LOCAL PLAN | Monitoring Report 1 April 2018 - 31 March 2019

Published May 2020

Braintree District Council

Braintree District Monitoring Report 2019: Contents

Braintree District Monitoring Report 2019: Contents		
		Page number

Introduction

The monitoring report aims to assess progress in meeting policy targets and milestones, and to present contextual information on Braintree District.

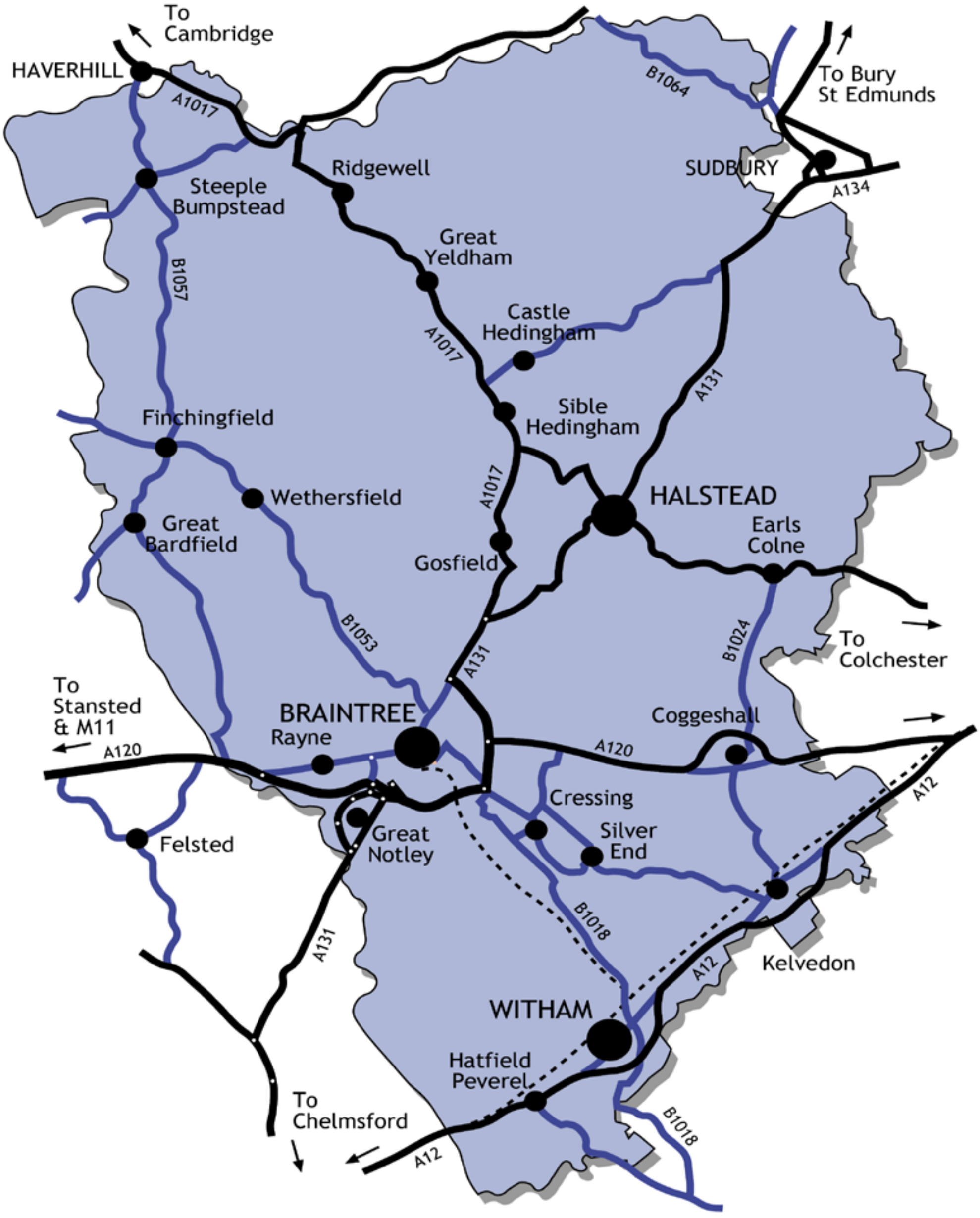
This report monitors between the period of 1 April 2018 to 31 March 2019, however more up to date information has been provided on occasion where relevant or useful

If you have any queries relating to this monitoring report, please contact the Planning Policy team on email planningpolicy@braintree.gov.uk

General information about the new Local Plan and about the Local Development Plan can be found via the link below:

https://www.braintree.gov.uk/info/200230/planning_policy

Figure 1: Map of Braintree District



Local Development Scheme

The Local Development Scheme (LDS) sets out a rolling programme for the preparation of documents that will form Braintree District Council's Local Plan. The most recent LDS was published in January 2019.

The full LDS may be viewed on the Braintree District Council website at:

https://www.braintree.gov.uk/downloads/200230/planning_policy

Profile of the District: Population Count and Broad Age Group

The estimated population of the District reached 151,561 in mid-2018. The table below indicates the age structure by broad age group.

Table 1: Population of Braintree District mid-2018

	Number	**As proportion of total**
Total persons Braintree District	151,561	100%
Persons aged 0 - 4	8,564	5.65
Persons aged 5 - 19	26,899	17.75
Persons aged 20 - 44	43,318	28.58
Persons aged 45 - 64	42,305	27.91
Persons aged 65 and over	30,475	20.11

Source: Office for National Statistics (ONS), mid-2018 population estimates, published 2019

The estimated population by District Ward as at mid-2018 is set out in Table 2.

Table 2: Population of Braintree District Wards, mid 2017	
Ward Name	All Ages
Bocking Blackwater	9,796
Bocking North	5,251
Bocking South	6,406
Braintree Central & Beckers Green	10,161
Braintree South	6,965
Braintree West	5,904
Bumpstead	2,849
Coggeshall	6,034
Gosfield & Greenstead Green	2,662
Great Notley & Black Notley	9,981
Halstead St Andrew's	5,989
Halstead Trinity	6,062
Hatfield Peverel & Terling	5,778
Hedingham	5,968
Kelvedon & Feering	5,645
Rayne	2,881
Silver End & Cressing	6,321
Stour Valley North	2,868
Stour Valley South	2,922
The Colnes	5,854
Three Fields	5,805
Witham Central	6,086
Witham North	7,073
Witham South	6,532
Witham West	7,000
Yeldham	2,768
Braintree and Bocking total	44,483
Halstead total	12,051
Witham total	26,691

Source: Office for National Statistics (ONS), mid-2018 population estimates, published 2019

District population change

Table 3 below illustrates estimated population change year on year between 2002/03 and 2017/18, according to the Office for National Statistics mid-year population estimates.

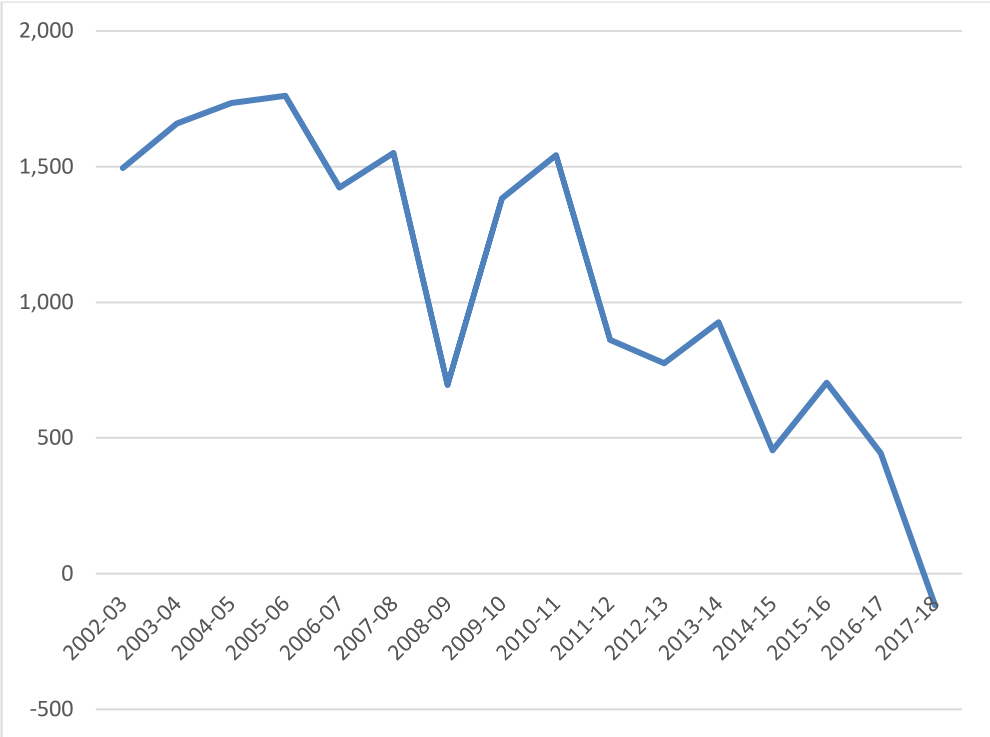
In the year 2017/2018, the population was estimated to have

Table 3: Population change by year, Braintree District, 2002/03 to 2017/18			
	Estimated population at start mid-year	Estimated population at end mid-year	Estimated population change
2002-2003	134,272	135,767	+1,495
2003-2004	135,767	137,426	+1,659
2004-2005	137,426	139,160	+1,734
2005-2006	139,160	140,921	+1,761
2006-2007	140,921	142,344	+1,423
2007-2008	142,344	143,894	+1,550
2008-2009	143,894	144,589	+695
2009-2010	144,589	145,972	+1,383
2010-2011	145,972	147,514	+1,542
2011-2012	147,514	148,375	+861
2012-2013	148,375	149,150	+775
2013-2014	149,150	150,076	+926
2014-2015	150,076	150,530	+454
2015-2016	150,530	151,233	+703
2016-2017	151,233	151,677	+444
2017-2018	151,677	151,561	-116
Sum total change 15 year period 2002-2018			+17, 289

Source: Office for National Statistics, Sub National Mid-Year Population Estimates

The Figure 2 illustrates the trend in year on year population increase in Braintree District.

Figure 2: Estimated population increase mid-year to mid-year 2002/03 to 2017/18



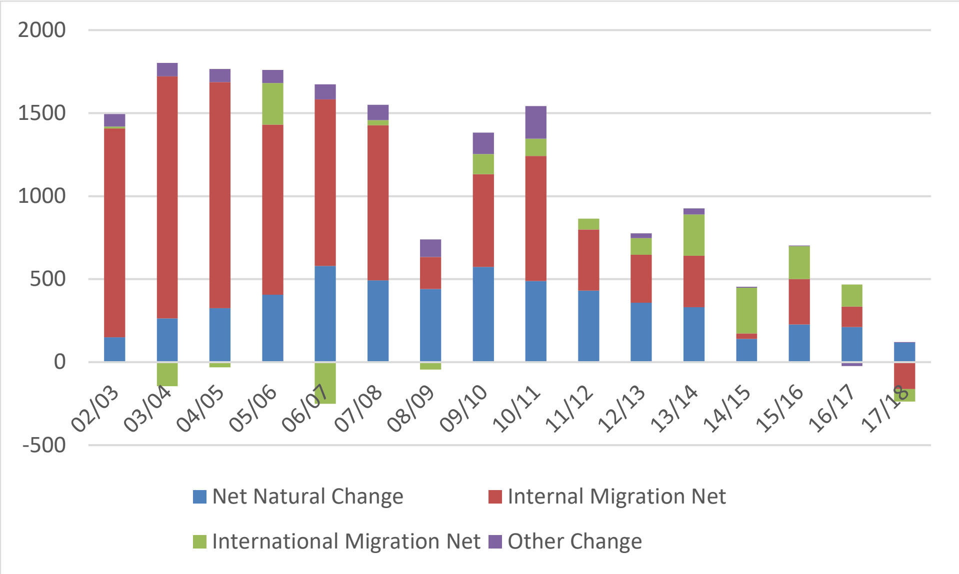
Source: Office for National Statistics, Sub National Mid-Year Population Estimates

Table 4 provides information on components of estimated population change in the District 2002-2018.

Table 4: Components of population change Braintree District 2002-2018												
	Births	Deaths	Net Natural Change	Internal Migration In	Internal Migration Out	Internal Migration Net	Intern-ational Migration In	Intern-ational Migration Out	Internat-ional Migration Net	Overall Net Migration	Other Change	Sum Net Change
2002-03	1508	1358	150	7199	5942	1257	354	341	13	1270	75	1495
2003-04	1591	1327	264	7572	6115	1457	321	465	-144	1313	82	1659
2004-05	1621	1296	325	7097	5736	1361	326	357	-31	1330	79	1734
2005-06	1635	1228	407	7023	6000	1023	718	467	251	1274	80	1761
2006-07	1766	1187	579	7442	6438	1004	621	871	-250	754	90	1423
2007-08	1787	1294	493	6929	5995	934	462	431	31	965	92	1550
2008-09	1747	1306	441	5675	5482	193	434	478	-44	149	105	695
2009-10	1834	1260	574	6667	6109	558	329	208	121	679	130	1383
2010-11	1766	1278	488	6708	5954	754	418	314	104	858	196	1542
2011-12	1767	1336	431	6689	6321	368	361	296	65	433	-3	861
2012-13	1720	1362	358	6618	6329	289	348	248	100	389	28	775
2013-14	1621	1291	330	7083	6772	311	451	203	248	559	37	926
2014-15	1636	1496	140	7023	6990	33	494	219	275	308	6	454
2015-16	1678	1452	226	7128	6854	274	488	290	198	472	5	703
2016-17	1,667	1,455	212	7,613	7,491	122	439	306	133	255	-23	444
2017-18	1,701	1,583	118	7,312	7,475	-163	369	443	-74	-237	3	-116

Source: ONS, sub-national population mid-year estimates components of change

Figure 3: Braintree District Population Trend 2002 to 2018 Components of change



Source: Office for National Statistics, mid-year population estimates, components of change

The overall net change for the years 2017-2018 was minus for the first time since 2002.

Projected population and household change

The Office for National Statistics produces projections of population change by age and sex over the next 25 years. These are trend-based projections, which means assumptions for future levels of births, deaths and migration are informed by observed levels mainly over the previous 5 years. The most recent set of these projections is 2016-based, and were published in 2018. However, as a result of a consultation on launched 26 October 2018 by the Ministry of Housing, Communities regarding changes to planning policy and guidance including the standard method for assessing local housing need concluded that the 2014 projections should continue to be used for calculating housing need.

Objectively Assessed Housing Need Study

In 2015 Braintree District Council, jointly with Chelmsford City Council; Colchester Borough Council and Tendring District Council, commissioned research from Peter Brett Associates to consider the emerging evidence for a joint Housing Market Area and advise on the scale of “objectively assessed housing need”.

A first report on this work was published in 2015, and an update by Peter Brett Associates was published in 2016 to take into account new population, household and employment projections.

The 2014-based population projections were published by ONS in May 2016; the 2014-based household projections were published by CLG in July 2016; and the EEFM 2016 employment projections were published in August 2016.

The projected population growth of Braintree District is lower in the ONS 2014 based projections than in the 2012 based projections. The EEFM 2016 employment forecasts for Braintree District are lower than the 2014 EEFM employment forecasts.

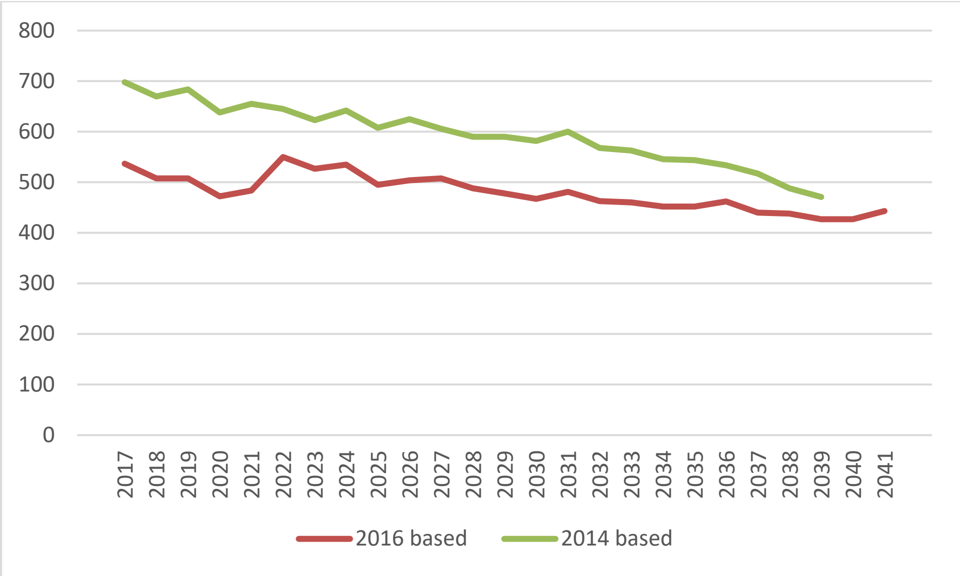
The 2016 Objectively Assessed Housing Need Study Update concluded that the objectively assessed need for Braintree District was an average of **716** new homes from 2013.

The Government has introduced a Standard Methodology with a formula that uses household projections and the local housing affordability ratio (both published by ONS) to calculate local housing need.

The Standard Methodology Target should be monitored and reviewed each year to take into account changes in the local housing affordability ratio (updated annually) and the household projections (published every two years).

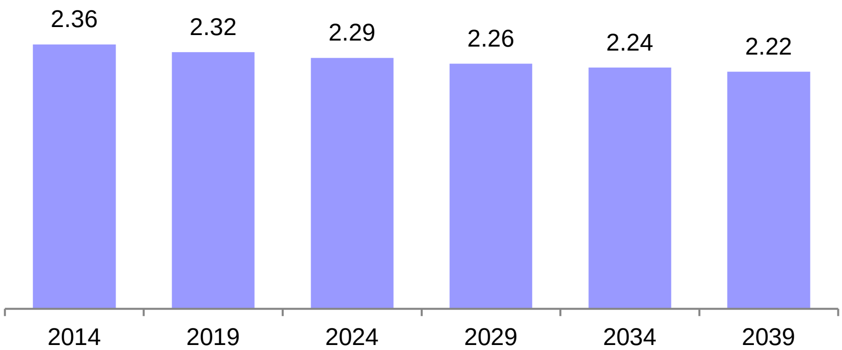
The Standard Methodology is therefore used for decision making and the calculation of the Districts 5 Year Housing Land Supply until the emerging Local Plan is adopted.

Figure 4: DCLG 2014-based and ONS 2016-based Household Projections: projected increase in number of households from previous year, Braintree District



Household size

Figure 5: Projected average household size Braintree District according to the CLG 2014-based household projections



According to the CLG 2014-based household projections, by 2039 1-person households were projected to form 29% of households in Braintree District. 36% of the projected increase in the number of households is in the form of one-person households. The chart below shows the projected increase in the number of households by household type in the district, 2014-2039.

Figure 6: Projected change in number of households Braintree District 2014-39

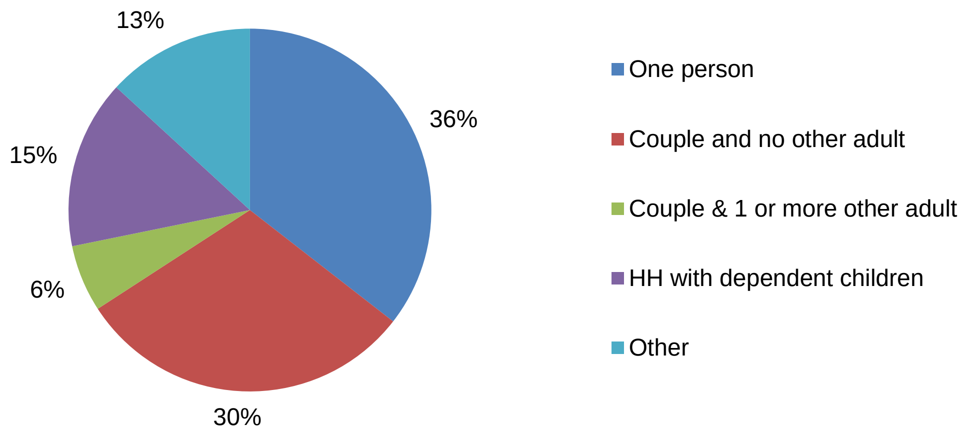


Table 5: Projected households ('000 h/h) in Strategic Housing Market Area in 2039 by household type, according to CLG 2014-based household projections

	1-person	Couple & no other adult	Couple & 1 or more other adult	Households with dependent children	Other	Total
Braintree	22.539	22.852	5.866	21.237	5.373	77.867
Chelmsford	24.022	25.651	7.147	24.478	6.524	87.822
Colchester	28.399	23.619	6.083	28.516	8.241	94.858
Tendring	26.630	23.944	5.761	17.509	5.006	78.850
HMA total	101.59	96.066	24.857	91.740	25.144	339.397

Source: Department for Communities and Local Government, 2016

Projected change in the number of households by household type, according to the CLG 2014-based household projections, is shown in Table 6.

Table 6: Projected change ('000 h/h) in Strategic Housing Market Area 2014-2039 by household type, according to CLG 2014-based household projections

	1-person	Couple and no other adult	Couple and 1 or more other adult	Households with dependent children	Other	Total
Braintree	5.312	4.533	0.892	2.247	1.970	14.954
Chelmsford	15.798	4.646	1.250	3.782	2.168	16.125
Colchester	6.503	6.503	0.888	6.681	2.893	19.956
Tendring	5.789	4.270	1.255	2.808	1.676	15.798
HMA total	21.883	16.440	4.285	15.518	8.707	66.833

Source: Department for Communities and Local Government, 2016

Employment, Labour Supply, and Unemployment

Table 7 sets out information from the Annual Population Survey on labour supply in the District compared with the regional and Great Britain averages.

Table 7: Employment and Unemployment (Jul 2018-Jun 2019)

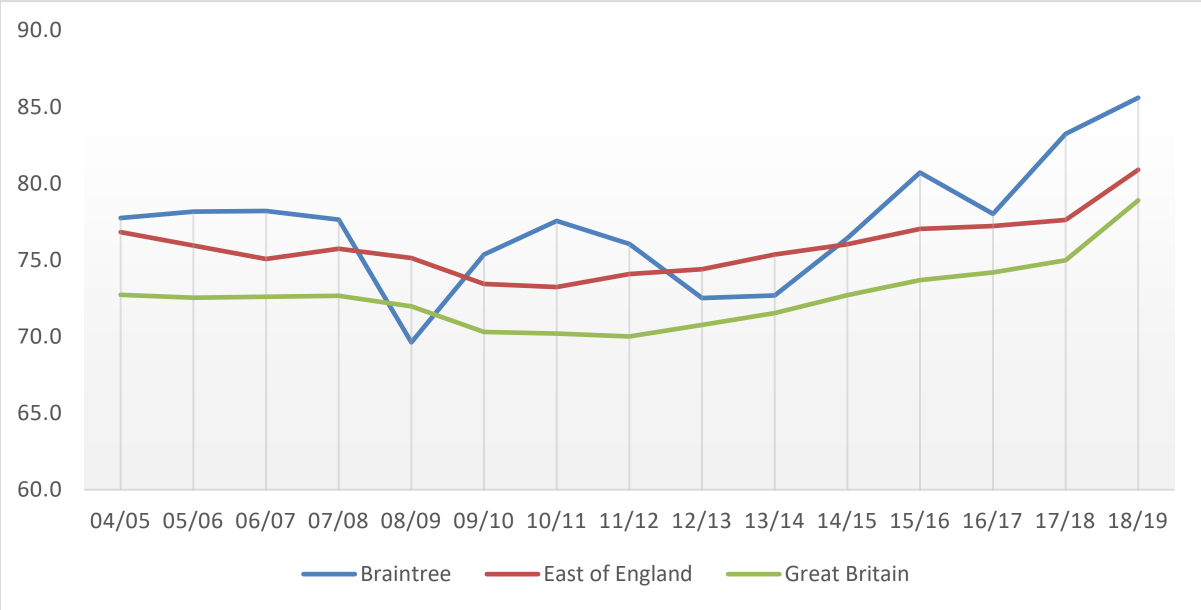
	Braintree (Numbers)	Braintree (%)	East (%)	Great Britain (%)
All People				
Economically Active†	84,000	85.6	80.9	78.9
In Employment†	80,700	82.0	78.3	75.6
Employees†	66,300	69.6	66.5	64.6
Self Employed†	13,100	12.0	11.7	10.7
Unemployed (Model-Based)§	2,300	2.8	3.2	4.1
Males				
Economically Active†	45,500	95.3	85.6	83.5
In Employment†	43,800	91.5	83.2	79.9
Employees†	36,700	77.9	67.5	65.4
Self Employed†	6,600	13.7	15.5	14.2
Unemployed§	#	#	2.8	4.2
Females				
Economically Active†	38,500	76.1	76.3	74.3
In Employment†	37,000	72.8	73.5	71.3
Employees†	29,600	61.4	65.4	63.9
Self Employed†	6,500	10.3	7.9	7.2
Unemployed§	#	#	3.6	3.9

Source: ONS annual population survey

**Data unavailable, sample size too small for reliable estimate.* *Source Nomis Labour Market Profile/APS*

The Annual Population Survey data uses sample survey and is less reliable at lower geographic levels, such as LA districts. That is illustrated in the chart, Figure 7, which compares the economic activity rate trend according to the Annual Population Survey, for Braintree, the region and Great Britain. The suggested Braintree Trend is volatile.

Figure 7: Economic activity rate trend April 2004/March 2005 to Jul 2018-Jun 2019
Source Annual Population Survey/Nomis



The unemployment rate in the District is below that of the East of England Region, and Great Britain as a whole.

Table 8: Claimant count unemployment, Braintree District, November 2019

Claimant count by age - not seasonally adjusted (November 2019)

	Braintree (Level)	Braintree (%)	East (%)	Great Britain (%)
Aged 16+	1,915	2.1	2.2	2.9
Aged 16 To 17	5	0.1	0.2	0.3
Aged 18 To 24	350	3.5	3.3	4.0
Aged 18 To 21	220	4.0	3.7	4.3
Aged 25 To 49	1,085	2.3	2.4	3.1
Aged 50+	470	1.5	1.8	2.4

Source: ONS Claimant count by sex and age
Note: % is number of claimants as a proportion of resident population of the same age

view time-series compare other areas query dataset...

Source: Nomis, Labour Market Statistics, Local Authority Profile

Employment and Jobs

Job density

'Job density' is the term given to represent the number of jobs available for a single person of working age over a given area. For example, a job density of 1 would represent the fact that there is a single job available for every person of working age. The most recent published figure for the District is as at 2017.

Table 9: Job Density (2017)			
	Braintree	East Region	GB
Jobs density	**0.76**	0.85	0.86

Source: Nomis, Labour Market Profile for Braintree, ONS Jobs Density.

The job density figures represent the ratio of total jobs to working-age population. "Total jobs" includes employees, self-employed, government-supported trainees and HM Forces. Job density in the District remained below the regional and national average. Table 10 compares the estimated employment and estimated jobs density for Braintree with those of other districts in the Strategic Housing Market Area.

Table 10: Estimated number of jobs and jobs density 2017		
District	Estimated no. of jobs	Estimated jobs density
Braintree	**65,000**	**0.76**
Chelmsford	104,000	0.95
Colchester	103,000	0.84
Tendring	47,000	0.60

Source: Nomis, Labour Market Profile, ONS Jobs Density.

Table 11 shows the reported job density for Braintree District over the period 2002 to 2017. The data is based on sample surveys.

Table 11: Job density, Braintree District 2002 - 2017			
Year	Jobs Density	Year	Jobs Density
2002	0.71	2010	0.60
2003	0.70	2011	0.60
2004	0.67	2012	0.61
2005	0.67	2013	0.62
2006	0.66	2014	0.65
2007	0.70	2015	0.67
2008	0.64	2016	0.70
2009	0.65	2017	0.76

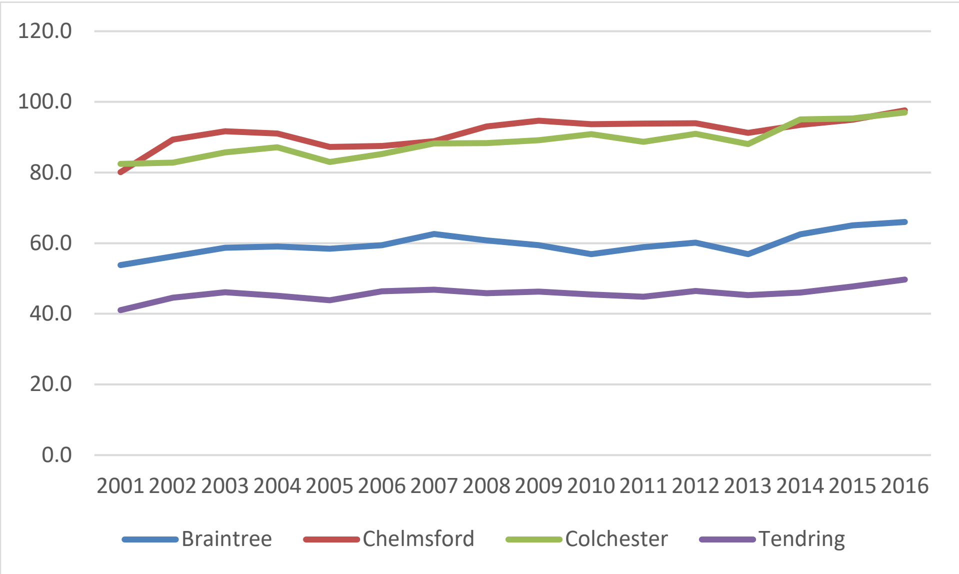
Source: Nomis, Labour Market Profile for Braintree, ONS Jobs Density.

Table 18 and Figure 14 show the estimated change in the number of jobs from 2001 to 2016 in Braintree District and in the other districts in the Strategic Housing Market Area, according to the EEFM 2017.

Table 12: Estimated change in number of jobs 2001-2016					
	Braintree	Chelmsford	Colchester	Tendring	SHMA
2001	**53.8**	80.1	82.4	41.0	257.4
2002	**56.3**	89.3	82.8	44.6	272.9
2003	**58.7**	91.7	85.7	46.1	282.2
2004	**59.1**	91.1	87.2	45.1	282.4
2005	**58.5**	87.3	83.0	43.8	272.5
2006	**59.4**	87.6	85.3	46.3	278.6
2007	**62.6**	88.9	88.2	46.8	286.5
2008	**60.8**	93.0	88.3	45.9	288.0
2009	**59.5**	94.7	89.2	46.3	289.5
2010	**56.9**	93.7	90.9	45.5	287.0
2011	**58.9**	93.8	88.7	44.8	286.3
2012	**60.1**	93.9	91.0	46.5	291.5
2013	**56.9**	91.3	88.0	45.3	281.4
2014	**62.5**	93.5	95.0	46.0	297.0
2015	**65.0**	94.9	95.3	47.7	303.0
2016	**66.0**	97.6	97.0	49.7	310.3
Change 2001-2016	**11.2**	14.8	12.9	6.7	52.9
% change 2001-2016	**20.8**	18.5	15.6	16.2	20.6

Source: East of England Forecasting Model/Cambridge Econometrics, 2017.

Figure 8: Estimated change in number of jobs 2001-2016



Source: East of England Forecasting Model/Cambridge Econometrics, 2017.

Forecast employment change

The East of England Forecasting Model (EEFM) 2017 was produced by Cambridge Econometrics. Users of district level data are cautioned that: the data used in the EEFM is largely based on survey data and as such, large 'jumps' in data can occur as a result of survey errors.

Table 13 and Figure 9 summarise the 2017 EEFM baseline employment forecasts for districts in the Housing Market Area.

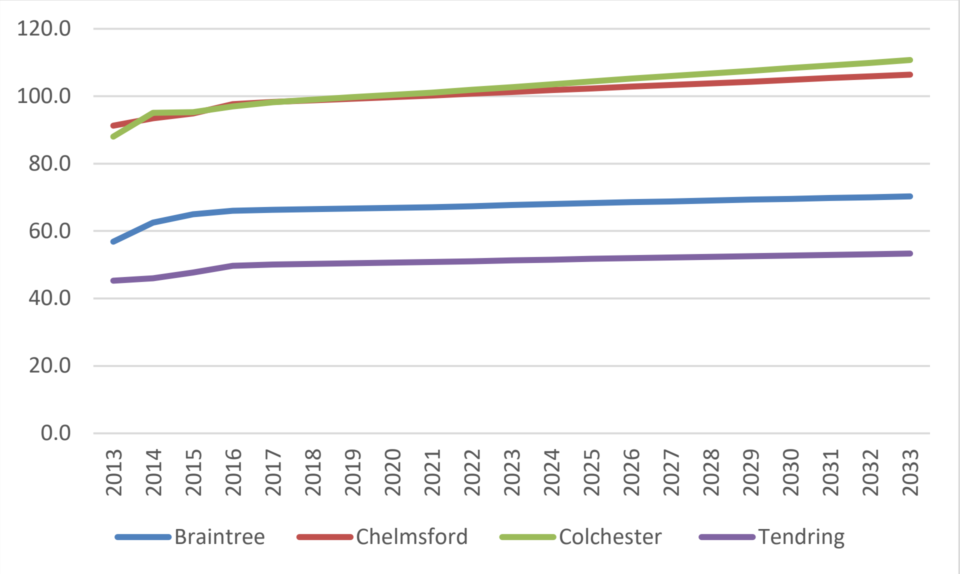
Table 13: 2017 EEFM Baseline Employment Forecasts ('000 jobs)

	Braintree	Chelmsford	Colchester	Tendring	SHMA total
2013	56.9	91.3	88.0	45.3	281.4
2014	62.5	93.5	95.0	46.0	297.0
2015	65.0	94.9	95.3	47.7	303.0
2016	66.0	97.6	97.0	49.7	310.4
2017	66.3	98.3	98.2	50.1	312.9
2018	66.5	98.8	99.0	50.3	314.6
2019	66.7	99.3	99.7	50.5	316.2
2020	66.9	99.8	100.4	50.7	317.7
2021	67.1	100.2	101.0	50.8	319.1
2022	67.4	100.7	101.9	51.1	321.0
2023	67.7	101.3	102.7	51.3	323.0
2024	68.0	101.9	103.6	51.5	324.9
2025	68.3	102.3	104.4	51.8	326.8
2026	68.6	102.9	105.2	51.9	328.6
2027	68.8	103.4	106.0	52.1	330.3
2028	69.1	103.9	106.8	52.3	332.0
2029	69.3	104.3	107.5	52.5	333.7
2030	69.6	104.8	108.3	52.7	335.5
2031	69.8	105.4	109.1	52.9	337.3
2032	70.1	105.9	109.9	53.1	339.0
2033	70.3	106.4	110.7	53.3	340.8
2013-2033 change	13.4 (0.7 p.a.)	15.1 (0.8 p.a.)	22.7 (1.1 p.a.)	8.1 (0.4 p.a.)	59.4 (3.0 p.a.)
2013-2033, % change	23.6%	16.6%	25.8%	17.8%	21.1%

Source: East of England Forecasting Model, Baseline Forecasts, 2017

The forecast rate of increase in employment in the District is higher initially as the District recovers from the recession, and then levels off.

Figure 9: Forecast number of jobs 2013-2033 ('000 jobs)



Source: East of England Forecasting Model, Baseline Forecasts, 2017

Commuting

The 2011 Census results showed commuting inflow of 15,184, and commuting out-flow of 31,765, with net out-commuting of 16,581 *(source: 2011 Census Origin/destination statistics, Location of usual residence and place of work by sex*). Table 14 shows estimated net commuting across Greater Essex. The level of net-out-commuting from Braintree District was the highest in Greater Essex.

Table 14: Net commuting, Greater Essex, according to the 2011 Census

	2011 Census Travel to Work data		
	Inflow	Outflow	Net flows
Basildon	36,071	36,243	-172
Braintree	**15,184**	**31,765**	**-16,581**
Brentwood	17,745	20,103	-2,358
Castle Point	7,467	23,573	-16,106
Chelmsford	30,575	34,430	-3,855
Colchester	22,968	24,850	-1,882
Epping Forest	21,509	35,628	-14,119
Harlow	15,994	16,561	-567
Maldon	6,513	13,782	-7,269
Rochford	10,411	24,441	-14,030
Tendring	6,763	17,412	-10,649
Uttlesford	17,618	18,110	-492
Southend on Sea	20,661	29,946	-9,285
Thurrock	21,804	35,032	-13,228

Source: ONS, Nomis; Origin/destination: location of usual residence and place of work, Table WU01UK

According to the 2011 Census, 26,964 residents of Braintree District aged 16 and over work within the District, and 8,664 mainly work at or from home. Table 15 compares information on where people work for the four districts in the Strategic Housing Market Area. Of the four districts, Braintree had the highest proportion travelling to work outside of their district of residence.

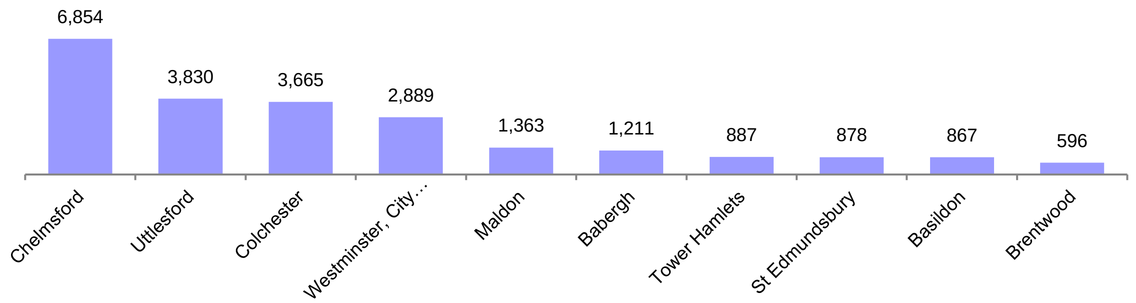
Table 15: Residents in employment

	Braintree	Chelmsford	Colchester	Tendring
Residents aged 16-74 in employment	72,016	83,355	81,214	53,285
Residents aged 16+ working within District	26,964	36,228	45,269	26,124
Residents aged 16+ who mainly work at or from home *	8,664	9,002	8,789	6,441
No fixed place of work*	7,179	7,265	7,167	5,429
Outside UK or offshore installation	150	161	249	179

Source: ONS, 2011 Census: data on the number of residents in employment is available for those aged 16-74, taken here from Table KS601EW - Economic activity by sex.

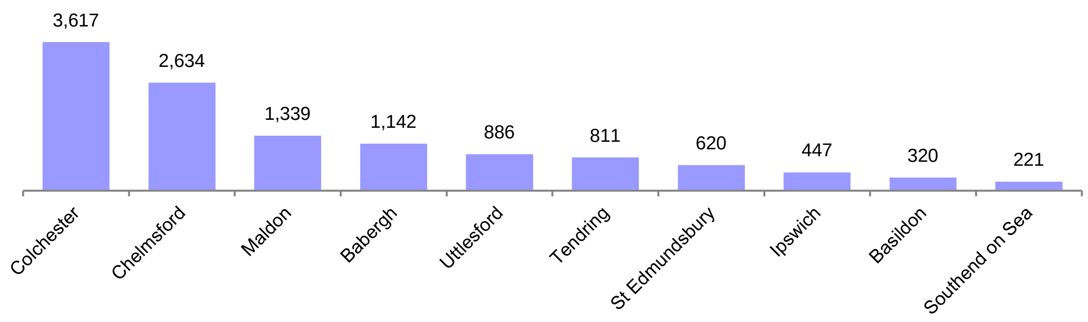
The average distance to work by District residents in 2011 was 21.1 km; the third highest in the East of England region (only Uttlesford and Maldon were higher). The average distance travelled had increased, from 20.1 km. in 2001 and was the 12th highest out of all the 326 local authority areas in England. (*Source: 2011 Census, Nomis, Census Table QS702EW*). The top ten destinations for Braintree residents travelling to work outside the District are shown in Figure 19.

Figure 10: Top ten destinations for District residents working outside the District, 2011



The top ten sources for people commuting into Braintree District are shown in Figure 11:

Figure 11: Top ten origins, people commuting to work in Braintree District, 2011



Forecast Commuting

Net out-commuting from the District is expected to increase. Table 16 compares forecast change in net commuting levels according to the EFFM 2017 forecasts for Braintree Districts and neighbouring districts of Chelmsford and Colchester.

Table 16: Net commuting (000s)			
	2013	2033	2045
Braintree	-16.1	-16.7	-18.7
Chelmsford	-12.3	-10.0	-10.8
Colchester	-5.1	-4.7	-4.1

Source: East of England Forecasting Model, Baseline Forecasts, 2017

Forecast employment change by sector

The East of England Forecasting Model provides forecasts of employment in districts by industrial sector, although Cambridge Econometrics (who produced the forecasts) advise that these should be used with caution.

In general terms, the forecasts show a reduction in manufacturing employment, and increases in employment in construction and services.

The 2017 EEFM forecasts can be viewed on the Cambridgeshire Insight website at: http://cambridgeshireinsight.org.uk/EEFM

Business development

The Base Date

The information set out in these results represents sites identified at 31 March 2019 involving additional development, or loss of, the land uses listed above. Planning permissions granted or development that has occurred after this base date will be taken into account in future monitoring.

Results Summary

Table 17 provides information on the completed non-residential floorspace for the whole of the District, in square metres by use class, in the survey year 2018/19, and also shows the amount of additional floorspace on previously developed land.

Table 17: Non-residential floorspace completed 2018/19						
	Use Class A1/A2	Use Class B1a Offices	Use Class B1, B2, B8 (other than B1a)	Use Class D2 – Leisure	Flexible	Total
Gross Floorspace developed 2018/19, sq. m	0	2,295	18,689	1,468	820	23,272
Floorspace losses 2018/19, sq. m	407	2090	14,889	716	0	18,102
Floorspace redevelopment Non-Res to Non-Res	*407*	*294*	*14,730*	*716*	*0*	*16,147*
Floorspace loss Non-Res to Res	*0*	*1,796*	*159*	*0*	*0*	*1,955*
Net change in floorspace 2018/19, sq. m	-407	205	3,800	752	820	5,170

Employment development in previous years

Tables 18 to 20 provide information on net development in employment floorspace, for A1-B8 Use Classes in square metres, over the seven-year period 2009-2019.

Table 18: Net retail floorspace development (sq m): 2009-2019											
A1 Retail & A2 Financial and Professional Services											
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	***2009-19***
Net fspace developed	2,245	937	1,130	-458	580	669	3,509	1,738	2,774	-407	***12,717***

Table 19: Net office floorspace development (sq m): 2009-2019										
B1a Offices										
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	***2009-19***
Net fspace developed	-1,092	-148	1,351	-3,047	-1,317	-4,963	2,724	-990	457	205	***-6,820***

Table 20: Net B1/B2/B8 floorspace development (sq m): 2009-2019											
B1/B2/B8											
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	***2009-19***
Net fspace developed	-20,020	6,816	2,030	-6,562	-18,359	-4,128	-956	1,416	1,013	3,800	***-34,950***

The particularly large loss of B1/B2/B8 floorspace that occurred in the 2009-2010 survey year consisted, in the main, of the demolition of obsolete non-original factory buildings (15,600 sq m) on the former Crittall Works site in Silver End, which is identified for regeneration in the Core Strategy.

The majority of the B1/2/8 floorspace lost in 2013/14 occurred at the former Premdor site (18,274 sq m), also identified as a regeneration area in the Core Strategy.

In recent years there have been losses through the Government policy to relax Permitted Development rights to encourage the conversion of empty offices to new homes.

Outstanding permissions for future development

Table 21 provides information on potential non-residential floorspace with planning permission for the whole of the District, in square metres by use class.

Table 21: Potential sq. m. of non-residential floorspace (with planning permission) identified as at 31st March 2019 by Use Class

	A1/A2	B1a Offices	B1, B2, B8 (other than specified as B1a)	D2 - Leisure	Flexible	Total
Outstanding fspace with permission	22,111	14,192	45,721	3,053	540	85,617
Outstanding fspace redevelopment/losses with permission	1,092	7,655	24,594	1,638	0	34,979
Potential fspace redevelopment Non-Res to Non-Res	*159*	*182*	*12,161*	*1,366*	*0*	*13,868*
Potential Fspace loss Non-Res to Res	*933*	*7,473*	*12,433*	*272*	*0*	*21,111*
Net additional floorspace outstanding with permission	21,019	6,537	21,127	1,415	540	50,638

These figures do not include sites allocated in the development plan that have yet to secure planning permission.

Future business land needs and work on the new Local Plan

In 2015 Braintree District Council commissioned an employment land needs assessment to review existing employment sites and consider future employment land needs. This assessment was published in August 2015 and forms part of the evidence base for the new Local Plan. The assessment can be viewed on the Braintree District Council website on:
https://www.braintree.gov.uk/downloads/file/5296/local_plan_2014_evidence_base_employment_land_employment_land_needs_assessment_aug_2015

Town Centres:

The 2018 update to the Braintree Retail Study is available to view on line via the Council website, as part of the Evidence Base to the Local Development Framework, at:

https://www.braintree.gov.uk/downloads/file/8332/retail_study_update_may_2018_-_subject_to_consultation

The supply of new homes

Dwelling stock

Table 22 shows the stock of homes in the District by tenure in 2019; the information on local authority and housing association stock is as reported by local authorities through the Housing Strategy Statistical Appendix (HSSA).

The total stock figures use the Census 2011 count as a baseline, with information on subsequent changes collected annually through the Housing Flows Reconciliation Form. Private rented accommodation is included within the overall private sector.

Table 22: Estimated dwelling stock Braintree District as at April 2019	
Total	65,612
Private registered provider (Housing association)	10,639
Local Authority	8
Other public sector	126
Private sector	54,839

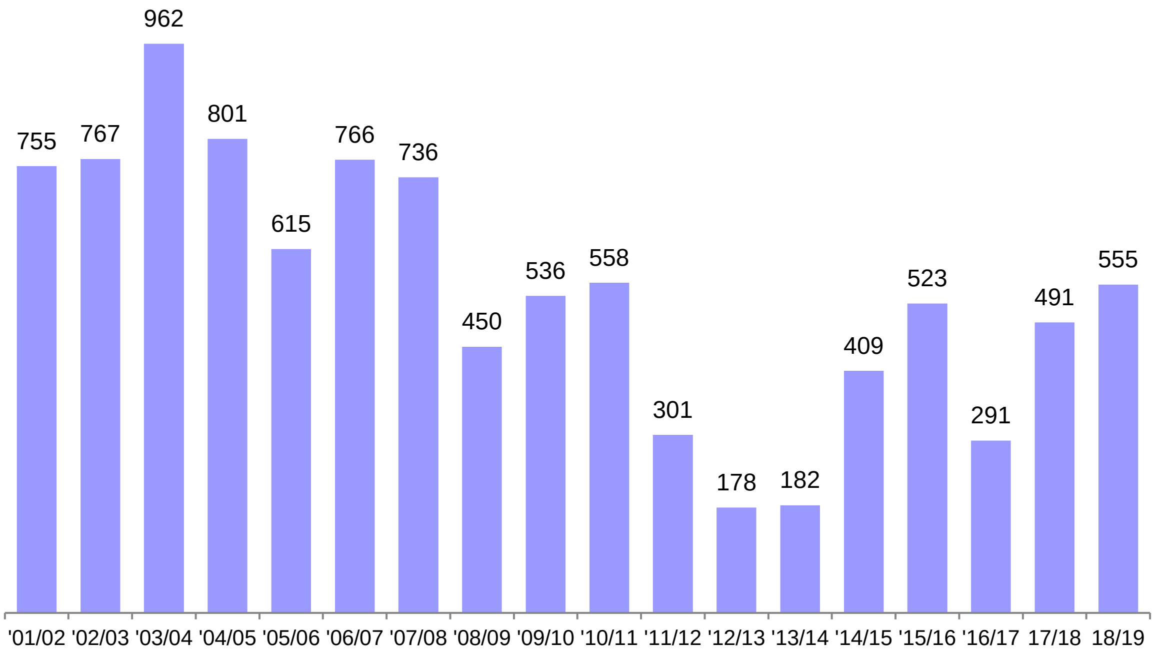
Source: MHCLG

The net supply of new homes in recent years

Figure 12 illustrates the trend in the supply of new homes in Braintree District since 2001. The housing market has, as nationally, experienced a slow and fragile recovery from the recession.

In the case of Braintree District, the recession had a particularly prolonged impact as it affected additional sites that could come forward to add to future supply to meet the challenge of an emerging higher target.

Figure 12: Net supply of new homes Braintree District 2001/02 to 2018/19



Net additional new homes for 2018/2019

The net supply of new homes for the reporting year, 2018/2019, was 555.

Sites producing 20 or more completions in the year 2018/2019 were:

- NE Witham Growth Location (Forest Road), 43 (Green Field – GF)
- Phase 1 Land south of Oak Road Halstead (phases 1 & 2), 50 (GF)
- Portway Place Halstead, 28 (Brownfield - PDL)
- Bakers Lane/London Road Black Notley, 48 (GF)
- Land West of Boars Tye Road, Sliver End, 40 (GF)
- West Witham Growth Location, 95 (GF)

Table 23: Summary of types of housing supply Braintree District			
	New build	Change of use	Conversions within residential use
2012/13	175	15	1
2013/14	159	27	31
2014/15	341	79	2
2015/16	459	72	2
2016/17	268	79	5
2017/18	428	77	2
2018/19	464	65	8

Source: MHCLG Live Tables Table 123 Housing supply; component flows of, by local authority district

A total of 22 new homes were completed in Braintree District in 2017/2018 from conversion of offices via permitted development.

Changes to supply of communal accommodation

In 2018 the Government introduced monitoring of net changes to the supply of communal accommodation as part of measuring supply in the calculations for the Housing Delivery Test. The MHCLG figures for communal accommodation are split into 'student' and 'other' communal accommodation. Communal student accommodation is the traditional 'student hall' style with many student rooms and a single refectory. Other communal accommodation includes care homes or hostels where rooms are arranged along corridors with one or more communal sitting and dining rooms.
MHCLG has published data on changes to the number of communal accommodation bedspaces over the past three years, from 2015/2016. Ten (non student) communal accommodation bedspaces were gained in Braintree District, in 2015/2016. Of Essex Districts, the major change was at Colchester where 541 additional student bedspaces were gained in the same year as part of the expansion of Essex University.

The Emerging Local Plan housing target

The adopted development plan, the Braintree District Local Development Framework Core Strategy (adopted September 2011) was based on a planned provision for the District 2001-2026 of 9,625 new homes (an annual average of 385), derived from the East of England regional strategy. However this is deemed out of date because the adopted plan is more than 5 years old and because it was not based on Objectively Assessed Housing Need as defined in the 2012 NPPF/2015 Planning Guidance.

The Emerging Local Plan defines a much higher target than in the adopted Core Strategy, at an average of 716 homes per year 2013-2033. This target was considered in the Section 1 Local Plan Examination in January 2018 and was endorsed by the Inspector as representing the objectively assessed housing need of the District, in his letter of 29 June 2018. Against this background, the Council is progressing the new Local Plan with additional site allocations proposed to meet the new (much higher) draft target for new homes; and large new sites are now coming on stream through the development management process which will should lead to an increase in housing delivery in future years. Table 38 (below) sets out information on the housing target **for Plan Making** purposes as at 31 March 2018

The supply of Affordable homes

Table 24 summarises the net supply of affordable homes in Braintree District from the 2013 Local Plan base date according to planning monitoring. The net supply in 2016/2017 was unusually low because of the demolitions that took place that year as part of regeneration developments the sites were under construction and the new homes were mainly completed the following year.

Table 24: Net supply of Affordable homes Braintree District	
2013/2014	81
2014/2015	124
2015/2016	129
2016/2017	25
2017/2018	135
2018/2019	165

The main source of new affordable homes in the future is likely to be via Section 106 Agreements secured on permissions for larger residential developments.

Custom Build and Self Build house building

Local authorities are required to hold a self build or custom build register and to identify land for those seeking a custom build home in the area. The Council will be supportive of these types of development on sites within development boundaries or meeting other policies in the Local Plan. In addition, the policy proposes to allocate specific targets for self build and custom build plots as part of the mix on larger developments in the area, to ensure that need is met.

The Submission Draft Local Plan includes a draft policy requirement that on sites of 500 dwellings or more, 2% of homes will be required to be available for self or custom builders (Draft Policy LPP 37).

The information for the return from Braintree District Council to the Government monitoring of custom and self build is summarised below:

- Braintree District Council has not introduced a local connection test
- Braintree District Council has not implemented a charge for entry onto the register
- Information and the form for registering is available on the Braintree District Council website
- A draft policy on this subject is included in the Braintree District Submission Draft Local Plan; plots are proposed to be included at the Strategic Growth Locations to be allocated in the Local Plan

<u>Demand generated from the register</u>

- Entries on the register in the first base period, to 30.10.2016: 38 individuals, no group entries.

- Entries on the register in the second base period, 31.10.2016 to 30.10.2017: 42 individuals, no group entries.
- Entries on the register in the third base period, 31.10.2017 to 30.10.2018: 56 individuals, no group entries.
- Entries on the register in the fourth base period, 31.10.2018 to 30.10.2019: 26 individuals, no group entries.
- 162 individual entries and no group entries across all four base periods.

Supply of suitable development permissioned plots

- The current guidance on what can be classed as a suitable permission and can be counted towards meeting the Council's demand is not clear. However, the Council's interpretation is that it has granted between 36 and 116 suitable permissions between 30 October 2016 and 30 October 2019 depending upon the criteria used to count permissions.

Travellers

According to the 2011 Census, in March 2011 there were 132 people in the District who defined their ethnic group as White, Gypsy or Irish Traveller.

The adopted Core Strategy Policy CS3 sets out the following requirements for Travellers and Travelling Showpersons in Braintree District:

- A minimum of 50 authorised traveller residential plots/pitches by 2011
- A minimum of 67 authorised traveller residential plots/pitches by 2021
- 5 traveller transit plots/pitches by 2013
- 6 traveller transit plots/pitches by 2021
- I additional travelling showpersons plots/plot by 2021

The number of traveller caravans in Braintree District for the most recent published 8 counts is shown in Table 25, using data published by the Department for Communities and Local Government.

Table 25: Number of traveller caravans Braintree District										
	Jan 2015	July 2015	Jan 2016	July 2016	Jan 2017	July 2017	Jan 2018	July 2018	Jan 2019	July 2019
Socially rented	40	40	44	28	31	30	35	31	38	33
Private caravans with planning permission	25	65	67	69	77	88	89	111	107	100
Caravans on Travellers' own land:										
Tolerated	0	0	0	0	0	0	0	0	0	0
Not tolerated	0	0	0	0	0	0	0	0	0	0
Caravans on land not owned by Gypsies:										
Tolerated	0	0	0	0	0	0	0	0	0	0
Not tolerated	0	15	0	10	0	6	0	0	0	0
Total all caravans	94	120	111	107	108	124	124	142	145	133

Source: Communities and Local Government, Count of Traveller Caravans

The Council's evidence base on Gypsy and Traveller and Travelling Showperson's has identified a need of 26 pitches to meet the needs of Gypsy and Travellers between 2016 and 2033. An additional need of 6 plots has been identified for Travelling Showpeople for the same period.

Additional traveller sites will be identified through the Draft Local Plan at appropriate Strategic Growth Locations. Further work is being undertaken to determine any likely need for Transit Pitch provision across Essex.

Five Year Housing Land Supply

The latest five year housing land supply assessment can be found on the Planning Policy Monitoring Webpage (link below).

https://www.braintree.gov.uk/downloads/download/794/monitoring

Policy Performance Conclusions

Over the monitoring year 2018/2019 the supply of new homes increased to 555, compared to the previous year when 491 homes were completed; but although an improvement this was still lower than the new target. This will add to the shortfall to be made up in future years in the Local Plan context, but under the new Standard Methodology approach for calculating the 5 year supply for decision making the key difference is that the District now needs to identify a 20% buffer in the 5 year supply; and will need to produce a Housing Action Plan when the Housing Delivery Test Results are published by the Government..

The three strategic Growth Locations identified in the LDF Core Strategy are coming forward; two are under construction) and the third is the subject of a current planning application. The Council has been actively working to increase future housing supply to meet higher targets, through the development management process, and in the preparation of the new Local Plan. This Monitoring Report provides evidence of draft allocations coming forward and additional sites being added to the supply.

There are now several large sites under construction being developed by volume housebuilders. The action taken by the Council in approving new sites in advance of and supplementing the Local Plan process is increasing the supply of new homes and is improving the District's 5 year supply position in relation to the new, much higher, housing targets for decision making and for the Local Plan.

There was a recorded net loss of retail floorspace in the monitoring year (-407 sq m). The District had been seeing an overall new increase in retail floorspace until this year. There were sites with planning permission for a potential net retial floorspace of 21, 019 sq m.

There was a net increase of office of 205 sq m. Overall, there has been a trend over the last number of years of net losses of office space within the district. In part this reflects the impact of the Government changes to Permitted Development regulations to encourage housing supply. There were sites with planning permission for a potential net floorspace of 6, 537 sq m.

There was a net increase in B1/B2/B8 floorspace of 3, 800 sq m. There were sites with planning permission for a potential net floorspace of 21, 127 sq m.

752 sq m of leisure uses floorspace was developed, and there were sites with planning permission for a potential net floorspace of 1, 415 sq m.

The Local Plan includes additional sites for future employment development, in good sites for business uses; whereas some of the losses that are occurring and proposed for the future are of old vacant or redundant sites.