taking using the final output from our work.

In terms of circulating work, that is fine. We have a few minor language amendments we would like to make to the slides first though, so I will make these this morning and then send you a finalised pdf version which can be circulated.

Kind Regards,
Original Message

From: [wealden.gov.uk]

Subject: SHMA Stakeholder workshop - LA Duty to Cooperate 19 August

Dear colleagues,
following requests, I am circulating a copy of the GVA presentation at our workshop last week. I hope that this is helpful.

Kind regards,

Senior Planning Officer
Wealden District Council

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please email us. Any views expressed are not necessarily the views of Wealden District Council unless stated.
Wealden District Council

Strategic Housing Market Assessment: Stakeholder Consultation

19th August 2014

Introduction

• Agenda for the Morning
• Purpose of the SHMA
• Defining the Strategic Housing Market Area
• Population and Households
• Housing Stock
• Understanding the Market
• Calculating Affordable Housing Need
Purpose of the Study

- Requirement of NPPF

- Informs policy, but as importantly informs strategy

- Provides key guidance on housing requirements for:
  - Different housing types, tenures and sizes;
  - Different groups of the population; and
  - Housing mix and scale of affordable housing requirement.

- Key Outputs:
  - Identify Wider Strategic Housing Market Area
  - Assess existing and future affordable housing need;
  - Asses existing and future private housing need;
  - Calculate housing requirements for specific groups in need; and
  - Produce recommendations on affordable housing type, location, size and tenure.
Key Messages

- **Strategic Housing market defined as:**
  - Wealden
  - Eastbourne
  - Tunbridge Wells
  - Rother
  - Lewes
  - Mid Sussex

- Significant growth over last decade driven by domestic migration
- Impact of ageing population on housing requirements for Wealden
- Significant under-occupancy trends
- More challenged affordability than wider Strategic Housing Market Area
- Home price variation evident within Wealden sub-markets (North-South distinction)
Defining the Strategic Housing Market Area
Defining Strategic Housing Market Area

- The following is reviewed in order to define the strategic housing market area:
  - Migration Statistics;
  - Travel To Work Data;
  - House Prices and Rate of Change;

- The final outputs of this SHMA focus solely on Wealden District, rather than the defined Strategic Housing Market Area.

- The defined Strategic Housing Market Area sets the wider context for Wealden and acts as a comparator for the baseline analysis of demographic and housing market data.
Strategic Housing Market Area (HMA)

Identified Strategic Housing Market Area

- Wealden
- Eastbourne
- Tunbridge Wells
- Rother
- Lewes
- Mid Sussex

Source: Neighbourhood Statistics 2014

- Wider geographical area defined by household demand and housing preference
- Reflecting key functional linkages between places where people live and work
- Defined in line with best practice guidance using travel to work patterns, migration patterns and house price data
Strategic HMA - In Migration (Gross)


- 1,383 people moved into Wealden from Eastbourne (17%)
- 584 people moved into Wealden from Lewes (7%)
- 579 people moved into Wealden from Tunbridge Wells (7%)
- A total of 4,813 people moved into Wealden from these top 10 contributing authorities

Source: GVA 2013
Strategic HMA – Out Migration (Gross)


- 1,261 people moved out of Wealden into Eastbourne (19%)
- 503 people moved out of Wealden into Rother (7%)
- 497 people moved out of Wealden into Tunbridge Wells (7%)
- A total of 3,590 people moved out of Wealden to these top 10 receiving authorities

Source: GVA 2013
Strategic HMA – Net Migration Gains

Net Migration Gains (2010 – 2013 Average)

- Net gain of 126 people from Lewes
- Net gain of 122 people from Mid Sussex
- Net gain of 107 people from Brighton and Hove
- Net gain of 94 people from Eastbourne
- Net gain of 87 people from Croydon

Source: GVA 2013
Strategic HMA – Net Migration Losses

Net Migration Losses (2010 – 2013 Average)

- Rother: Net loss of 40 people
- Canterbury: Net loss of 27 people
- Southampton: Net loss of 21 people
- Oxford: Net loss of 19 people
- Winchester: Net loss of 16 people

Source: GVA 2013
Aggregate Migration Flows (2010 – 2013 Average)

- **Aggregate flow of 2,644 people between Wealden and Eastbourne**
- **Aggregate flow of 1,077 people between Wealden and Tunbridge Wells**
- **Aggregate flow of 966 people between Wealden and Rother**
- **Aggregate flow of 954 people between Wealden and Lewes**
- **Aggregate flow of 843 people between Wealden and Mid Sussex**

*Source: GVA 2013*
Strategic HMA – Aggregate Migration

Aggregate Migration Flows

- Aggregate flow of 2,644 people between Wealden and Eastbourne
- Aggregate flow of 1,077 people between Wealden and Tunbridge Wells
- Aggregate flow of 966 people between Wealden and Rother
- Aggregate flow of 954 people between Wealden and Lewes
- Aggregate flow of 843 people between Wealden and Mid Sussex

Source: Neighbourhood Statistics and GVA 2014
## Strategic HMA – Travel to Work

### Key Travel To Work Movements Into Wealden (2011)

<table>
<thead>
<tr>
<th>Workplace</th>
<th>Place of Usual Residence</th>
<th>Number of In-Commuters</th>
<th>% of Workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wealden</td>
<td>Wealden</td>
<td>21,579</td>
<td>59%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Eastbourne</td>
<td>4,249</td>
<td>12%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Lewes</td>
<td>1,812</td>
<td>5%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Rother</td>
<td>1,736</td>
<td>5%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Tunbridge Wells</td>
<td>1,586</td>
<td>4%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Mid Sussex</td>
<td>1,358</td>
<td>4%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Brighton and Hove</td>
<td>844</td>
<td>2%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Hastings</td>
<td>831</td>
<td>2%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Tonbridge and Malling</td>
<td>252</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Census 2011

### Key Travel To Work Movements Out Of Wealden (2011)

<table>
<thead>
<tr>
<th>Place of Usual Residence</th>
<th>Workplace</th>
<th>Number of Out-Commuters</th>
<th>% of Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wealden</td>
<td>Wealden</td>
<td>21,579</td>
<td>42%</td>
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<tr>
<td>Wealden</td>
<td>Eastbourne</td>
<td>6,556</td>
<td>13%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Tunbridge Wells</td>
<td>4,119</td>
<td>8%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Lewes</td>
<td>3,145</td>
<td>6%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Mid Sussex</td>
<td>2,375</td>
<td>5%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Westminster,City of London</td>
<td>2,041</td>
<td>4%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Brighton and Hove</td>
<td>1,517</td>
<td>3%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Rother</td>
<td>1,381</td>
<td>3%</td>
</tr>
<tr>
<td>Wealden</td>
<td>Crawley</td>
<td>1,263</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Census 2011
Key Travel To Work Movements Into and Out Of Wealden (2011)

<table>
<thead>
<tr>
<th></th>
<th>In</th>
<th>Out</th>
<th>Total Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wealden</td>
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<td>21,579</td>
<td>43,158</td>
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<tr>
<td>Eastbourne</td>
<td>4,249</td>
<td>6,556</td>
<td>10,805</td>
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<tr>
<td>Tunbridge Wells</td>
<td>1,586</td>
<td>4,119</td>
<td>5,705</td>
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<tr>
<td>Lewes</td>
<td>1,812</td>
<td>3,145</td>
<td>4,957</td>
</tr>
<tr>
<td>Mid Sussex</td>
<td>1,358</td>
<td>2,375</td>
<td>3,733</td>
</tr>
<tr>
<td>Rother</td>
<td>1,736</td>
<td>1,381</td>
<td>3,117</td>
</tr>
<tr>
<td>Brighton and Hove</td>
<td>844</td>
<td>1,517</td>
<td>2,361</td>
</tr>
<tr>
<td>Westminster, City of London</td>
<td>6</td>
<td>2,041</td>
<td>2,047</td>
</tr>
<tr>
<td>Hastings</td>
<td>831</td>
<td>710</td>
<td>1,541</td>
</tr>
<tr>
<td>Crawley</td>
<td>172</td>
<td>1,263</td>
<td>1,435</td>
</tr>
</tbody>
</table>

Source: Census 2011

- **Wealden workers = 21,579**
  - 42% of all working residents
  - 59% of Wealden workforce

- **Wealden residents work in**:
  - Eastbourne - 13% (6,556)
  - Tunbridge Wells - 8% (4,119)
  - Lewes - 6% (3,145)
  - Mid Sussex - 5% (2,375)

- **Wealden workforce consists of**:
  - Eastbourne residents - 12% (4,249)
  - Lewes residents – 5% (1,812)
  - Rother residents – 5% (1,736)
  - Tunbridge Wells residents – 4% (1,586)
  - Mid-Sussex residents – 4% (1,358)
Strategic HMA – Travel To Work Flows

Travel To Work Flows

Source: Neighbourhood Statistics and GVA  2014
Strategic HMA – TTW & Migration

Travel To Work Flows

Aggregate Migration Flows

Source: Neighbourhood Statistics and GVA 2014

Strategic Housing Market Assessment – August 2014
Strategic HMA – Average Price (£)

Mean House Price Based on Land Registry Data (1996 – 2012)

- 2012 average home price in Wealden = £294,926
- 2012 average home price in proposed Strategic HMA = £274,481
- Average home price trend comparable for all market areas

Source: DCLG 2014
Strategic HMA – Average Price Change (%)

Percentage Increase in Mean House Prices from 1996 Base Year

- Largest increase of 353% from 1996 to 2012 for Brighton and Hove
- Smallest increase of 212% from 1996 to 2012 for Wealden
- Increase of 233% for proposed Strategic HMA from 1996 to 2012

Source: DCLG 2013
Strategic Housing Market Area

Identified Strategic Housing Market Area

- Wealden
- Eastbourne
- Tunbridge Wells
- Rother
- Lewes
- Mid Sussex

- Wider geographical area defined by household demand and housing preference
- Reflecting key functional linkages between places where people live and work
- Defined in line with best practice guidance using travel to work patterns, migration patterns and house price data

Source: Neighbourhood Statistics 2014
Population and Households
Market Drivers – Population Change

- 8.84% growth since 2001
- Growth of 10,200 persons in last ten years
- 2013 Total Population = 152,600
- Relatively low population growth 2001 – 2013 compared to Eastbourne (11.9%), Tunbridge Wells (11.3%) and Mid Sussex (12.1%).
- Higher growth than Lewes over the same period (7.9%)

Source: Census 2011 [NOMIS]

Strategic Housing Market Assessment – August 2014
Populations – Components of Change

Wealden Components of Population Change (2001 – 2013)

- 2001-2013 deaths outnumber births by 6,852
- Domestic in-migration accounted for 13,658 more residents in Wealden
- International in-migration accounted for 788 more residents in Wealden
- Population growth driven by domestic migration, with some, limited, international migration. Mortality exceed fertility indicative of an older population structure

Source: Census 2011 (NOMIS)
Demographics – Age Structure Change

Wealden Population Pyramid (2001 & 2013)

- 2001-2013: largest increase in 60 - 70 year olds
- Also growth in 45 – 53 year olds and 20 – 30 year olds
- 30 - 45 group decrease as % of population
- Under 16 year olds decrease as % of population
- Population ageing

Source: Census 2011 (NOMIS)
Recent population projects have changed growth prospects of Wealden

- 2008 underestimated base population but projected high growth
- 2010 like 2008 underestimated base population but showed slower growth
- 2012 shows higher base population (Census adjusted) and higher growth as per 2008
Strategic HMA Household Projections 2011-21


- Projected to be 68,069 households in 2021 up from 62,869 in 2011 (8.27% increase)

- Lower than Eastbourne (9.79%), Tumbridge Wells (13.43%), Lewes (14.10%), Rother (12.4%) and Mid Sussex (9.44%).

Source: DCLG 2013
Strategic HMA Household Projections 2011-21


- 100% = 1991 base year
- Household size (a proxy for household formation) has fallen since 1991 but is the second largest in the sub-region
- Household size has plateaued since the early 2000s demonstrative of housing bubble and recession.

Source: DCLG 2013
Wealden Household Projections


- 2008 Based SNHP – 6,560 more Households by 2021
- 2011 Based SNHP – 5,200 more Households by 2021
- Qs: Will slow household growth continue?

Source: CLG and GVA 2013
Housing Stock
Housing Stock – Change in Stock 2001-2011

Change in Total Number of Dwellings in Wealden between 2001 and 2011

- **Total number of dwellings:**
  - 2001 = 60,574
  - 2011 = 65,159

- **Shared dwellings:**
  - 2001 = 10
  - 2011 = 14

- **Unshared dwellings:**
  - 2001 = 60,564
  - 2011 = 65,145

- **8% increase in total number of dwellings between 2001 and 2011**

Source: Census 2001 & 2011
Housing Stock - Type

Key Distinctions:

- Largest proportion is Detached House/Bungalow (45%)
- Smallest proportion is Conversions (2%)
- Other Stock types fairly comparable across areas

% Profile of Dwelling Stock by Type (2011)

Source: Census, 2011 (NOMIS)
Housing Stock – Tenure Profile

% Profile of Dwelling Stock by Tenure (2011)

- Larger proportion of outright ownership (42%)
- Proportion of ownership with mortgage or loan comparable to the South East region (37% and 35% respectively)
- Smaller proportion of social and private rented (7.7% and 11.1% respectively)

Source: Census 2011 (NOMIS)
Housing Stock – Number of Bedrooms

% Profile of Dwelling Stock by Number of Bedrooms (2011)

- Fairly comparable profiles across all areas
- Smaller proportion of 1 bedroom units (8%)
- Larger proportion of 4 and 5+ bedrooms (20% and 8% respectively)

Source: Census 2011 (NOMIS)
Housing Stock – Occupancy

Average Household Size and Number of Bedrooms (2011)

- Fewer people than bedrooms across all areas
- Largest difference between average household size and number of bedrooms for Wealden
- 2.3 people per household and 3 bedrooms per household

Source: Census 2011 [NOMIS]
Housing Stock - Overcrowding

Occupancy Rating (bedrooms) of -1 or Less

- Occupancy rating = indicator of overcrowding
- Occupancy rating of -1 or less = at least one less bedroom than required for a household based on its size
- Only 2.2% of Wealden households at least 1 bedroom short

Source: Census 2011 (NOMIS)
Housing Stock – Under Occupied

Occupancy Rating (bedrooms) of +1 or More

- Occupancy rating of +1 or more = household has at least one more bedroom than required based on its size
- 79% of Wealden households have at least 1 too many bedrooms

Source: Census 2011 (NOMIS)
Housing Stock – Public Sector Vacancy Rate

Vacancy Rate for LA Housing and ‘Other’ Public Vacant Dwellings (2011)

- 2.8% of LA and ‘Other’ Public dwellings vacant in Wealden (1,736 dwellings)
- Comparable to vacancy of 2.7% in HMA (8,290 dwellings)
- More updated data from the Council (at 31st March 2014) suggests:
  - 35 void properties (vacant for 6+ months)
  - 3 to be brought back into use
  - 32 likely to be demolished

Source: HSSA 2011
According to HSSA data (2011):

- 729 private sector properties identified as vacant in Wealden
- Vacancy of 3,002 within private sector stock in HMA
Understanding the Market
Housing Market – Sub Borough Average

Average Home Price for Wealden sub-markets (Jan 2012 – Jan 2014)

<table>
<thead>
<tr>
<th>Sub-Borough</th>
<th>Detached</th>
<th>Semi-detached</th>
<th>Terraced</th>
<th>Flats</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest Row</td>
<td>£545,743</td>
<td>£266,790</td>
<td>£478,333</td>
<td>£174,000</td>
<td>£422,697</td>
</tr>
<tr>
<td>Wadhurst</td>
<td>£825,909</td>
<td>£219,500</td>
<td>£281,500</td>
<td>£258,000</td>
<td>£433,235</td>
</tr>
<tr>
<td>Crowborough</td>
<td>£450,205</td>
<td>£255,244</td>
<td>£195,919</td>
<td>£133,051</td>
<td>£331,721</td>
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<tr>
<td>Mayfield</td>
<td>£565,174</td>
<td>£325,000</td>
<td>£231,886</td>
<td>£340,000</td>
<td>£454,795</td>
</tr>
<tr>
<td>Uckfield</td>
<td>£435,884</td>
<td>£273,077</td>
<td>£214,893</td>
<td>£140,456</td>
<td>£315,940</td>
</tr>
<tr>
<td>Heathfield</td>
<td>£423,593</td>
<td>£211,327</td>
<td>£228,357</td>
<td>£105,333</td>
<td>£313,573</td>
</tr>
<tr>
<td>Hailsham</td>
<td>£285,870</td>
<td>£183,312</td>
<td>£165,603</td>
<td>£113,400</td>
<td>£213,556</td>
</tr>
<tr>
<td>Polegate</td>
<td>£382,540</td>
<td>£201,694</td>
<td>£236,588</td>
<td>£119,081</td>
<td>£251,914</td>
</tr>
</tbody>
</table>

- Based on Land Registry data
- Highest average prices for Mayfield, Wadhurst and Forest Row
- Lowest average prices for Polegate and Hailsham
- Range of £241,239 between highest and lowest average price
- Clear distinction between North and South of district – higher prices in North and lower prices in South

Source: Land Registry 2014
Housing Market – Sub Borough Average

Average Sold Price Over Last 12 Months (Zoopla – Aug 2014)

<table>
<thead>
<tr>
<th>Sub Borough</th>
<th>Detached</th>
<th>Semi-detached</th>
<th>Terraced</th>
<th>Flats</th>
<th>Average</th>
<th>Number of sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest Row</td>
<td>£674,894</td>
<td>£381,933</td>
<td>£258,153</td>
<td>£131,566</td>
<td>£446,054</td>
<td>50</td>
</tr>
<tr>
<td>Wadhurst</td>
<td>£603,727</td>
<td>£370,881</td>
<td>£243,613</td>
<td>£232,158</td>
<td>£398,102</td>
<td>113</td>
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<tr>
<td>Crowborough</td>
<td>£457,864</td>
<td>£279,799</td>
<td>£206,082</td>
<td>£141,374</td>
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<td>Mayfield</td>
<td>£594,560</td>
<td>£303,300</td>
<td>£278,750</td>
<td>£280,000</td>
<td>£455,750</td>
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</tr>
<tr>
<td>Uckfield</td>
<td>£432,932</td>
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<td>Polegate</td>
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<td>£217,192</td>
<td>£204,697</td>
<td>£121,647</td>
<td>£237,866</td>
<td>276</td>
</tr>
</tbody>
</table>

Source: Zoopla 2014

- Based on Zoopla data for last 12 months
- Reinforces conclusions based on Land Registry data
- Highest average prices for Mayfield, Wadhurst and Forest Row
- Lowest average prices for Polegate and Hailsham
- Range of £224,327 between highest and lowest average price
- Clear distinction between North and South of district – higher prices in North and lower prices in South
### Current Asking Prices (Zoopla – Aug 2014)

<table>
<thead>
<tr>
<th>Town</th>
<th>1 bed</th>
<th>2 bed</th>
<th>3 bed</th>
<th>4 bed</th>
<th>5 bed</th>
<th>Number of properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest Row</td>
<td>£212,500</td>
<td>£235,817</td>
<td>£401,355</td>
<td>£730,940</td>
<td>£904,000</td>
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<tr>
<td>Wadhurst</td>
<td>£153,124</td>
<td>£300,709</td>
<td>£381,913</td>
<td>£653,927</td>
<td>£1,098,889</td>
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<td>Crowborough</td>
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<td>£411,742</td>
<td>£487,419</td>
<td>£1,016,910</td>
<td>173</td>
</tr>
<tr>
<td>Mayfield</td>
<td>£250,000</td>
<td>£458,333</td>
<td>£482,273</td>
<td>£710,238</td>
<td>£987,500</td>
<td>44</td>
</tr>
<tr>
<td>Uckfield</td>
<td>£146,290</td>
<td>£273,833</td>
<td>£423,185</td>
<td>£575,839</td>
<td>£935,525</td>
<td>189</td>
</tr>
<tr>
<td>Heathfield</td>
<td>£148,931</td>
<td>£227,203</td>
<td>£379,175</td>
<td>£547,073</td>
<td>£847,492</td>
<td>152</td>
</tr>
<tr>
<td>Hailsham</td>
<td>£141,205</td>
<td>£182,628</td>
<td>£289,291</td>
<td>£436,506</td>
<td>£532,787</td>
<td>176</td>
</tr>
<tr>
<td>Polegate</td>
<td>£102,994</td>
<td>£202,588</td>
<td>£426,285</td>
<td>£428,325</td>
<td>£1,300,000</td>
<td>93</td>
</tr>
</tbody>
</table>

Source: Zoopla 2014

- Based on current advertised prices on Zoopla (at August 2014)
- Generally overstated compared to sold price – less accurate indicator of value
- More variation between towns
- Still reinforces North-South divide:
  - Hailsham and Polegate with lowest asking prices across all sizes
  - Forest Row, Wadhurst and Mayfield with highest asking prices across all sizes
Housing Market – Sub Borough Average

Home Price Heat Map

- Mayfield, Wadhurst and Forest Row are District’s home price hot spots
- Hailsham and Polegate are District’s home price cold spots

= Home price hot spot – represents higher prices

= Home price cooler spot – represents lower prices

Housing Market – Lower Quartile Average (£)

Lower Quartile House Prices (1996 – 2012)

- Lower quartile = proxy for entry level ownership
- Lower quartile average house price in Wealden (2012) = £179,250
- Lower quartile average house price in Strategic HMA (2011) = £173,042
- Fairly close alignment and similar trend between Wealden, Strategic HMA and South East LQ price trajectories

Source: DCLG 2011
Housing Market – Lower Quartile Change (%)

- Very close alignment between in LQ price increase for Wealden and South East
- Similar trend for Strategic HMA but slightly larger increase
- % increase of 250% over the period for Strategic HMA
- % increase of 232% over the period for Wealden

Source: DCLG 2011
Demographics – Resident Earnings

Mean Average Resident Earnings (2003, 2008 and 2013)

- N.B. Average 2013 earnings in Wealden not available from ASHE due to statistical inaccuracies
- N.B. 2013 earnings in Strategic HMA therefore do not include figure for Wealden
- Average 2008 earnings in Wealden = £37,521
- Average 2013 earnings in Strategic HMA = £37,273

Source: ASHE 2013
Demographics – Lower Quartile Earnings

Lower Quartile Resident Earnings (2003, 2008 and 2013)

- Lower Quartile 2013 earnings in Wealden = £19,396
- Lower Quartile 2008 earnings in Wealden = £18,495
- Lower Quartile 2013 earnings in Strategic HMA = £20,091

Source: ASHE 2013
Demographics – Household Income

Mean and Lower Quartile Household Income (2013)

- **Wealden average household income = £38,833**
- **GB average household income = £35,994**
- **Wealden LQ household income = £16,409**
- **GB LQ household income = £14,852**

Source: CACI 2010
Housing Market – Affordability

• Ratio of lower quartile house price to lower quartile earnings = indicator of affordability

• Higher ratio = lower affordability

• Wealden has more challenged affordability than Strategic HMA and other comparators
Calculating Future Affordable Housing Need – in Progress
Methodology – Calculating Housing Need

1 Current Housing Need
- Homeless Households/Temporary Accommodation
- Overcrowded/Concealed Households
- Other Waiting List Groups

2 Future Housing Need
- New Household Formation (Annual)
  \times\ \text{Proportion of Newly Forming Household Falling Into Need}
+\ \text{Existing Households Falling Into Need}

3 Future Affordable Housing Supply
- Affordable Dwellings Occupied by Households in Need
  +\ \text{Surplus Stock}
+\ \text{Committed Supply of New Affordable Housing}
-\ \text{Units to be Taken Out of Management}

Total Current Housing Need (Gross Backlog) + Total Newly Arising Housing Need - Total New Affordable Housing Stock Available = Total Net Housing Need

Source: GVA 2014
Key Messages

- **Strategic Housing market defined as:**
  - Wealden
  - Eastbourne
  - Tunbridge Wells
  - Rother
  - Lewes
  - Mid Sussex

- Significant growth over last decade driven by domestic migration
- Impact of ageing population on housing requirements for Wealden
- Significant under-occupancy trends
- More challenged affordability than wider Strategic Housing Market Area
- Home price variation evident within Wealden sub-markets (North-South distinction)

Source: Neighbourhood Statistics 2014
Dear All,

Please find attached the Draft Housing Position statement which has been prepared following the Duty to Cooperate meetings we had earlier in the year. Consultation on the Wealden Local Plan – Issues, Options and Recommendations document starts on 19th October and this document will support this document and also the draft SHMA which we anticipate will be published at the same time. If you have any comments on the document if you could please let me have them by Wednesday 14th October it would be appreciated.

Kind regards,
1 Purpose

1.1 This purpose of this paper is to set out Wealden District Council has actively and positively sought to comply with the duty to cooperate in the preparation of the Wealden Local Plan (WLP) with regard to housing provision.
1 Purpose
2 Background and policy context

2.1 Section 110 of the Localism Act 2011 places a legal duty on local planning authorities and other prescribed bodies to co-operate with each other on strategic planning matters on cross boundary issues in so far as they are relevant to their administrative areas throughout the preparation of their local plans. The National Planning Policy Framework (NPPF) 2012 reiterates this duty and requires an independent inspector to assess whether the development plan they are examining has been prepared in accordance with the duty to co-operate.

2.2 It is expected that engagement and co-operation will be constructive, active and ongoing and in order to maximise effectiveness throughout plan preparation as well as implementation, delivery and subsequent review. The National Planning Policy Guidance (NPPG) confirms that this is not a duty to agree but that local planning authorities should make every effort to secure the necessary co-operation on cross boundary strategic matters before submitting development plan documents for examination. The examination will test whether the duty has been complied with.
3 Housing Market Areas

3.1 The NPPF and NPPG draw attention to the need to plan for housing across Housing Market Areas (HMA’s). Paragraph 10 of the NPPG states:

“A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. It might be the case that housing market areas overlap. The extent of the housing market areas identified will vary, and many will in practice cut across various local planning authority administrative boundaries. Local planning authorities should work with all the other constituent authorities under the duty to cooperate.”

3.2 In April 2014 Wealden District Council appointed Bilfinger GVA to undertake a Strategic Housing Market Assessment (SHMA) to understand Wealden District Council’s current and future housing market and how this relates to the District’s housing growth and needs.

3.3 The findings of the report will be used to inform policy for long-term delivery of housing within the District.

3.4 Wealden is a relatively large local authority area with a relatively low density population overall. The District faces the challenge of striking an appropriate balance between maintaining and enhancing the environment and addressing housing development pressures.

3.5 The housing market is primarily focused on a set of larger settlements which are influenced by relationships with larger towns which sit just beyond the local authority boundaries. These relationships include those between Forest Row and East Grinstead, Crowborough and Tunbridge Wells, Hailsham and Eastbourne and, to a lesser extent, Uckfield and Haywards Heath. These relationships reflect local commuting patterns, with workers in these larger external towns seeking housing opportunities nearby. There is also some relationship in terms of localised house prices.

3.6 There is also a regional overlay to the housing market, with settlements to the north being closer in travel time to London as well as the Gatwick/Crawley area and the M25 corridor.

3.7 The overall effect is that the north of the District has a housing market that includes inner south east characteristics, while the south includes characteristics of its nearby south coast. This results in higher prices being found to the north on a per square foot basis or for similar types of properties.

3.8 The SHMA defines Wealden’s wider housing market area as including; Wealden District, Eastbourne Borough, Tunbridge Wells Borough, Rother District, Lewes District and Mid Sussex District. This incorporates the local authorities which have the strongest and most consistent migration and commuting relationships with Wealden, as well as linkages in house prices and rates of change. It is acknowledged that the relationships
3 Housing Market Areas

with each adjoining authority are different; the relationship with Tunbridge Wells to the north of the District and with Eastbourne in the south of the District are the strongest.

3.9 The wider HMA sets the context for understanding the Wealden housing market and allows comparability between Wealden and other authorities within the wider HMA. Figure 1 shows the identified wider housing market area.
3 Housing Market Areas
3.10 There are clear distinctions in house prices across the sub-markets within Wealden, particularly between the north and the south of the District. Key northern sub-markets including Forest Row, Wadhurst, Crowborough and Mayfield have higher values, whereas southern sub-markets including Hailsham and Polegate represent lower price locations.

3.11 The higher sales and rental values in the north of the District in part reflect the better connectivity of the north with wider economic markets. The north of the District provides access to jobs in nearby towns such as East Grinstead and Tunbridge Wells, as well as access to the Gatwick Diamond, and is also within commuter range of Central London. There is also an element of relative affordability in the Wealden housing market compared to other economic markets and commuter locations i.e. Tunbridge Wells and the wider London market itself.

3.12 The north part of the district therefore presents inner south east characteristics. In contrast, the south of the District does not provide the opportunity for residents to commute to London easily and is more characteristic of neighbouring south coast areas and markets, with a strong emphasis on local employment. It is important to note that whilst location is clearly important, higher values can also be attributed to stock type and quality. There are value differences in individual settlements in Wealden.

3.13 The Wealden market also shows some other distinctions between north and south, with a greater concentration of larger homes north and smaller homes south. There is evidence of a generally older population, with an emphasis in the south. There are also indicators of under-occupancy.

3.14 The clear and well-evidenced north-south distinctions in Wealden’s housing market reflect the connectivity and travel to work patterns and times of the two halves of the District. The higher prices in the northern sub-markets such as Forest Row, Wadhurst and Mayfield are attributed to by the ability to live in the north of the District and commute to East Grinstead and Tunbridge Wells, the Gatwick Crawley area, and at the widest level London, therefore providing residents in this part of the District with access to wider economic markets and increasing the desirability of the north Wealden location. These higher prices are also reflective of the delivery of good quality new stock and the relative affordability of stock compared with other commuter locations and London sub-markets (as identified through consultation with lettings and sales agents). Conversely sub-markets in the south of the District like Hailsham and Polegate are more restricted in terms of their accessibility and connection to areas beyond the north of the district, and are more reflective of the southern coast housing market characteristics. Although such coastal locations can be desirable in housing terms, access to wider employment opportunities is not as strong a driver for increasing values in the south of the District to the level of those in the north.

3.15 It is recommended that Wealden District Council should seek to deliver a mix of housing types, sizes and tenures throughout the District. Continuing demand can be expected across all parts of the District given access to employment in other areas from the north, as well as an active local employment market in the south and access to some jobs in nearby south coast towns.
3.16 There is evidence of a broadly similar proportion of affordable need within the north and south of the District based on those households currently registered on the Council’s housing register, although focussed around key settlements (48% in the north and 52% in the south). This reinforces the requirement for mixed delivery throughout Wealden. There is no significant sub-district variation in stock tenure than needs to be considered.

3.17 Wealden’s strongest relationships are in the north with Tunbridge Wells and to the south with Eastbourne.
4 Considering neighbouring authorities

4.1 In June and July 2015 separate individual meetings took place with the Council's adjoining authorities, East Sussex County Council, South Downs National Park Authority and Brighton and Hove City Council to discuss cross boundary issues.

4.2 The meetings included discussion on housing market areas, objectively assessed housing need and the provision of housing development in the Local Plan process. Each authority is at a different stage in the Local Plan process and the preparation of their SHMA's to inform their Local Plan.

4.3 Table 1 analyses the status of each authority's SHMA within Wealden's identified HMA. The table shows that Wealden is not specifically identified as falling within the HMA geographies of any of these separate evidence based reports. The exception to this is Eastbourne which has strong links with South Wealden and forms part of a joint evidence base for both authorities local plan preparation and Tunbridge Wells which identifies a strong relationship with the northern part of the District.

Table 1 Review of neighbouring authority's evidence

<table>
<thead>
<tr>
<th>Authority</th>
<th>Defined Housing Market Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sevenoaks</td>
<td>Currently working on a joint SHMA with Tunbridge Wells which is anticipated to be published in 2015. The identified HMA includes Sevenoaks, Tunbridge Wells and Tonbridge.</td>
</tr>
<tr>
<td>Tunbridge Wells</td>
<td>As above for Sevenoaks. The report identifies a functional relationship with into the northern parts of Wealden including Crowborough.</td>
</tr>
<tr>
<td>Tandridge</td>
<td>Currently working on a SHMA to be published in 2015. A technical paper has been prepared to inform the SHMA which identify the HMA which includes Croydon, Reigate and Banstead, Mid Sussex and Sevenoaks.</td>
</tr>
<tr>
<td>Rother</td>
<td>The identified HMA is Rother and Hastings. Evidence published in 2006, 2009/10 and 2012.</td>
</tr>
<tr>
<td>Lewes</td>
<td>Sussex Coast HMA which includes; Adur, Arun, Brighton &amp; Hove, Chichester, Lewes and Worthing. Evidence published for Lewes in 2008 (SHMA) and 2013.</td>
</tr>
</tbody>
</table>

DHS69
4.4 There is a recurring position within these evidence base documents in that whilst market linkages are identified with Wealden these linkages are weaker than with other neighbouring authorities. As the evidence within the SHMA has shown this is a result of Wealden having connections with a number of areas, including those beyond immediate neighbouring boundaries, resulting in the strength of these relationships being diluted.

4.5 The following map shows the spatial definitions of the HMA geographies being used in comparable studies covering neighbourhood areas. Many of these studies have been undertaken on a multi authority basis and, with the exception of Eastbourne and Tunbridge Wells Wealden falls outside of the housing market areas being considered in surrounding areas. It is also recognised that the SHMA evidence in areas with which Wealden has some form of housing market linkage and have been undertaken to different timetables.
Map 2 Housing Market Areas Relevant to Wealden District
The draft Tunbridge Wells and Sevenoaks HMA includes the northern part of Wealden District.
4.6 Table 2 summarises the relationship with each of Wealden’s adjoining authorities and the outcomes of the duty to cooperate meetings with regard to the Wealden HMA. With the exception of Rother the HMA identified in the SHMA is accepted by each authority which falls within it.

4.7 Given the strength of the relationships within the Wealden HMA it is evident that Wealden should continue to work with each authority identified in the HMA however the housing needs of Eastbourne and Lewes in relation to the southern part of the district and with Tunbridge Wells with regard to the north are the strongest.

Table 2: Relationship between authorities identified in Wealden’s housing market area

<table>
<thead>
<tr>
<th>Authority</th>
<th>Relationship with Wealden</th>
<th>Outcome of Duty to cooperate meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid Sussex</td>
<td>The SHMA concludes that there are strong localised migration links between Wealden and Mid Sussex. It is the second highest area from which residents are moving to Wealden. Out commuting (5%) and in commuting (4%) indicates a strong connection. There is a particularly strong alignment in the mean average house price levels between 1996 and 2012.</td>
<td>It is accepted that Mid Sussex falls within Wealden’s HMA but that the relationship is not as strong as with Tunbridge Wells and Eastbourne.</td>
</tr>
<tr>
<td>Sevenoaks</td>
<td>The SHMA indicates that the only evidence linking Wealden and Sevenoaks is in and out migration; there is a 2% movement into Wealden from Sevenoaks and 1% flow from Wealden to Sevenoaks. There is no evidence to suggest Wealden has a link with Sevenoaks with regard to in and out commuting. The SHMA concludes Sevenoaks is not within Wealden’s HMA.</td>
<td>It is accepted that Sevenoaks should not fall within the Wealden HMA.</td>
</tr>
<tr>
<td>Tunbridge Wells</td>
<td>The SHMA concludes that Wealden has a strong relationship with Tunbridge Wells particularly in the north of the District. In 2013 10% of Wealden’s new residents moved from Tunbridge Wells (the second highest) and 8% moved from Wealden to Tunbridge Wells (again the second highest).</td>
<td>It is acknowledged that Tunbridge Wells has a strong relationship with Wealden, especially in north Wealden.</td>
</tr>
<tr>
<td>Tandridge</td>
<td>Tandridge is not included in Wealden’s HMA. The only evidence in the SHMA with regard to linkages with this authority is that Tandridge is 9th in the top ten areas from which residents are moving to Wealden. There is</td>
<td>It is accepted that Tandridge should not fall within the Wealden HMA</td>
</tr>
</tbody>
</table>
### Housing Market Position Statement

<table>
<thead>
<tr>
<th>Authority</th>
<th>Relationship with Wealden</th>
<th>Outcome of Duty to cooperate meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rother</strong></td>
<td>The SHMA concludes that 6% of new residents into Wealden were from Rother and 7% moved from Wealden into Rother. The net migration loss shows the recent trend (between 2010 and 2013) for people to migrate out of Wealden to Rother (which is the highest level of net migration losses). In terms of commuting 3% of Wealden’s residents work in Rother and 5% of Rother’s residents work in Wealden.</td>
<td>Following discussion and subsequent correspondence Rother District Council’s view is that Rother District Council should be excluded from the Wealden HMA but should sit alongside Hastings in the same terms as referred to in paragraph 2.51 of the draft SHMA report.</td>
</tr>
<tr>
<td><strong>Lewes</strong></td>
<td>Wealden has a strong relationship with Lewes. 7% of people moving into Wealden in 2013 were from Lewes (3rd highest) and 5% moved from Wealden to Lewes (5th highest). Overall Lewes is the top area from which residents are moving to Wealden between 2010 and 2013. In terms of commuting 5% of Wealden’s residents work in Lewes and 5% of Lewes residents work in Wealden.</td>
<td>It is accepted that Lewes falls within Wealden’s HMA but that the relationship is not as strong as with Tunbridge Wells and Eastbourne.</td>
</tr>
<tr>
<td><strong>Eastbourne</strong></td>
<td>Wealden has the strongest relationship with Eastbourne in terms of migration and commuting trends. In 2013 17% of residents moving to Wealden were from Eastbourne and 19% of Wealden’s residents moved to Eastbourne. 13% of Wealden’s residents work in Eastbourne and 12% of Eastbourne’s residents work in Wealden. There are notable differences in prices across the HMA with Eastbourne having the lowest mean average house price (£197,081) compared with Wealden (£274,907).</td>
<td>It is acknowledged that Eastbourne has the strongest relationship with Wealden, especially in the South Wealden area.</td>
</tr>
</tbody>
</table>