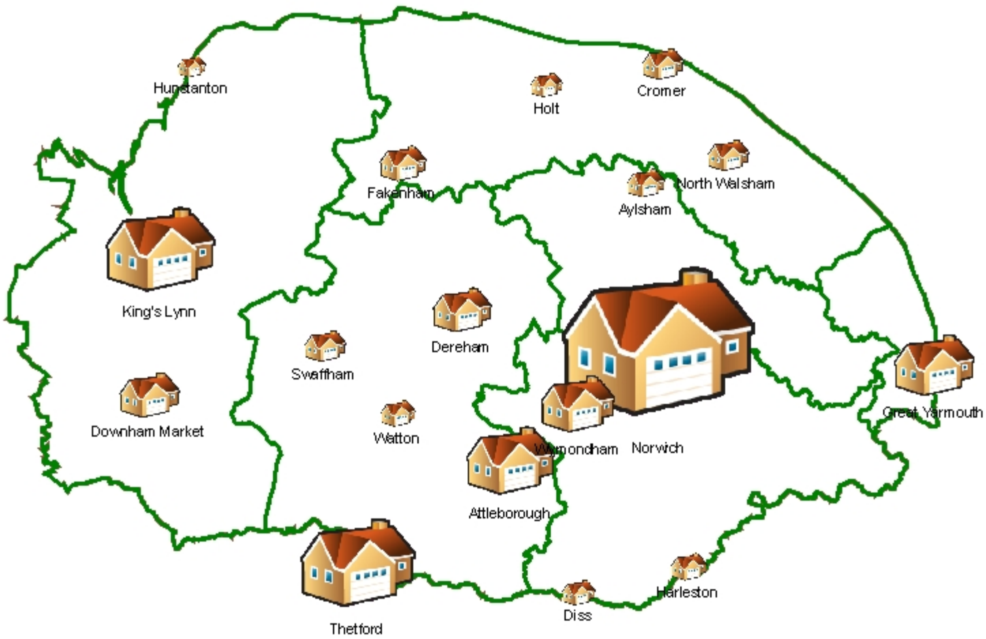
# Housing Monitoring Report
# April 2008 - March 2009

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## Executive Summary

This report monitors housing development across the county, according to the County Council's statutory duty to monitor significant trends. The base date for information in the report is 31 March 2009, with much of the data being drawn from district council Annual Monitoring Reports, supplemented by data published by Communities and Local Government.

Annual housing completions county-wide dropped by 32% in 2008-9, following a peak year in 2007-8. In Broadland, completions actually increased, while in Great Yarmouth and Breckland the downturn in completions was less severe than other districts. Average annual completions since 2001 in King's Lynn & West Norfolk, Norwich and South Norfolk districts have exceeded RSS annual targets, with other districts (and the Norwich Policy Area) performing less well. Across the County, 38% of the RSS housing target has been achieved after 40% of the plan period has elapsed. Although a County-wide trajectory would indicate the combined RSS target can be met, projected completion rates to do so seem ambitious.

Taking all completions since 2001 together with growth planned to 2026, the Norwich Urban Area is the key growth settlement in the County. Market towns of Attleborough, Wymondham, Dereham and Downham Market will also experience significant growth in this period. Finding a ready supply of land for this growth can be problematic. District returns to National Indicator 159 suggest that Breckland and Broadland cannot demonstrate a 5 year supply of developable land.

Many districts have met their 60% target for completions on previously developed land, with Norwich achieving just under 99%. King's Lynn & West Norfolk and South Norfolk are below target for the monitoring year. However, the 35% target for affordable housing has only been met by Norwich and South Norfolk, leaving the combined County with 32% of 2008-9 completions being affordable homes. Although this is discouraging, while total completions decreased in the year, affordable additions to stock (through acquisitions and completions) rose in Breckland, Broadland, North Norfolk and South Norfolk.

The ratio of lower quartile house prices to lower quartile household income suggests that, after years of decreasing affordability, the 2008-9 monitoring year saw some improvement, particularly in Broadland and Norwich. The typical ratio across Norfolk is still between 6 and 8 to 1, making open market housing expensive for many first time buyers and key workers. Affordability is often linked to the prevalence of second home ownership. North Norfolk and Gt Yarmouth have high numbers of second homes.

Regarding Gypsy and Traveller pitches, 26 (transit and permanent) pitches were permitted across Norfolk in 2008-9, with a further 10 transit pitches provided during the year.

Contents

## 1 Introduction

The County Council has a statutory duty to monitor significant trends in the County. The purpose of the annual Housing Monitoring Report is to set out the monitoring of housing development and land supply in the County against the housing trajectory and other core indicators (as set out in DCLG's Regional Spatial Strategy and Local Development Framework Core Output Indicators – Update 2/2008).

The period covered in this report is from April 1 2001 to March 31 2009 and the base date for data in the report is March 2009. The Norfolk Structure Plan (1993-2011) has only four saved policies, none of which relate to housing. Therefore, this report is set within a planning policy framework consisting of:

- Planning Policy Statement 3: Housing.
- Regional Spatial Strategy (RSS) known as the East of England Plan 2001-2021.
- District Councils' LDF documents and saved Local Plans.

The monitoring guidance set out in *Regional Spatial Strategy and Local Development Framework Core Output Indicators* includes a set of core indicators that local authorities are required to address through their annual monitoring reports. The housing core indicators include:

| | |
|---|---|
| 1 | Planned housing period and provision |
| 2a | Net additional dwellings over the previous five year period or since the start of the relevant development plan document period, whichever is the longer; |
| 2b | Net additional dwellings for the current year; |
| 2c | Projected net additional dwellings up to the end of the relevant development plan document period or over a fifteen year period, whichever is the longer |
| 2d | The managed delivery target showing how likely levels of future housing are expected to come forward taking into account the previous years' performance |
| 3 | Number of (gross) new and converted dwellings on previously developed land |
| 4 | Net additional gypsy/traveller pitches |
| 5 | Gross affordable housing completions |
| 6 | Number and proportion of new build completions by Building for Life criteria. |

Where available, these indicators are reflected in this report. Where these statistics are not available, it is expected that they will be addressed in District Council AMRs for 2009-10, and will therefore appear in next year's Annual Housing Monitoring Report. District AMR information is supplemented in this report by data available from Communities and Local Government (CLG) or other reliable sources, as stated.

## 2 Policy Context

**Planning Policy Statement 3 (PPS3):** published on 29 November 2006 by the Department for Communities and Local Government (DCLG) introduced increased requirements to provide affordable housing, the push to provide family homes, opportunities to increase density of development and the incorporation of 'green' environmentally friendly measures. It introduced a more rigorous approach to supply and states that Local Planning Authorities (LPAs) should monitor progress towards achieving high quality housing and consistently good design standards. It declares that RSS targets should be viewed as minima to be achieved.

The **Regional Spatial Strategy (RSS)** called **The East of England Plan** was adopted in May 2008, covers the East of England Government Office Region (Norfolk, Suffolk, Cambridgeshire, Essex, Hertfordshire and Bedfordshire, plus the unitary authorities of Luton, Peterborough, Southend-on-Sea and Thurrock) and relates to the period 2001 to 2021.

The RSS Objective B addresses housing shortages in the region, and includes housing provision figures for the County, each District, and the Norwich Policy Area. It sets a minimum target for Norfolk of 78,700 homes to build from 2001 -2021, of which 52,440 homes were still to be built at March 2008.  The RSS target equates to an annual house building target for Norfolk of 3,935 homes per year for the period from 2001 to 2021, or 4,160 for the period 2006-2021 due to under-performance in the first five years of the plan period. This was an increase over previous Structure Plan and Regional Planning Guidance targets. This increased housing target reflects the response by the Government to address the problems of housing need and affordability.

The RSS also provides policy guidance on the relative scale of housing development in different categories of location, which are to be interpreted locally through LDFs.

**Local Development Frameworks (LDF) in Norfolk**
The Local Development Framework is the name given to the folder of planning documents for a Local Planning Authority (LPA). It is within these documents that the strategies and policies that affect the delivery of housing are formulated.

In Norfolk no district has completed all of the documents necessary for an adopted LDF. North Norfolk District Council and the Broads Authority are the most advanced, with adopted Core Strategy Documents. Breckland District Council hopes to adopt its Core Strategy in early 2010.

LPAs should plan for delivery of housing for at least 15 years from the date of adoption of the relevant development plan documents. Therefore, future projections in this report include the period to 2025-26.

**Strategic Housing Land Availability Assessments**
As part of the evidence base to support the LDF process a key component is for districts to prepare a Strategic Housing Land Availability Assessment (SHLAA). This Assessment sets out to identify areas of land that could be developed as housing over the period of the plan and indicates if a five year supply of immediately deliverable sites exists, as required in PPS 3.

The SHLAA should also show that a further 10 year supply of housing sites exist which could be brought forward in this timescale. It is a key part of such an assessment that the constraints and likely timescale of development are taken into account. The guidance on the preparation of SHLAAs indicates that for a site to be deliverable, i.e. likely to be completed within 5 years, it must be:

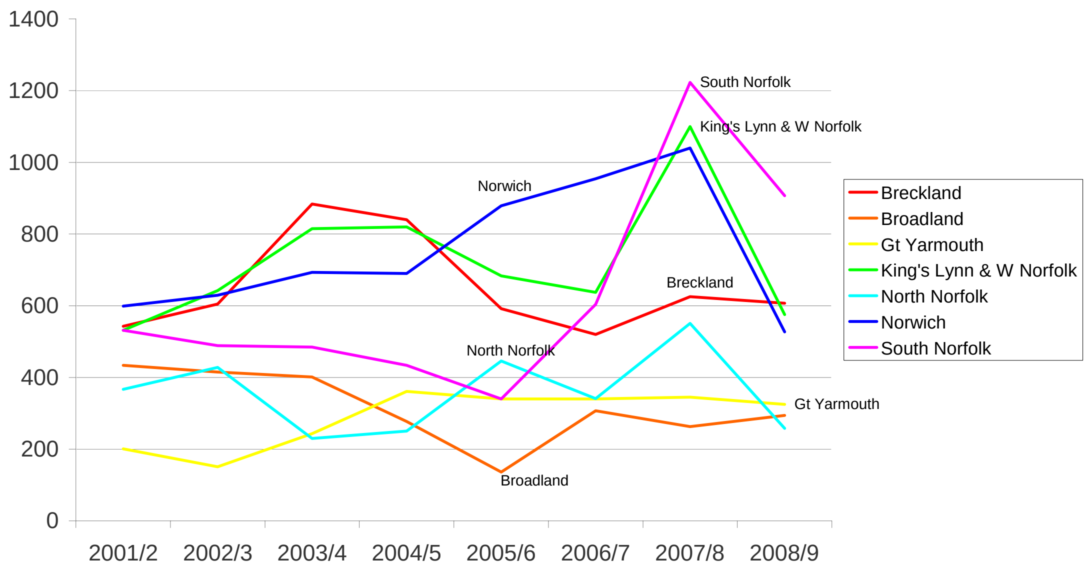
- available now
- suitable now
- achievable now

A number of districts have either completed an assessment or are currently working towards producing one. At the base date of this report (March 2009) district councils had made the following progress towards producing a SHLAA:

- King's Lynn and West Norfolk published a SHLAA covering their district in May 2008.
- The Greater Norwich Development Partnership finalised its SHLAA in September 2009, just after the base date of this report.
- Breckland District Council has finalised its first SHLAA.
- North Norfolk District Council finalised its SHLAA in June 2009.
- Great Yarmouth Borough Council has consulted on their SHLAA methodology which is in production.

# 3 Housing Completions (Core Indicators 1 – 2b)

**Fig. 1: 2001-2009 Completions by District**




As Fig. 1 shows, across the county housing completions peaked in 2007-8, before the effects of the property market downturn were felt in 2008-9, equating to a Norfolk-wide drop of 32% in completions in one year. However, Gt Yarmouth and Breckland were affected less than other districts, and Broadland bucked the trend with a slight increase in completions, although from a low base.

Prior to this completion rates have fluctuated in most districts, with Breckland and King's Lynn both exhibiting relatively high numbers of completions between 2003 and 2005 while North Norfolk has experienced a pattern of peaks and troughs.

Examining this data at Strategic Housing Market Area level, while Gt Yarmouth and Waveney have lower development rates, they have been less severely affected by the downturn in the development industry. The Rural East Anglian Partnership (REAP) out-performed the Greater Norwich Development Partnership (GNDP) for several years prior to 2006/7 (see Fig. 2). The Joint Core Strategy (JCS) has redistributed growth between the three districts of the GNDP to exceed RSS targets by 2021.

**Fig. 2: Net Additional Dwelling Completions 2001-2009 by Regional Housing Strategy Sub-Region**

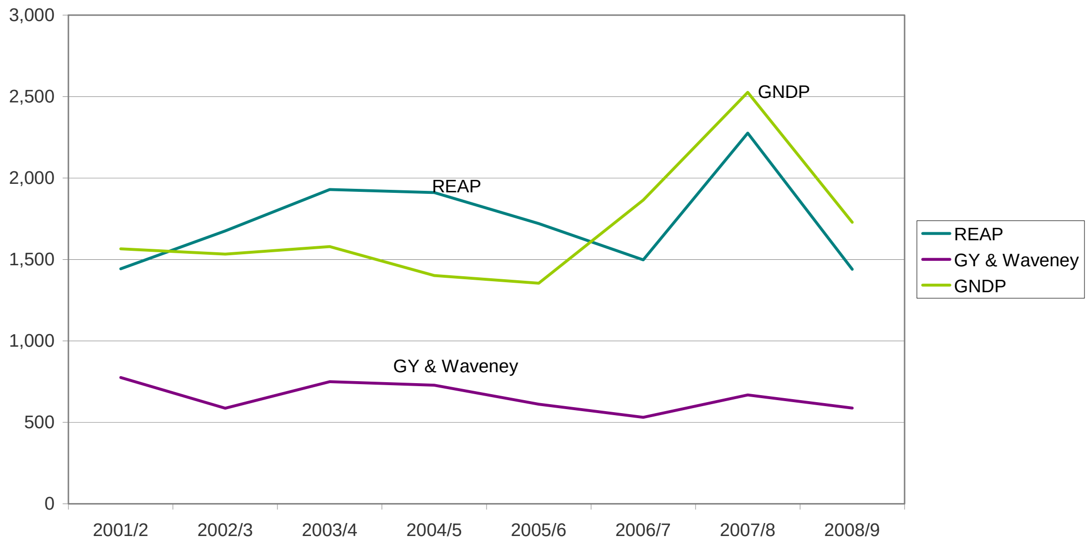
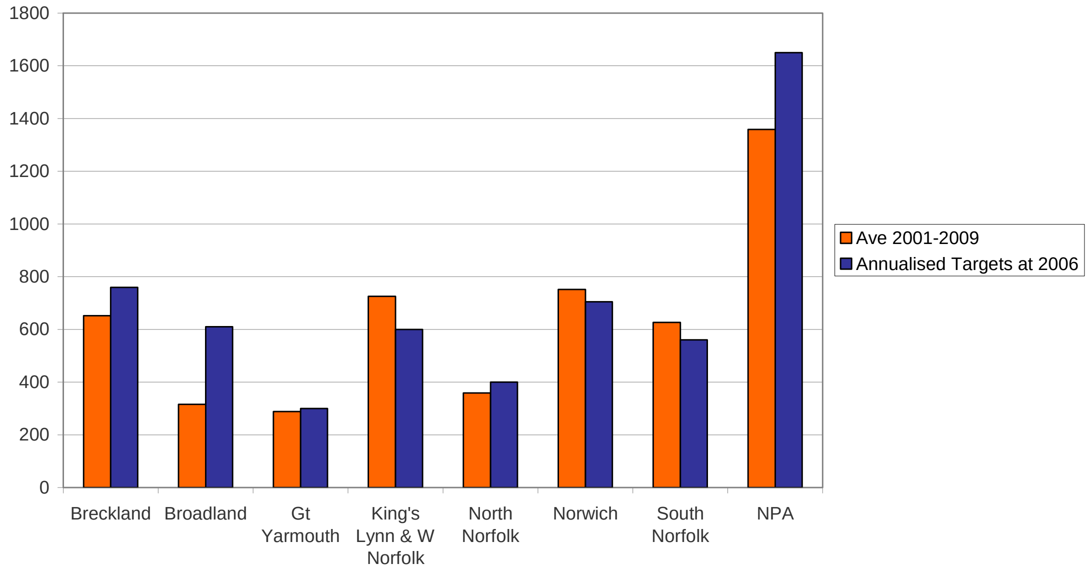
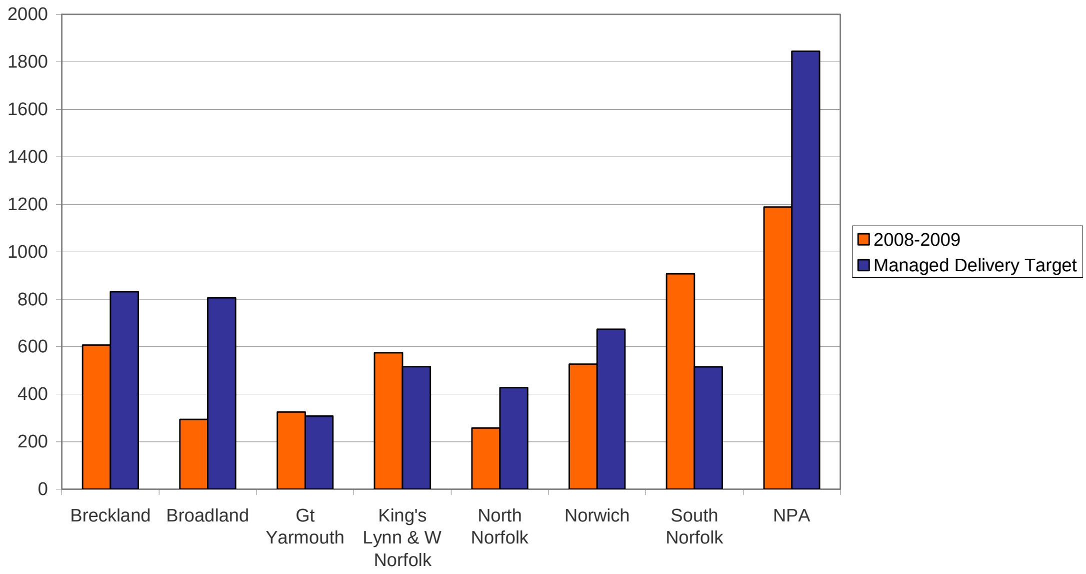



**Fig. 3 Average Annual Performance Against Annualised RSS Targets**




Performance to date compared to RSS annualised targets demonstrated in Fig. 3 suggests that King’s Lynn, Norwich and South Norfolk have been performing over RSS targets, while other districts and the NPA have been under-performing, with Broadland falling some way short of target to date (Gt Yarmouth have been performing almost to target). NB RSS targets for Broadland, Norwich and South Norfolk should be treated as indicative and have been varied in the emerging JCS.

**Fig. 4 Performance in Monitoring Year/Managed Delivery Targets**




Comparing performance in 2008-9 with managed delivery targets, Fig. 4 shows a similar picture, although it is clear that Norwich and the NPA had a particularly difficult year and Gt Yarmouth and South Norfolk both had a better year, compared to other districts.

**Fig. 5: Percentage difference between average completions 2001-2009 and averaged RSS targets**

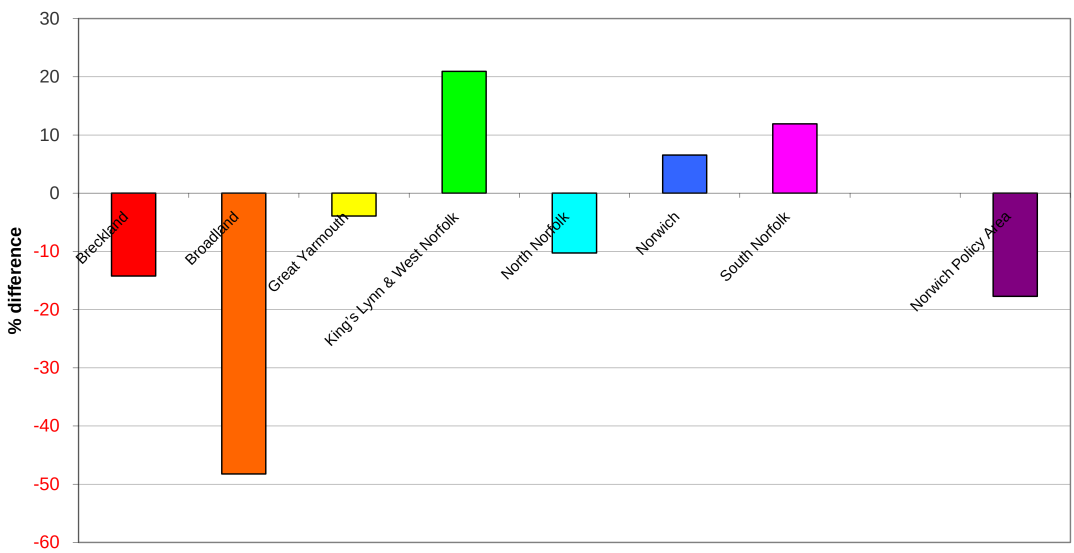
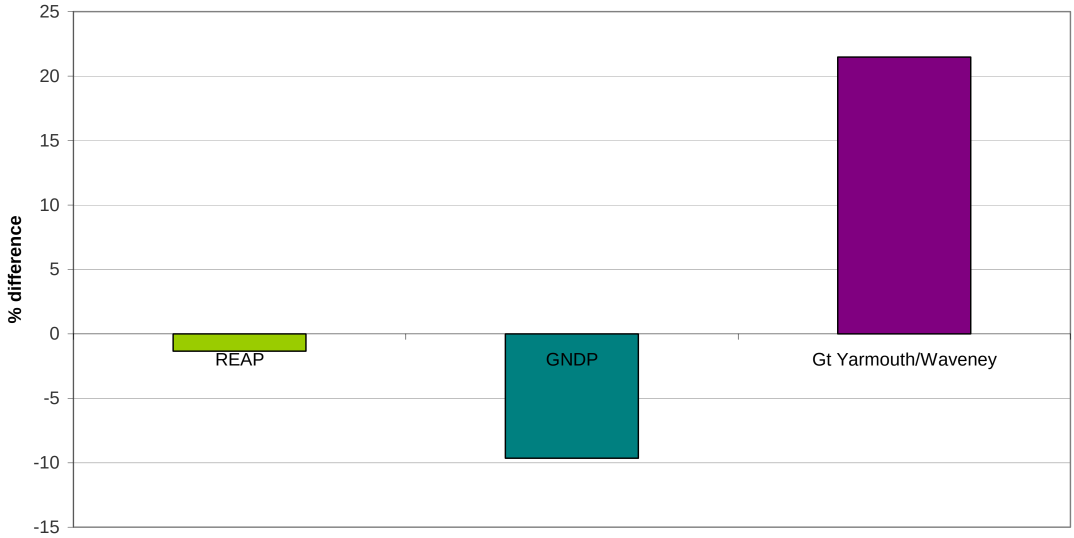



Fig. 5 shows a familiar picture for districts, with strong average performance by King's Lynn & West Norfolk and good performance compared to targets for South Norfolk and Norwich. Other districts' (and the NPA) average performance falls short of average targets. When grouped together in Fig.6 the Housing Strategy Sub-Region average completions show Great Yarmouth and Waveney to be in a strong position but GNDP missing targets.

**Fig. 6 Percentage difference between average completions 2001-2009 and averaged RSS targets**



# 4 Housing Supply (Core Indicators 2c – 2d)

| Table 1a Total Growth 2001 - 2026 | Completions 2001-2009 | Permissions at April 2009 | Residual LP Allocations at April 2009 | Emerging LDF Allocations at April 2009 |
|---|---|---|---|---|
| **Norfolk** | **29749** | **17571** | **6401** | **46774** |
| Breckland | 5216 | 2653 | 0 | 11900 |
| Broadland | 2527 | 1437 | 1607 | 10080 |
| Great Yarmouth | 2306 | 1204 | 0 | 1369 |
| King's Lynn & West Norfolk | 5804 | 3616 | 2909 | 6445 |
| North Norfolk | 2871 | 1904 | 0 | 3400 |
| Norwich | 6011 | 2900 | 990 | 3000 |
| South Norfolk | 5014 | 3857 | 895 | 10580 |
| **Regional Housing Strategy Sub-Regions** | | | | |
| Greater Norwich | 13552 | 8194 | 3492 | 23660 |
| Rural East Anglia | 13891 | 8173 | 2909 | 21745 |
| Yarmouth and Waveney | 5238 | 2480 | 0 | 2786 |
| **Norwich Urban Area** | 8260 | 5483 | 2458 | 8700 |
| **KCDCs** | | | | |
| Gt Yarmouth urban | 1640 | 944 | 0 | 1299 |
| King's Lynn urban | 1130 | 1344 | 2695 | 4600 |
| Thetford | 1104 | 274 | 0 | 6500 |
| NPA | 10870 | 6281 | 3095 | 21000 |
| Broadland part | 1447 | 556 | 1503 | 9000 |
| Norwich part | 6011 | 2900 | 990 | 3000 |
| South Norfolk part | 3412 | 2825 | 602 | 9000 |

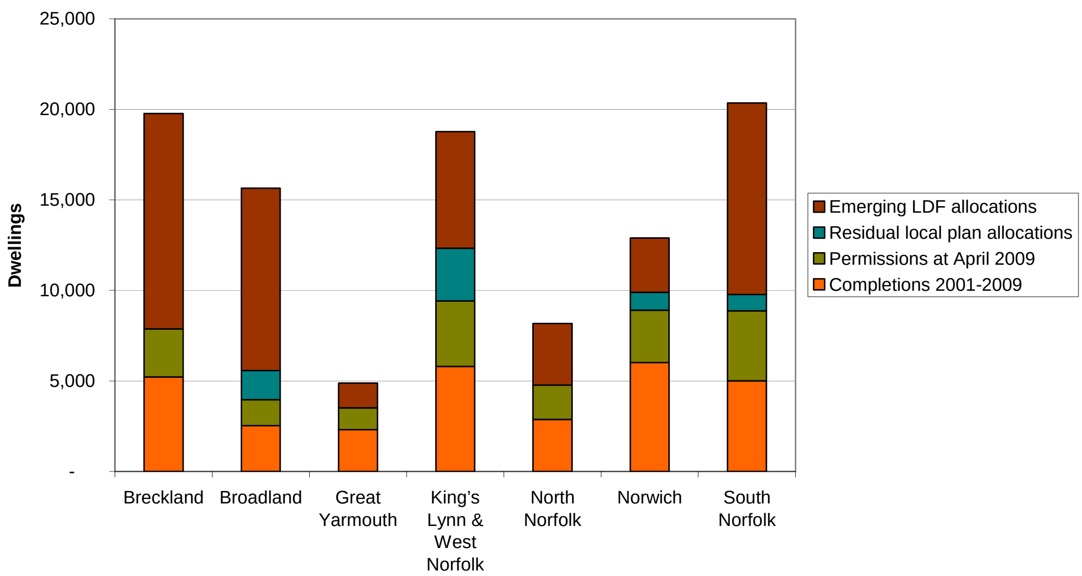
Completions by March 2009, permissions outstanding in April 2009 and allocations emerging in LDF documents for some settlements are graphically represented on the map at Fig. 7, with the size of the symbol proportional to total growth to 2026. It is clear that KCDCs are attracting much of the planned growth, with Norwich Urban Area the key growth settlement in the County. (NB settlements are the first tier as identified in adopted or emerging Core Strategy documents, outside of KCDCs, which represent the 'urban area' as defined in Appendix 1).

**Fig. 7 Settlement Growth to 2026**


Assumptions: the following tables and charts use AMR data where available, supplemented by school pupil forecast returns. LDF allocations are taken from latest documents at April 2009. An assumption has been made about NPA growth in the north-east sector to 2026, which has been apportioned to Rackheath Ecotown and the Norwich Urban Area parishes of Sprowston, Thorpe St Andrew and Old Catton equally, and is therefore indicative. In many cases Local Plan (LP) allocations will be subsumed into emerging LDF allocations. Totals have been shown separately in the tables and graphs below, but the map at Fig. 7 assumes residual LP allocations have been included in new allocation sites.

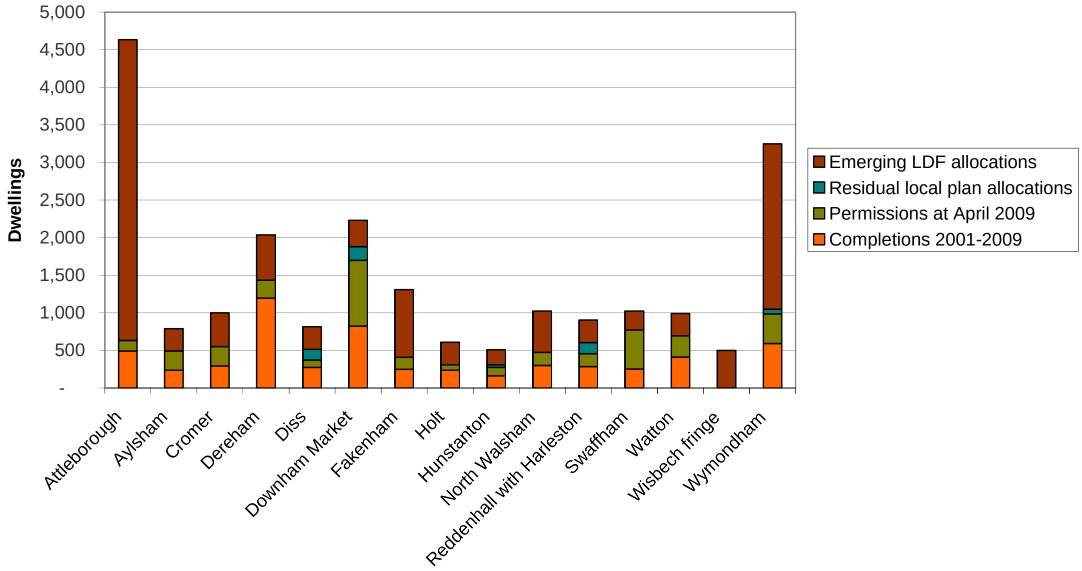
| **Table 1b First Tier Settlements** | Completions 2001-2009 | Permissions at April 2009 | Residual LP Allocations at April 2009 | Proposed LDF Allocations at April 2009 |
|---|---|---|---|---|
| Attleborough | 490 | 134 | 0 | 4000 |
| Aylsham | 235 | 255 | 0 | 300 |
| Cromer | 293 | 257 | 0 | 450 |
| Dereham | 1196 | 214 | 0 | 600 |
| Diss | 273 | 81 | 143 | 300 |
| Downham Market | 824 | 875 | 181 | 350 |
| Fakenham | 241 | 153 | 0 | 900 |
| Holt | 237 | 72 | 0 | 300 |
| Hunstanton | 162 | 108 | 33 | 200 |
| North Walsham | 300 | 173 | 0 | 550 |
| Reddenhall with Harleston | 285 | 169 | 150 | 300 |
| Swaffham | 252 | 521 | 0 | 250 |
| Watton | 411 | 271 | 0 | 300 |
| Wisbech fringe | 0 | 0 | 0 | 500 |
| Wymondham | 591 | 394 | 64 | 2200 |

**Fig. 8 Dwellings completed, permitted and allocated, by district**



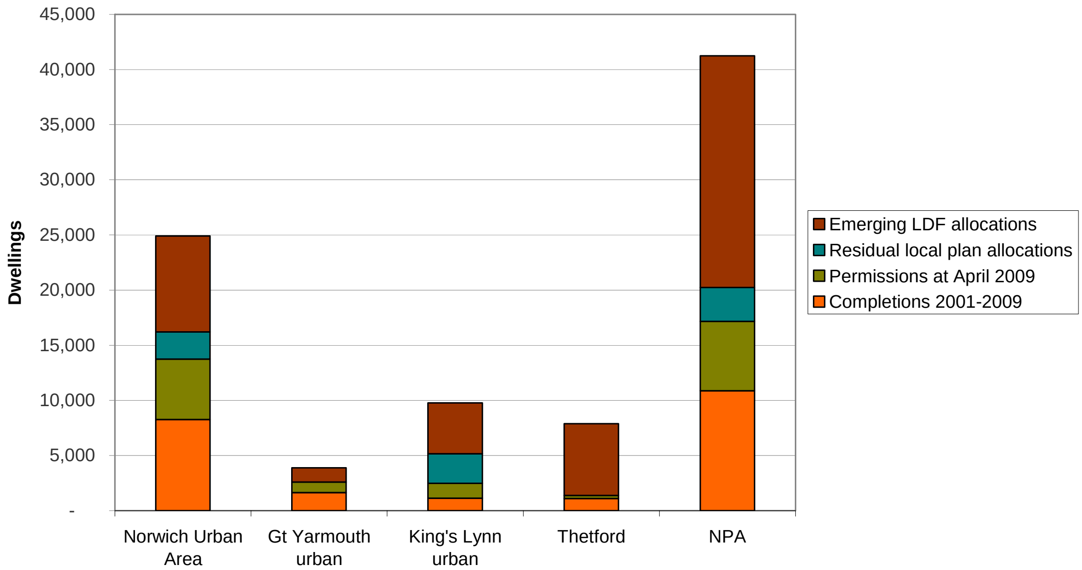

The market towns of Attleborough, Wymondham, Downham Market and Dereham will experience significant growth over the 2001-2026 period through allocations, which is evident already at Dereham and Downham Market through completions and extant permissions. In Attleborough and Wymondham the growth will be largely through LDF allocations.

**Fig. 9 Dwellings completed, permitted and allocated, by settlement**



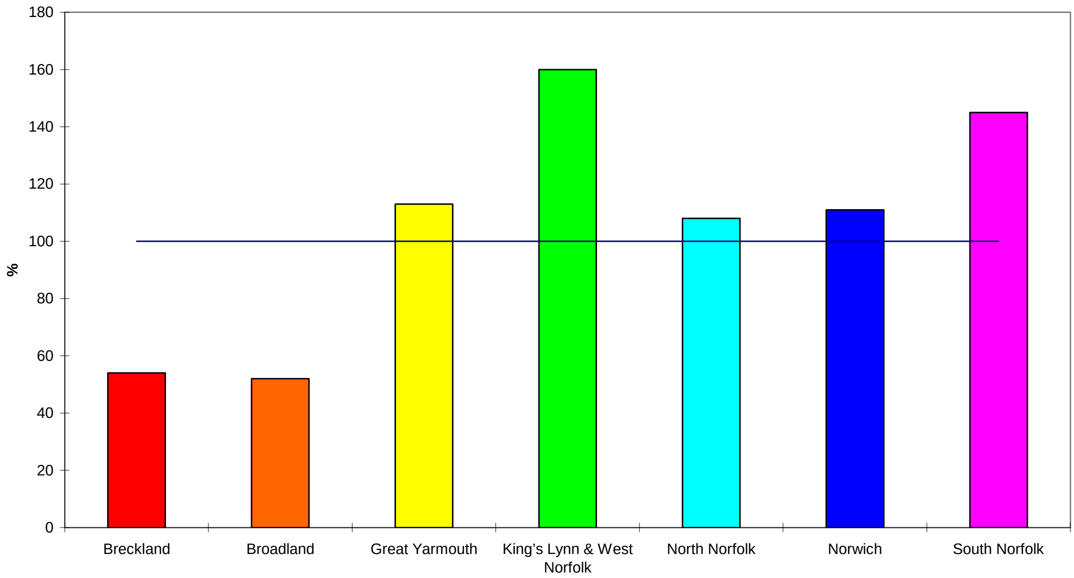

For the county's urban centres, the graph below suggests that the vast majority of growth will come from newly allocated sites, although a significant number of permissions are outstanding in the Norwich Urban Area and the wider Norwich Policy Area. While a significant proportion of NPA growth will happen in the Urban Area, more is planned in the surrounding vicinity.

**Fig. 10 Dwellings completed, permitted and allocated, by urban area**



The following graph has been compiled from CLG returns to National Indicator 159, expressed as a percentage, with the target being 100%, or 5 years' supply.

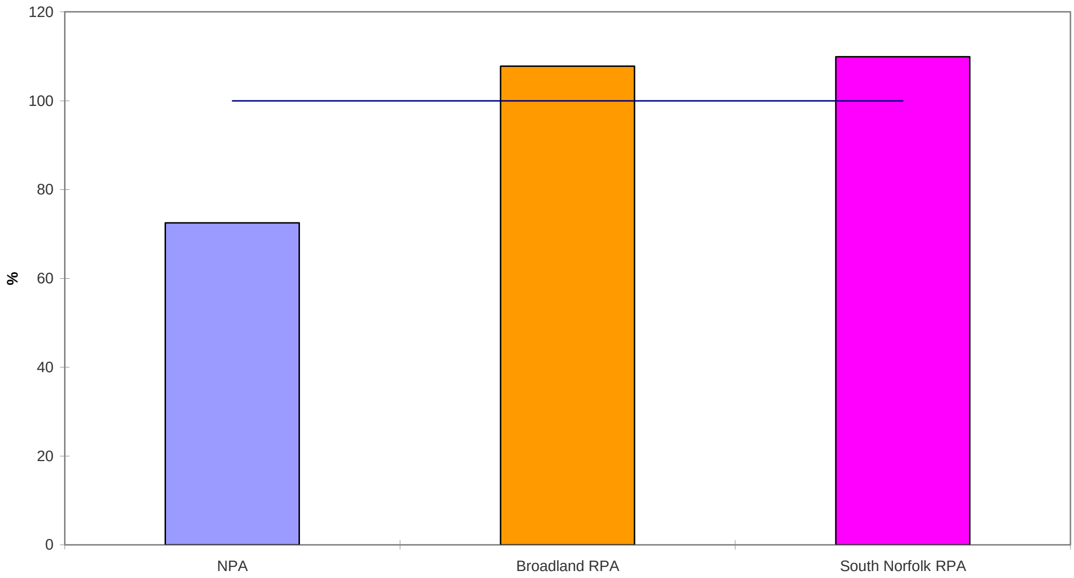
**Fig. 11 NI 159 Supply of Ready to Develop Housing Sites**




PPS3 requires all local planning authorities to demonstrate 5 years' supply of ready to develop housing sites. According to CLG/PINS advice this should include sites allocated for housing in the development plan, sites with planning permission and specific brownfield sites, which are measured as a percentage of the housing target for the same period. It is widely accepted that this target should be the managed delivery target, taking account of prior completions. Calculations of five year supply sometimes stray from this definition, leaving room for confusion through conflicting information. North Norfolk report 84% supply in their Statement of Five Year Supply of Housing Land, stating that this could rise to 112% on adoption of their Site Specific Proposals DPD. Norwich report 103% in their AMR, and while this is lower than the returns for NI 159, it does demonstrate a five year supply.

Member authorities of the Greater Norwich Development Partnership have produced a joint 5 Year Supply Assessment, showing that although a shortfall exists across the NPA, the rural parts of the GNDP area can demonstrate a 5 year supply.  It is not possible to calculate a Norwich Policy Area supply figure for the districts of Broadland and South Norfolk because the East of England Plan does not break down the total housing requirement for the Norwich Policy Area by district.

**Fig. 12 GNDP 5 Year Supply Statement**

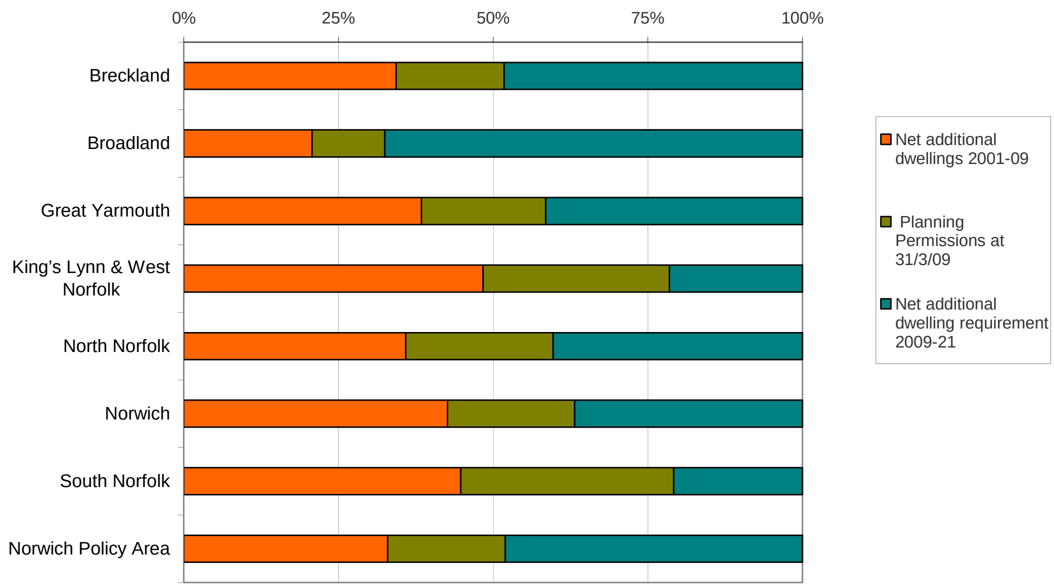



Progress towards targets can be monitored through combining completions with permissions to show how many more dwellings need to be provided through allocations in LDF documents.

| Table 2 Progress Towards Target | Dwelling target 2001-21 RSS | Net additional dwellings 2001-09 | Planning Permissions at 31/3/09 | Additional dwellings plus permissions | Net additional dwelling requirement 2009-21 |
|---|---|---|---|---|---|
| Breckland | 15,200 | 5,216 | 2,653 | 7,869 | 7,331 |
| Broadland | 12,200 | 2,527 | 1,437 | 3,964 | 8,236 |
| Great Yarmouth | 6,000 | 2,306 | 1,204 | 3,510 | 2,490 |
| King's Lynn & West Norfolk | 12,000 | 5,804 | 3,616 | 9,420 | 2,580 |
| North Norfolk | 8,000 | 2,871 | 1,904 | 4,775 | 3,225 |
| Norwich | 14,100 | 6,011 | 2,900 | 8,911 | 5,189 |
| South Norfolk | 11,200 | 5,014 | 3,857 | 8,871 | 2,329 |
| **Norfolk** | **78,700** | **29,749** | **17,571** | **47,320** | **31,380** |
| | | | | | |
| Norwich Policy Area | 33,000 | 10,870 | 6,281 | 17,151 | 15,849 |
| Broadland part | | 1,447 | 556 | 2,003 | |
| South Norfolk part | | 3,412 | 2825 | 6,237 | |

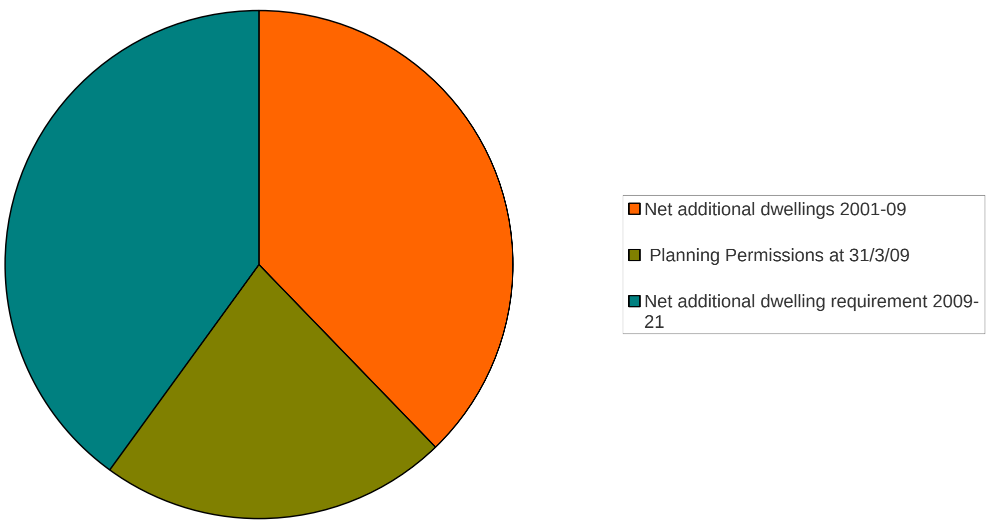
As the above table shows when planning permissions are added to completions to date, some districts (most notably King's Lynn & West Norfolk and South Norfolk) have made extremely good progress towards RSS housing targets. This is illustrated below.

**Fig. 13 Residual Housing Requirements to 2021 (RSS Targets)**



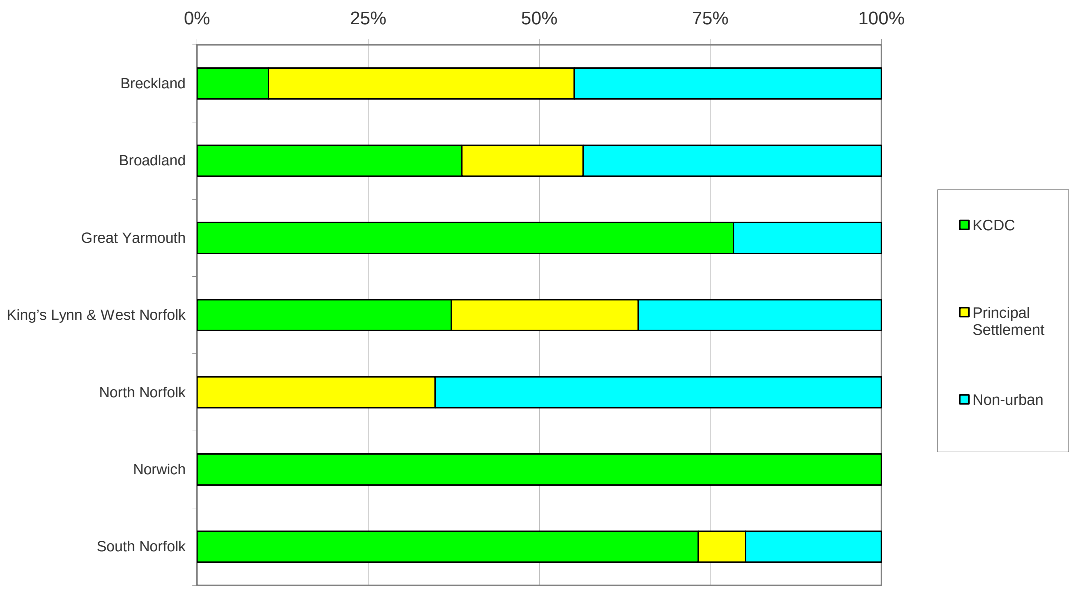

The picture for Norfolk overall is not discouraging, considering 40% of the plan period has elapsed, and 38% of the target has been achieved:

**Fig. 14 Residual Housing Requirements for Norfolk**



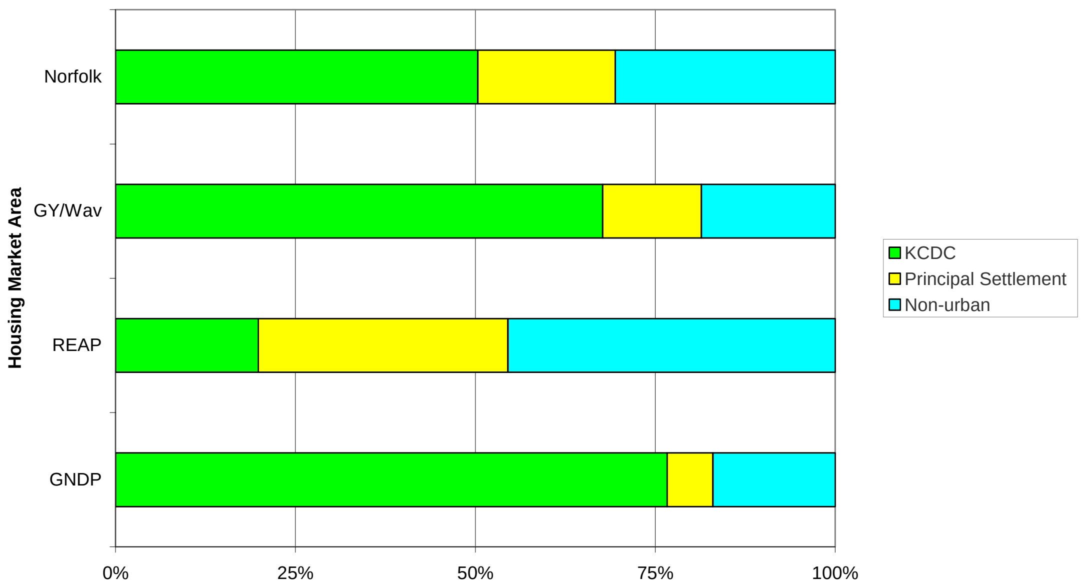

Looking in more detail at the geographic location of immediate future growth, the following graph shows the percentage of outstanding permissions in KCDCs (as defined by the RSS and set out in Table 1a) and principal settlements (as defined by emerging Core Strategy documents and set out in Table 1b) compared to 'non-urban' locations. The latter category will contain secondary settlements, and smaller villages. For the districts of the GNDP, the RSS is unclear but appears to define the NPA as a KCDC. This analysis uses the NPA although the NPA is actually a small sub-region containing the urban area, a large market town, and several key service centres. The geography of the districts clearly determines much of the pattern of development, with rural North Norfolk lacking any KCDC, and Gt Yarmouth being largely rural around the KCDC itself. Two key findings relate to South Norfolk and Breckland, which display opposite approaches to granting planning permission within KCDCs.

**Fig.15 Indicative Urban/Rural Permissions**



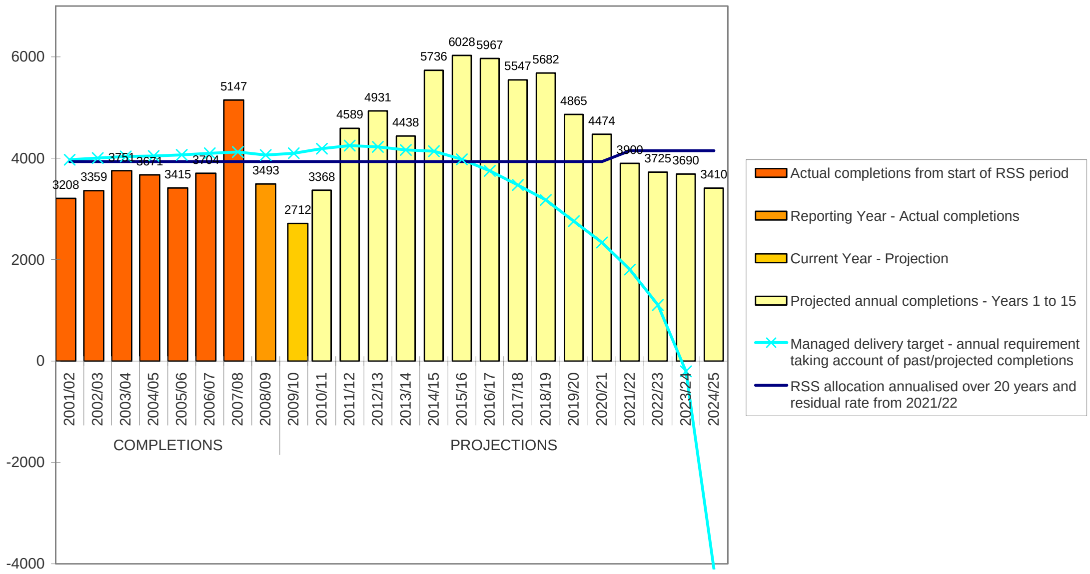

Across Norfolk more than two thirds of the immediate growth is permitted in the KCDCs/principal settlements, which fulfils RSS Policy SS2, to "concentrate development at the region's cities and other significant urban areas". The only sub-region to struggle with this is the Rural East Anglian Partnership, which by definition has a more rural constitution.

**Fig. 16 Indicative Urban/Rural Permissions by County & Housing Area**



Using trajectory data supplied in AMR documents (and including informally identified and contingent sites) the following Norfolk-wide trajectory has been produced. Inconsistent information is available regarding lapse rates, and for consistency all sites identified have been included (e.g. SHLAA sites). Viewed across the county and taking into account past completions, projected completion rates seem ambitious. Although county-wide we are set to meet our combined targets in 2023/4, this leaves only just over 3,000 dwellings surplus over the entire plan period.

**Fig. 17 Norfolk Trajectory 2001-2025**



## 5 Previously Developed Land (Core Indicator 3)

CLG guidance on COI H3 requires gross completions on previously developed land as a percentage of total gross completions. Brownfield land will eventually fall into short supply, but most districts have recently managed to achieve the RSS target of 60% of completions. Fig. 18 shows that in the monitoring year (2008-2009) several districts experienced a drop in the number of completions on PDL, although most remain above target. South Norfolk achieved a marked increase from 20% to 40%, while Norwich and North Norfolk also achieved increases to boost their previous high achievements (Norwich achieved just under 99% of completions on brownfield land). NB King's Lynn and Norwich AMRs quote different percentages to those represented below, due to different methodologies used.

**Fig. 18 Annual Completions on Previously Developed Land**

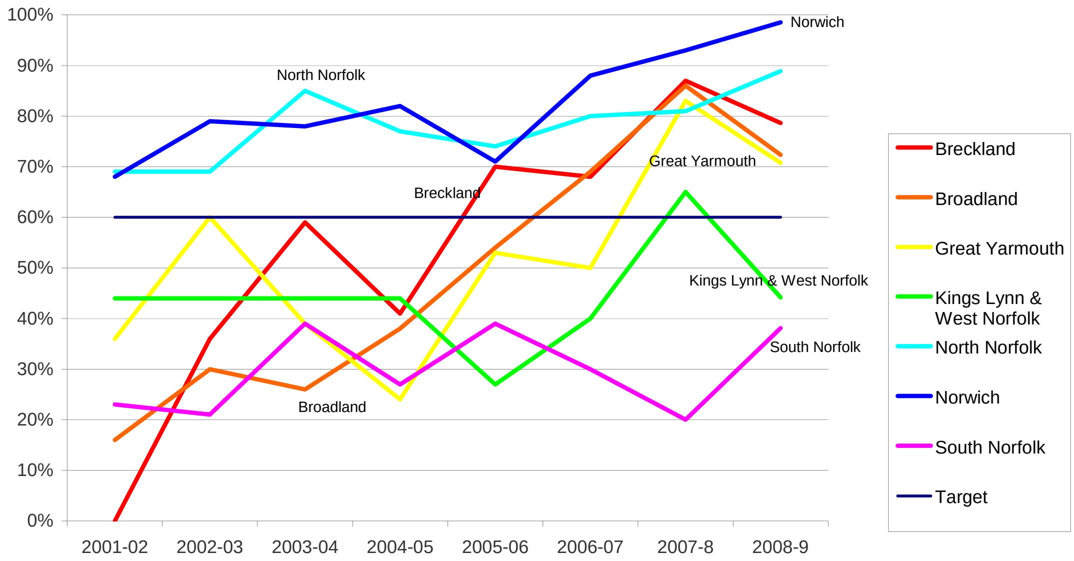



**Fig. 19 Norfolk Completions on PDL**

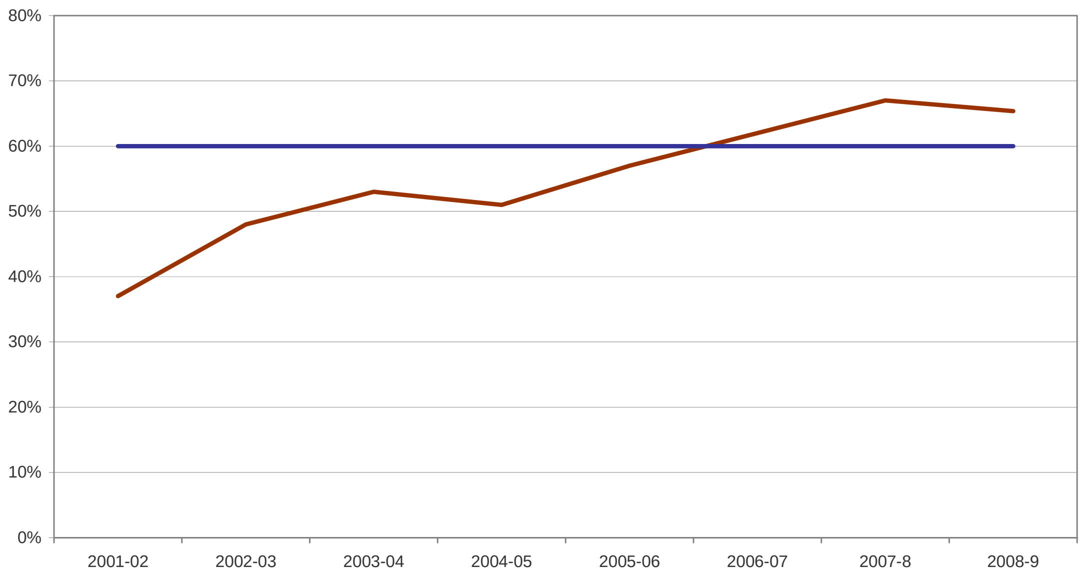
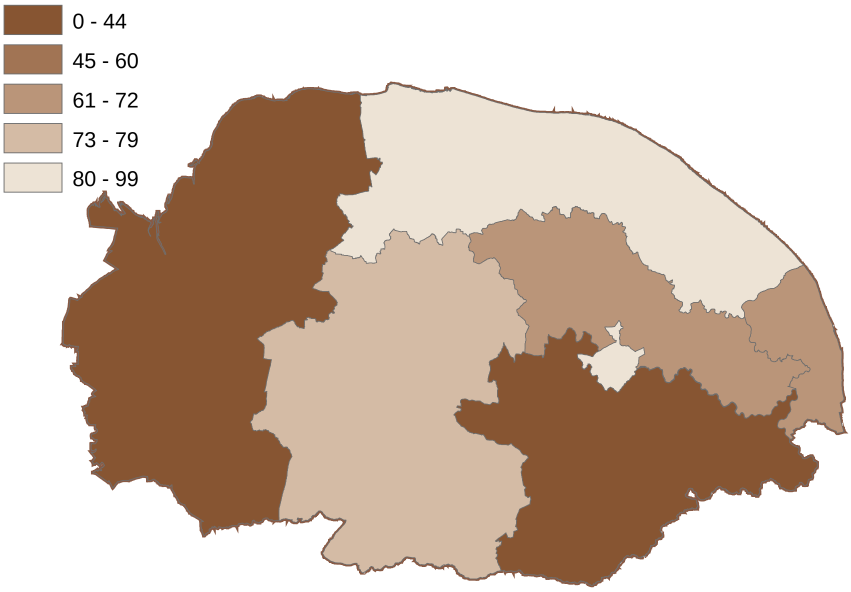


Fig. 19 above demonstrates the cumulative impact this has had county-wide, and Fig. 20 illustrates the position for the monitoring year.

**Fig. 20 % Completions on PDL 2008-9**



# 6 Affordable Housing (Core Indicator 5)

RSS Policy H2 set a target of 35% of all completions to be for affordable housing following the publication of the RSS (in 2008). According information in district AMRs, in the monitoring year only Norwich and South Norfolk have achieved this percentage, leaving the county with 32% affordable completions, just below target (see Figs. 21 & 22, based on gross affordable as a percentage of gross total completions).

**Fig. 21 Affordable Completions 2008-2009**

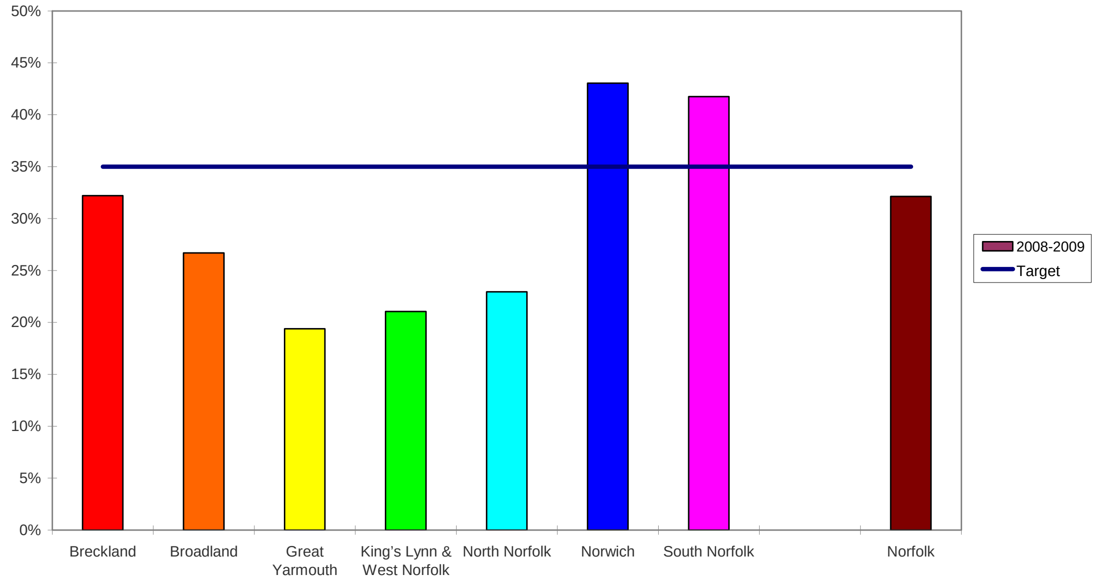
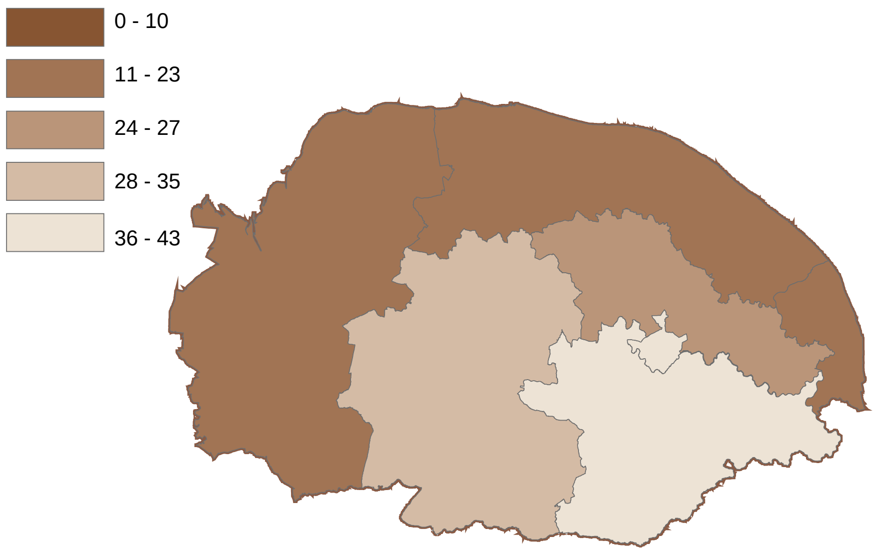
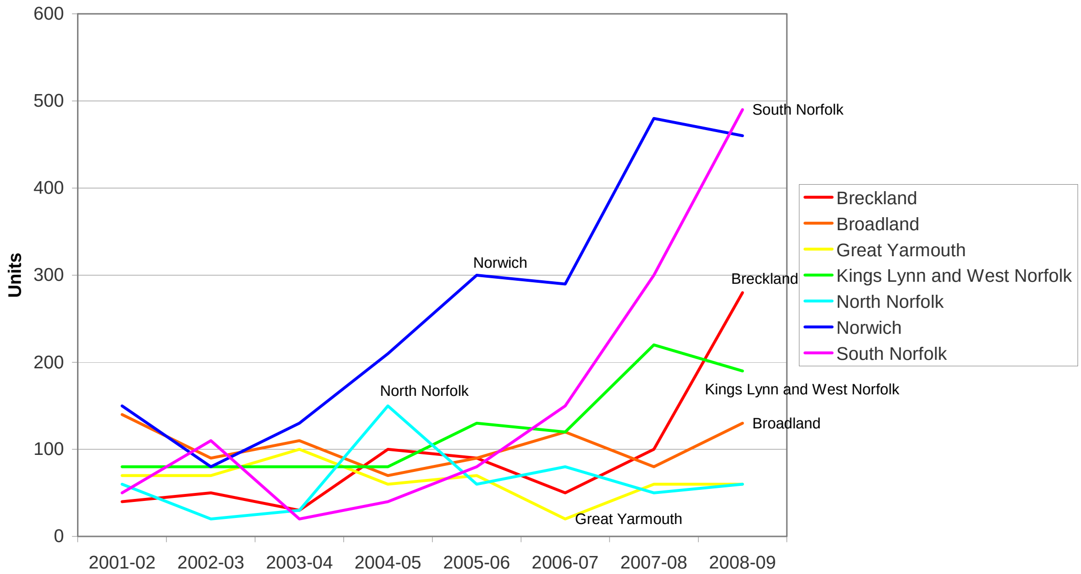



**Fig. 22 % Affordable Completions 2008-9**



However, over the plan period to date (2001-2009) CLG Table 1008 (derived from HSSA (Housing Strategy Statistical Appendix) returns) shows the following pattern of additional affordable stock. NB the figures in the HSSA returns differ from affordable completions data given in AMRs (and therefore from previous Norfolk County Council Housing Monitor Reports) and include affordable acquisitions as well as completions, rounded to the nearest 10.

**Fig. 23 Additional Affordable 2001-2009**



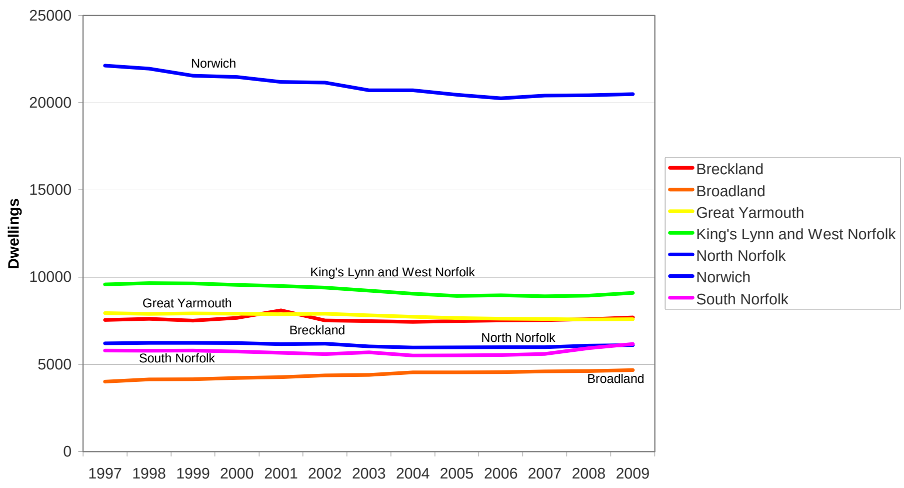

It is clear that since 2006-7 there has been a significant increase in the number of affordable dwelling additions across the county. Most districts display some sort of upward trend, although trend analysis for Broadland and Great Yarmouth shows a slight downward trend over the entire period. However, in 2008-9 when overall housing completions dropped, the number of affordable additions continued to rise for four districts, reflecting RSL-driven development.

| **Table 3 Affordable Additions** | 2001 -02 | 2002 -03 | 2003 -04 | 2004 -05 | 2005 -06 | 2006 -07 | 2007 -08 | 2008 -09 |
|---|---|---|---|---|---|---|---|---|
| Breckland | 40 | 50 | 30 | 100 | 90 | 50 | 100 | 280 |
| Broadland | 140 | 90 | 110 | 70 | 90 | 120 | 80 | 130 |
| Great Yarmouth | 70 | 70 | 100 | 60 | 70 | 20 | 60 | 60 |
| Kings Lynn and West Norfolk | 80 | 80 | 80 | 80 | 130 | 120 | 220 | 190 |
| North Norfolk | 60 | 20 | 30 | 150 | 60 | 80 | 50 | 60 |
| Norwich | 150 | 80 | 130 | 210 | 300 | 290 | 480 | 460 |
| South Norfolk | 50 | 110 | 20 | 40 | 80 | 150 | 300 | 490 |
| | | | | | | | | |
| **Norfolk** | **590** | **500** | **500** | **710** | **820** | **830** | **1290** | **1670** |

(Source: CLG Table 1008 http://www.communities.gov.uk/documents/housing/xls/1406085.xls)

Additions to affordable housing stock are only part of the housing stock cycle. The Housing Act of 1980 gave local authority tenants the right to buy their home. CLG Statistics from 1997 to 2009 show a gradual decrease in stock held by RSLs and LAs across Norfolk as a whole, which is represented in Fig. 24. Broadland has bucked the trend, showing a slight but steady increase in affordable stock, and South Norfolk stock dipped in the mid 2000s but has recovered. While Norwich has significantly more affordable stock than other districts, the loss of stock has been more pronounced here.

**Fig. 24 Affordable Stock Levels**




Looking at the wider definition of affordability, CLG publish affordability information using the Annual Survey of Hours and Earnings (ASHE, based on a 1% sample of employee jobs as at April) compared to HM Land Registry data for lower quartile house prices.

**Fig. 25 Ratio of Lower Quartile House Prices to Lower Quartile Household Income**

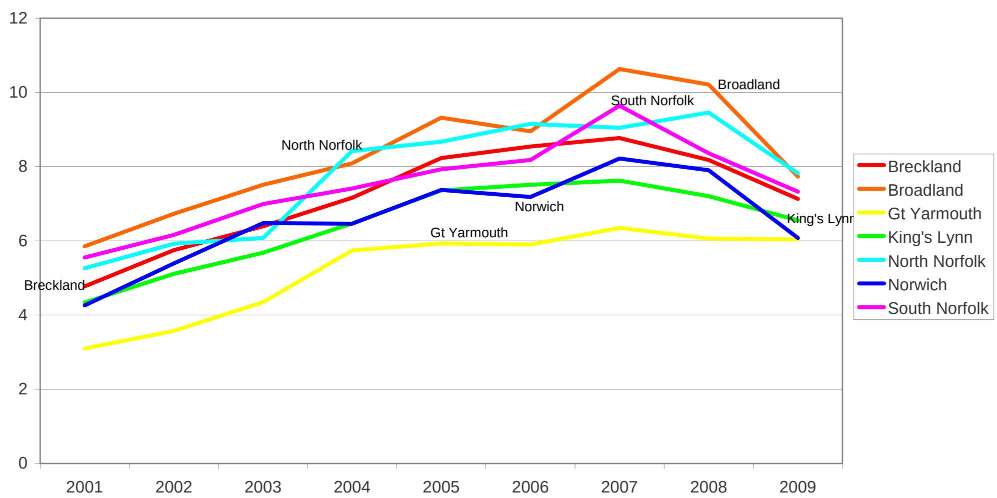
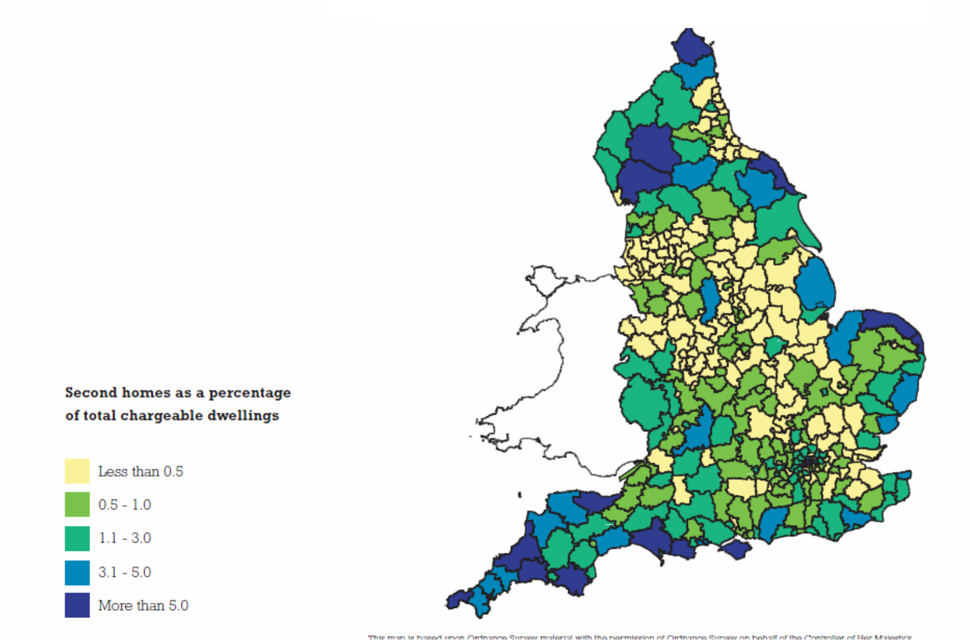


Fig. 25 shows all districts exhibited an upward trend in the ratio from 2001 - 2007, signifying a gradual decline in affordability (at this level, i.e. largely first time buyers) across the county from 4 times household earnings to (at its peak) 8.5 times household earnings. On average over the period 2001-2009, Broadland was the least affordable district, being slightly overtaken by North Norfolk in 2004, 2006 and 2009. Great Yarmouth has consistently been the most affordable district. From a peak in 2007, lower quartile house prices fell compared to lower quartile household earnings, although in Great Yarmouth this trend was less pronounced than in other districts. Therefore, in most districts affordability levels in 2009 were at 2003-2004 levels, while in Great Yarmouth the ratio is still slightly above 2005-2006 levels.

Linked to the issue of affordability is the prevalence of second home ownership. Second homes are often found in attractive rural and coastal locations. The map below (from Commission for Rural Communities) shows the location of second homes ranking as a percentage of total housing stock, as at 2005.

Fig. 26 Location of Second Homes




Counting absolute numbers of second homes (rather than a percentage) as reported via council tax returns North Norfolk ranks as 4th highest local authority in England and Great Yarmouth as 16th, at October 2008 (CLG, Housing in England 2007-2008) but the effects are very localised. At LSOA level the pockets of second home ownership reach levels of up to 57% (in Hemsby), and while LSOAs do not correlate to parish or settlement boundaries, the ‘hotspots’ featuring over 10% of stock as second homes also include: Ormesby St Margaret; Somerton; Cromer; Mundesley and Wells, among others. Anecdotally, some villages in West Norfolk (e.g. Burnham Market) are believed to have high levels of second home ownership, but due to the format of council tax returns for the district, the statistics do not support this ‘fact’.

## 7 Gypsy and Traveller Pitches (Core Indicator 4)

In July 2009 the East of England RSS Gypsy and Traveller Review was published, requiring districts across the region to provide a specific number of additional traveller pitches. According to EERA's Single Issue Review, February 2008, a pitch is space for one household and equates to approximately 1.7 caravans. At the March 2009 base date, the policy was still under review (and was later published in July 2009). District AMRs reflect the following situation:

**Breckland** have 9 authorised sites at Swaffham, Thetford, Attleborough, Gressenhall, Little Dunham, Mattishall and Stanfield, with a total of 67 caravans, which is approximately 39 pitches. No new pitches were added in 2008-9.

**Broadland** granted permission for two further sites in the monitoring year, containing 11 permanent and one transit pitches.

**Great Yarmouth** had one existing transit site with 19 pitches and in the monitoring year has approved an additional 6 transit pitches at the site.

**King's Lynn** have added no additional pitches in the monitoring year, but will outline its plans for new pitch provision in the Core Strategy.

**Norwich** permitted no new pitches in 2008-9. There is an authorised site at Swanton Road, Mile Cross with 18 pitch capacity, and limited land exists for further sites, but the council aims to work with GNDP partners to find appropriate sites.

**North Norfolk** identified a need to provide short stay stopping places to assist in the management of unauthorised encampments. 10 additional transit pitches have been provided in 2008-9.

**South Norfolk** has been producing its LDF policy document on Gypsy and Traveller provision which details a mixture of new private and public sites. Currently, there is one public site, and an additional 9 pitches on private sites. 8 pitches were permitted during the monitoring period. There are also 10 unauthorised sites in the district.

Table 3 shows the number of pitches per district in January 2006 and the minimum additional pitches required following publication of the RSS Gypsy and Traveller Review.

**Table 3: Additional Residential Pitches Required 2006-2011**

| | Authorised pitches January 2006 | Minimum additional pitches 2006-2011 | Minimum pitches 2011 |
|---|---|---|---|
| Breckland | 32 | 15 | 47 |
| Broadland | 2 | 15 | 17 |
| Great Yarmouth | 4 | 15 | 19 |
| King's Lynn & West Norfolk | 93 | 53 | 146 |
| North Norfolk | 1 | 15 | 16 |
| Norwich | 18 | 15 | 33 |
| South Norfolk | 25 | 28 | 53 |
| **Norfolk** | **175** | **156** | **331** |

## 8 Housing Quality (Core Indicator 6)

The Regional Spatial Strategy and Local Development Framework Core Output Indicators suggests this indicator should measure ‘the number and proportion of total new build completions on housing sites [where at least 10 new dwellings have been completed] reaching very good, good, average and poor ratings against the Building for Life criteria’.

As this is a relatively new Core Indicator, as a rule district councils have not included this information in AMRs for 2008-9. However, Norwich and South Norfolk have included the information as follows:

| District | Number of Schemes | Percentage of Dwellings on Those Schemes: | | | |
|---|---|---|---|---|---|
| | | Very Good | Good | Average | Poor |
| Norwich | 18 | 10% | 47% | 41.5% | 1.5% |
| South Norfolk | 3 | 0% | 27.7% | 0% | 51.1% |

Although in Broadland this indicator was not monitored, 15 affordable dwellings at Great Witchingham were built to a Very Good standard.

## 9 *Appendix 1: Definitions and Sources*

1. Figures may differ slightly from those that might be found in District and Regional Annual Monitoring Reports.

2. All references to the 'Structure Plan' relate to the Norfolk Structure Plan (1999).

3. All figures for allocations, 5-year supply and district-wide completions are derived from district council-produced Annual Monitoring Reports, Housing Land Availability reports, LDF documents and 5-year Supply Statements.

4. School pupil forecasting is an exercise which is undertaken by the County Council each year, to inform decisions regarding School place provision. As part of this work information is collected from District and Borough councils which provides the settlement completion and permission figures which are used within this report. These are aggregated to provide NPA and urban area information.

5. Various definitions exist to describe the urban areas of:

   **GNDP area** is the combined Norwich, South Norfolk and Broadland districts.
   **Norwich Policy Area** reaches up to and including: Spixworth, Beeston St Andrew, Rackheath, Salhouse, Blofield, Hemblington, Brundall, Surlingham, Bramerton, Framingham Earl, Poringland, Stoke Holy Cross, Swainsthorpe, Newton Flotman, Tasburgh, Long Stratton, Tharston and Hapton, Bracon Ash, Wymondham, Great Melton, Marlingford & Colton, Easton, Taverham, Horsford, Horsham St Faith.
   **Norwich Urban Area** comprises Norwich City Council area plus Costessey, Cringleford, Drayton, Hellesdon, Old Catton, Sprowston, Taverham, Thorpe St Andrew and Trowse with Newton.
   **Great Yarmouth** urban area includes Bradwell and Caister on Sea.
   **King's Lynn** urban area includes North Wootton and South Wootton.
   **Diss** settlement information includes the parish of Roydon.

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