

Appendix 1

Future Housing Requirements

**Eastbourne & Wealden
Housing Market Assessments**

**Future Housing
Requirements**

Working Paper 1

April 2007

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Eastbourne and Wealden Councils

Future Housing Requirements

Working Paper 1

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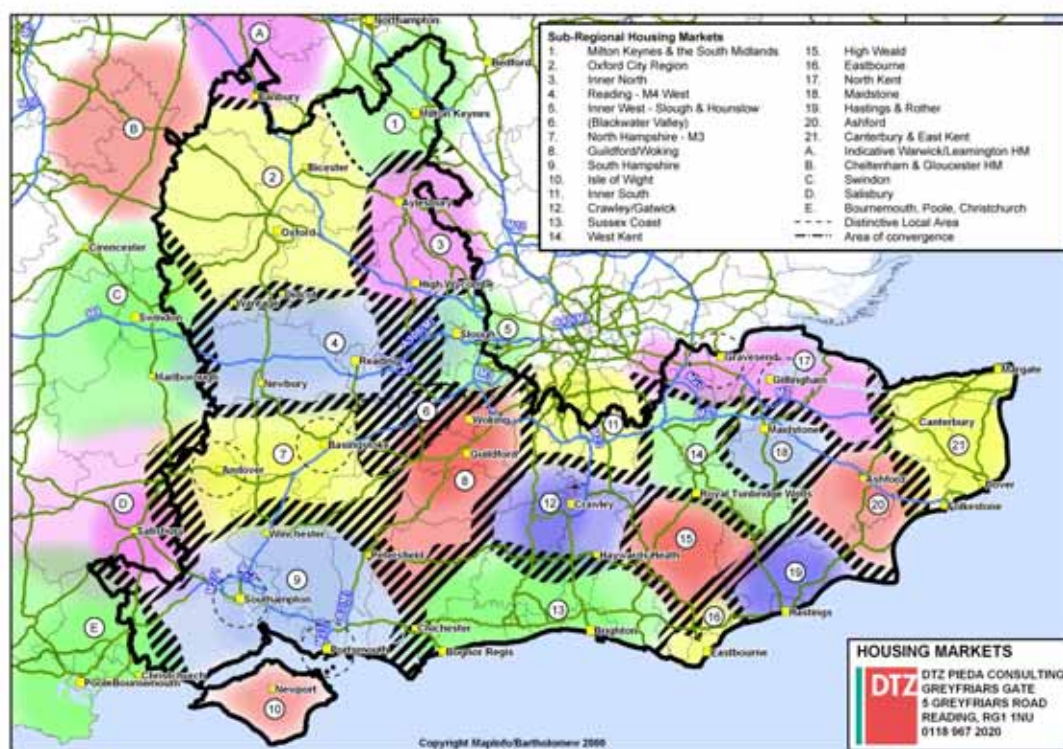
1. WORKING PAPER 1 – FUTURE HOUSING REQUIREMENTS

- 1.01 An important objective of this HMA is to determine the number of dwellings required to meet current and future housing requirements in Eastbourne and Wealden. Linked to this is the need to establish a reasonable level of balance with employment to ensure sustainable patterns of development and travel.
- 1.02 This working paper provides an examination of the available demographic and economic evidence base (both historic and forecast) to verify and draw conclusions on the appropriateness of the future housing provision targets set across the market area. It also analyses the internal dynamics of the housing market and how different parts of the sub-region interrelate.

The Dynamics of the Market Area

- 1.03 It is important to understand how different parts of the Eastbourne and Wealden sub-region function and relate spatially to one another. This provides an insight into the dynamics of the sub-region, its relationship to surrounding areas and the extent of smaller local markets operational within it. It also fulfils the first step in the HMA process to examine and define the spatial extent of the housing market.
- 1.04 In May 2004 DTZ were commissioned by the South East England Regional Assembly (SEERA) and English Partnerships to provide advice to the South East Regional Housing Board (SEHB) on the strategic pattern of housing markets in the region. The study mapped the spatial extent of sub-regional housing markets across the South East using a range of data. It concluded that the region comprised of the market areas shown in Figure 1.1.

Figure 1.1: The Spatial Extent of the South East's Sub-Regional Housing Markets



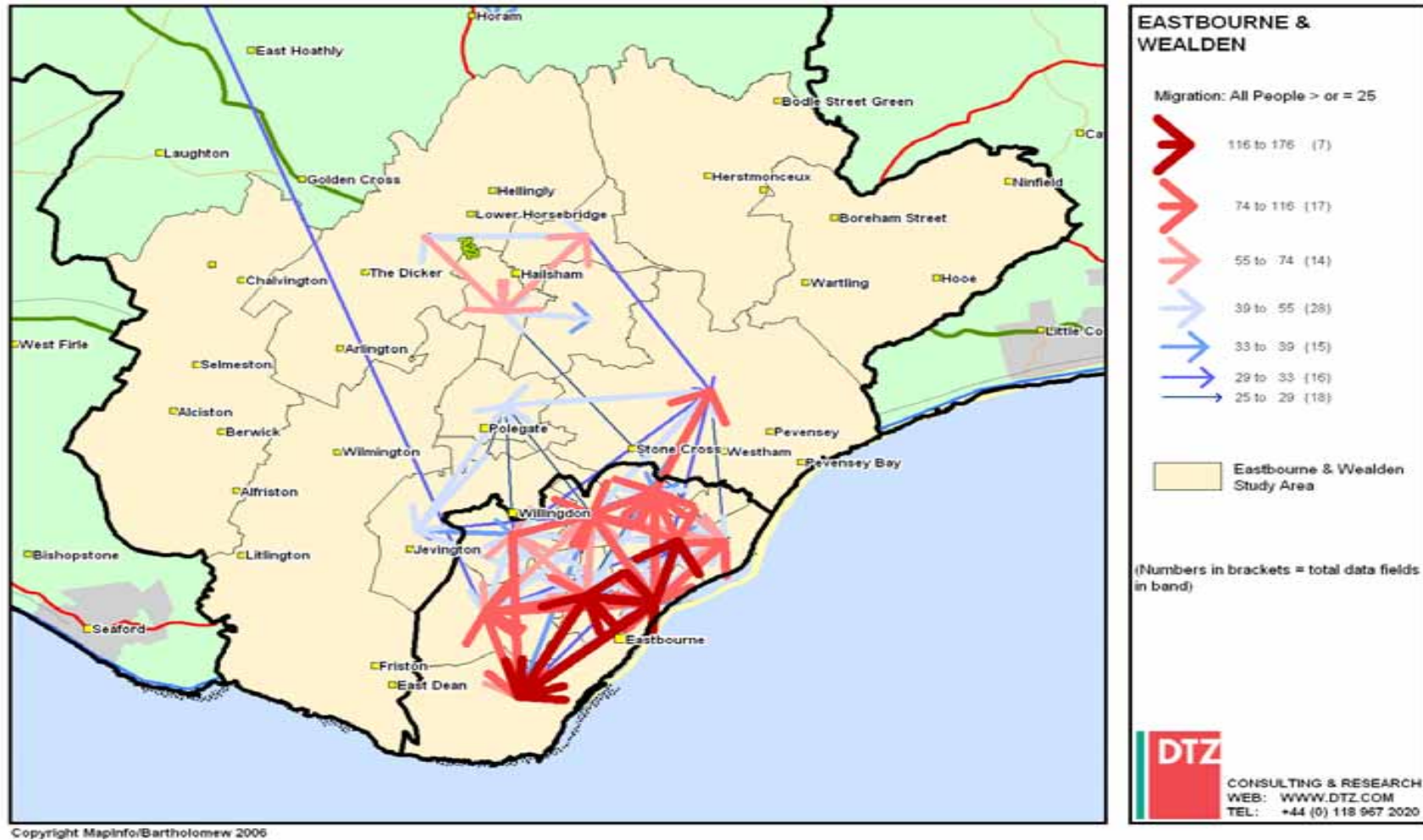
- 1.05 The Regional Housing Board study found that,

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“Analysis of household movement patterns and travel to work patterns indicates that there is a small housing market focused on Eastbourne itself and its rural hinterland which comprises part of Wealden District. The household movement analysis and consultations indicated that Eastbourne has relatively little connectivity with Brighton or the Sussex Coast. To the extent there is a connection with an adjacent area, it is with the adjacent Hastings and Rother area.”

- 1.06 Eastbourne was therefore identified as a single housing market, with a spatial extent covering the southern area of Wealden district. A smaller ‘High Weald’ housing market, largely contained within Wealden District but under the influence of surrounding areas (most notably Tunbridge Wells and the West Kent housing market), was found to cover the northern area of Wealden.
- 1.07 The pattern of household movement is the primary factor that needs to be considered in determining the spatial extent of sub-regional housing markets. A more detailed analysis of **household movement** patterns supports the contention that Eastbourne has a strong relationship with southern parts of Wealden. Figure 1.2 maps the number and origin and destination of ward level household movements in the year preceding the 2001 Census (the latest available). Figure 1.7 provides a ward level context map of the study area.
- 1.08 The analysis shows a high level of self-containment of moves between the coast wards (Meads, Devonshire and Sovereign) of Eastbourne, together with a slightly weaker concentration of moves between the wards of Old Town, Ratton, Hampden Park and Langley. Strong integration between wards in South Wealden and those in Eastbourne is also evident, with an especially high number of movements from eastern parts of Eastbourne into Pevensey and Westham.

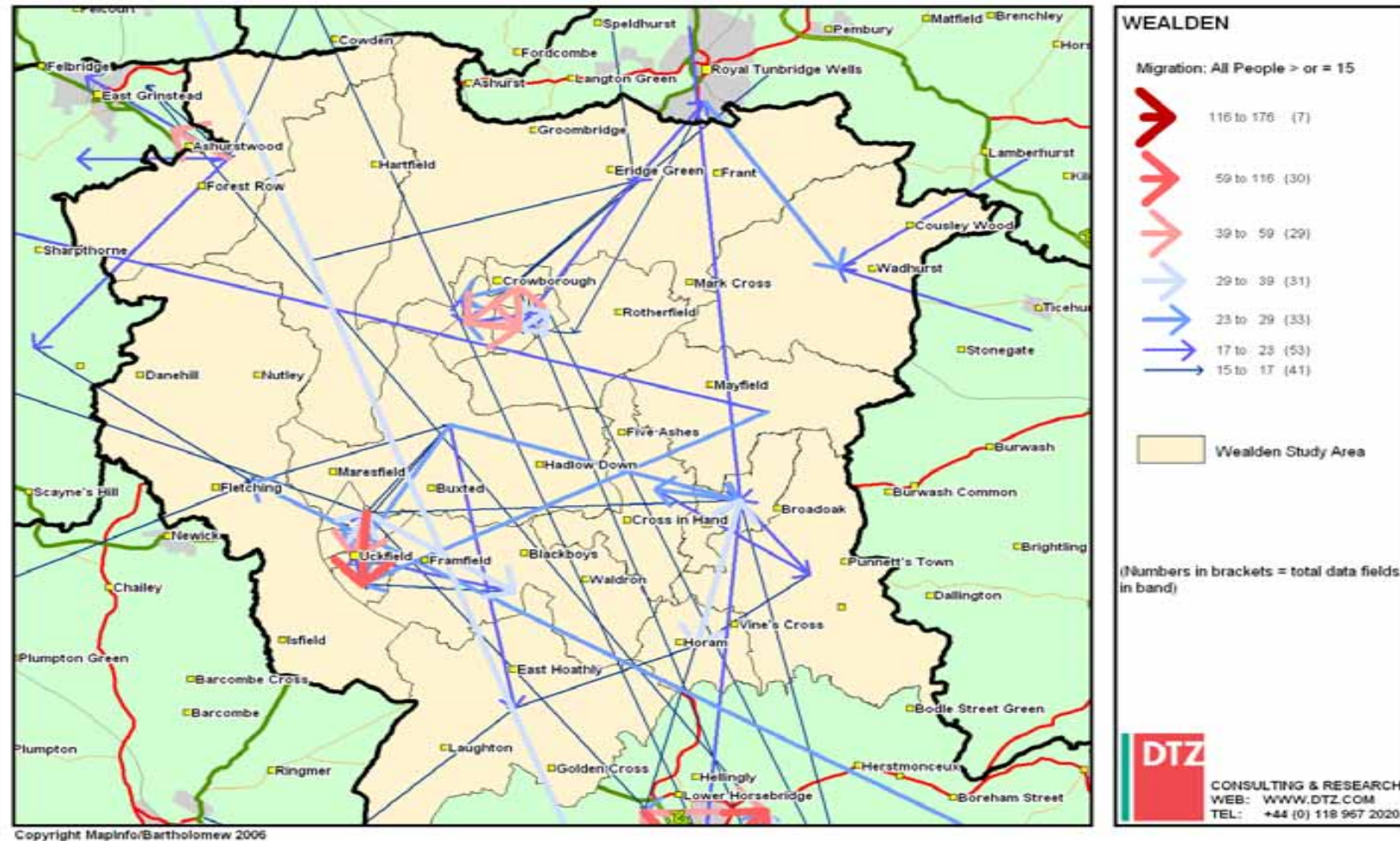
Figure 1.2: Origin and Destination of Household Movements Across Eastbourne and South Wealden 2001 (The Eastbourne HMA Area)



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- 1.09 Figure 1.2 also shows that Polegate receives a number of inward household movements from Pevensey, whilst it generates a relatively large volume of moves into Willingdon. The wards surrounding Hailsham tend to have a greater level of self-containment, although those household movements leaving this area all have a southern bias.
- 1.10 Overall the patterns of household movements presented in Figure 1.2 show strong housing linkages within Eastbourne and the southern fringes of Wealden and suggests that this area has a well integrated housing market that operates with autonomy.
- 1.11 In contrast, a number of more localised housing markets and smaller self-contained movements are evident across the northern area of Wealden. The household movements in Figure 1.3 show, for example, clusters of moves centred upon Crowborough and Uckfield. They also show the influence on northern areas of Wealden of Tunbridge Wells, which receives a large number of household moves from Crowborough, and the strong housing relationship between East Grinstead and the settlement of Forest Row.

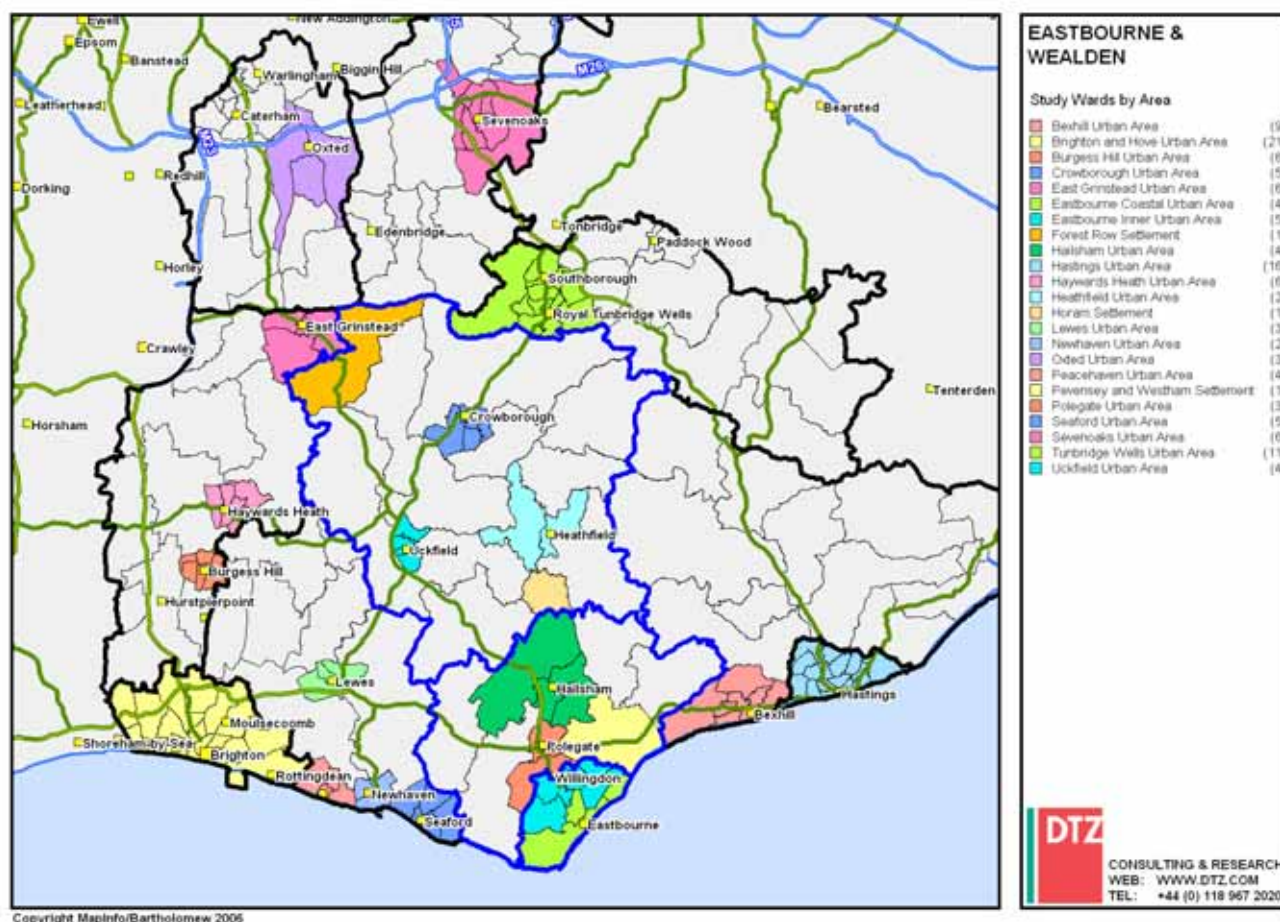
Figure 1.3: Household Movement Patterns Across North Wealden



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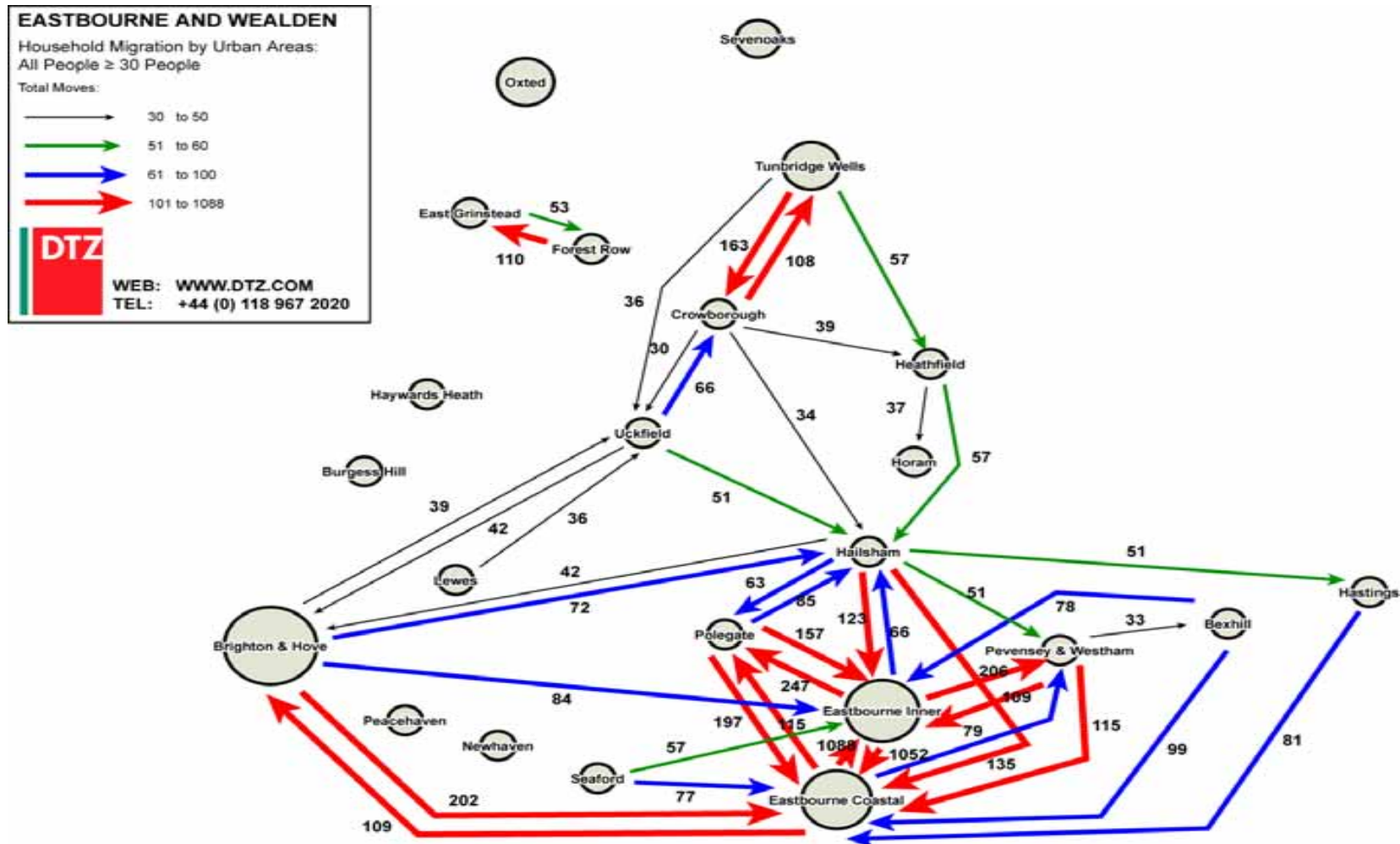
- 1.12 The analysis in Figures 1.2 and 1.3 is more usefully illustrated by tracing total movements between the settlements and urban areas across the study area. These settlements have been defined according to the wards they cover, which is presented in Figure 1.4.
- 1.13 In order to better understand flows to and from and within Eastbourne the Borough has been split into an ‘Inner Eastbourne’ and ‘Coastal Eastbourne’ area (as shown in Figure 1.4). The groupings of wards that each of these areas comprise is informed by the analysis in Figure 1.2, which reveals the high level of movements and strong integration between the coastal wards of Eastbourne, together with a weaker pattern of movements between the encompassing wards, which we have termed the “Inner Eastbourne” area.

Figure 1.4: Definitions (Ward Based) of Urban Areas and Settlements



- 1.14 The housing relationships between these urban areas and settlements are represented diagrammatically in Figure 1.5. A threshold of 30 moves has been applied to show with greater clarity the pattern of most significant movements.

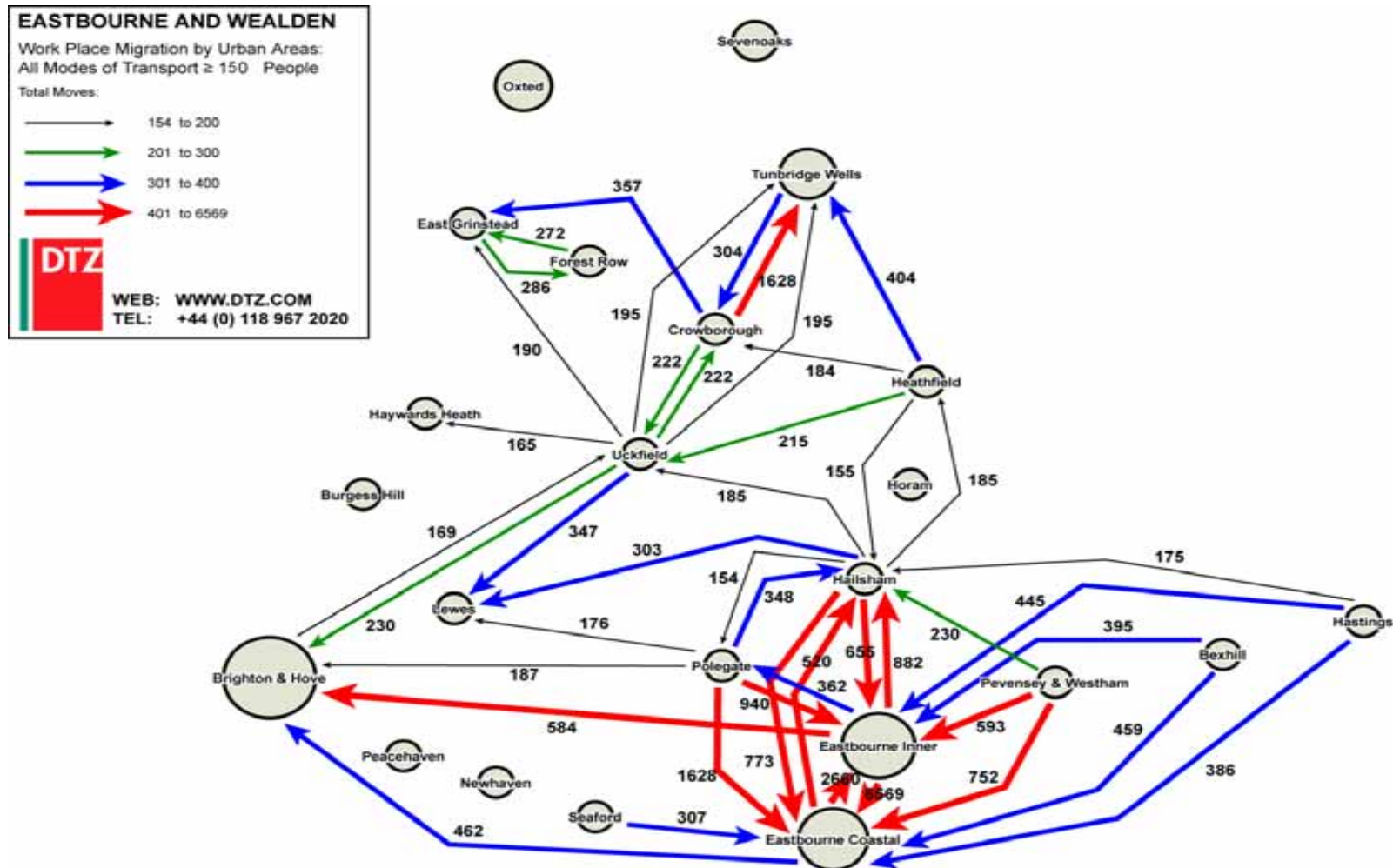
Figure 1.5: Household Movements Between the Urban Centres and Settlements Across Eastbourne and Wealden, All Movements ≥ 30 People (Source: ONS 2001)



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- 1.15 Figure 1.5 shows very high levels of household movements taking place between the South Wealden settlements of Polegate, Pevensey & Westham and Hailsham with the Eastbourne Inner and Eastbourne Coastal urban areas. Polegate receives particularly large volumes of household moves from Eastbourne, with some 247 people living in the Eastbourne Inner and 115 people living in the Eastbourne Coastal urban areas moving to Polegate in 2001.
- 1.16 A weaker pattern of movement is evident between the North Wealden settlements of Uckfield, Heathfield, Horem and Crowborough. There is, however, a high level of integration between the Tunbridge Wells and Crowborough areas, with over 100 people moving in between these in 2001.
- 1.17 There is a net inflow of household movements from Brighton and Hove into Eastbourne, with 292 people moving from Brighton and Hove into the Eastbourne Coastal area in 2001, compared with 109 movements in the opposite direction. There were a further 84 movements from Brighton and Hove into the Eastbourne Inner area, resulting in an overall net inflow into Eastbourne of 267.
- 1.18 Due to the close relationship between the boundaries of sub-regional housing markets and sub-regional labour markets, the second key determinant of the spatial pattern of housing markets is **travel to work movements**. These have been compiled on the same basis as the household movement patterns shown in Figure 1.5. They show (Figure 1.6) a very well integrated labour market operating across Eastbourne and the southern area of Wealden, with the Eastbourne Inner and Eastbourne Coastal areas receiving large commuting flows from Hailsham, Polegate and Pevensey & Westham. This is a reciprocal relationship, with Hailsham in particular attracting large commuting flows from Eastbourne Coastal (520) and Eastbourne Inner (882).
- 1.19 Sizeable movements are also evident within Eastbourne. The Eastbourne Coastal area attracts more than twice the number of commuting movements (6,569) from Eastbourne Inner compared to the scale of the flow in the opposite direction (2,680). The Eastbourne Coastal area receives its second highest commuting inflow from Polegate (1,628).
- 1.20 Overall, therefore, Figure 1.6 shows a well-defined and highly integrated labour market operating across Eastbourne and the settlements of Polegate, Hailsham and Pevensey and Westham. The settlements across north Wealden appear to have a restricted relationship with this south Wealden and Eastbourne labour market. Limited movements are, for example, evident from Polegate and Hailsham to the settlements in north Wealden such as Uckfield, Crowborough and Heathfield.
- 1.21 These settlements show a higher level of labour market integration with one another. Crowborough and Uckfield, for example, have an equal level of commuting movements travelling between them. Uckfield also draws in a relatively high travel to work flow from Heathfield to the east (215).
- 1.22 Figure 1.6 also reveals the influence of Tunbridge Wells on North Wealden. Tunbridge Wells attracts a very large commuting flow from Crowborough (1,628) and, to a lesser extent, Heathfield (404). East Grinstead also exerts a strong influence on Crowborough and Forest Row, with some 357 and 272 people living in Crowborough and Forest Row respectively working in East Grinstead.

Figure 1.6: Travel to Work Between the Urban Centres and Settlements Across Eastbourne and Wealden, All Movements ≥ 150 People
(Source: ONS 2001)



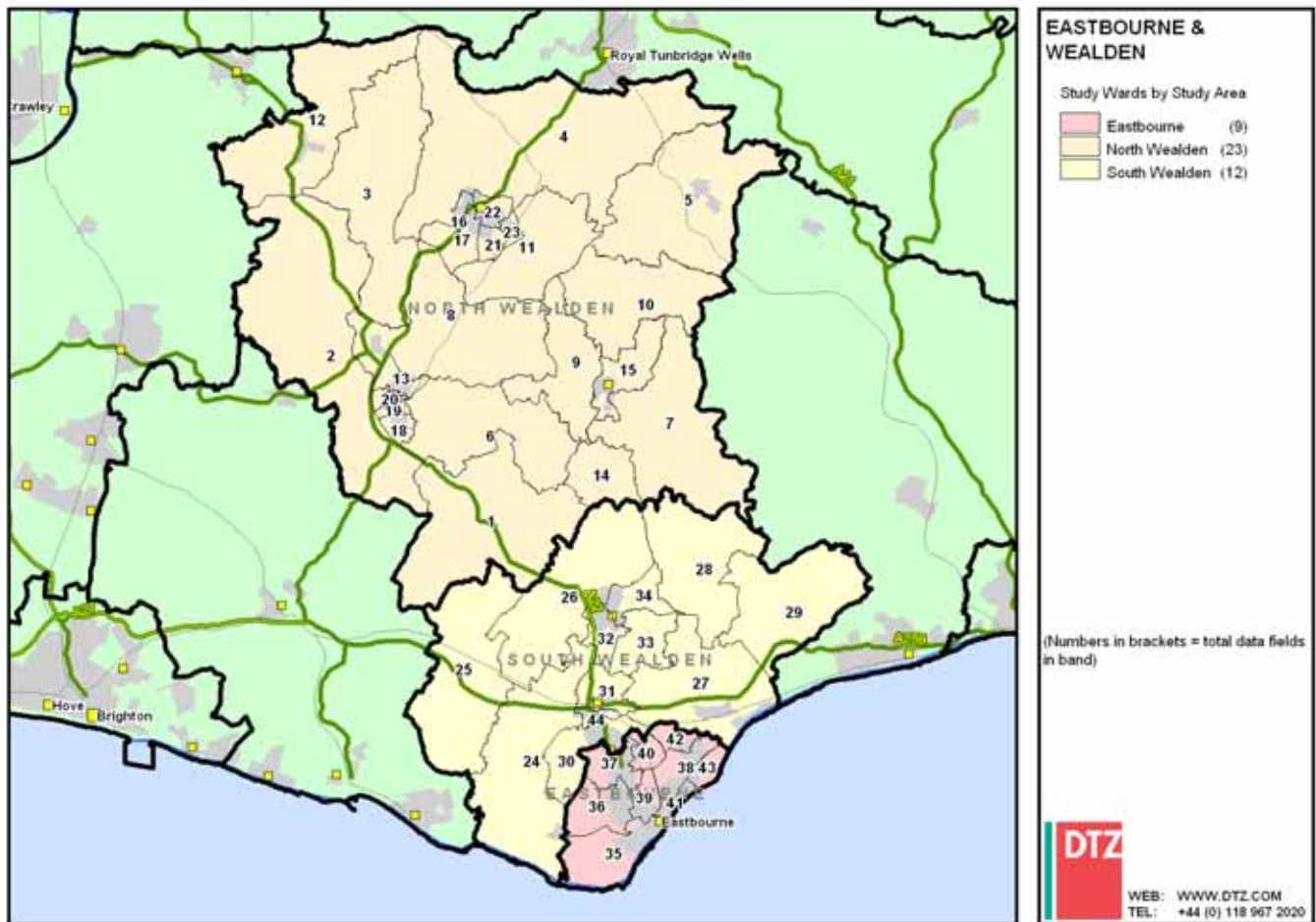
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- 1.23 The examination of household and travel to work movements – the two key determinants of the spatial extent of housing markets - show the existence of a well integrated south Wealden and Eastbourne housing market. This operates with a reasonably high level of autonomy. In north Wealden, the market comprises a series of more localised housing markets that have a relatively weaker connection with one another and are influenced by areas outside Wealden, most notably Tunbridge Wells.
- 1.24 In light of these conclusions on the market areas in Eastbourne and Wealden the remainder of this paper distinguishes between the South and North Wealden markets in its demographic and economic analysis. Where historic ward level data is available this has been used according to the ward definitions of the market areas shown in Figure 1.4 (demarcated by the thick blue line) and Figure 1.7 below. Where this is not available (most notably within the economic and demographic forecasts) DTZ has used official data at district level and pro-rated this according to the ward level distribution of population/households in each area.¹
- 1.25 The Eastbourne HMA area included in the analysis comprises all of Eastbourne district and South Wealden.
- 1.26 Within the remainder of this and the subsequent working papers, therefore, the following benchmarks are used within the analysis:
1. Eastbourne
 2. South Wealden
 3. Eastbourne HMA / Wider Eastbourne Area (comprises an aggregation of Eastbourne district and South Wealden)
 4. North Wealden
 5. Wealden
 6. East Sussex
 7. South East
- 1.27 A context map of the study area and the spatial extent of the benchmark areas used within the analysis are shown in Figure 1.7.

¹ For example, in 2001 the population of the wards making up South Wealden was equivalent to 38% of the total population of Wealden district. The population of the wards making up North Wealden was equivalent to 62% of the district total. Therefore these percentages have been applied to population projections that are only available at district level to offer indicative estimates in North Wealden and South Wealden.

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Figure 1.7: Context Map of Eastbourne and Wealden



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Key	Ward Name	Local Authority	Study Area	Key	Ward Name	Local Authority	Study Area
1	Chiddingfold and East Hoathly	WEALDEN	North Wealden	23	Crowborough Jarvis Brook	WEALDEN	North Wealden
2	Danehill/Fletching/Nutley	WEALDEN	North Wealden	24	East Dean	WEALDEN	South Wealden
3	Hartfield	WEALDEN	North Wealden	25	Alfriston	WEALDEN	South Wealden
4	Frant/Withyham	WEALDEN	North Wealden	26	Hellingly	WEALDEN	South Wealden
5	Wadhurst	WEALDEN	North Wealden	27	Pevensey and Westham	WEALDEN	South Wealden
6	Framfield	WEALDEN	North Wealden	28	Herstmonceux	WEALDEN	South Wealden
7	Heathfield East	WEALDEN	North Wealden	29	Ninfield and Hove with Warling	WEALDEN	South Wealden
8	Buxted and Maresfield	WEALDEN	North Wealden	30	Willingdon	WEALDEN	South Wealden
9	Cross in Hand/Five Ashes	WEALDEN	North Wealden	31	Polegate North	WEALDEN	South Wealden
10	Mayfield	WEALDEN	North Wealden	32	Hailsham South and West	WEALDEN	South Wealden
11	Rotherfield	WEALDEN	North Wealden	33	Hailsham East	WEALDEN	South Wealden
12	Forest Row	WEALDEN	North Wealden	34	Hailsham Central and North	WEALDEN	South Wealden
13	Uckfield North	WEALDEN	North Wealden	35	Meads	EASTBOURNE	Eastbourne
14	Horam	WEALDEN	North Wealden	36	Old Town	EASTBOURNE	Eastbourne
15	Heathfield North and Central	WEALDEN	North Wealden	37	Ratton	EASTBOURNE	Eastbourne
16	Crowborough St. Johns	WEALDEN	North Wealden	38	St. Anthony's	EASTBOURNE	Eastbourne
17	Crowborough West	WEALDEN	North Wealden	39	Upperton	EASTBOURNE	Eastbourne
18	Uckfield Ridgewood	WEALDEN	North Wealden	40	Hampden Park	EASTBOURNE	Eastbourne
19	Uckfield New Town	WEALDEN	North Wealden	41	Devonshire	EASTBOURNE	Eastbourne
20	Uckfield Central	WEALDEN	North Wealden	42	Langney	EASTBOURNE	Eastbourne
21	Crowborough East	WEALDEN	North Wealden	43	Sovereign	EASTBOURNE	Eastbourne
22	Crowborough North	WEALDEN	North Wealden	44	Polegate South	WEALDEN	South Wealden

Future Housing Requirements - Context

- 1.28 Eastbourne faces marked constraints in its ability to deliver future new housing. An area of outstanding natural beauty (AONB) encompasses the Borough, whilst its wide flood plains and urban character further restrict the supply of land for housing. Wealden also faces significant constraints but has now identified and allocated sufficient land to meet its housing requirements over the next five years. Working Paper 2 of this study provides a full review of housing land within each of the market areas.
- 1.29 The housing constraints faced in Eastbourne and the potential for higher rates of development in South Wealden are recognised in the South East Plan. The latest version of the Plan sets a target to provide 9,400 net additional dwellings over the period 2006 to 2026 in the Eastbourne HMA area, compared with 3,400 in North Wealden. Over the 20 year period of the Plan these totals equate to 470 and 170 dwellings per annum in the Eastbourne HMA area and North Wealden respectively, as shown in Figure 1.7.

Figure 1.7: Future Housing Targets Eastbourne and Wealden

Area	Total New Housing 2006 to 2026	Annual Equivalent
Eastbourne	4,800	240
South Wealden	4,600	230
Eastbourne HMA Area	9,400	470
North Wealden	3,400	170
Wealden	8,000	400

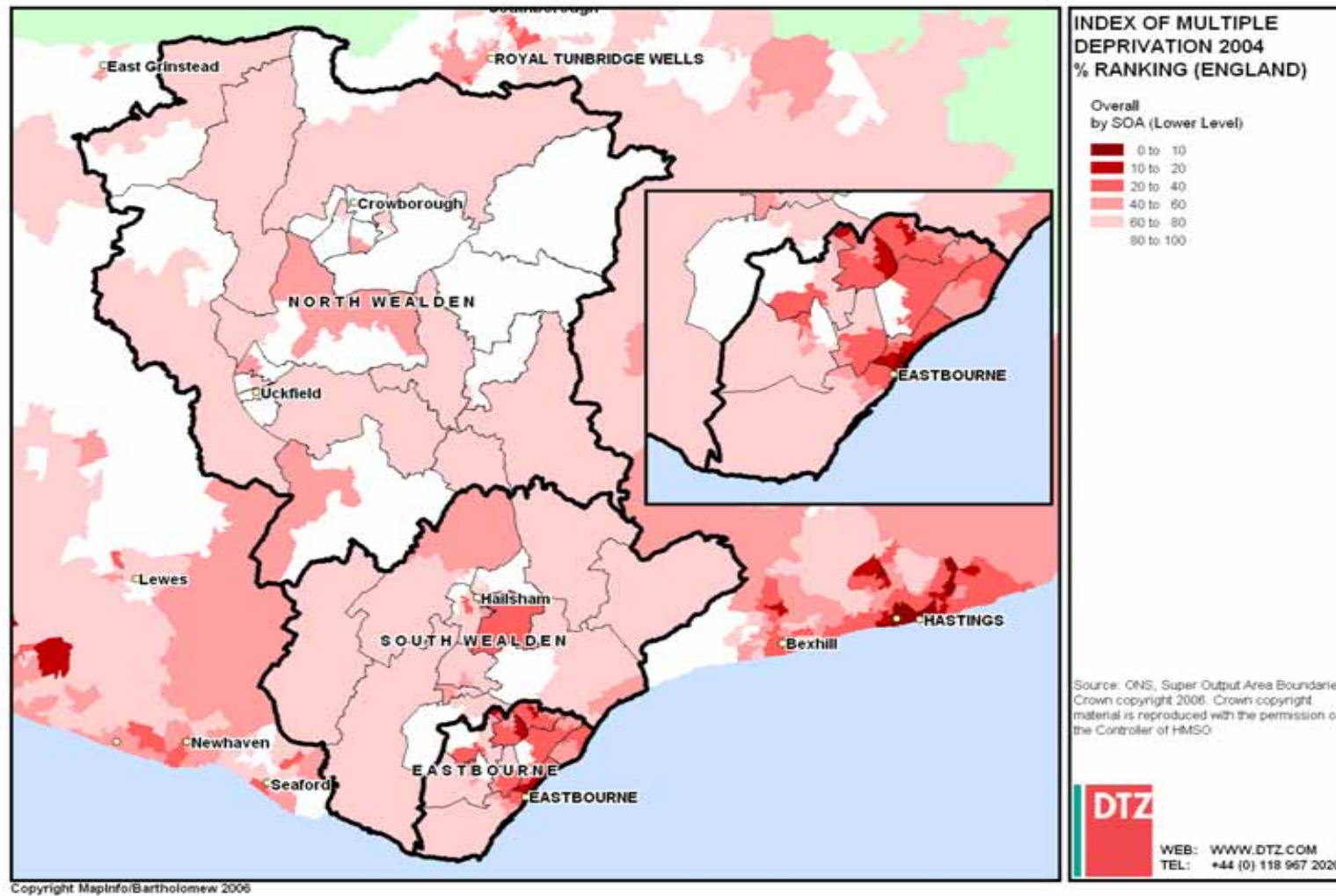
Source: South East Plan 2006 / East Sussex County Council

- 1.30 This paper now examines a range of sources on the historic and projected demographic and economic change across the sub-region. These are used to establish whether the current evidence base supports the housing targets set in the South East Plan for Eastbourne and Wealden and the future scale of housing delivery they imply.

Deprivation

- 1.31 In order to set the context for the analysis it is important to establish the current structure of economic development across the study area using indices from the Index of Multiple Deprivation (IMD).
- 1.32 Figure 1.8 shows that Eastbourne suffers from the high concentrations of deprivation that tend to be associated with coastal areas of the South East. Ten of its Super Output Areas (SOAs) are ranked within the 20% most deprived in the country. These tend to be concentrated in the East of the Borough and are located in the wards of Hampden Park, Langney and St Antony's.
- 1.33 Wealden has fewer areas that rank higher on the IMD than in Eastbourne, although there is a notable concentration of deprivation to the east of Hailsham. Levels of deprivation tend to be very low across almost all of North Wealden.

Figure 1.8: IMD Rankings 2004



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Central Government (ONS) Trend Based Population Projections

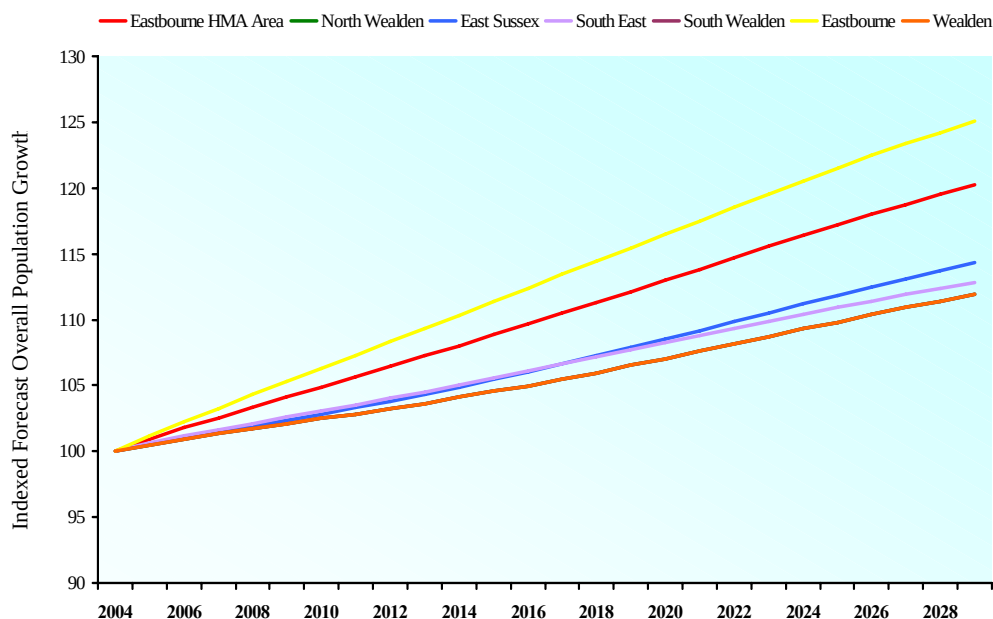
- 1.34 The 2004 based population projections are the latest to be produced by the ONS. These use past demographic data to form assumptions about future demographic patterns. They are therefore extrapolations of past trends and assume that what has happened in the past will continue in the future.
- 1.35 The translation of these demographic projections into housing figures is a matter for regional policy guidance. It is here that policy does and indeed must enter. Ultimately, regional guidance will 'bend' the trends of the projections as policy is taken into account. The South East RSS, for example, puts forward a considerably different allocation of housing to districts across the South East than would prevail if trend based (bottom up) household projections alone determined the allocation. The general policy effect is to shift allocations from areas where housing supply in the future will be constrained into areas where greater growth can be accommodated (in terms of both jobs and housing).
- 1.36 The two approaches are therefore distinctly different, with the policy based (top down) approach taking into account interventions that may disrupt past trends (such as an exhaustible amount of land or resources). DTZ believe that, whilst the trend based projections provide a useful indication of potential unconstrained demand, the policy based forecasts (examined later in this section) provide the most reliable scenario upon which to base future local policy.
- 1.37 The above partly explains why the ONS population projections (Figures 1.9 and 1.10) show the highest levels of population growth of all the benchmark areas occurring in Eastbourne over the next 20 years. The population of Eastbourne increased by around 4,400 between 2001 and 2006, compared with around 2,700 between 1996 and 2001. This high recent population growth helps to explain why the ONS projections expect annual growth of 900 people in Eastbourne over the next 20 years. This is some 25% higher than that expected in Wealden over the same period (700 per annum), despite Eastbourne having a lower rate of planned dwelling growth.

Figure 1.9: Absolute Historic and Projected Population Growth

	1996	2001	2006	2011	2016	2021	2026	Annual Change 1996-2006	Annual Change 2006-2026
Eastbourne	87,100	89,800	94,200	98,800	103,500	108,200	112,800	700	900
South Wealden	51,600	53,300	54,000	55,100	56,200	57,600	59,100	200	300
North Wealden	84,100	86,900	88,200	89,800	91,700	94,000	96,400	400	400
Eastbourne HMA Area	139,000	143,400	148,600	154,200	160,100	166,200	172,300	1,000	1,200
Wealden	135,700	140,200	142,200	144,900	147,900	151,600	155,500	700	700
East Sussex	480,000	493,100	501,700	513,100	526,700	542,300	558,600	2,200	2,800
South East	7,800,400	8,023,400	8,205,100	8,396,800	8,603,100	8,823,200	9,035,700	40,500	41,500

ONS 2004 Based Population Projections

Figure 1.10: Indexed Projected Population Growth (Source: ONS)²



Source: ONS, DTZ

- 1.38 In contrast to Eastbourne, population growth in Wealden has slowed and stabilised over the past ten years. Accordingly the ONS projections anticipate future rates of annual growth (700 people) at similar levels to historic rates (also 700 people). For the Eastbourne HMA area, therefore, the projected annual rise in population based on ONS projections of 1,200 (which equates to an additional 24,000 people between 2006 and 2026) is a combination of faster population growth in Eastbourne and slower population growth in South Wealden.

Population Age Structure

- 1.39 ONS projections provide analysis of the composition of future population growth in terms of age structure. North Wealden's projected age structure shows the highest growth occurring in those aged 75 and above (5,800 people) between 2006 and 2026. There is also a projected decline in the number of people aged below 45 years (Figure 1.11).

Figure 1.11: North Wealden Anticipated Change in Age Structure

North Wealden	1996	2001	2006	2011	2016	2021	2026	Annual Change 1996-2006	Annual Change 2006-2026
0-14	15,400	15,700	15,400	14,800	14,500	14,400	14,600	0	-40
15-24	8,100	7,900	8,500	8,900	8,700	8,400	8,400	40	-10
25-44	21,100	21,300	19,300	17,400	16,400	16,800	17,200	-180	-110
45-64	21,800	23,700	25,800	27,400	27,800	28,100	27,400	400	80
65-74	8,800	9,100	9,400	10,900	12,900	13,100	13,200	60	190
75+	8,900	9,300	9,700	10,400	11,300	13,300	15,600	70	290
Total	84,300	86,900	88,100	89,800	91,700	94,100	96,300	380	410

Source: ONS Mid Year Population Estimates and ONS 2004 Based Population Projections

² It should be noted the data lines for Wealden, South Wealden and North Wealden are the same in Figures 1.10, 1.14 and 1.16 as the growth projected for Wealden is assumed to be the same across each of its sub-areas (see also footnote 1).

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Figure 1.12: South Wealden Anticipated Change in Age Structure

South Wealden	1996	2001	2006	2011	2016	2021	2026	Annual Change 1996-2006	Annual Change 2006-2026
0-14	9,500	9,600	9,500	9,100	8,900	8,900	8,900	0	-30
15-24	5,000	4,800	5,200	5,400	5,300	5,200	5,100	20	0
25-44	13,000	13,000	11,900	10,600	10,100	10,300	10,600	-110	-60
45-64	13,400	14,500	15,800	16,800	17,100	17,200	16,800	240	50
65-74	5,400	5,500	5,700	6,700	7,900	8,000	8,100	30	120
75+	5,500	5,700	5,900	6,400	7,000	8,100	9,500	50	180
Total	51,600	53,200	54,000	55,000	56,200	57,700	59,100	240	250

Source: ONS Mid Year Population Estimates and ONS 2004 Based Population Projections

- 1.40 Overall the proportion of the population above the age of 45 is expected to increase from 51% to 58% over the next 20 years in North Wealden. In absolute terms this represents a rise of 5,800 people over the age of 75 years, as well as growth of 3,800 and 1,600 in the 65-74 and 45-64 age cohorts respectively. Similar patterns are also evident in South Wealden, as shown in Figure 1.12, with all population growth expected in the 45 and above age cohorts.
- 1.41 The ONS projections show that if previous demographic trends continue then growth in the population of South and North Wealden will be almost exclusively in older age cohorts. Furthermore, the majority of this growth is expected in age groups (65+) that are traditionally associated with economic inactivity. This could have implications on Wealden's ability to enlarge its labour force, encourage new business growth and ultimately raise economic output in the future.
- 1.42 The ONS projections for Eastbourne also anticipate that future population expansion will be driven by growth in older age cohorts. However, whilst the largest annual growth is expected in the 75+ age band (315 per annum) Eastbourne is also expected to experience smaller growth in its younger age groups, as shown in Figure 1.13. This is in contrast to South and North Wealden where the population of younger age groups is expected to decline over the next 20 years.

Figure 1.13: Eastbourne Anticipated Change in Age Structure

Eastbourne	1996	2001	2006	2011	2016	2021	2026	Annual Change 1996-2006	Annual Change 2006-2026
0-14	14,100	15,100	15,200	15,300	15,400	15,700	16,000	110	40
15-24	10,400	9,800	11,400	12,100	11,900	11,600	11,800	100	20
25-44	21,500	22,500	22,300	21,700	21,800	22,200	22,900	80	30
45-64	18,300	20,300	23,000	25,600	27,200	28,300	28,300	470	265
65-74	10,200	9,700	9,800	11,200	13,400	14,300	14,900	-40	255
75+	12,500	12,500	12,600	12,900	13,900	15,900	18,900	10	315
Total	87,000	89,900	94,300	98,800	103,600	108,000	112,800	730	925

Source: ONS Mid Year Population Estimates and ONS 2004 Based Population Projections

Central Government (DCLG) Household Growth Forecasts

1.43 Household projections from DCLG are also trend-based and are not, therefore, policy-based forecasts of what the Government expects to happen in the future (many social and economic factors influence the formation of households, including policies adopted by both central and local government). The household projections are based on the ONS population projections and, as a result, are influenced by similar assumptions on future migration, fertility and mortality. This explains why Eastbourne, in keeping with its population projections, has the highest rate of anticipated household growth of all the benchmark areas, as shown in Figure 1.14.

Figure 1.14: Projected Growth of Total Household 2006-2026 (Indexed)³

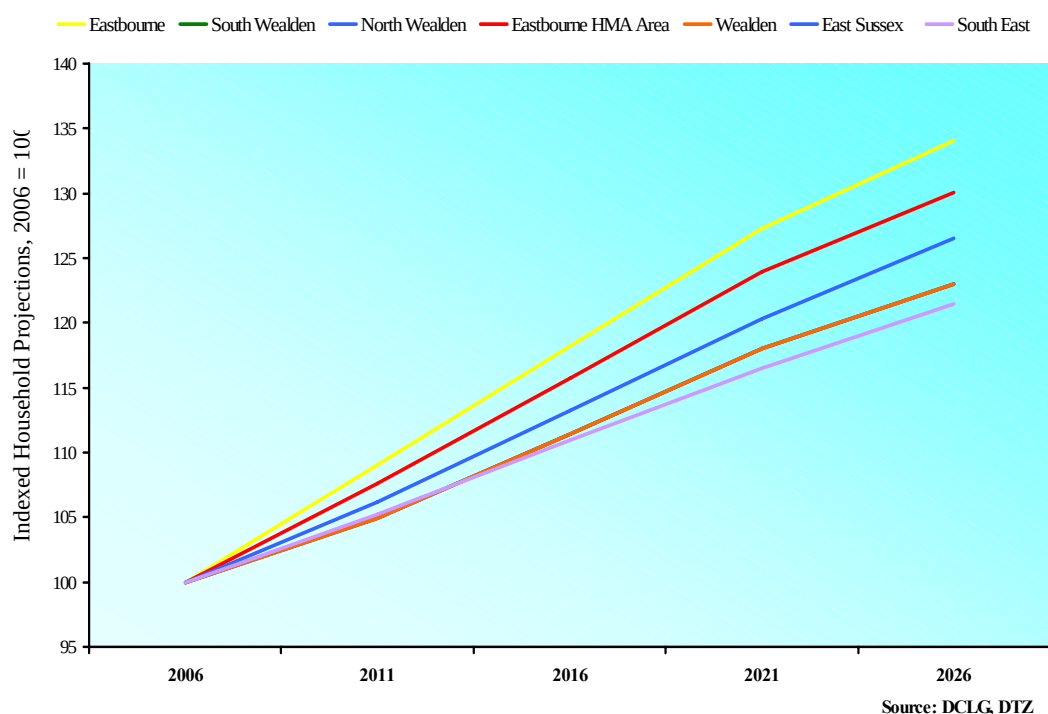


Figure 1.15: DCLG Household Projections 2006 to 2026

	2006	2011	2016	2021	2026	Total change to 2026	Annual Change
Eastbourne	44,000	48,000	52,000	56,000	59,000	15,000	750
South Wealden	25,000	26,200	27,900	29,500	30,800	5,800	290
North Wealden	36,000	37,800	40,100	42,500	44,300	8,300	415
Eastbourne HMA Area	69,000	74,200	79,900	85,500	89,800	20,800	1,040
Wealden	61,000	64,000	68,000	72,000	75,000	14,000	700
East Sussex	226,000	240,000	256,000	272,000	286,000	60,000	3,000
South East	3,445,000	3,626,000	3,822,000	4,013,000	4,184,000	739,000	36,950

Source: DCLG

³ It should be noted the data lines for Wealden, South Wealden and North Wealden are the same in Figures 1.14 as the growth projected for Wealden is assumed to be the same across each of its sub-areas (see also footnote 1).

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- 1.44 The projections prepared by DCLG anticipate similar household growth in Eastbourne and Wealden over the next 20 years, with the number of households expected to rise by 15,000 and 14,000 in each area respectively, as shown in Figure 1.15. Overall, therefore, whilst absolute population growth is expected to be notably higher in Eastbourne compared to Wealden (see Figure 1.9) household growth is expected to be comparable. Annualised this is equivalent 750 and 700 new households in Eastbourne and Wealden respectively over the next two decades.
- 1.45 This can be partly explained by the anticipated change in age structure across the study area, which shows population growth in Wealden being driven by more elderly groups (which have smaller households) compared to Eastbourne. The consequence of this trend is that within Wealden population increases will result in greater numbers of new households relative to similar population increases in Eastbourne. A full analysis of the relationship between the projected change in the numbers of new households and demand for housing of particular sizes is examined in Working Paper 4 on “The Size and Type of New Housing”.
- 1.46 Overall, the rate of new household growth projected under the DCLG estimates is around three times the level of future dwelling provision in Eastbourne (240 units pa) and twice that in Wealden (400 units pa) set in the South East Plan.

Anticipated Policy Based Growth

- 1.47 The central government household and population projections examined above are trend-based. However, it should be remembered that new local planning policies are often intended to modify past trends. Structure Plans and Local Development Documents, for example, may be based on reasoned and agreed departures from the projections that seem better able to fit particular local circumstances⁴.
- 1.48 Policy based forecasts, which take account of how policy intends to guide future growth and the constraints within local markets, show a very different picture to the trend based forecasts. According to policy based forecasts produced by the Regional Assembly and County Council, the number of households in Eastbourne is expected to increase at the slowest rate of all of the benchmark areas over the next 20 years, as shown in Figures 1.16 and 1.17. This represents a significant departure from the pattern of future household growth anticipated in the trend based projections (Figure 1.14), which expect Eastbourne to have the highest rate of future growth of all the benchmark areas.
- 1.49 The policy based forecasts show that future policy intends to steer housing growth away from Eastbourne and East Sussex into other parts of the South East. This is reflected in a comparison of the trend based projections (Figure 1.14), where all of the benchmark areas are projected to have higher household growth than the South East, against the policy based forecasts (Figure 1.16), where growth in the South East is forecast to be higher than in each of the benchmark areas.

⁴ Further discussion of the differences between trend and policy based forecasts is contained in paragraphs 1.35 to 1.37.

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Figure 1.16: SEERA (Policy Based) Household Projections 2006 to 2026

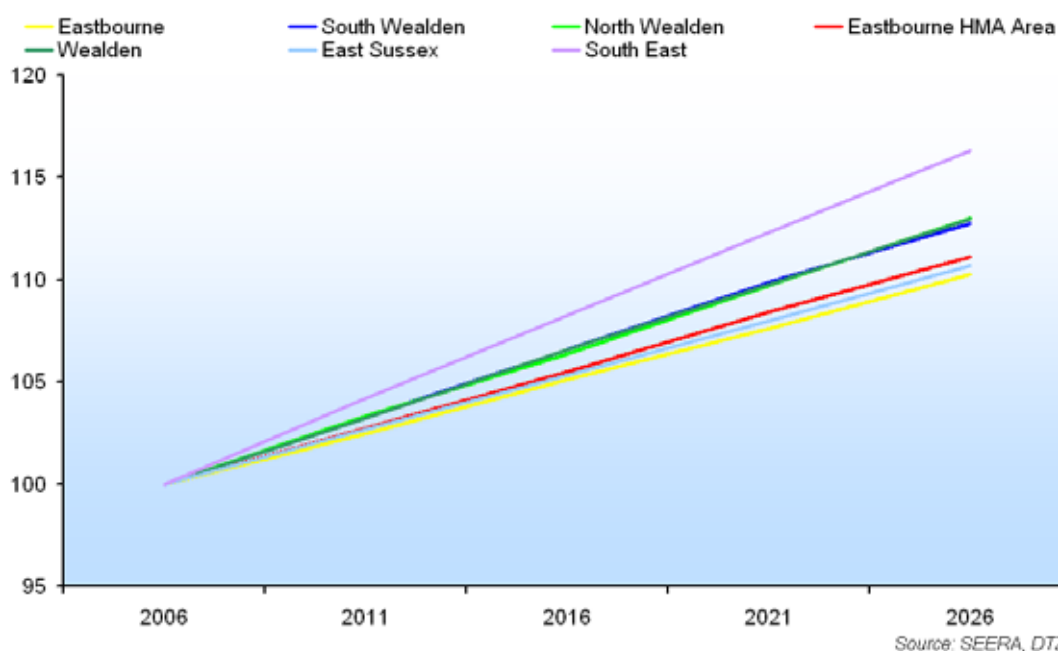


Figure 1.17: Policy Based Household Projections 2001 to 2026

	2001	2006	2011	2016	2021	2026	Annual 2001-2006	Annual 2006-2026
Eastbourne	41,300	44,800	45,900	47,100	48,200	49,400	700	230
South Wealden	24,000	24,300	25,100	25,900	26,700	27,500	60	160
North Wealden	34,500	35,000	36,100	37,300	38,400	39,500	100	225
Eastbourne HMA Area	65,300	69,100	71,000	73,000	74,900	76,900	760	390
Wealden	58,400	59,300	61,200	63,200	65,100	67,000	180	385
East Sussex	329,700	340,800	349,900	359,000	368,100	377,200	2,220	1,820
South East	3,295,800	3,433,300	3,577,100	3,717,100	3,855,600	3,994,200	27,500	28,045

Source: SEERA / East Sussex County Council

- 1.50 At 230 and 385 households per annum in Eastbourne and Wealden respectively, household growth expected under the policy based forecasts is much more closely aligned with the housing targets set for Eastbourne and Wealden in the South East Plan (which stems from the fact that policy based demographic forecasts are themselves influenced by housing provision).
- 1.51 For Eastbourne these targets imply a significant constraint on demand in terms of the number of households that could be expected if previous trends were to continue. Figure 1.17 shows, for example, that annual household growth expected over the next 20 years (230 per annum) is around one third the level of household growth over the last five years. Eastbourne is therefore unlikely to encounter difficulties in attracting demand for its new housing stock in future, given the constraint on trend growth that they imply.
- 1.52 By contrast Wealden is expected to make a notable increase in the amount of new households it accommodates in the future compared with past levels. In South Wealden household growth is expected to rise from 60 to 160 households per annum and in North Wealden from 100 to 225 households per annum (when the forecasts are divided between

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the southern and northern areas based on the current distribution of households). The South East Plan targets (Figure 1.7), which set higher rates of housing provision for South Wealden than for North Wealden, therefore suggest that housing growth will be redistributed within Wealden away from the north of the district (where a higher proportion of the current housing stock is located compared with the south) and into South Wealden.

Job Growth

- 1.53 It is important that the provision of future housing across Eastbourne and Wealden is balanced with job growth. Each area must also be able to accommodate the labour force enlargement required to meet its economic development aspirations.
- 1.54 DTZ has not been able to obtain the job forecasts (job forecasts are workplace based and therefore show the expected demand for labour within a given location) produced by Experian for Eastbourne and Wealden in connection with the preparation of the South East Plan. We have, however, obtained the historic pattern of job growth across each of the benchmark areas, as shown in Figure 1.17.
- 1.55 Between 1996 and 2005 around 1,000 new jobs were added to the Eastbourne economy each year, compared with 720 in Wealden.
- 1.56 Within Wealden district, North Wealden produced the most significant number of new jobs, which rose on average by 460 per annum. In contrast, just over half the level of jobs (260 per annum) were generated in South Wealden over the same period. Job growth has therefore been quite buoyant in North Wealden, but less so in the south.

Figure 1.18: Job (Workplace) Growth Between 1996 and 2005

	Eastbourne	South Wealden	North Wealden	Eastbourne HMA Area	Wealden	East Sussex	South East
1996	29,900	11,400	23,900	41,300	35,300	139,700	3,213,000
1997	29,700	12,000	25,200	41,800	37,200	146,800	3,334,000
1998	32,200	12,200	24,900	44,500	37,100	146,600	3,425,000
1999	34,200	15,200	26,900	49,400	42,100	158,900	3,598,000
2000	36,700	14,000	28,100	50,800	42,100	163,400	3,663,000
2001	36,200	13,500	28,300	49,600	41,800	162,900	3,664,000
2002	35,600	13,400	28,000	48,900	41,400	162,000	3,677,000
2003	36,600	13,400	27,200	50,000	40,600	159,200	3,628,000
2004	38,100	13,700	27,200	51,800	40,900	163,000	3,657,000
2005	40,000	14,000	28,500	54,100	42,500	168,200	3,762,000
Change 96 to 05	10,100	2,600	4,600	12,800	7,200	28,500	549,000
Annual Change 96 to 05	1,010	260	460	1,280	720	2,850	54,900

Source: Annual Business Enquiry

- 1.57 Economic activity levels in North Wealden are also higher than in South Wealden, as shown in Figure 1.19. This will be due to more robust economy in North Wealden and its higher levels of commuting into Tunbridge Wells, London and Gatwick compared to South Wealden (see Annex A). These commuting patterns will also tend to raise residence based wages in North Wealden vis a vis South Wealden and Eastbourne (household incomes across the study area are documented in Working Paper 4) given the higher salaries in these locations.

Figure 1.19: Economic Activity and Unemployment Rates

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	Claimant Count (% Working Age Population) 2007	Economic Activity Rate Census 2001
North Wealden	0.7%	69.9%
South Wealden	1.4%	63.7%
Eastbourne	3.0%	63.3%
Eastbourne HMA	2.4%	63.5%

Source: Claimant Count 2007 & Census 2001

1.58 Lower economic activity levels in Eastbourne and South Wealden are also a consequence of weaknesses in the local economy. A recent study on “*A Blueprint for the Eastbourne/Hailsham Triangle*,” for example, found that Eastbourne and South Wealden:

- Has a weak economic base with an over-representation of small firms and declining sectors
- Under-performs relative to the South East on the majority of economic indicators
- Is over-dependent on ‘traditional’ sector employment
- Has limited opportunities for new inward investment
- Is under-represented in the new growth industries particularly in the ‘knowledge’ economy

1.59 There are also concerns (expressed during the consultations conducted as part of this study) that the Eastbourne HMA area is becoming dormitory and that skills shortages may deter new job formation in the future (particularly higher paid jobs and those not related to the tourism and retail sectors). These characteristics of the local economy lead DTZ to believe that the Eastbourne HMA area could encounter difficulties in sustaining a high output of new jobs in the future.

Workforce Growth

1.60 The counterpart of job growth (labour demand) is workforce growth (labour supply). Policy based workforce projections (workforce projections are residence based and therefore show the expected supply of labour within a given location), shown in Figure 1.18, envisage a decline in workforce in Eastbourne over the next 20 years of around 650 people. In contrast, it is expected that the workforce of Wealden will increase by 2,800 between 2006 and 2026 and will contribute some 40% of the total anticipated growth in the workforce of East Sussex (7,140) during this period.

1.61 Over the shorter term (2006 to 2011), however, the workforce in Eastbourne is expected to rise from 42,200 to 42,900 (equivalent to 140 workers per annum). In Wealden the workforce is expected to grow from 66,900 to 68,900 (equivalent to 400 workers per annum). During the next 5 years, therefore, the number of workers in Eastbourne and Wealden is expected to increase by around 540 per annum - a level considerably lower than the historic rates of job growth shown in Figure 1.18.

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Figure 1.18: Policy Based Workforce Projections

	2001	2006	2011	2016	2021	2026	Change 2006 to 2026	Annual Change
Eastbourne	38,900	42,200	42,900	42,900	42,500	41,500	-650	-30
South Wealden	25,300	25,400	26,200	26,600	26,800	26,500	1,080	50
North Wealden	41,200	41,500	42,700	43,300	43,700	43,200	1,770	90
Eastbourne HMA Area	64,100	67,600	69,100	69,500	69,300	68,000	430	20
Wealden	66,500	66,900	68,900	69,900	70,500	69,700	2,850	140
East Sussex	220,900	228,600	234,800	237,400	238,600	235,700	7,140	360

Source: SEERA / East Sussex County Council

- 1.62 Future labour force expansion in Wealden is therefore likely to provide a source of labour supply to not only satisfy its own requirements for job growth but also those in Eastbourne. This will help to support higher rates of housing growth in Wealden in the future, particularly in South Wealden where the labour market is strongly integrated with Eastbourne.
- 1.63 Nevertheless, anticipated workforce growth in South Wealden and North Wealden is still lower than the number of new households predicted by the policy based forecasts. This could lead to imbalances occurring in the market place if too many households begin to chase too few jobs, as policy tends to seek to balance job growth and household (rather than population) growth (in the South East, for example, there are around 1.1 jobs per household).
- 1.64 However, analysis of the composition of future household growth in South and North Wealden (Figures 1.20 and 1.21) shows that older households at or above the age of retirement (RA) are likely to be the main contributors to future growth. There will therefore be a lower requirement to balance household growth against new job growth for these groups.

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Figure 1.19: Policy Based Household Growth and Age Structure Eastbourne

Eastbourne	2001	2006	2011	2016	2021	2026	2006 to 2026
0-14	0	0	0	0	0	0	0
15-29	3,900	3,800	3,600	3,700	3,500	3,200	-600
30-44	10,100	11,200	10,500	9,100	8,400	8,500	-2,700
45-RA	11,500	13,400	14,800	15,800	16,400	15,800	2,400
RA+	15,900	16,400	17,100	18,400	19,900	21,900	5,500
Total	41,300	44,800	45,900	47,100	48,200	49,400	4,600

Source: SEERA / East Sussex County Council

Figure 1.20: Policy Based Household Growth and Age Structure South Wealden

South Wealden	2001	2006	2011	2016	2021	2026	2006 to 2026
0-14	0	0	0	0	0	0	0
15-29	1,200	900	1,100	1,300	1,300	1,300	400
30-44	5,900	5,700	5,100	4,600	4,600	5,200	-500
45-RA	8,300	8,800	9,000	9,100	8,900	8,300	-500
RA+	8,500	8,900	9,900	11,000	11,800	12,700	3,800
Total	24,000	24,300	25,100	25,900	26,700	27,500	3,200

Source: SEERA / East Sussex County Council

Figure 1.21: Policy Based Household Growth and Age Structure North Wealden

North Wealden	2001	2006	2011	2016	2021	2026	2006 to 2026
0-14	0	0	0	0	0	0	0
15-29	1,700	1,400	1,500	1,800	1,900	1,800	400
30-44	8,500	8,100	7,300	6,600	6,700	7,400	-700
45-RA	12,000	12,600	13,000	13,100	12,900	11,900	-700
RA+	12,200	12,900	14,300	15,800	17,000	18,300	5,400
Total	34,500	35,000	36,100	37,300	38,400	39,500	4,500

Source: SEERA / East Sussex County Council

- 1.65 The age composition of future household growth in North and South Wealden, being almost exclusively comprised of households above the traditional retirement age, does however pose questions about whether the relatively high rates of labour force enlargement expected in Wealden (Figure 1.18) are likely to be achieved.
- 1.66 The answers to such questions lie in the economic activity levels in Wealden over the next 20 years and the manner in which they are expected to change. These are shown in Figures 1.22 and 1.23. They reveal that economic activity rates in Wealden are predicted to significantly increase in the 60 to 64 (by 14%), 65 to 69 (by 11%) and 70 to 74 (by 5%) age groups. These age groups are therefore expected to have an increasing level of participation in the workforce in Wealden. Consequently, Wealden's high rates of household growth in older age cohorts will make an increasingly higher contribution to workforce enlargement and help to facilitate job growth across the sub-region.

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Figure 1.22: Economic Activity Rates Eastbourne 2006 to 2026

PERSONS	2006	2011	2016	2021	2026	Change 06 to 26
15-19	47.4	47.4	47.3	47.1	46.9	-0.5
20-24	70.3	70.6	70.5	69.6	69.9	-0.4
25-29	81.3	82.1	83.1	83.8	83.2	1.9
30-34	81.3	81.5	82.2	83.3	83.2	1.9
35-39	82.8	83.4	83.7	84.5	84.8	2.0
40-44	83.6	84.8	85.4	85.9	85.9	2.3
45-49	83.6	84.0	84.3	84.2	84.0	0.4
50-54	79.1	79.7	79.6	79.9	79.9	0.8
55-59	69.4	70.9	73.2	75.2	75.7	6.3
60-64	44.6	48.7	52.9	57.8	57.7	13.1
65-69	14.9	17.5	20.2	23.1	23.2	8.3
70-74	6.0	7.3	8.5	9.7	9.6	3.6
Total 15-74	63.4	63.4	63.2	63.1	62.1	-1.3

Source: SEERA / East Sussex County Council

Figure 1.23: Economic Activity Rates Wealden 2006 to 2026

PERSONS	2006	2011	2016	2021	2026	Change 06 to 26
15-19	47.6	47.7	47.7	47.7	47.6	0.0
20-24	85.3	85.3	85.5	85.5	85.6	0.4
25-29	86.6	87.7	88.4	89.3	89.3	2.7
30-34	84.5	85.6	86.5	86.8	86.9	2.4
35-39	84.4	85.3	86.3	87.2	86.8	2.4
40-44	85.7	86.8	87.6	88.5	88.7	2.9
45-49	86.5	86.8	87.0	87.0	87.1	0.6
50-54	82.1	82.4	82.3	82.5	82.5	0.4
55-59	72.6	74.1	76.1	77.9	78.3	5.6
60-64	49.9	54.4	59.2	64.3	64.1	14.2
65-69	20.1	23.6	27.1	31.0	30.8	10.7
70-74	10.1	11.8	13.8	15.6	15.5	5.4
Total 15-74	66.2	66.1	66.2	67.2	67.3	1.1

Source: SEERA / East Sussex County Council

1.67 Based upon the evidence contained within this section DTZ would summarise our view on the economic and housing prospects of each of the market areas as follows:

- **North Wealden:** Job growth has been much more buoyant in North Wealden compared with South Wealden. Economic activity rates are also higher than in South Wealden, as is the level of commuting to higher paid jobs in areas such as Tunbridge Wells, Gatwick and London, which will tend to raise resident based wages in North Wealden. However, new housing in North Wealden is quite constrained and the population is ageing, which will reduce or limit the future growth in the workforce.
- DTZ believes that the most likely scenario for North Wealden is that jobs will continue to grow, enabled by increases in activity rates of the working age and growth in activity rates among retirement age people, with scope for reduction in net out-commuting. However, small rural businesses reliant on relatively low paid labour may find it increasingly difficult to recruit or be forced to pay more given the increasing tightening of the labour market in North Wealden.
- **Eastbourne HMA Area:** The evidence contained within this report shows that South Wealden and Eastbourne operate as a single integrated labour and housing

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market (the Eastbourne HMA area). This market will benefit from more generous housing allocations in the future compared with North Wealden.

- The housing targets set for the area do, however, imply a significant restraint on previous household and demographic growth rates. The level of expected workforce growth is also significantly lower than past levels of job growth. On the face of it, therefore, this market could become constrained in the future, with demand for housing outstripping supply and job growth becoming increasingly divergent from workforce growth. The perpetuation of this trend would over the long term undermine sustainable economic development.
- However, job prospects in the Eastbourne HMA area appear weaker than in North Wealden. There are concerns, for example, that the area is becoming dormitory and that skills shortages may deter new job formation in the future (particularly higher paid jobs and those not related to the tourism and retail sectors). The area also has a weak economic base (with an over-representation of small firms and declining sectors) and under-performs relative to the South East on the majority of economic indicators.
- DTZ believes that weaker future job prospects in the Eastbourne HMA area are likely to ease pressures within the market and prevent significant imbalances occurring between new household (and therefore workforce) growth and job growth. Within this market there is also more scope for increasing activity rates and reducing unemployment (particularly in Eastbourne) and for in-migration of labour from Eastern Europe.
- Additional labour demand in the Eastbourne HMA area in the future is therefore likely to draw fourth additional labour supply from within the area as well as from outside it.
- However, there remains a risk that less good prospects for job growth could result, over the longer term, in increased levels of commuting from the Eastbourne HMA area to Brighton, London and Gatwick.

Conclusions

- 1.68 This Working Paper has analysed the spatial extent of the Eastbourne and Wealden sub-region and looked in detail at its pattern of household and travel to work movements. These show a clearly defined and well integrated housing market operating across Eastbourne and the southern part of Wealden (**the Eastbourne HMA Area**). The housing market across **North Wealden** comprises a series of more localised markets that show looser connection to one another. These are also influenced by external areas such as Tunbridge Wells, East Grinstead and Haywards Heath and the London and Gatwick jobs market.
- 1.69 This working paper also provides an examination of the available demographic and economic evidence base (both historic and forecast) to verify and draw conclusions on the appropriateness of the future housing provision targets set across the market area.
- 1.70 The trend based household and population projections, which are, examined use recent past demographic data to form assumptions about future demographic behaviour. They are therefore extrapolations of past trends. They do not take into account future constraints on accommodating population growth such as the scale of new dwelling provision.

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- 1.71 Trend based demographic projections anticipate very high rates of new household growth in Eastbourne over the next 20 years, which are well in excess of the housing targets set for the Borough in the South East Plan. On the face of it these imply that (unconstrained) demand could far outstrip the future supply of new housing in Eastbourne. However, these projections are trend based and are influenced by the high historic rates of population growth experienced in Eastbourne over the last decade (particularly the last 5 years).
- 1.72 The limitations of the trend based forecasts is that they do not take into account the manner in which government intends to steer growth in the future given market constraints and policy objectives. New local planning policies are often intended to modify past trends. Structure Plans and Local Development documents, for example, may be based on reasoned and agreed departures from the projections that seem better able to fit particular local characteristics.
- 1.73 Policy based forecasts, which are shaped by the intentions of planning policy, show a very different pattern of future development across Eastbourne and Wealden (the theoretical basis of trend and policy based forecasts is discussed in paras 1.35 and 1.36). The current development constraints in Eastbourne are evident in its expected growth rate of 230 households per annum under the policy based estimates. These are much more in line with the target rate of new dwelling provision in the South East Plan of 240 units per annum. Similarly, Wealden's expected rate of household growth of 385 units per annum also corresponds closely with its target dwelling provision of 400 units per annum.
- 1.74 The comparison between the trend and policy based forecasts therefore show that over the next 20 years new household growth will be steered away from the highly constrained Eastbourne market and into Wealden.
- 1.75 The composition of future household growth, which is expected, be dominated by older age groups across the sub-region, raises questions as to whether new dwelling provision can be balanced with adequate employment growth. Older households will generally require fewer jobs in order to be supported. Yet the consequence of this pattern may be that job growth, particularly in Eastbourne where no expansion of the resident workforce is forecast over the next 20 years and only limited growth is expected over the next 5 years, is not matched with an appropriate supply of labour. Such an imbalance would generate a need to draw in labour from elsewhere or could deter business growth altogether.
- 1.76 DTZ's views on the employment and housing prospects for each of the market areas can be summarised as follows:
- **North Wealden:** Job growth has been much more buoyant in North Wealden compared with South Wealden. Economic activity rates are also higher than in South Wealden and Eastbourne, as is the level of commuting to higher paid jobs in areas such as Tunbridge Wells, Gatwick and London, which will tend to raise resident based wages in North Wealden. However, new housing in North Wealden is quite constrained and the population is ageing, which will reduce or limit the future growth in the workforce.
 - DTZ believes that the most likely scenario for North Wealden is that jobs will continue to grow, enabled by increases in activity rates of the working age and growth in activity rates among retirement age people, with scope for reduction in net out-commuting. However, small rural businesses reliant on relatively low paid labour may

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find it increasingly difficult to recruit or forced to pay more given the increasing tightening of the labour market in North Wealden.

- **Eastbourne HMA Area:** The housing targets set for the Eastbourne HMA area imply a significant restraint on previous household and demographic growth rates. The level of expected workforce growth is also significantly lower than past levels of job growth. On the face of it, therefore, this market could become constrained in the future, with demand for housing outstripping supply and job growth becoming increasingly divergent from workforce growth. The perpetuation of this trend would over the long term undermine the principals of sustainable economic development.
- However, job prospects in the Eastbourne HMA area appear weaker than in North Wealden. There are some concerns, for example, that the area is becoming dormitory and that skills shortages may deter new job formation in the future (particularly higher paid jobs and those not related to the tourism and retail sectors).
- DTZ believes that weaker future job prospects in the Eastbourne HMA area are likely to ease pressures within the market and prevent significant imbalances occurring between new household (and therefore workforce) growth and job growth. Within this market there is also more scope for increasing activity rates and reducing unemployment (particularly in Eastbourne) and for more in-migration of labour from Eastern Europe.
- Additional labour demand in the Eastbourne HMA area in the future is therefore likely to draw fourth additional labour supply from within the area as well as from outside it, and therefore reduce the amount of new housing provision needed to meet job growth. However, there remains a risk that less good prospects for job growth (particularly higher paid jobs) could result, over the longer term, in increased levels of commuting from the Eastbourne HMA area to Brighton, London and Gatwick.

1.77 Overall, DTZ believes that a high proportion of Wealden's future housing growth has the potential to be located in South Wealden given that it shares an integrated labour market with Eastbourne. This is consistent with the South East Plan targets and demographic projections, which show the intention to steer growth from North Wealden (where more of the district's housing stock is currently located) and into South Wealden.

1.78 South Wealden will therefore have an increasing role in housing the workforce for the Eastbourne travel to work area and it will be partly a matter of policy and partly a matter of market demand whether job growth is located in Eastbourne or Wealden.

Annex A: Long Distance Commuting Patterns From Eastbourne and Wealden

