Housing supply in 2017/18: where do we stand?

Latest house building figures show 222,194 additional dwellings were completed from April 2017 to March 2018, up 2.2% from 217,345 in 2016/17, the highest level for a decade, and just 1,340 shy of the 2007/8 peak.

While this is positive, the rate of growth has plateaued somewhat and the figure for new homes remains significantly lower than the Government's stated target of 300,000 homes per annum by the mid-2020s.

With this in mind, it is helpful to also consider the patterns of housing delivery and demand across the country. The Government's new Housing Delivery Test (HDT), formally introduced in the NPPF 2018, was first proposed in the Autumn Statement in November 2015 by then Chancellor George Osborne. When in place, the HDT will use the new Standard Method for deriving housing need for local areas (Local Housing Need) and offer a consistent measure of how closely housing delivery is meeting need or the local plan target at the local authority level.

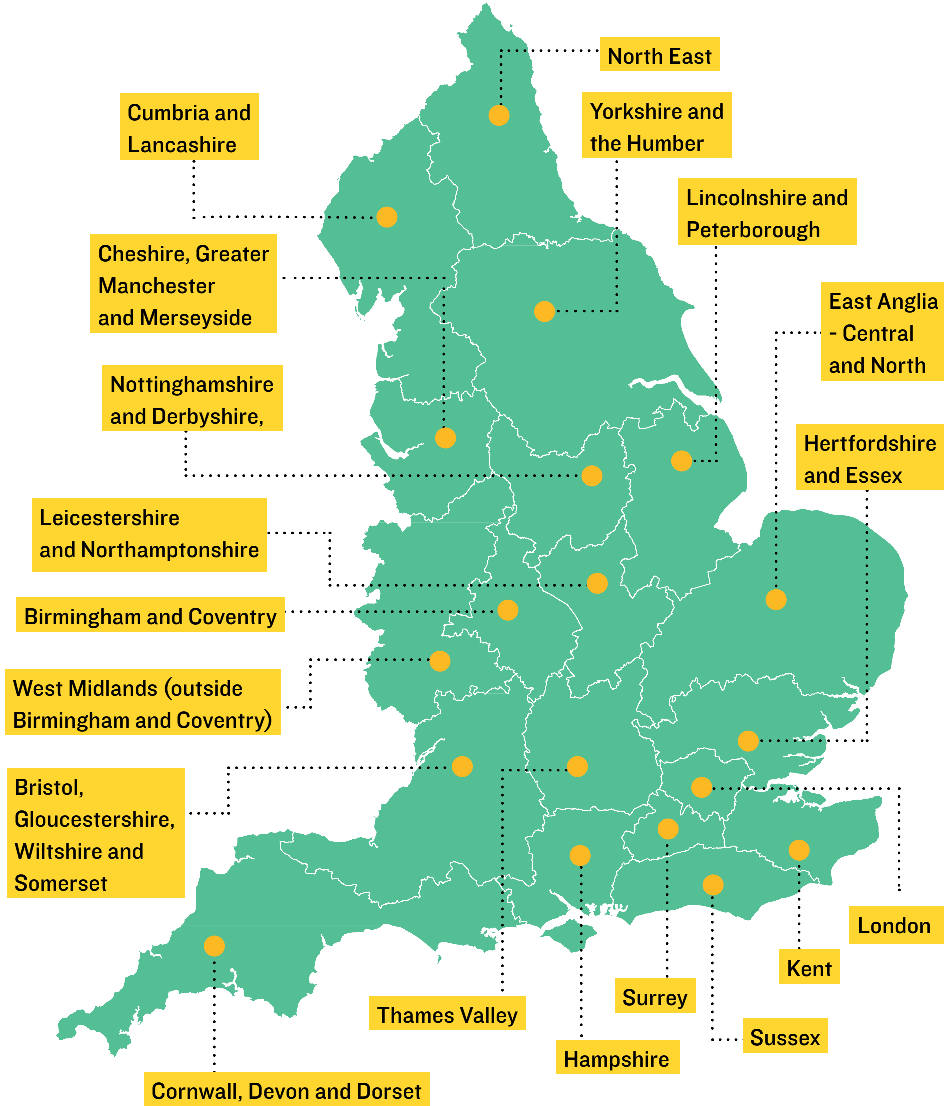
We have produced this guide to assist consideration of what the new figures might mean. It is split into two broad sections. Firstly, what does analysis of the latest data on housing completions tell us about the make up of house building up and down the country and how is this affected by certain planning considerations? Secondly, we make an estimate at the local authority level of how current housing delivery rates will perform against the Housing Delivery Test.

For the analysis in the second part of the report – and in advance of the Government publishing its formal figures - we have calculated whether each local authority would 'pass' their HDT given current delivery rates as of November 2018 and by November 2020. The Standard Method estimates are based on the 2014-based household projections for the 10 year period 2018-28. Our projections of HDT results for 2020 are illustrative because they assume no change in either rate of delivery or the status of individual authorities (or joint authorities) Local Plans. They also do not include student or communal dwellings as this data is not yet available.

Our analysis forecasts that if current trends continue, half of local authorities will pass the 2020 HDT, 34% would be below the presumption in favour of sustainable development threshold and 10% of authorities would operate within the 20% land buffer, while 6% would require an action plan.

This guide has been produced by Lichfields to help you navigate the new data on housing net additions published by MHCLG and potential implications for the Housing Delivery Test (November 2018 and 2020). Click on an area of England for the headlines including:

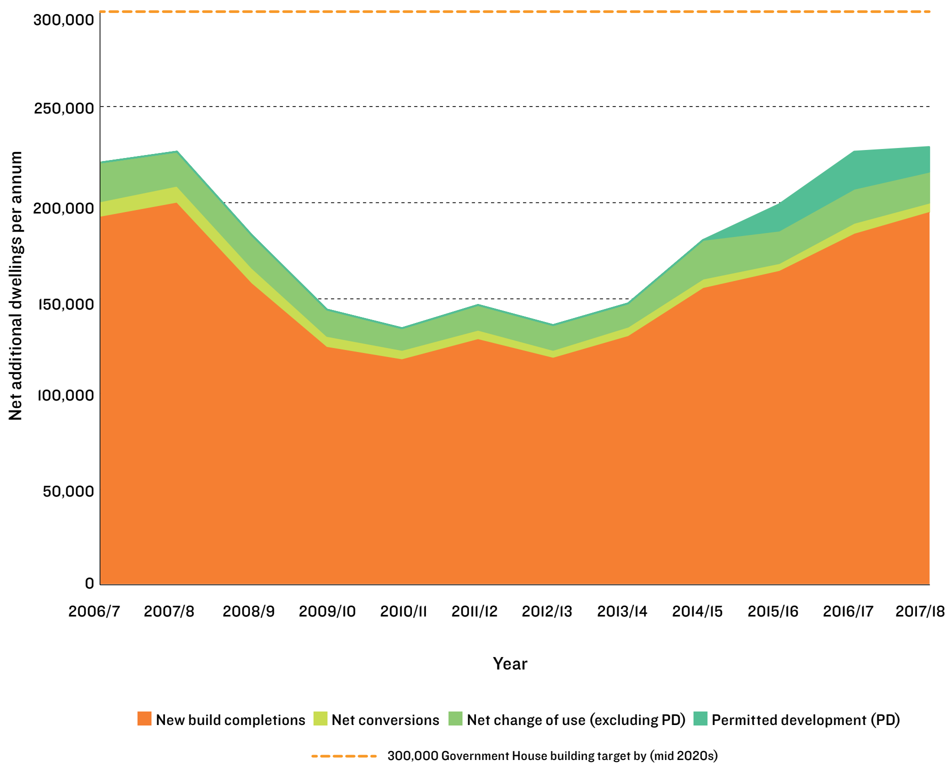
- The latest net additional dwelling figures
- An indicative illustration of the potential HDT results for November 2018
- A ceteris paribus illustration of the projected HDT results in November 2020
- The contribution of permitted development rights to net additions
- The net additional dwellings three-year average (2014/16-2017/18) used to calculate the test
- The Standard Method figure (also used to calculate the test, based on Lichfields up to date analysis)



How did we get to a ten year high in house building?

Of the 222,194 additional dwellings completed from April 2017 to March 2018, by far the largest component (88%) is made up of new build. Its therefore significant that new build completions grew by 6% since last year. However, this growth rate in house building, while welcome, is slower than the 12% year on year change from 2015/16 to 2016/17 and represents something of a plateau. It will take 14 years at the current rate of growth to reach the Government's ambition for 300,000 homes per annum.

Beyond new build delivery, permitted development rights have become an increasingly important source of new homes over the last few years (reaching 8.7% of net additions in 2016/17). However new dwellings from permitted developments fell significantly (by 28%) after the previous year's high. While there have only been three years of data for permitted development completions, the trend of applications for office to residential conversions has also steadily dropped quarter on quarter reflecting a fall in the stock of buildings suitable and available for conversion and likely a lower level in the coming years. More and more reliance will therefore be placed on new build completions.



What is the geography of housing need and delivery?

The latest 2017/18 figures show that most English regions met – and in many cases exceeded - the aggregate of Local Housing Need under the Government's proposed revisions of the Standard Method. However, the picture is mixed and raises stark planning messages.

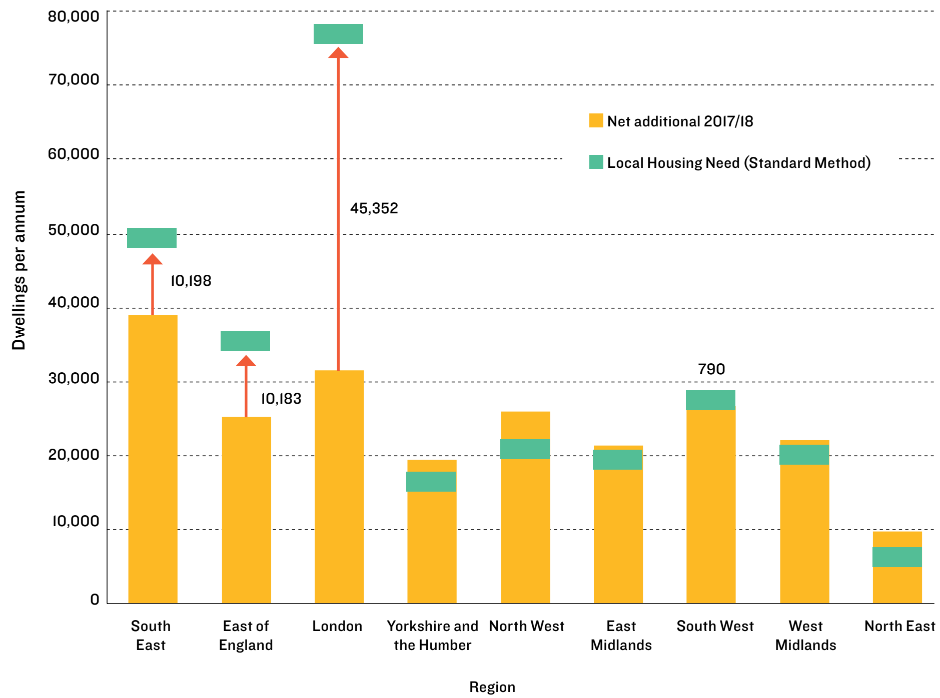
The South East and East of England both have shortfalls of over 10,000 homes per year and London saw a huge gap between need and supply of more than 45,000 homes.

Housebuilding in London is of particular concern given that the supply of new homes in the Capital dropped by 20% from last year. Of this, new build completions fell by 13% while new homes from permitted development dropped by just over 50%, perhaps reflecting the introduction of Article 4 Directions.

By contrast, in many other areas, the Standard Method has been criticised for producing lower estimates of need than those in previous SHMAs. This is particularly (but not exclusively) in the Midlands and North of England where housing delivery is now outpacing local housing need figures in those regions, causing some local authorities to downgrade their levels of ambition.

However, the Standard Method is described in the NPPF as the "minimum starting point". Indeed, the national total it produces (of c.273,000 per annum) is lower than the Government's ambition for 300,000 by the mid-2020s. In response, the Planning Practice Guidance (PPG) actively supports local authorities which pursue higher figures, highlighting economic growth, new infrastructure, previous SHMAs and past rates of development as reasons why higher housing need figures may or should be considered.

The extent to which these PPG provisions will have the necessary "bite" – to sustain and boost higher rates of housing delivery where the Standard Method shows a reduction – is open to question. Given this scepticism, the Government could usefully use its current consultation on reforms to the NPPF and PPG to tighten up its provisions.

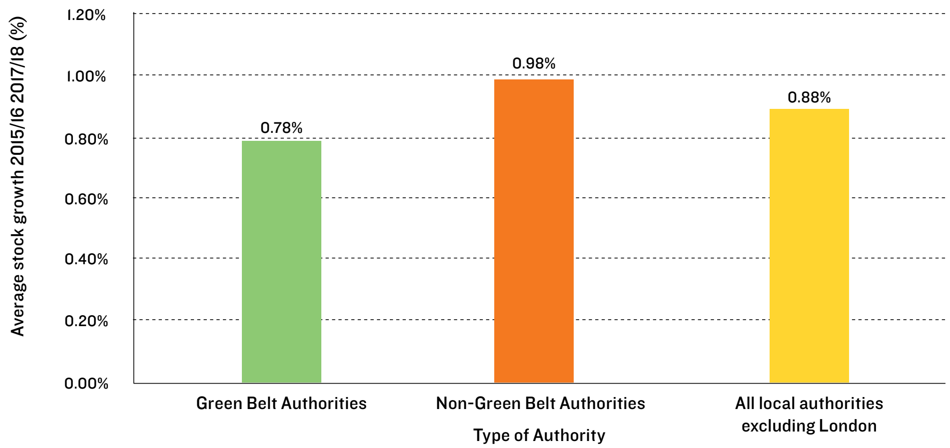


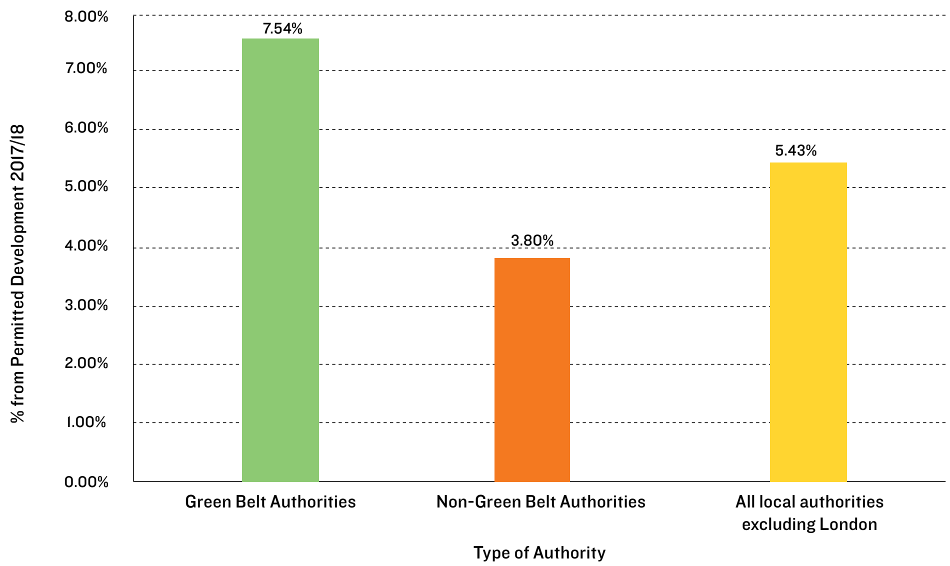
Housing delivery is lower in Green Belt areas but the proportion of supply from permitted development rights are higher

Perhaps unsurprisingly, local authorities outside of London with a significant proportion of land designated as Green Belt (more than 40% of non-urban land), had a lower average delivery rate over the last three years (0.78% of total stock) than areas that do not have significant levels of Green Belt (0.98%). This is likely due to the constrained availability of land for house building in these areas.

Interestingly, these Green Belt constrained local authorities also have almost twice the share of their housing delivered through permitted developments than other areas. Whilst this might seem to suggest constraints on land suitable for housing increase values and pressure to convert existing urban stock, it must be seen in the context that PD is a larger proportion of a smaller level of supply overall.

By categorising local authorities into rural and urban (using the Government's definitions and again excluding London), there are significantly more housing completions in urban areas (78%, in 235 local authorities) than rural (22%, in 91 local authorities). However, there are more completions as a share of total existing stock in rural areas (1.13%, as opposed to 0.86% in urban area). When considered against housing need (derived from Standard Method calculations), rural areas have already, in sum, met 98% of their delivery target in the last three years, whereas urban areas have met just 71%, a significant gap. This is without including London's very significant shortfall in delivery.



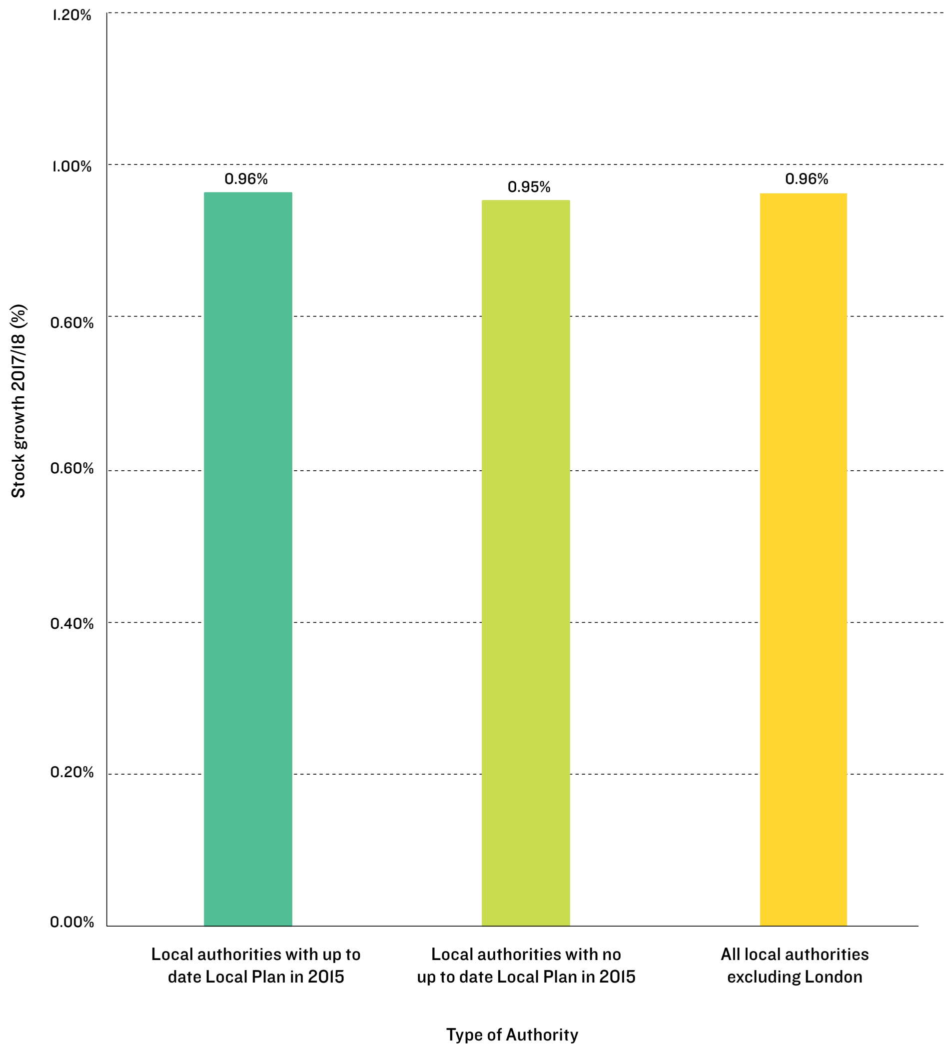


There is little difference in delivery rates between local authorities with or without an agreed Local Plan

The planning system has been ostensibly 'plan led' since 1991. The localism agenda was heavily predicated on the role of up-to-date Local Plans and the latest NPPF reiterates that "the planning system should be genuinely plan-led". The theory is that it is Local Plans which provide the confidence and certainty necessary for new housing delivery. For some forms of development this is self-evidently true. There are, of course, other good reasons for having Local Plans, not least local control and accountability over a formally agreed and thought-out spatial plan.

However, to what extent are Local Plans a pre-requisite for boosting housing delivery? To provide a provisional, high level perspective, we looked at the growth in housing stock against whether these local authorities had an agreed Local Plan in 2015. The year 2015 was chosen as the latest year in which most houses completed in 2017/18 could have received permission. In 2015 just under a third of local authorities had a post-NPPF local plan in place.

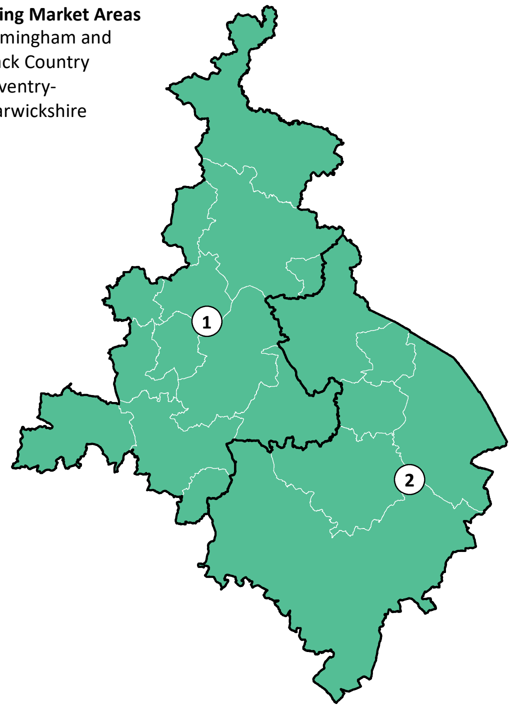
The results are striking. Rates of housing stock growth were very similar irrespective of the presence of an up to date Local Plan. This suggests that, at least in 2015, the presumption in favour of sustainable development proved an effective route to secure housing delivery despite the absence of an agreed local plan. Interestingly, 2015/16 was the high point for housing allowed at appeal, with 34,415 dwellings allowed (63% of those at appeal); The equivalent figures for 2017/18 were 15,651 and 53%. And with the main gaps in plan coverage now being in Green Belt locations, where the presumption does not apply, this was likely a peak for housing delivery through speculative, off-plan, planning applications.

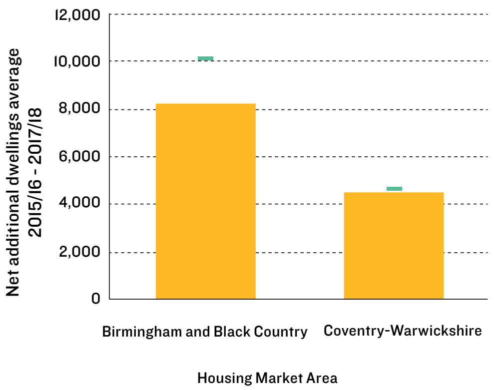


Birmingham and Coventry

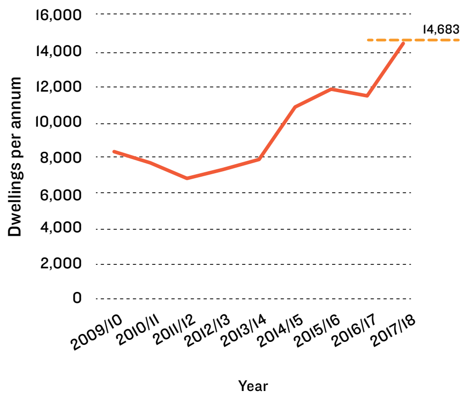
Net additional dwellings 2017/18	14,491
Net additional dwellings (% 2017 stock)	0.87%
Net additional dwellings average 2015/16-2017/18	12,632
Local Housing Need (Standard Method)	14,683
Net additional dwellings from permitted development 2017/18	879

Housing Market Areas
1. Birmingham and Black Country
2. Coventry-Warwickshire





- Net additional dwellings average 2015/16 - 2017/18
- Local Housing Need (Standard Method)



- Net additional dwellings per annum
- Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Birmingham and Black Country	**9,859**	**7.8%**	**0.76%**	**8,168**	**10,048**	–	–
Cannock Chase	625	6.7%	1.48%	330	284	137%	259%
East Staffordshire	681	0.0%	1.37%	558	430	134%	158%
Lichfield	552	2.0%	1.26%	358	334	117%	170%
Tamworth	151	0.0%	0.46%	126	148	71%	102%
Birmingham	3,160	9.8%	0.74%	2,583	3,577	101%	124%
Dudley	712	26.8%	0.52%	608	621	106%	117%
Sandwell	676	7.4%	0.52%	705	1,447	55%	47%
Solihull	710	6.2%	0.80%	659	767	112%	97%
Walsall	758	0.0%	0.67%	710	897	92%	85%
Wolverhampton	796	6.3%	0.74%	645	745	112%	107%
Bromsgrove	513	1.6%	1.28%	429	373	161%	149%
Redditch	384	12.5%	1.07%	249	178	136%	220%
Wyre Forest	141	9.2%	0.31%	207	246	109%	59%
Coventry-Warwickshire	**4,632**	**2.4%**	**1.22%**	**4,463**	**4,635**	–	–
North Warwickshire	227	0.0%	0.83%	254	173	165%	135%
Nuneaton and Bedworth	497	12.7%	0.91%	436	428	107%	118%
Rugby	578	1.4%	1.31%	498	512	110%	114%
Stratford-on-Avon	1,336	1.6%	2.40%	1,204	570	264%	246%
Warwick	899	2.3%	1.47%	861	632	161%	151%
Coventry	1,095	0.0%	0.81%	1,210	2,321	63%	47%

Pass · Action plan · 20% Land Buffer · Presumption in favour of sustainable development

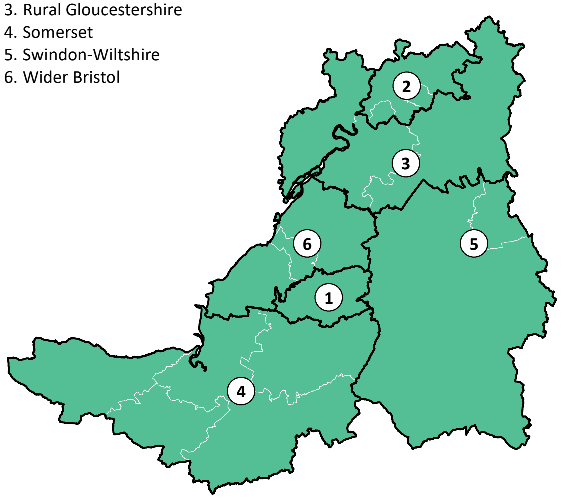
* Based on the Standard Method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.

† Note, the November 2018 Housing Delivery Test is measured against 2012- and 2014-based household projections rather than the Standard Method.

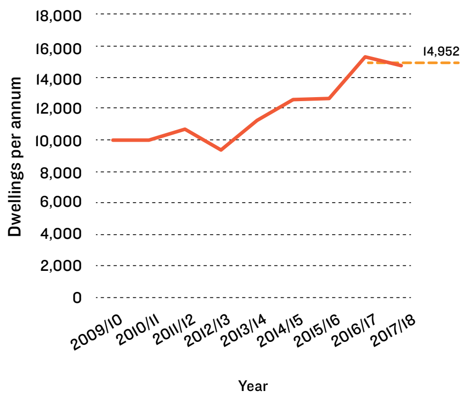
Bristol, Gloucestershire, Wiltshire and Somerset

Net additional dwellings 2017/18	14,785
Net additional dwellings (% 2017 stock)	1.14%
Net additional dwellings average 2015/16-2017/18	14,245
Local Housing Need (Standard Method)	14,952
Net additional dwellings from permitted development 2017/18	652

Housing Market Areas
1. Bath
2. Cheltenham-Gloucester
3. Rural Gloucestershire
4. Somerset
5. Swindon-Wiltshire
6. Wider Bristol



Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Bath and North East Somerset	**1,245**	**2.6%**	**1.61%**	**975**	**657**	**226%**	**206%**
Wider Bristol	**4,102**	**8.5%**	**1.03%**	**3,931**	**5,180**	–	–
Bristol	1,640	17.0%	0.85%	1,724	2,440	92%	70%
North Somerset	863	4.3%	0.92%	761	1,338	74%	82%
South Gloucestershire	1,599	2.1%	1.42%	1,445	1,402	133%	118%
Swindon-Wiltshire	**3,216**	**2.4%**	**1.07%**	**3,665**	**3,057**	–	–
Swindon	789	4.9%	0.85%	1,310	1,023	122%	78%
Wiltshire	2,427	1.5%	1.17%	2,355	2,034	138%	121%
Cheltenham-Gloucester	**1,913**	**3.1%**	**1.31%**	**1,622**	**1,770**	–	–
Cheltenham	493	0.4%	0.92%	396	539	90%	96%
Tewkesbury	945	0.0%	2.46%	766	580	184%	168%
Gloucester	475	12.0%	0.88%	461	652	81%	73%
Rural Gloucestershire	**1,664**	**0.4%**	**1.28%**	**1,451**	**1,507**	–	–
Cotswold	911	0.4%	2.20%	755	496	275%	207%
Forest of Dean	256	0.0%	0.69%	269	373	101%	72%
Stroud	497	0.4%	0.97%	428	638	94%	109%
Somerset	**2,645**	**4.9%**	**1.08%**	**2,601**	**2,781**	–	–
Mendip	679	2.1%	1.37%	514	588	123%	162%
Sedgemoor	434	1.4%	0.82%	476	756	90%	60%
South Somerset	563	15.1%	0.75%	600	726	105%	81%
Taunton Deane	866	2.4%	1.71%	900	612	190%	146%
West Somerset	103	2.9%	0.58%	111	100	142%	114%

Pass Action plan 20% Land Buffer Presumption in favour of sustainable development

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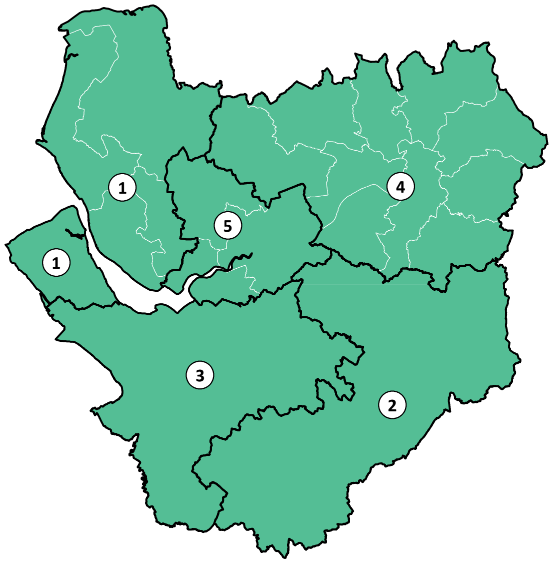
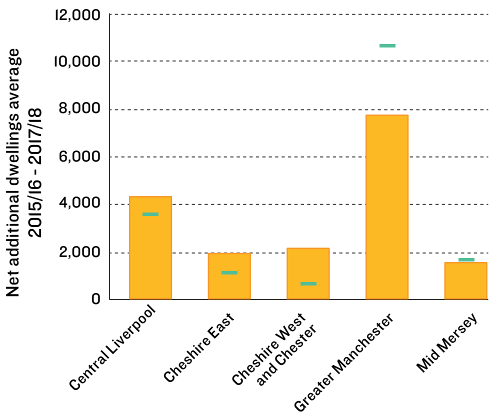
Cheshire, Greater Manchester and Merseyside

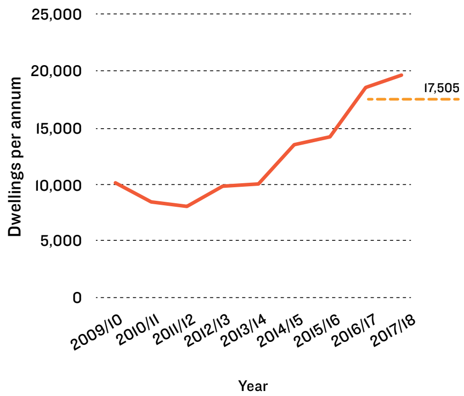
Net additional dwellings 2017/18	19,633
Net additional dwellings (% 2017 stock)	0.84%
Net additional dwellings average 2015/16-2017/18	17,452
Local Housing Need (Standard Method)	17,505
Net additional dwellings from permitted development 2017/18	923

Housing Market Areas
1. Central Liverpool
2. Cheshire East
3. Cheshire West and Chester
4. Greater Manchester
5. Mid Mersey





■ Net additional dwellings average 2015/16 - 2017/18
■ Local Housing Need (Standard Method)



— Net additional dwellings per annum
-- Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Central Liverpool	**4,692**	**2.8%**	**0.78%**	**4,277**	**3,545**	–	–
West Lancashire	185	0.0%	0.38%	269	204	156%	90%
Knowsley	626	0.0%	0.98%	465	266	182%	225%
Liverpool	2,748	4.0%	1.27%	2,751	1,636	200%	161%
Sefton	429	0.2%	0.34%	282	645	49%	67%
Wirral	704	3.3%	0.48%	510	794	75%	88%
Cheshire East	**2,298**	**0.9%**	**1.36%**	**1,878**	**1,101**	**188%**	**212%**
Cheshire West and Chester	**2,546**	**0.0%**	**1.70%**	**2,112**	**641**	**357%**	**398%**
Greater Manchester	**8,961**	**7.3%**	**0.76%**	**7,680**	**10,585**	–	–
Bolton	483	20.1%	0.40%	477	791	56%	60%
Bury	275	1.1%	0.33%	326	608	61%	46%
Manchester	2,974	14.0%	1.37%	2,174	2,584	98%	112%
Oldham	313	1.0%	0.33%	300	716	45%	43%
Rochdale	799	7.6%	0.88%	474	514	108%	174%
Salford	1,479	0.9%	1.34%	1,686	1,372	137%	106%
Stockport	738	0.4%	0.58%	574	1,087	67%	70%
Tameside	484	2.5%	0.48%	481	632	68%	76%
Trafford	468	1.7%	0.48%	386	1,335	42%	37%
Wigan	948	4.3%	0.66%	801	945	83%	97%
Mid Mersey	**1,136**	**10.0%**	**0.50%**	**1,507**	**1,633**	–	–
Halton	369	0.0%	0.66%	535	264	194%	133%
Warrington	359	27.9%	0.40%	482	887	56%	40%
St Helens	408	3.4%	0.51%	490	482	99%	82%

■ Pass ■ Action plan ■ 20% Land Buffer ■ Presumption in favour of sustainable development

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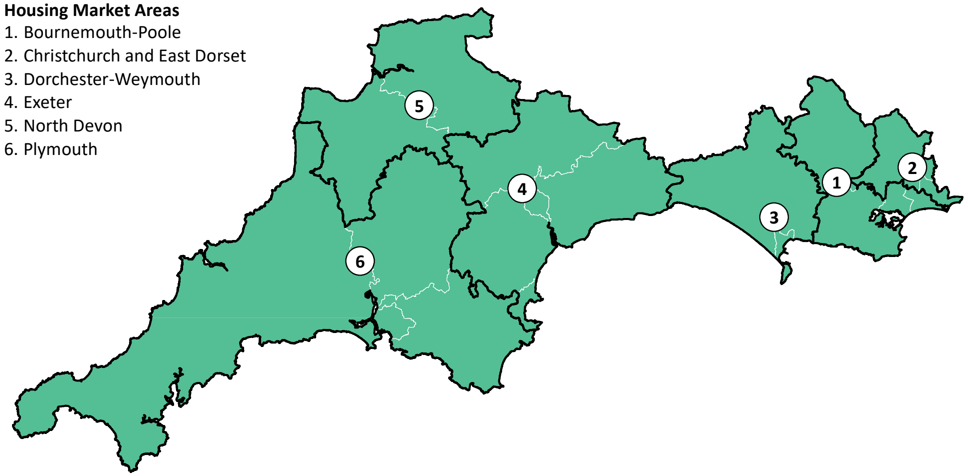
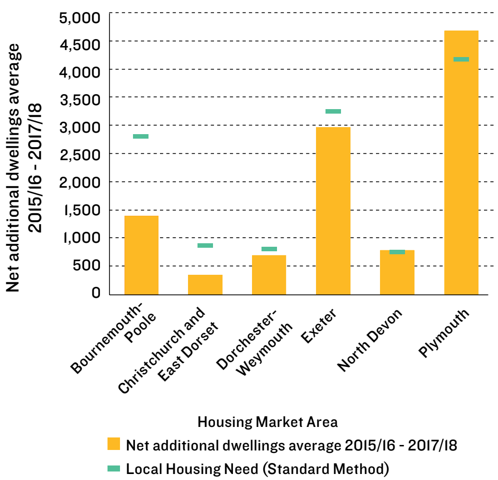
† Note, the November 2018 Housing Delivery Test is measured against 2012- and 2014-based household projections rather than the Standard Method.

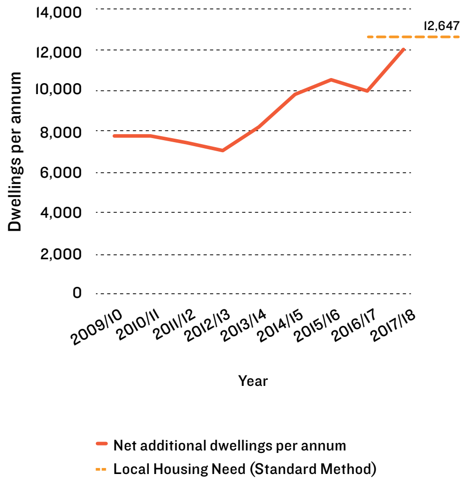
Cornwall, Devon & Dorset

Housing Market Areas
1. Bournemouth-Poole
2. Christchurch and East Dorset
3. Dorchester-Weymouth
4. Exeter
5. North Devon
6. Plymouth



Net additional dwellings 2017/18	12,024
Net additional dwellings average 2015/16-2017/18	10,868
Net additional dwellings from permitted development 2017/18	287
Net additional dwellings (% 2017 stock)	1.04%
Local Housing Need (Standard Method)	12,647





	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Bournemouth-Poole	**1,225**	**1.6%**	**0.59%**	**1,392**	**2,797**	–	–
Bournemouth	635	1.7%	0.73%	646	1,441	67%	46%
Poole	307	1.6%	0.46%	424	823	71%	40%
North Dorset	159	1.3%	0.51%	174	353	83%	56%
Purbeck	124	0.8%	0.55%	148	180	140%	77%
Christchurch and East Dorset	**412**	**3.9%**	**0.66%**	**349**	**870**	–	–
Christchurch	100	3.0%	0.43%	135	381	65%	43%
East Dorset	312	4.2%	0.79%	214	489	78%	94%
Dorchester-Weymouth	**633**	**1.3%**	**0.77%**	**692**	**809**	–	–
West Dorset	421	1.2%	0.84%	496	575	137%	80%
Weymouth and Portland	212	1.4%	0.67%	196	233	127%	96%
Exeter	**3,249**	**4.6%**	**1.17%**	**2,964**	**3,242**	–	–
Torbay	414	0.0%	0.64%	383	581	88%	84%
East Devon	873	0.7%	1.33%	875	885	156%	107%
Exeter	707	0.3%	1.36%	603	637	142%	114%
Mid Devon	529	18.9%	1.52%	402	363	140%	153%
Teignbridge	726	5.8%	1.22%	702	777	143%	117%
North Devon	**890**	**2.4%**	**1.16%**	**788**	**757**	–	–
North Devon	634	2.2%	1.40%	456	325	181%	211%
Torridge	256	2.7%	0.82%	331	432	101%	63%
Plymouth	**5,615**	**1.3%**	**1.25%**	**4,683**	**4,172**	–	–
Cornwall	3,427	1.3%	1.29%	3,033	2,857	137%	131%
Isles of Scilly	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Plymouth	1,465	0.0%	1.28%	1,040	630	209%	231%
South Hams	551	1.1%	1.25%	435	362	206%	169%
West Devon	172	14.0%	0.69%	174	323	66%	57%

Pass · Action plan · 20% Land Buffer · Presumption in favour of sustainable development

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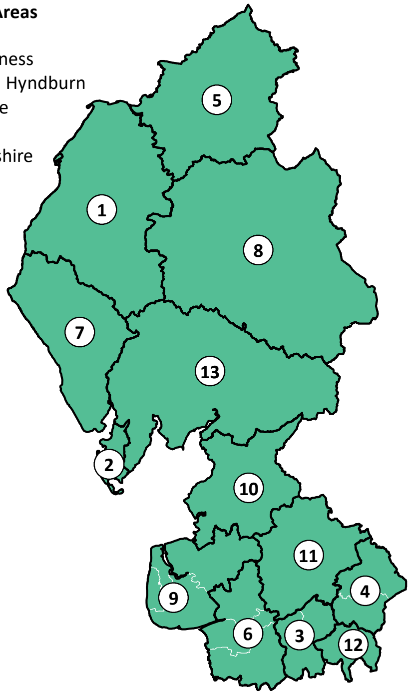
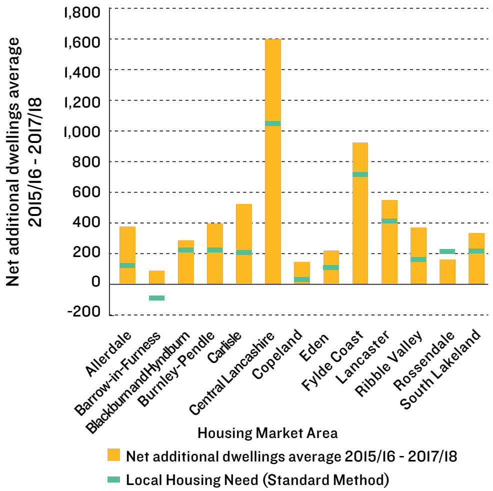
Cumbria and Lancashire

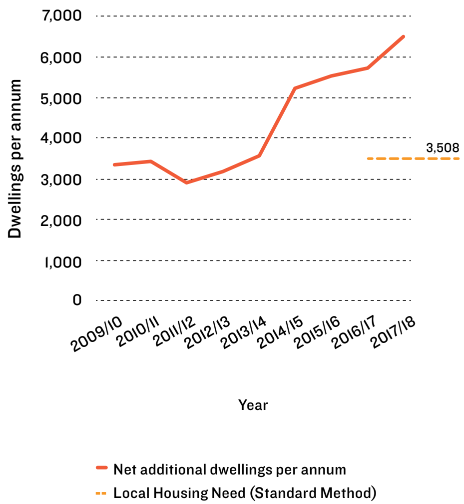
Net additional dwellings 2017/18	6,498
Net additional dwellings (% 2017 stock)	0.76%
Net additional dwellings average 2015/16-2017/18	5,905
Local Housing Need (Standard Method)	3,508
Net additional dwellings from permitted development 2017/18	122

Housing Market Areas

1. Allerdale
2. Barrow-in-Furness
3. Blackburn and Hyndburn
4. Burnley-Pendle
5. Carlisle
6. Central Lancashire
7. Copeland
8. Eden
9. Fylde Coast
10. Lancaster
11. Ribble Valley
12. Rossendale
13. South Lakeland







	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Allerdale	**480**	**0.6%**	**1.04%**	**371**	**118**	**304%**	**397%**
Barrow-in-Furness	**96**	**0.0%**	**0.29%**	**83**	**-99**	**N/A**	**109%**
Blackburn and Hyndburn	**371**	**0.3%**	**0.39%**	**284**	**217**	–	–
Blackburn with Darwen	279	0.0%	0.46%	171	157	76%	176%
Hyndburn	92	1.1%	0.25%	113	60	142%	146%
Burnley-Pendle	**474**	**0.8%**	**0.60%**	**393**	**218**	–	–
Burnley	335	0.9%	0.84%	248	66	387%	477%
Pendle	139	0.7%	0.35%	145	153	73%	85%
Carlisle	**505**	**0.0%**	**0.99%**	**516**	**199**	**252%**	**245%**
Central Lancashire	**1,711**	**4.5%**	**1.09%**	**1,596**	**1,046**	–	–
Chorley	661	7.3%	1.36%	595	603	120%	110%
Preston	738	3.4%	1.21%	675	234	264%	312%
South Ribble	312	1.3%	0.65%	326	209	129%	146%
Copeland	**132**	**0.0%**	**0.40%**	**138**	**20**	**244%**	**515%**
Eden	**187**	**0.0%**	**0.73%**	**214**	**100**	**206%**	**191%**
Fylde Coast	**1,116**	**1.3%**	**0.71%**	**921**	**712**	–	–
Blackpool	276	1.4%	0.40%	127	108	104%	272%
Fylde	470	0.0%	1.24%	410	287	169%	162%
Wyre	370	2.7%	0.73%	385	317	144%	119%
Lancaster	**523**	**0.6%**	**0.86%**	**542**	**404**	**164%**	**127%**
Ribble Valley	**400**	**0.3%**	**1.57%**	**363**	**153**	**262%**	**258%**
Rossendale	**149**	**12.1%**	**0.48%**	**154**	**208**	**77%**	**72%**
South Lakeland	**354**	**0.3%**	**0.65%**	**330**	**212**	**188%**	**178%**

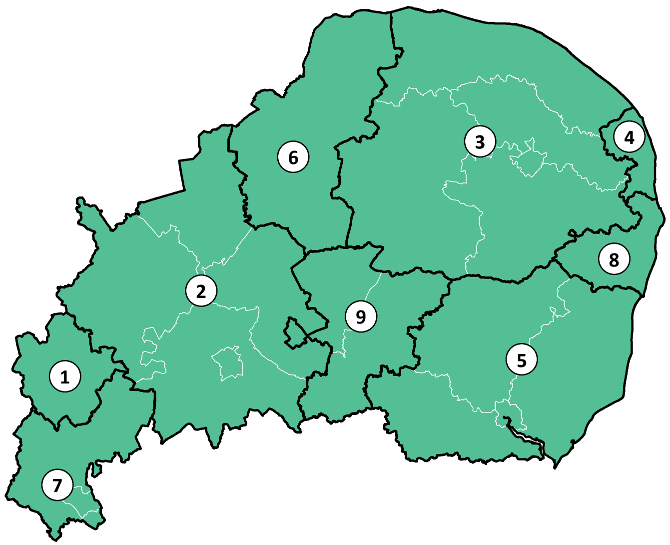
Pass Action plan 20% Land Buffer Presumption in favour of sustainable development

* Based on the Standard Method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.

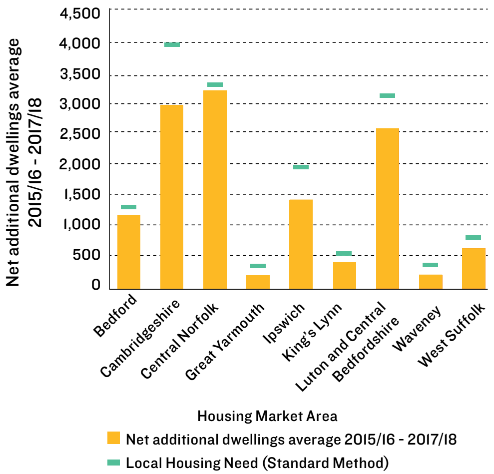
† The current Local Housing Need estimate for Barrow-in-Furness is 0.

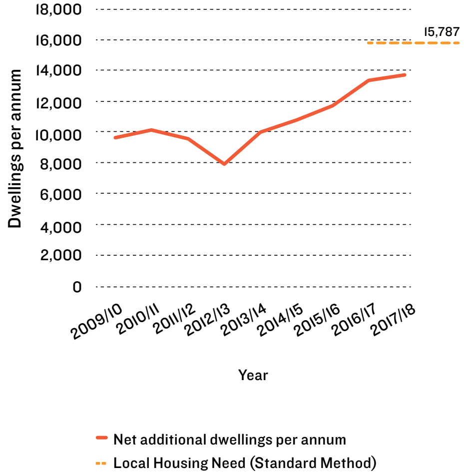
East Anglia - Central and North

Housing Market Areas
1. Bedford
2. Cambridgeshire
3. Central Norfolk
4. Great Yarmouth
5. Ipswich
6. King's Lynn
7. Luton and Central Bedfordshire
8. Waveney
9. West Suffolk



Net additional dwellings 2017/18	13,769
Net additional dwellings average 2015/16-2017/18	12,955
Net additional dwellings from permitted development 2017/18	804
Net additional dwellings (% 2017 stock)	1.09%
Local Housing Need (Standard Method)	15,787





	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Bedford	**1,350**	**18.4%**	**1.93%**	**1,190**	**1,320**	**131%**	**108%**
Cambridgeshire	**3,363**	**2.3%**	**1.26%**	**2,984**	**3,956**	–	–
Cambridge	1,152	0.0%	2.29%	1,071	657	320%	193%
East Cambridgeshire	289	0.0%	0.79%	234	597	45%	51%
Fenland	447	3.1%	1.04%	376	521	86%	88%
Huntingdonshire	746	4.6%	1.02%	654	993	90%	78%
South Cambridgeshire	729	4.0%	1.15%	648	1,188	77%	66%
Central Norfolk	**3,107**	**3.2%**	**1.07%**	**3,216**	**3,306**	–	–
Breckland	530	0.0%	0.91%	647	697	121%	80%
Broadland	679	3.7%	1.22%	717	544	179%	134%
North Norfolk	543	0.7%	1.00%	488	543	129%	107%
Norwich	237	29.1%	0.37%	349	604	73%	50%
South Norfolk	1,118	0.0%	1.97%	1,015	918	146%	127%
Great Yarmouth	**208**	**1.4%**	**0.46%**	**210**	**360**	**61%**	**58%**
Ipswich	**1,480**	**1.6%**	**0.73%**	**1,446**	**1,973**	–	–
Babergh	331	0.0%	0.83%	238	428	83%	102%
Ipswich	141	12.1%	0.24%	298	445	64%	32%
Mid Suffolk	426	0.0%	0.99%	345	585	83%	77%
Suffolk Coastal	582	1.0%	0.98%	565	515	132%	120%
King's Lynn and West Norfolk	**384**	**0.0%**	**0.51%**	**428**	**556**	**93%**	**72%**
Luton and Central Bedfordshire	**2,976**	**9.7%**	**1.57%**	**2,599**	**3,125**	–	–
Central Bedfordshire	2,103	1.5%	1.87%	1,834	2,474	112%	90%
Luton	873	29.4%	1.14%	765	651	69%	100%
Waveney	**284**	**2.8%**	**0.52%**	**228**	**370**	**77%**	**80%**
West Suffolk	**617**	**9.2%**	**0.81%**	**654**	**822**	–	–
Forest Heath	385	3.9%	1.35%	304	367	100%	109%
St Edmundsbury	232	18.1%	0.49%	350	455	103%	54%

Pass　Action plan　20% Land Buffer　Presumption in favour of sustainable development

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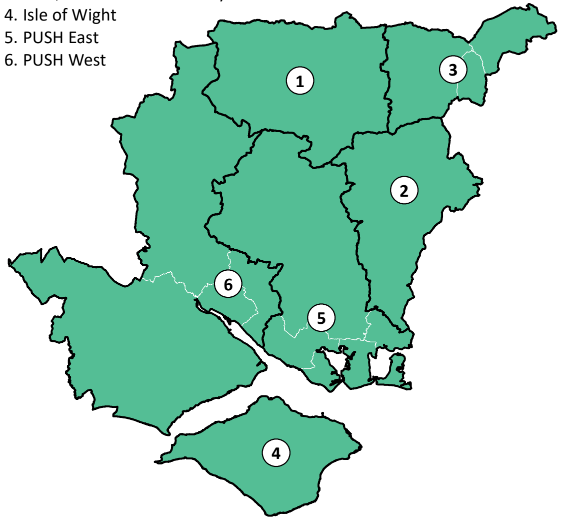
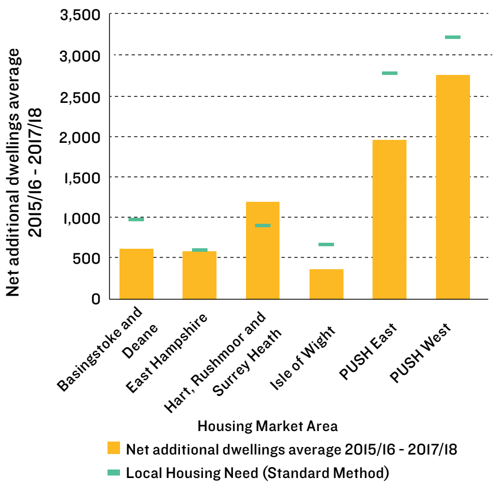
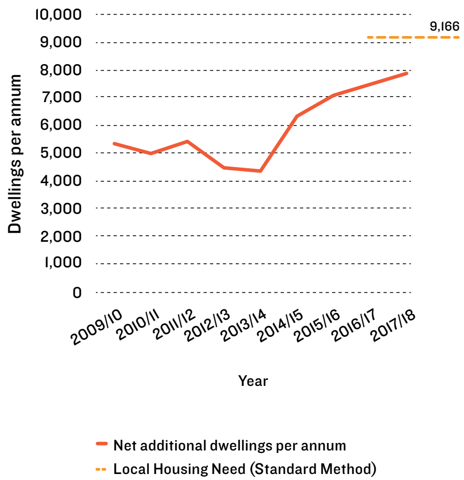
Hampshire

Net additional dwellings 2017/18	7,878
Net additional dwellings (% 2017 stock)	0.91%
Net additional dwellings average 2015/16-2017/18	7,477
Local Housing Need (Standard Method)	9,166
Net additional dwellings from permitted development 2017/18	455

Housing Market Areas
1. Basingstoke and Deane
2. East Hampshire
3. Hart, Rushmoor and Surrey Heath
4. Isle of Wight
5. PUSH East
6. PUSH West







	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Basingstoke and Deane	**828**	**5.4%**	**1.14%**	**618**	**987**	**73%**	**97%**
East Hampshire	**893**	**1.0%**	**1.78%**	**594**	**610**	**142%**	**182%**
Hart, Rushmoor and Surrey Heath	**1,225**	**12.7%**	**1.11%**	**1,193**	**910**	**–**	**–**
Hart	551	22.9%	1.48%	628	289	280%	204%
Rushmoor	450	0.0%	1.18%	329	284	128%	166%
Surrey Heath	224	12.9%	0.64%	236	336	100%	71%
Isle of Wight	**373**	**3.5%**	**0.54%**	**370**	**675**	**72%**	**58%**
PUSH East	**1,755**	**6.4%**	**0.63%**	**1,949**	**2,776**	**–**	**–**
Portsmouth	408	22.1%	0.46%	407	857	55%	48%
Fareham	291	1.0%	0.60%	337	543	83%	57%
Gosport	219	2.7%	0.59%	187	238	110%	129%
Havant	290	1.7%	0.54%	508	478	148%	65%
Winchester	547	1.6%	1.09%	511	659	115%	91%
PUSH West	**2,804**	**4.3%**	**0.97%**	**2,753**	**3,210**	**–**	**–**
Southampton	826	10.9%	0.81%	956	953	123%	87%
Eastleigh	893	1.0%	1.64%	622	706	118%	133%
New Forest	292	2.1%	0.36%	279	989	41%	32%
Test Valley	793	1.9%	1.56%	896	563	262%	150%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development

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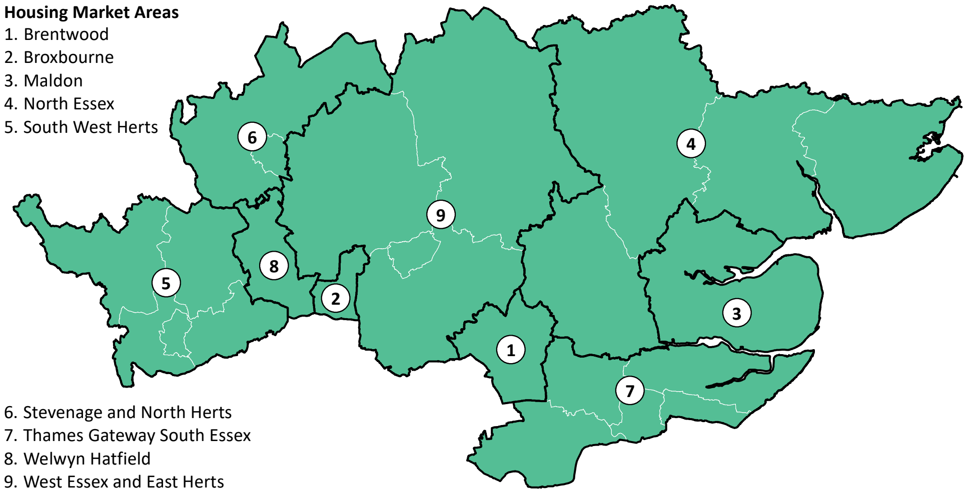
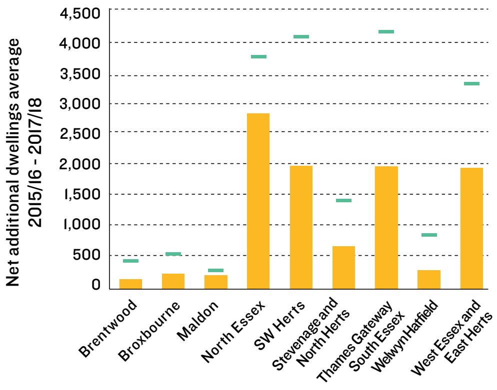
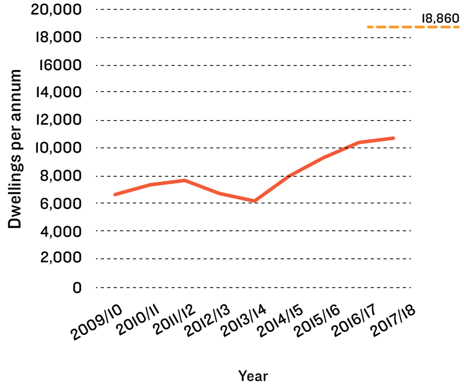
Hertfordshire and Essex



Net additional dwellings 2017/18	10,933
Net additional dwellings average 2015/16-2017/18	10,347
Net additional dwellings from permitted development 2017/18	858
Net additional dwellings (% 2017 stock)	0.89%
Local Housing Need (Standard Method)	18,860



- Net additional dwellings average 2015/16 - 2017/18
- Local Housing Need (Standard Method)



- Net additional dwellings per annum
- Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Brentwood	**213**	**10.3%**	**0.65%**	**158**	**453**	**53%**	**51%**
Broxbourne	**299**	**14.0%**	**0.75%**	**243**	**565**	**66%**	**57%**
Maldon	**175**	**7.4%**	**0.64%**	**227**	**304**	**104%**	**62%**
North Essex	**3,112**	**5.3%**	**1.11%**	**2,823**	**3,731**	**–**	**–**
Braintree	491	6.7%	0.77%	435	849	65%	61%
Chelmsford	1,008	5.0%	1.40%	934	976	141%	112%
Colchester	1,048	7.1%	1.36%	964	1,069	114%	102%
Tendring	565	1.2%	0.84%	489	838	83%	73%
SW Herts	**2,083**	**9.4%**	**0.87%**	**1,983**	**4,064**	**–**	**–**
Dacorum	586	8.4%	0.93%	659	1,035	94%	61%
Hertsmere	536	13.8%	1.28%	442	714	83%	81%
St Albans	385	3.9%	0.65%	374	902	58%	46%
Three Rivers	264	15.2%	0.72%	208	615	47%	46%
Watford	312	5.4%	0.80%	301	798	55%	42%
Stevenage and North Herts	**356**	**4.8%**	**0.39%**	**693**	**1,434**	**–**	**–**
N Hertfordshire	281	4.6%	0.50%	387	988	57%	31%
Stevenage	75	5.3%	0.21%	306	445	85%	17%
Thames Gateway South Essex	**2,181**	**7.6%**	**0.75%**	**1,977**	**4,139**	**–**	**–**
Southend-on-Sea	521	19.4%	0.66%	408	1,177	51%	48%
Thurrock	857	0.5%	1.32%	724	1,169	90%	78%
Basildon	341	16.7%	0.45%	523	1,076	77%	34%
Castle Point	163	0.6%	0.43%	132	353	51%	50%
Rochford	299	1.0%	0.86%	191	363	76%	89%
Welwyn Hatfield	**237**	**43.5%**	**0.51%**	**300**	**867**	**54%**	**29%**
West Essex and East Herts	**2,277**	**6.0%**	**1.23%**	**1,943**	**3,303**	**–**	**–**
Epping Forest	564	2.0%	1.02%	327	937	52%	65%
Harlow	281	30.2%	0.77%	282	468	87%	64%
Uttlesford	969	2.3%	2.82%	749	723	150%	143%
E Hertfordshire	463	3.9%	0.77%	585	1,175	76%	43%

Pass · Action plan · 20% Land Buffer · Presumption in favour of sustainable development

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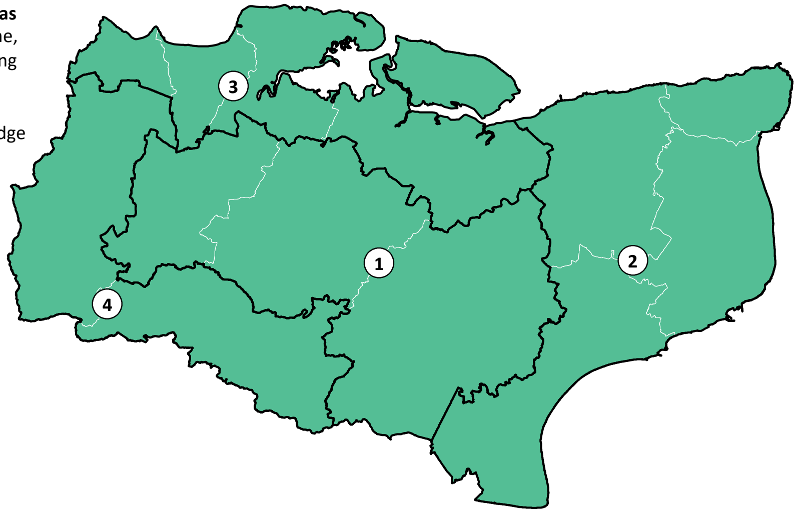
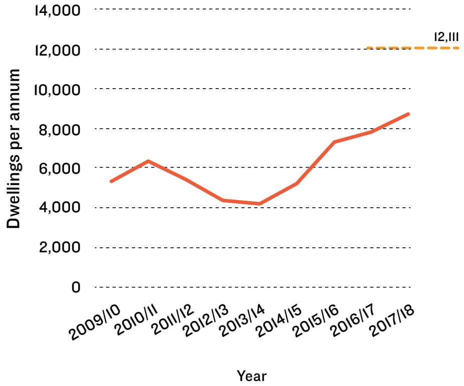
Kent

Housing Market Areas
1. Ashford, Maidstone, Tonbridge & Malling
2. East Kent
3. North Kent
4. Sevenoaks-Tunbridge Wells



Net additional dwellings 2017/18	8,718
Net additional dwellings average 2015/16-2017/18	7,965
Net additional dwellings from permitted development 2017/18	420
Net additional dwellings (% 2017 stock)	1.15%
Local Housing Need (Standard Method)	12,111

Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Ashford, Maidstone, Ton' & M'g	**3,043**	**8.41%**	**1.79%**	**2,723**	**3,069**	–	–
Ashford	591	13.03%	1.16%	770	1,015	110%	62%
Maidstone	1,286	11.82%	1.91%	984	1,200	114%	114%
Tonbridge and Malling	1,166	2.32%	2.27%	969	854	160%	147%
East Kent	**2,268**	**1.98%**	**0.97%**	**1,950**	**3,583**	–	–
Canterbury	1,139	1.84%	1.74%	617	1,120	96%	142%
Dover	446	1.12%	0.86%	534	598	130%	78%
Shepway	445	4.04%	0.89%	472	751	96%	64%
Thanet	238	0.42%	0.36%	326	1,114	46%	23%
North Kent	**2,575**	**1.28%**	**1.01%**	**2,465**	**4,063**	–	–
Medway	685	0.44%	0.61%	628	1,672	48%	42%
Dartford	1,031	1.55%	2.42%	1,055	818	185%	134%
Gravesham	274	0.00%	0.65%	206	508	57%	75%
Swale	585	2.39%	0.99%	576	1,065	74%	75%
Sevenoaks-Tunbridge Wells	**832**	**10.34%**	**0.85%**	**827**	**1,396**	–	–
Sevenoaks	388	1.80%	0.79%	377	708	78%	59%
Tunbridge Wells	444	17.79%	0.90%	450	688	82%	69%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development

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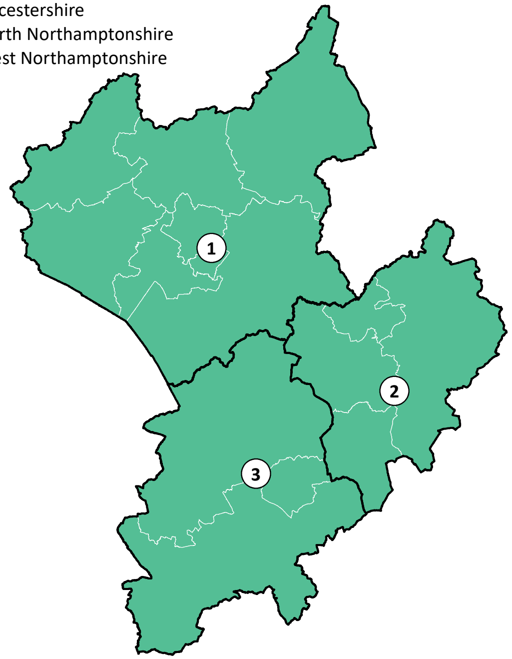
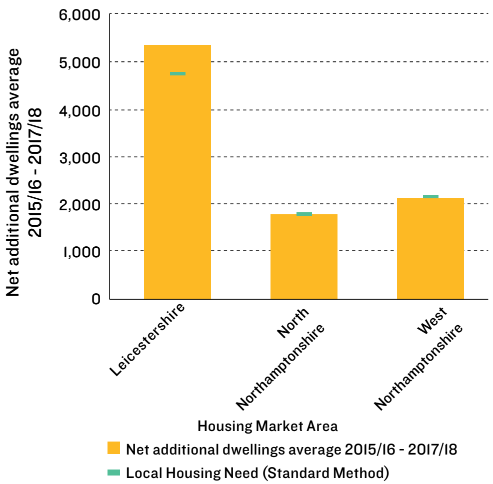
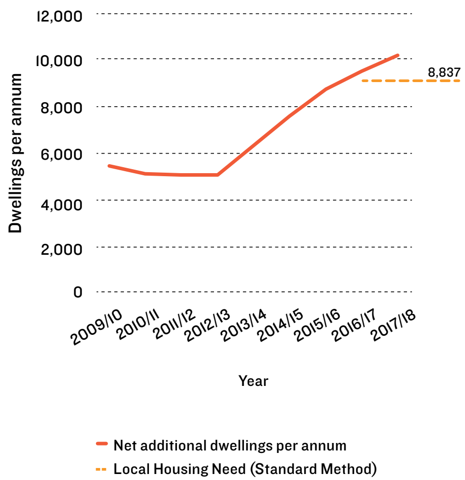
Leicestershire and Northamptonshire

Net additional dwellings 2017/18	10,140
Net additional dwellings (% 2017 stock)	1.41%
Net additional dwellings average 2015/16-2017/18	9,415
Local Housing Need (Standard Method)	8,837
Net additional dwellings from permitted development 2017/18	344

Housing Market Areas
1. Leicestershire
2. North Northamptonshire
3. West Northamptonshire







	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Leicestershire	**5,831**	**4.3%**	**1.41%**	**5,424**	**4,815**	–	–
Leicester	1,954	11.0%	1.50%	1,548	1,659	124%	153%
Blaby	588	0.0%	1.45%	688	346	260%	175%
Charnwood	1,070	1.0%	1.51%	935	1,088	118%	130%
Harborough	580	0.3%	1.57%	561	542	144%	113%
Hinckley and Bosworth	423	4.5%	0.88%	528	468	145%	93%
Melton	138	3.6%	0.61%	142	200	85%	71%
North West Leicestershire	971	0.2%	2.34%	888	368	324%	271%
Oadby and Wigston	107	0.0%	0.47%	133	144	191%	80%
North Northamptonshire	**1,818**	**1.9%**	**1.28%**	**1,823**	**1,824**	–	–
Corby	597	0.0%	2.17%	447	488	115%	130%
East Northamptonshire	452	4.2%	1.19%	493	468	151%	108%
Kettering	495	1.2%	1.16%	583	526	133%	96%
Wellingborough	274	3.6%	0.82%	300	341	108%	83%
West Northamptonshire	**2,491**	**2.2%**	**1.53%**	**2,169**	**2,198**	–	–
Daventry	854	3.5%	2.58%	664	378	236%	240%
Northampton	805	3.2%	0.86%	845	1,329	81%	77%
South Northamptonshire	832	0.0%	2.25%	659	491	199%	237%

Pass Action plan 20% Land Buffer Presumption in favour of sustainable development

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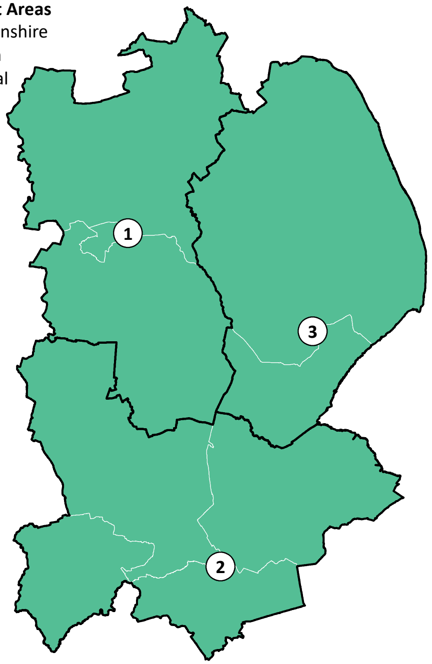
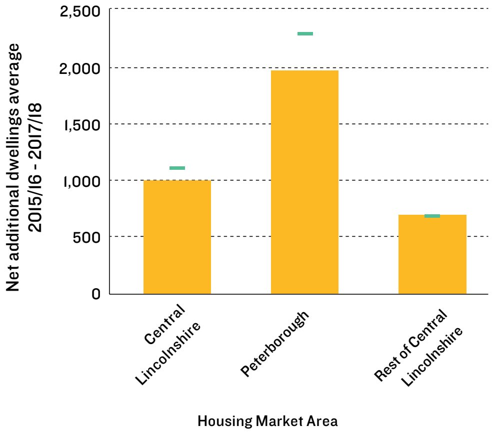
Lincolnshire and Peterborough

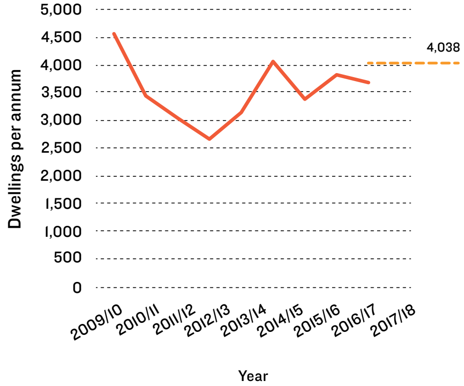
Net additional dwellings 2017/18	3,668
Net additional dwellings (% 2017 stock)	0.87%
Net additional dwellings average 2015/16-2017/18	3,619
Local Housing Need (Standard Method)	4,038
Net additional dwellings from permitted development 2017/18	143

Housing Market Areas
1. Central Lincolnshire
2. Peterborough
3. Rest of Central Lincolnshire





- Net additional dwellings average 2015/16 - 2017/18
- Local Housing Need (Standard Method)



- Net additional dwellings per annum
- Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Central Lincolnshire	**1,102**	**1.9%**	**0.83%**	**986**	**1,096**	–	–
Lincoln	265	7.2%	0.61%	176	286	75% (20% Land Buffer)	91% (Action plan)
North Kesteven	578	0.2%	1.19%	513	476	123% (Pass)	124% (Pass)
West Lindsey	259	0.4%	0.63%	297	334	100% (Pass)	77% (20% Land Buffer)
Peterborough	**1,701**	**5.2%**	**0.87%**	**1,944**	**2,267**	–	–
Rutland	251	4.0%	1.53%	243	133	240% (Pass)	204% (Pass)
South Holland	296	6.1%	0.75%	285	415	74% (20% Land Buffer)	73% (Presumption)
South Kesteven	448	0.0%	0.73%	474	775	83% (20% Land Buffer)	60% (Presumption)
Peterborough	706	8.6%	0.89%	942	944	108% (Pass)	75% (20% Land Buffer)
Rest of Central Lincolnshire	**865**	**3.8%**	**0.91%**	**689**	**675**	–	–
Boston	394	4.8%	1.37%	308	259	121% (Pass)	153% (Pass)
East Lindsey	471	3.0%	0.71%	381	415	101% (Pass)	117% (Pass)

Pass | Action plan | 20% Land Buffer | Presumption in favour of sustainable development

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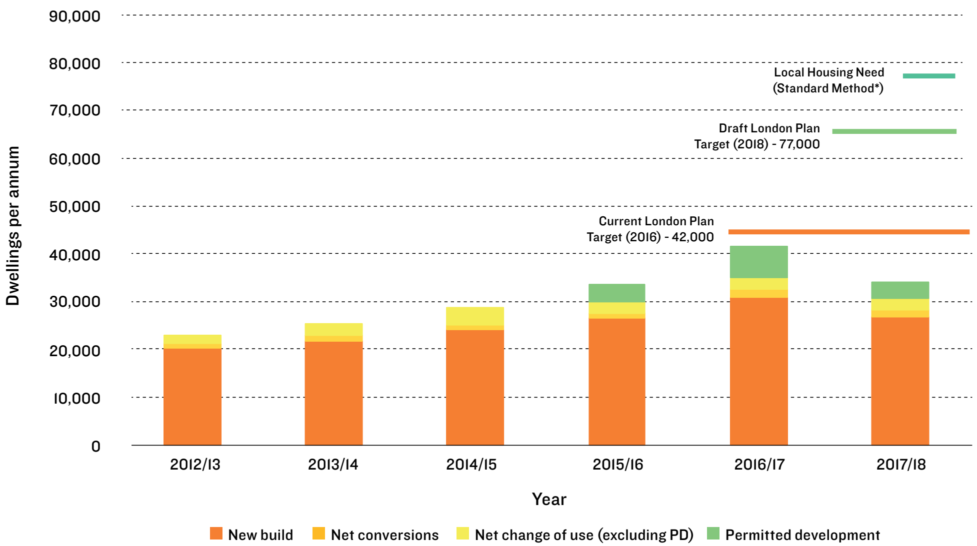
London

Net additional dwellings 2017/18	31,723
Net additional dwellings (% 2017 stock)	0.93%
Net additional dwellings average 2015/16-2017/18	33,891
Local Housing Need (Standard Method)	77,056
Net additional dwellings from permitted development 2017/18	3,178

Housing Market Areas
1. Greater London



	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Greater London	31,723	10.0%	0.93%	33,891	77,056	–	–
Barking and Dagenham	413	15.0%	0.57%	580	2,237	38%	20%
Barnet	2,208	7.9%	1.53%	1,822	4,048	63%	58%
Bexley	277	0.7%	0.29%	303	1,759	28%	17%
Brent	694	12.0%	0.61%	1,036	2,746	59%	27%
Bromley	554	23.8%	0.41%	704	2,635	42%	23%
Camden	945	0.4%	0.93%	1,039	1,568	117%	106%
City of London	138	0.0%	2.30%	74	115	86%	132%
Croydon	2,076	41.4%	1.37%	2,318	3,480	98%	64%
Ealing	1,457	10.6%	1.12%	1,008	2,398	53%	65%
Enfield	386	8.3%	0.31%	652	3,292	28%	13%
Greenwich	1,901	2.3%	1.80%	2,000	3,245	109%	71%
Hackney	1,267	0.6%	1.20%	1,096	3,134	54%	43%
Hammersmith and Fulham	1,531	6.1%	1.82%	958	939	181%	172%
Haringey	1,200	2.3%	1.13%	727	2,810	36%	45%
Harrow	700	28.6%	0.80%	755	1,922	53%	39%
Havering	277	12.3%	0.28%	577	1,879	47%	16%
Hillingdon	842	10.2%	0.79%	772	2,730	43%	33%
Hounslow	911	32.3%	0.93%	649	1,151	79%	111%
Islington	367	46.3%	0.37%	689	2,420	38%	16%
Kensington and Chelsea	335	0.6%	0.39%	358	840	164%	51%
Kingston upon Thames	217	37.8%	0.33%	243	1,514	23%	15%
Lambeth	1,543	5.4%	1.14%	1,342	1,673	86%	99%
Lewisham	526	1.9%	0.43%	1,223	3,137	57%	18%
Merton	648	6.0%	0.79%	530	1,550	44%	45%
Newham	1,846	0.6%	1.73%	1,888	3,580	74%	54%
Redbridge	462	18.0%	0.45%	424	2,931	20%	17%
Richmond upon Thames	382	23.0%	0.46%	453	1,698	40%	24%
Southwark	818	1.8%	0.64%	1,537	2,956	72%	29%
Sutton	697	10.8%	0.86%	580	1,765	45%	42%
Tower Hamlets	2,003	5.0%	1.82%	3,075	4,591	99%	46%
Waltham Forest	712	4.4%	0.71%	906	2,405	54%	32%
Wandsworth	2,247	4.5%	1.63%	2,440	2,414	172%	124%
Westminster	1,143	0.0%	0.95%	1,131	1,495	106%	107%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development

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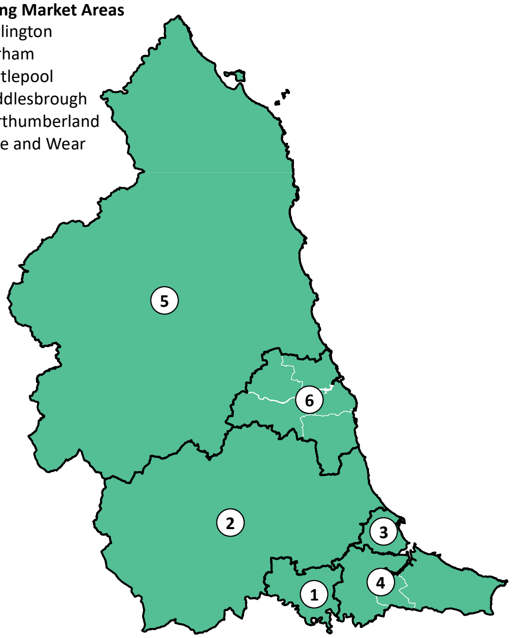
North East

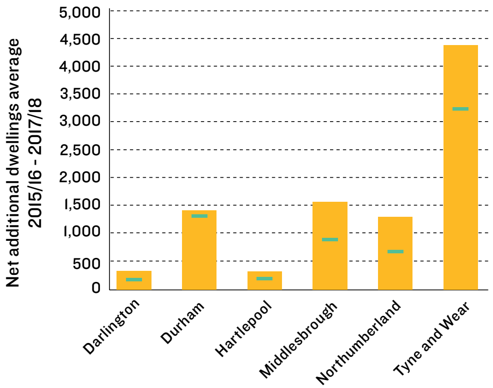
Net additional dwellings 2017/18	9,774
Net additional dwellings (% 2017 stock)	0.82%
Net additional dwellings average 2015/16-2017/18	9,349
Local Housing Need (Standard Method)	6,497
Net additional dwellings from permitted development 2017/18	294

Housing Market Areas
1. Darlington
2. Durham
3. Hartlepool
4. Middlesbrough
5. Northumberland
6. Tyne and Wear

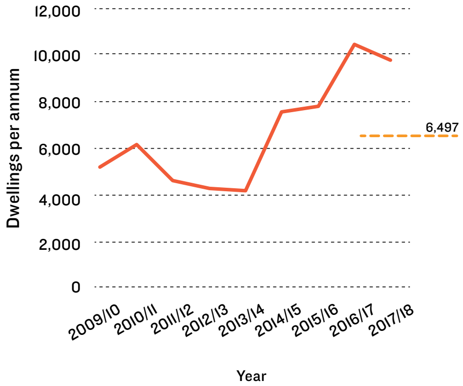


	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Darlington	**540**	**0.0%**	**1.10%**	**336**	**176**	**180%**	**301%**
Durham	**1,339**	**0.0%**	**0.57%**	**1,422**	**1,315**	**108%**	**98%**
Hartlepool	**265**	**0.0%**	**0.62%**	**326**	**195**	**163%**	**128%**
Middlesbrough	**1,607**	**3.3%**	**0.78%**	**1,580**	**890**	**–**	**–**
Middlesbrough	407	12.8%	0.67%	500	254	206%	154%
Redcar and Cleveland	430	0.2%	0.69%	394	117	271%	338%
Stockton-on-Tees	770	0.0%	0.92%	686	519	126%	145%
Northumberland	**1,376**	**0.1%**	**0.92%**	**1,299**	**686**	**201%**	**200%**
Tyne and Wear	**4,647**	**5.2%**	**0.92%**	**4,387**	**3,235**	**–**	**–**
Gateshead	161	1.2%	0.17%	227	455	53%	38%
Newcastle upon Tyne	2,326	2.3%	1.90%	2,110	1,023	258%	245%
North Tyneside	965	5.7%	1.01%	798	823	104%	122%
South Tyneside	304	2.0%	0.43%	380	353	108%	85%
Sunderland	891	13.8%	0.72%	872	581	169%	148%

Pass Action plan 20% Land Buffer Presumption in favour of sustainable development



Housing Market Area
Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

* Based on the Standard Method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.

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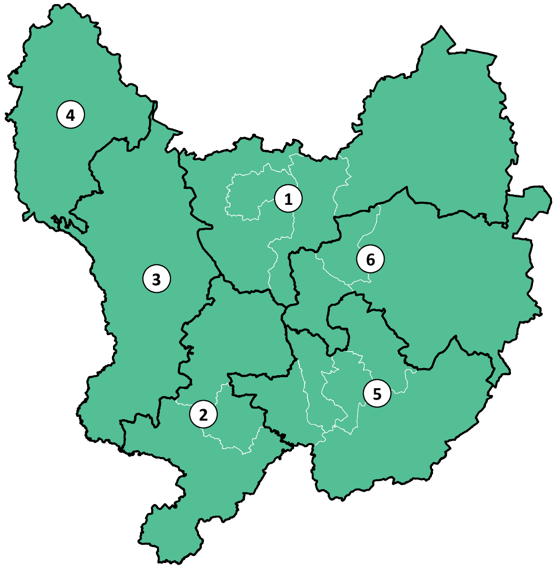
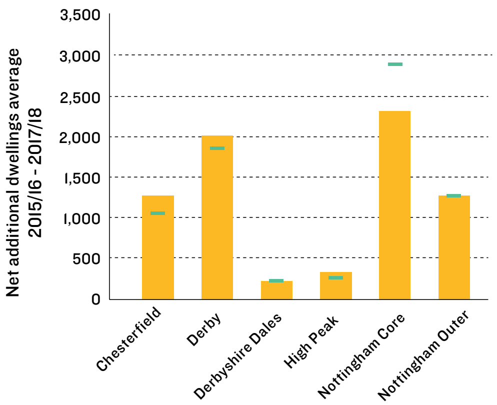
Nottinghamshire and Derbyshire

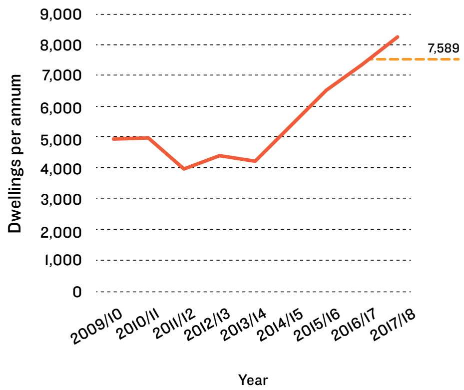
Net additional dwellings 2017/18	8,308
Net additional dwellings (% 2017 stock)	0.88%
Net additional dwellings average 2015/16-2017/18	7,420
Local Housing Need (Standard Method)	7,589
Net additional dwellings from permitted development 2017/18	590

Housing Market Areas
1. Chesterfield
2. Derby
3. Derbyshire Dales
4. High Peak
5. Nottingham Core
6. Nottingham Outer





Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Chesterfield	**1,308**	**2.4%**	**0.73%**	**1,270**	**1,059**	–	–
Bolsover	251	0.8%	0.72%	290	240	133%	103%
Chesterfield	110	14.5%	0.23%	149	247	68%	44%
North East Derbyshire	396	0.3%	0.89%	381	266	160%	152%
Bassetlaw	551	2.2%	1.10%	450	306	143%	176%
Derby	**2,362**	**13.3%**	**1.15%**	**2,006**	**1,854**	–	–
Derby	787	39.6%	0.73%	687	893	106%	122%
Amber Valley	654	0.3%	1.18%	549	387	148%	166%
South Derbyshire	921	0.0%	2.22%	770	573	156%	163%
Derbyshire Dales	**309**	**3.2%**	**0.91%**	**225**	**232**	**109%**	**140%**
High Peak	**498**	**0.4%**	**1.21%**	**329**	**271**	**123%**	**186%**
Nottingham Core	**2,710**	**8.0%**	**0.81%**	**2,317**	**2,894**	–	–
Nottingham	1,393	13.6%	1.05%	1,105	1,081	119%	138%
Erewash	173	0.0%	0.34%	240	390	65%	47%
Broxtowe	314	6.4%	0.64%	233	361	69%	87%
Gedling	237	1.3%	0.46%	203	443	54%	56%
Rushcliffe	593	0.5%	1.23%	536	620	123%	102%
Nottingham Outer	**1,121**	**1.5%**	**0.73%**	**1,272**	**1,278**	–	–
Ashfield	397	1.0%	0.73%	500	502	113%	77%
Mansfield	234	0.0%	0.49%	287	278	115%	83%
Newark and Sherwood	490	2.7%	0.94%	486	498	119%	99%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development

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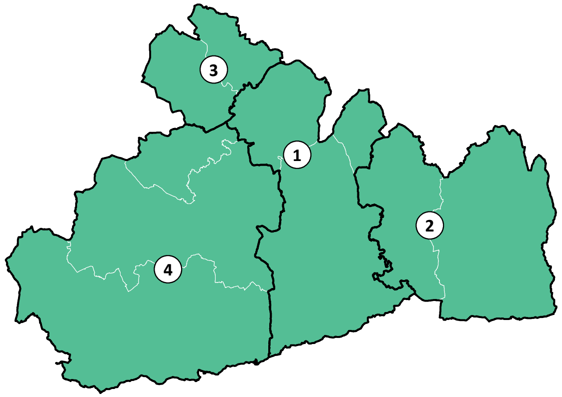
Surrey

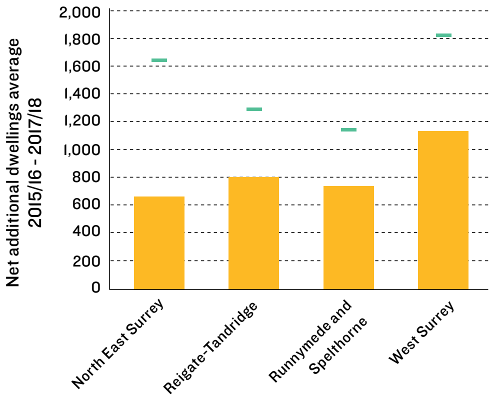
Net additional dwellings 2017/18	3,671
Net additional dwellings (% 2017 stock)	0.82%
Net additional dwellings average 2015/16-2017/18	3,354
Local Housing Need (Standard Method)	5,913
Net additional dwellings from permitted development 2017/18	790

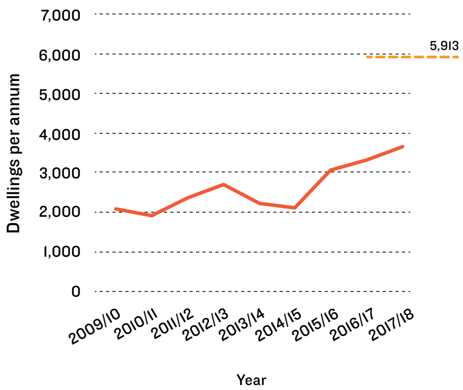
Housing Market Areas
1. North East Surrey
2. Reigate-Tandridge
3. Runnymede and Spelthorne
4. West Surrey



	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
North East Surrey	**667**	**31.9%**	**0.53%**	**668**	**1,647**	–	–
Elmbridge	123	7.3%	0.22%	210	623	53%	21%
Epsom and Ewell	160	23.8%	0.51%	209	577	55%	30%
Mole Valley	384	43.2%	1.02%	250	447	76%	93%
Reigate-Tandridge	**837**	**6.5%**	**0.89%**	**807**	**1,293**	–	–
Reigate and Banstead	546	7.3%	0.93%	533	644	116%	119%
Tandridge	291	4.8%	0.82%	274	649	65%	48%
Runnymede and Spelthorne	**1,004**	**18.9%**	**1.32%**	**741**	**1,147**	–	–
Runnymede	754	13.3%	2.18%	440	548	113%	147%
Spelthorne	250	36.0%	0.60%	302	599	68%	45%
West Surrey	**1,163**	**28.6%**	**0.77%**	**1,137**	**1,826**	–	–
Guildford	299	25.1%	0.53%	396	752	76%	42%
Waverley	519	35.6%	1.00%	385	643	91%	91%
Woking	345	21.2%	0.83%	357	431	113%	86%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development





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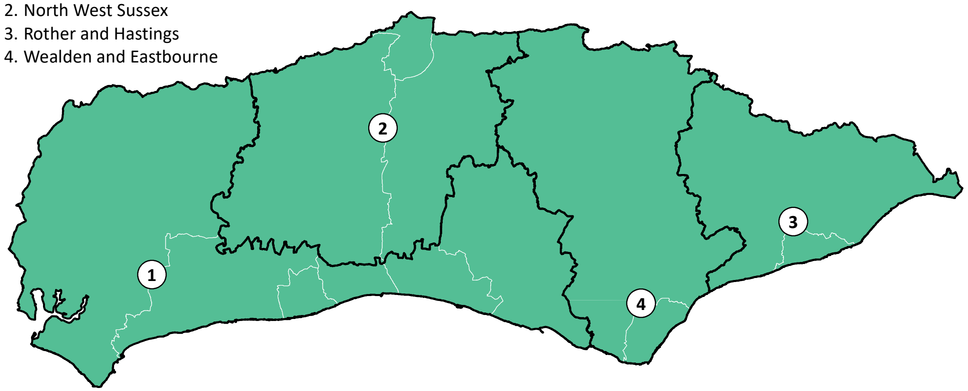
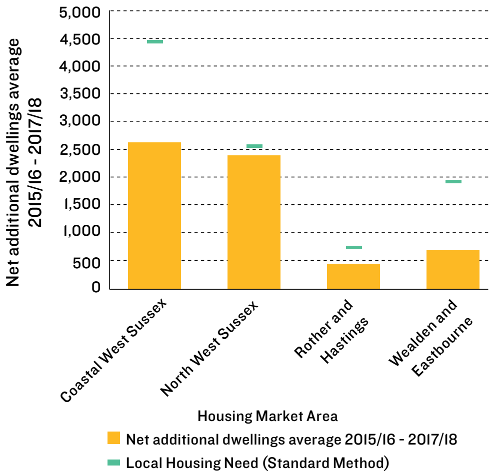
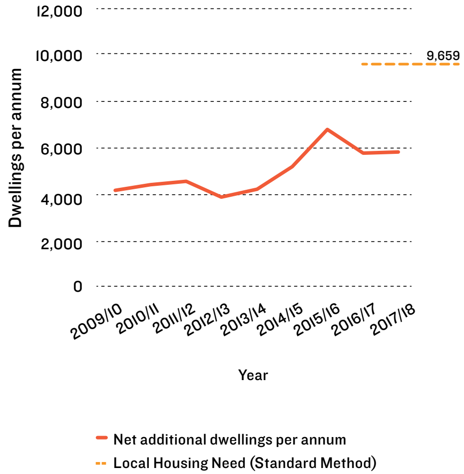
Sussex

Housing Market Areas
1. Coastal West Sussex
2. North West Sussex
3. Rother and Hastings
4. Wealden and Eastbourne



Net additional dwellings 2017/18	5,848
Net additional dwellings average 2015/16-2017/18	6,158
Net additional dwellings from permitted development 2017/18	300
Net additional dwellings (% 2017 stock)	0.79%
Local Housing Need (Standard Method)	9,659





	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Coastal West Sussex	**2,754**	**5.8%**	**0.74%**	**2,624**	**4,423**	–	–
Brighton and Hove	444	19.1%	0.35%	495	924	75%	67%
Lewes	311	0.3%	0.70%	267	483	77%	90%
Adur	114	2.6%	0.41%	70	248	25%	42%
Arun	713	7.9%	0.99%	745	1,287	96%	61%
Chichester	690	0.7%	1.26%	611	609	141%	159%
Worthing	482	2.3%	0.99%	436	873	74%	60%
North West Sussex	**2,115**	**5.3%**	**1.30%**	**2,387**	**2,560**	–	–
Crawley	369	9.5%	0.84%	507	476	149%	109%
Horsham	1,132	3.3%	1.95%	1,047	973	173%	142%
Mid Sussex	614	6.7%	1.01%	833	1,111	125%	61%
Rother and Hastings	**390**	**3.3%**	**0.44%**	**451**	**749**	–	–
Hastings	204	3.4%	0.47%	213	280	107%	102%
Rother	186	3.2%	0.42%	238	469	71%	56%
Wealden and Eastbourne	**589**	**2.2%**	**0.51%**	**696**	**1,927**	–	–
Eastbourne	127	10.2%	0.26%	181	691	39%	20%
Wealden	462	0.0%	0.69%	515	1,236	71%	40%

Pass Action plan 20% Land Buffer Presumption in favour of sustainable development

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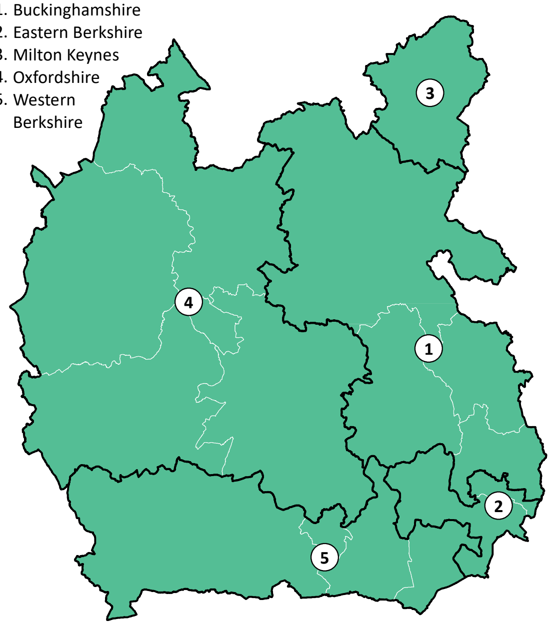
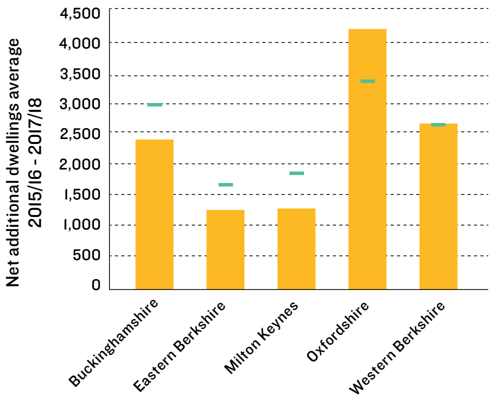
Thames Valley

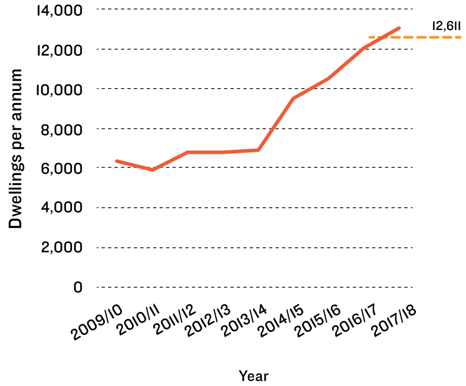
Net additional dwellings 2017/18	13,148
Net additional dwellings (% 2017 stock)	1.38%
Net additional dwellings average 2015/16-2017/18	11,923
Local Housing Need (Standard Method)	12,611
Net additional dwellings from permitted development 2017/18	929

Housing Market Areas
1. Buckinghamshire
2. Eastern Berkshire
3. Milton Keynes
4. Oxfordshire
5. Western Berkshire





Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Buckinghamshire	**2,550**	**11.2%**	**1.20%**	**2,429**	**2,990**	–	–
Aylesbury Vale	1,414	5.7%	1.89%	1,309	1,450	135%	104%
Chiltern	286	23.4%	0.73%	231	330	109%	95%
South Bucks	299	27.8%	1.06%	317	433	103%	75%
Wycombe	551	9.8%	0.78%	572	778	101%	76%
Eastern Berkshire	**1,361**	**20.0%**	**1.19%**	**1,287**	**1,695**	–	–
Slough	846	31.6%	1.61%	720	928	89%	96%
Windsor and Maidenhead	515	1.0%	0.84%	567	767	96%	72%
Milton Keynes	**1,485**	**5.9%**	**1.40%**	**1,303**	**1,887**	**87%**	**82%**
Oxfordshire	**4,601**	**1.7%**	**1.68%**	**4,213**	**3,373**	–	–
Cherwell	1,387	2.2%	2.31%	1,305	754	238%	194%
Oxford	184	9.2%	0.32%	292	743	70%	26%
South Oxfordshire	903	0.2%	1.55%	737	627	182%	158%
Vale of White Horse	1,583	0.8%	3.03%	1,444	659	336%	251%
West Oxfordshire	544	3.5%	1.17%	436	590	106%	100%
Western Berkshire	**3,151**	**6.5%**	**1.29%**	**2,691**	**2,667**	–	–
Bracknell Forest	416	1.2%	0.87%	396	637	75%	68%
Reading	700	16.7%	1.05%	723	614	154%	119%
West Berkshire	526	7.6%	0.80%	545	551	115%	102%
Wokingham	1,509	2.8%	2.37%	1,027	864	156%	189%

Pass　Action plan　20% Land Buffer　Presumption in favour of sustainable development

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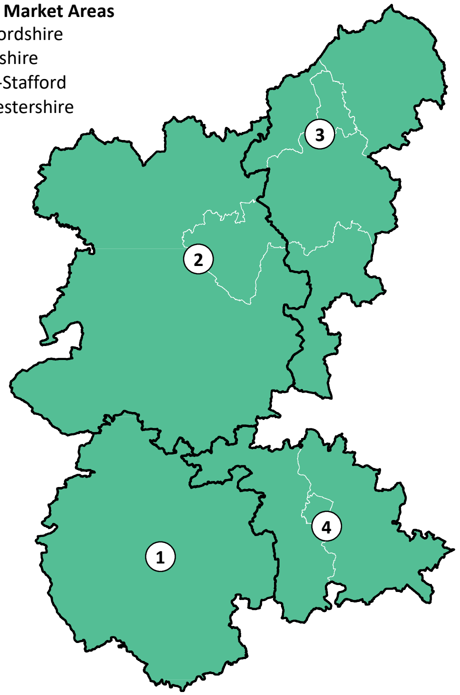
† Note, the November 2018 Housing Delivery Test is measured against 2012- and 2014-based household projections rather than the Standard Method.

West Midlands (outside Birmingham and Coventry)

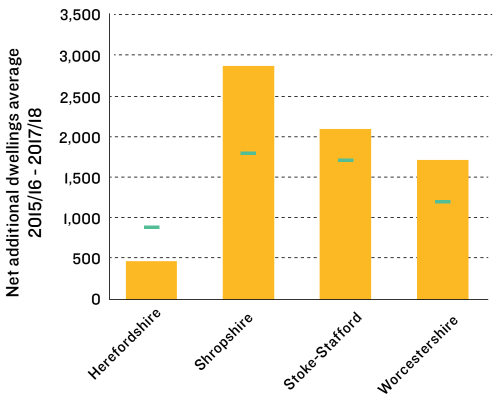
Net additional dwellings 2017/18	7,697
Net additional dwellings (% 2017 stock)	1.04%
Net additional dwellings average 2015/16-2017/18	7,172
Local Housing Need (Standard Method)	5,618
Net additional dwellings from permitted development 2017/18	281

Housing Market Areas
1. Herefordshire
2. Shropshire
3. Stoke-Stafford
4. Worcestershire

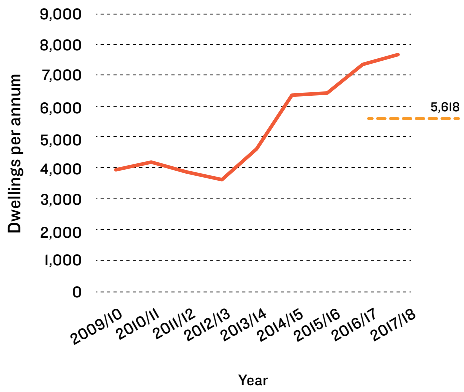


	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Herefordshire	**777**	**5.1%**	**0.93%**	**470**	**893**	**69%**	**94%**
Shropshire	**2,923**	**1.1%**	**1.40%**	**2,879**	**1,807**	**–**	**–**
Shropshire	1,876	1.7%	1.36%	1,729	1,263	174%	153%
Telford and Wrekin	1,047	0.0%	1.48%	1,150	544	249%	192%
Stoke-Stafford	**2,198**	**2.6%**	**0.69%**	**2,100**	**1,716**	**–**	**–**
Stoke-on-Trent	675	1.3%	0.60%	623	494	141%	133%
Newcastle-under-Lyme	263	3.0%	0.48%	267	344	99%	75%
South Staffordshire	255	0.4%	0.55%	234	270	107%	95%
Stafford	863	3.5%	1.48%	854	413	228%	210%
Staffordshire Moorlands	142	6.3%	0.32%	123	195	70%	73%
Worcestershire	**1,799**	**8.5%**	**1.36%**	**1,722**	**1,203**	**–**	**–**
Malvern Hills	455	4.0%	1.33%	380	329	163%	194%
Worcester	250	0.0%	0.57%	444	373	157%	88%
Wychavon	1,094	12.3%	2.04%	897	501	275%	248%

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development



Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

* Based on the Standard Method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.

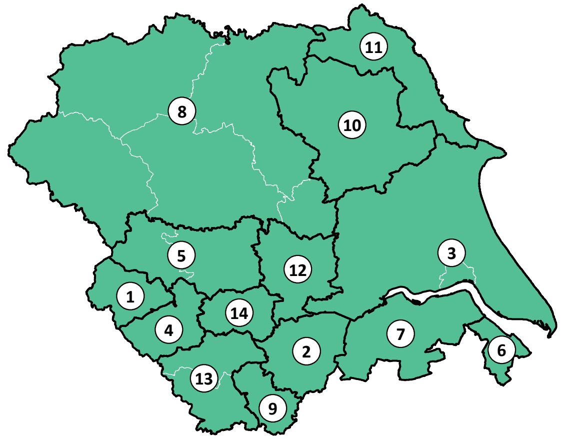
† Note, the November 2018 Housing Delivery Test is measured against 2012- and 2014-based household projections rather than the Standard Method.

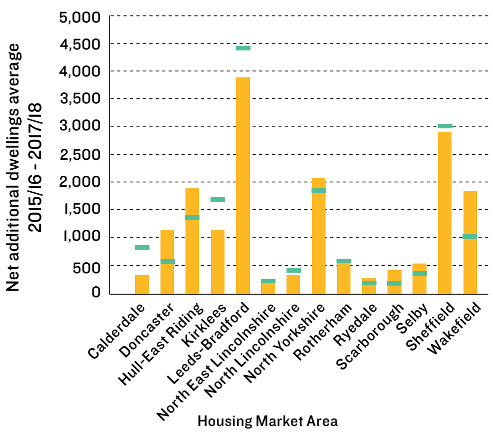
Yorkshire and The Humber

Net additional dwellings 2017/18	19,488
Net additional dwellings (% 2017 stock)	0.83%
Net additional dwellings average 2015/16-2017/18	17,580
Local Housing Need (Standard Method)	16,593
Net additional dwellings from permitted development 2017/18	1277

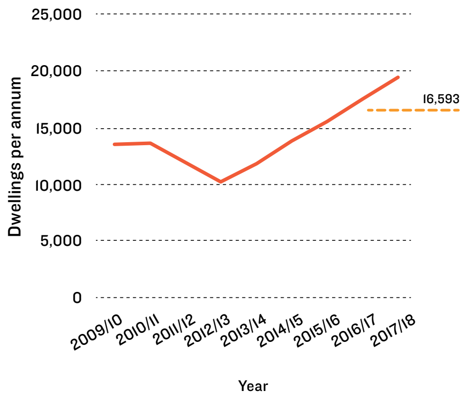
Housing Market Areas

1. Calderdale
2. Doncaster
3. Hull-East Riding
4. Kirklees
5. Leeds-Bradford
6. North East Lincolnshire
7. North Lincolnshire
8. North Yorkshire
9. Rotherham
10. Ryedale
11. Scarborough
12. Selby
13. Sheffield
14. Wakefield





Net additional dwellings average 2015/16 - 2017/18
Local Housing Need (Standard Method)



Net additional dwellings per annum
Local Housing Need (Standard Method)

	Net additional dwellings 2017/18	% arising from Permitted Development 2017/18	Stock growth rate	Net additional dwellings average 2015/16 - 2017/18	Local Housing Need (Standard Method*)	HDT Result November 2018 (Estimated†)	HDT Result November 2020 (Projected)
Calderdale	**292**	**18.2%**	**0.31%**	**332**	**815**	**42%**	**35%**
Doncaster	**1,208**	**5.3%**	**0.91%**	**1,140**	**572**	**198%**	**206%**
Hull-East Riding	**2,484**	**2.8%**	**0.91%**	**1,886**	**1,361**	**–**	**–**
East Riding of Yorkshire	1,143	0.1%	0.74%	1,048	957	112%	120%
Kingston upon Hull	1,341	5.1%	1.14%	838	405	169%	314%
Kirklees	**1,330**	**3.7%**	**0.72%**	**1,149**	**1,682**	**78%**	**79%**
Leeds-Bradford	**3,904**	**14.1%**	**0.71%**	**3,866**	**4,384**	**–**	**–**
Bradford	1,621	21.4%	0.77%	1,339	1,695	79%	95%
Leeds	2,283	8.9%	0.68%	2,527	2,689	100%	85%
North East Lincolnshire	**186**	**0.0%**	**0.25%**	**273**	**229**	**116%**	**78%**
North Lincolnshire	**356**	**2.5%**	**0.48%**	**336**	**412**	**73%**	**84%**
North Yorkshire	**2,835**	**4.3%**	**1.14%**	**2,068**	**1,840**	**–**	**–**
York	1,296	5.2%	1.49%	788	1,066	102%	126%
Craven	230	3.5%	0.84%	216	152	166%	157%
Hambleton	416	7.5%	1.03%	441	221	236%	196%
Harrogate	609	2.6%	0.86%	397	390	117%	166%
Richmondshire	284	0.0%	1.22%	226	11	448%	2269%
Rotherham	**472**	**5.1%**	**0.42%**	**554**	**578**	**95%**	**80%**
Ryedale	**279**	**1.4%**	**1.10%**	**282**	**187**	**217%**	**158%**
Scarborough	**458**	**3.5%**	**0.80%**	**422**	**171**	**263%**	**275%**
Selby	**612**	**0.7%**	**1.65%**	**538**	**365**	**158%**	**169%**
Sheffield	**3,313**	**7.1%**	**0.96%**	**2,902**	**2,985**	**–**	**–**
Barnsley	1,009	0.1%	0.94%	855	888	105%	110%
Sheffield	2,304	10.2%	0.96%	2,047	2,098	113%	108%
Wakefield	**1,759**	**4.3%**	**1.18%**	**1,832**	**1,009**	**188%**	**172%**

Pass   Action plan   20% Land Buffer   Presumption in favour of sustainable development

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† Note, the November 2018 Housing Delivery Test is measured against 2012- and 2014-based household projections rather than the Standard Method.

Contacts

Speak to your local office or visit our website.

Bristol

Andrew Cockett
andrew.cockett@lichfields.uk
0117 403 1980

Cardiff

Simon Coop
simon.coop@lichfields.uk
029 2043 5880

Edinburgh

Nicola Woodward
nicola.woodward@lichfields.uk
0131 285 0670

Leeds

Justin Gartland
justin.gartland@lichfields.uk
0113 397 1397

London

Matthew Spry
matthew.spry @lichfields.uk
020 7837 4477

Manchester

Simon Pemberton
simon.pemberton@lichfields.uk
0161 837 6130

Newcastle

Michael Hepburn
michael.hepburn@lichfields.uk
0191 261 5685

Thames Valley

Daniel Lampard
daniel.lampard@lichfields.uk
0118 334 1920

Endnotes

Current estimates of the Housing Delivery Test Results do not take into account communal accommodation flows, and therefore are subject to change.

Future projections of Housing Delivery Test Results assume no change in either delivery or the status of individual authorities' (or joint authorities') Local Plans.

The Government consultation on changes to the Standard Methodology closes imminently; therefore the Standard Method figures in this publication may well change in the near future. Calculations for the Standard Method are based on the 2014-based household projections for the 10-year period 2018-28.

Data on adoption dates of Local Plans and their requirements has been taken from the Government spreadsheet published in September 2017 in the 'Planning for the Right Homes in the Right Places consultation' – Lichfields accepts no responsibility for the accuracy of that data. Areas with plans adopted since 2017 (including their requirement) have been updated by Lichfields.

Affordability data is based on the 2017 median workplace affordability ratio published in ONS in March 2018.

Caps on the Standard Method do not take into account plans which are current undergoing examination and may be found sound before the transitional arrangements take effect nor plans which have/will be submitted before the 24th January 2019 deadline and subject to the current methodology for housing.

The caps on these areas may change in the future once plans become adopted. Some areas have negative household growth, and therefore if the uplift were applied as per the Standard Method these numbers would reduce further.

For the purposes of this analysis, areas with negative household growth do not have their percentage 'uplift' applied – the Standard Method figure is taken as the household growth figure.

These authorities are: Barrow-in-Furness, Copeland, Blackpool, Richmondshire, Cambridge and City of London. Three areas contain joint spatial plans but do not provide a breakdown of housing target for each local authority within the joint area. These are Central Lincolnshire (comprising Lincoln, North Kesteven and West Lindsey), Christchurch and East Dorset (comprising the two respective authorities) and West Dorset, Weymouth and Portland (comprising the two respective authorities). For the purposes of calculating the Standard Method cap an assumption has been made about the distribution of the overall housing requirement between individual local authorities. Stevenage and East Hertfordshire Local Plans both are currently subject to holding directions, however as they have been found sound by Inspectors, for the purposes of this analysis their housing requirements have been treated as adopted. This could be subject to change. No affordability data for West Somerset is available. A proxy based on the average ratio of Mendip, Sedgemoor, South Somerset and Taunton Deane has been used.