



GL Hearn

Coastal West Sussex SHMA Update

South Downs National Park Summary Report

November 2012

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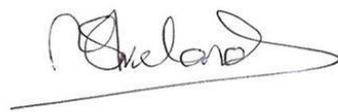
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1 INTRODUCTION

- 1.1 The Coastal West Sussex Strategic Housing Market Assessment (SHMA) Update has been prepared by GL Hearn and Justin Gardner Consulting for the local authorities of Adur, Arun, Chichester and Worthing (which together comprise the Coastal West Sussex Sub-Region) and for the South Downs National Park Authority.
- 1.2 The National Planning Policy Framework (NPPF) was published by Government in 2012 and set out new national planning policies. It outlines that an SHMA forms part of the evidence base for Local Plans. It is intended to provide an assessment of needs for all types of housing, taking account of demographic projections and the needs of different groups in the community, as well as housing demand and the level of housing supply necessary to meet this demand.
- 1.3 The SHMA Update addresses these requirements. It defines a functional housing market stretching along the South Coast from Chichester to Lewes. It includes demographic projections for local authorities within this area and considers broad environmental and infrastructure constraints – these factors together will inform future policies for housing provision. The assessment is intended to inform both policies regarding levels of housing provision and the mix of housing to be provided through new development.
- 1.4 The SHMA Update takes account of changes in housing market dynamics and includes an updated assessment of housing need and dynamics within the affordable housing sector for each of the four local authorities in Coastal West Sussex (Adur, Arun, Chichester and Worthing). This takes account of national policy changes including policies within the Governments 2011 *Housing Strategy for England* as well as reforms affecting the affordable housing sector and housing-related benefits introduced in the 2011 Localism Act and 2012 Welfare Reform Act.
- 1.5 The South Downs National Park stretches from Winchester to Eastbourne. This includes parts of the Coastal West Sussex sub-region, primarily in Chichester and Arun Districts, but also areas which fall outside of Coastal West Sussex and are not considered in this SHMA Update.
- 1.6 The National Park Authority is the local planning authority for planning applications relating to development within the National Park. However it does not have a strategic housing function. The recommendations from the SHMA Update which are relevant to the National Park thus relate to the development of planning policy, and are intended to inform and support the development of the Authority's Local Development Framework and particularly the Core Strategy within this.
- 1.7 The South Downs National Park is located within South East England. This is an economically vibrant region with considerable development pressures.

- 1.8 The purposes of the National Park Authority are defined in the 1995 Environment Act. The authority has a statutory duty to conserve and enhance the natural beauty, wildlife and cultural heritage of the area; and to promote opportunities for understanding and enjoyment of its special qualities by the public. National planning policies, as set out in the National Planning Policy Framework¹, recognise that the statutory purposes of National Parks and attach great weight to conserving landscape and scenic beauty, recognising that this may mean that it is appropriate for development to be restricted where it conflicts with these objectives.
- 1.9 This report has been prepared alongside the main SHMA Update Report. It summarises the findings and recommendations with regard to those parts of the South Downs National Park which fall within Coastal West Sussex. We have termed this 'CWS National Park.' It is defined on the basis of wards with a population which falls largely within the National Park boundary. The wards included for the basis of the SHMA Update as within the National Park are set out in Figure 1.1.

Figure 1.1: Coastal West Sussex Wards predominantly within the National Park

Local Authority	Wards
Arun	Arundel, Walberton
Chichester	Bury, Easebourne, Fernhurst, Funtington, Harting, Lavant, Midhurst, Petworth, Rogate, Stedham

2 HOUSING OFFER

- 2.1 A high proportion of households in 2031 will live in housing which exists today, and it is therefore important that policies regarding future housing provision are framed by an understanding of the housing offer today and gaps within this.
- 2.2 There were 18,000 homes in the CWS National Park Area in 2011. The area's housing stock is focused towards larger and higher value properties, with a third of properties in Council Tax Bands F or above compared to 12% across Coastal West Sussex. There is also a significant level of second home ownership, accounting for 4.0% of the housing stock. These factors, together with high house prices reflecting the strong quality of place which the Park's setting provides, contribute to affordability pressures.
- 2.3 Robust up-to-date information on the profile of homes within the Park is not available. The 2001 Census indicates that a third of properties in the CWS National Park area had 7 or more rooms (equivalent to a property with four or more bedrooms) compared with 20% across Coastal West

¹ CLG (March 2012) *National Planning Policy Framework*

Sussex as a whole. The profile of homes of different types in 2001 indicated that 41% of properties were detached and 30% semi-detached. However the level of private renting was above average, and in those parts of the area within Chichester District, affordable housing provision was above both the sub-regional and regional average, accounting for 15% of the housing stock.

2.4 Figure 2.1 profiles the housing stock in those wards in Arun and Chichester Districts which fall mainly within the National Park boundary.

Figure 2.1: Housing Stock Profile

	Arun National Park	Chichester National Park	Coastal West Sussex	South East
Housing Stock: 2011	3,468	14,578	199,554	3,684,296
Owner Occupied, 2001:	74.2%	67.3%	76.5%	74.0%
Social Rented, 2001:	9.5%	15.1%	11.4%	14.0%
Private Rented, 2001:	11.7%	12.0%	10.1%	10.2%
Growth in Private Renting SE: 2001-11				60%
Detached Homes: 2001	35%	43%	30.5%	29.3%
Semi-Detached Homes: 2001	26%	30%	26.8%	28.5%
Terraced Homes: 2001	23%	15%	20.1%	23.1%
Flats/Maisonettes: 2001	15%	12%	21.9%	18.5%
1-4 Rooms: 2001	28%	24%	12%	12%
4-6 Rooms: 2001	43%	42%	68%	63%
7+ Rooms: 2001	29%	34%	20%	25%
Council Tax Bands Bands A & B: 2011	11%	12%	27%	25%
Council Tax Bands C, D and E: 2011	61%	54%	61%	59%
Council Tax Bands F & Above: 2011	28%	34%	12%	15%
Second Homes: 2007	3.9%	3.1%	2.5%	1.0%
Vacant Homes: 2011	-	4.0%	2.8%	2.7%

3 HOUSING MARKET CONDITIONS

- 3.1 Strong housing demand in the decade to 2007 was supported by a sustained period of macro-economic stability and growth, low interest rates and strong competition in the mortgage market, which provided a choice of highly competitive mortgage products. This supported strong growth in effective demand, which outstripped growth in supply, resulting in strong house price growth in real terms.
- 3.2 Since 2008 market conditions across the UK have been very different. Effective demand is constrained by access to mortgage finance, weak macro-economic conditions and market confidence, and strong inflation which has constrained real earnings growth and households' ability to save. Bank lending continues to be affected by concerns regarding Eurozone sovereign debt. Critically for the housing market, many young households are unable to raise the necessary deposit (currently averaging 20% of the value of a home) to secure mortgage finance on competitive terms. As a result, market activity has plummeted to its lowest level in more than 40 years.
- 3.3 Key settlements within Coastal West Sussex which fall within the National Park in Coastal West Sussex are Petworth and Midhurst. These command some of the highest house prices in the sub-region. The mix-adjusted house price in Midhurst stood at £353,000 in April 2012, with Petworth commanding £394,000. Arundel prices stood at £307,000. This compares with between £192,000 - £288,000 in the coastal towns in the sub-region and £290,000 in Chichester². House prices in the rural areas are generally higher still.
- 3.4 Over the preceeding three years, house prices in Petworth have increased by almost £47,000 and by almost £33,000 in Midhurst – notably above average relative to the Coastal Towns. House price growth in Arundel has been a more moderate £15,000 but has increased over the last 12 months, whereas prices in Petworth and Midhurst have both fallen.
- 3.5 Average house prices for terraced and flatted properties in Arundel are above average for the Sussex Coast Housing Market. In Midhurst, Petworth and near Petersfield, there is a notable premium for detached and semi-detached properties. In Petworth and Arundel prices for flats are also particularly expensive.

² Source: Zoopla April 2012

Figure 3.1: Average House Prices, Spring 2012

Postal Town	Detached	Semi-Detached	Terraced	Flat/Maisonette	Overall
Arundel	£461,867	£212,293	£257,531	£272,375	£302,827
Midhurst	£517,819	£313,917	£388,493	£169,000	£440,397
Petworth	£509,158	£298,667	£252,625	£227,500	£361,097
Petersfield	£526,500	£390,000			£503,750
Sussex Coast Housing Market	£395,552	£253,154	£237,510	£180,454	£395,552

Source: HMLR

- 3.6 Entry-level house prices for homes in the Coastal West Sussex National Park area vary from £113,000 for a 1-bed property to £377,000 for a property with four or more bedrooms. Housing costs for entry level properties are some of the highest in the sub-region.

Figure 3.2: Entry-Level Housing Costs

	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms
Entry-level purchase price				
Arun – National Park	£143,000	£212,000	£276,000	£377,000
Chichester – National Park & NE	£113,000	£174,000	£256,000	£368,000
Entry-level private rent (per month)				
Arun – National Park	£700	£795	£975	£1,400
Chichester – National Park & NE	£507	£775	£948	£1,513

Source: Online Estate and Letting Agents Survey (April 2012)

- 3.7 Whilst the sales market is in the doldrums, the rental market is buoyant. The sector has grown substantially over the last decade, and local agents report continuing strong demand which is outstripping supply. This is driving rental growth. Rental costs vary from £500 per month for a 1-bed property through to £1,500 per month for a property with four or more bedrooms in some areas.
- 3.8 The market evidence suggests that (at the time of writing in 2012), effective demand for market housing is relatively subdued – particularly relative to market conditions pre-2008. This reflects macro-economic circumstances. However the demand profile for homes in the National Park includes a higher proportion of older buyers with equity in existing homes, and thus whilst the market is clearly not immune from wider dynamics, it is likely to perform better in relative terms. Demand has been supported by the opening of the Hindhead Tunnel, which improves accessibility from the west of the area in particularly towards London.

3.9 Young households ability to buy homes is influenced by high prices and the significant deposit needed to obtain mortgage finance (despite historically low interest rates). As a result the buyer profile is focused more towards older households and those moving into the area, attracted by the strong quality of place.

4 AFFORDABILITY & HOUSING NEED

Housing Affordability

4.1 The typical earnings of households in the National Park are notably higher than in other parts of the Coastal West Sussex Sub-Region, as Figure 4.1 shows. However there remain strong affordability pressures for younger households, influenced by high house prices.

Figure 4.1: Average Household Earnings, 2012

	Median Household Income, 2011
Arun – National Park	£40,333
Chichester – National Park	£46,578
Coastal West Sussex	£35,257

4.2 Taking account of the costs of either buying or renting a home an estimated 45% of households in Arun District and 34% of households in Chichester District, who live within the National Park, are unable to afford market housing without some form of subsidy.

Figure 4.2: Households Unable to Afford Market Housing without Subsidy

	Income required to access market	Number unable to afford	Estimated households, 2011	% unable to afford
Arun - National Park	£38,200	1,503	3,363	44.7%
Chichester – National Park	£37,200	4,986	14,520	34.3%
Coastal West Sussex	£35,700	85,543	188,221	45.4%

Affordable Housing Need

4.3 The SHMA Update has included an analysis of the need for affordable housing using the Basic Needs Assessment Model set out in Government Practice Guidance³. The model is designed specifically to identify whether there is a surplus or shortfall in affordable housing.

4.4 The model considers differences between the level of current affordable housing need, based on interrogation of housing registers and newly-arising need over the 2011-16 period. This is compared with the estimated supply of affordable housing from relets of existing affordable homes

³ CLG (2007) Strategic Housing Market Assessments – Practice Guidance (V2)

and delivery of affordable housing schemes with planning permission which are expected to come forward before 2016.

- 4.5 A net housing need for 568 affordable homes is identified over the 2011-16 period within those wards in Coastal West Sussex which fall mainly within the National Park, if all households in housing need were to be housed in an affordable home.. This equates to a net need for 114 additional affordable homes a year. The table below indicates how this breaks down into different areas.

Figure 4.3: Estimated Housing Need, 2011-16

	Arun National Park	Chichester National Park
Current (Backlog) Housing Need	45	239
Need from Newly-Forming Households	146	484
Existing Households Falling into Need	18	182
Total Need (=1+2+3+4)	209	905
Supply from Relets	70	394
Supply from Development Pipeline	0	82
Total Supply	70	476
Net Need (=4-7)	139	429
Net Need per Year (=8/5)	28	86

- 4.6 The housing needs analysis does not look at all housing needs, but specifically the needs of those who can't afford market housing. It assumes that households spend no more than 25% of their gross income on housing costs, and assumes that all households in 'housing need' are housed in affordable homes (which includes provision that the home remains at an affordable price for future eligible households. In reality some households in housing need will be able to secure appropriate accommodation in the Private Rented Sector, supported by Local Housing Allowance.

- 4.7 However the Government's welfare and benefit reforms may impact both on levels of households falling into housing need and on the supply of housing to meet need, in both the private and social rented sectors. In particular the size criteria for working-age households in the social rented sector to be introduced in 2013 may result in a short-term increase in need for smaller properties. Similarly the Government's attempts to control growth in LHA payments may result in some increases in pressures for social rented accommodation by restricting the supply of properties to households in need from the private rented sector. The affordable rent tenure and flexible tenancies both aim to support increases in the supply of affordable properties and given the levels of need identified,

should be carefully considered. The SHMA Update recommends that Coastal West Sussex authorities consider policies regarding flexible tenancies, working with Registered Providers; and work to support households in housing need to access suitable housing in the private rented sector.

- 4.8 The evident shortfall of affordable housing of 226 homes over the 2011-16 period in those wards in Coastal West Sussex which fall mainly within the National Park provides a strong evidence base to support policies seeking affordable housing provision in new development. However the viability of residential development and available funding also needs to be considered in setting policies. The SDNPA is undertake further work to consider the viability of residential development to inform policies within its Core Strategy on affordable housing.

Need for Different Types of Affordable Homes

- 4.9 Analysis of households incomes has been used to consider levels of need for different types of affordable housing. A household is considered to afford intermediate housing is they can afford between 80-100% of market rents. They are included in the affordable rented category if they could afford more than existing social rents but would not be able to access intermediate housing. Figure 4.4 sets out the household incomes necessary to access different types of homes:

Figure 4.4: Income Thresholds for Intermediate Housing

Area	Income required to access market housing	Income below which affordable rented housing is required	Income below which social rented housing is required
Arun National Park	£38,200	£28,300	£18,400
Chichester National Park	£37,200	£29,800	£19,900

- 4.10 Taking account of both need for different types of affordable property and the existing supply of homes, Figure 4.5 sets out net needs for different types of properties.

Figure 4.5: Net Need for Different Types of Affordable Homes, 2011-16

Area	Intermediate	Social/affordable rented
Arun National Park	26%	74%
Chichester National Park	34%	66%
Coastal West Sussex	21%	79%

- 4.11 The evidence suggests a higher requirement for intermediate housing (34%) within those parts of the National Park which fall within Chichester District. This partly reflects the existing level of social rented housing (15% of the housing stock in 2001). In Arun District there is a higher requirement for intermediate housing within the National Park (26%) relative to other parts of the District.

- 4.12 The high intermediate housing requirement in this area and the National Park is also influenced by the profile of incomes of households in this area. However it should be recognised that, particularly in the short-term, many households in need which fall into this intermediate category may not have sufficient deposits to be able to purchase shared ownership or equity homes.
- 4.13 The SHMA Update recommends that a minimum of 20% of affordable housing should be intermediate housing in the short-term, increasing to 30% over the longer-term across Coastal West Sussex. The specific tenure mix on individual sites should however take account of the local needs evidence in the settlement at the time of any planning application.

5 FUTURE HOUSING REQUIREMENTS

- 5.1 The SHMA Update forms part of the commissioning authorities evidence base to support policies in current or emerging Local Plans. The National Planning Policy Framework⁴ sets out that Local Plans should seek to meet objectively assessed development needs across the housing market where this is consistent with sustainable development, but specifically recognises the statutory purposes of National Parks and attaches great weight to conserving landscape and scenic beauty, recognising that this may mean that it is appropriate for development to be restricted where it conflicts with these objectives.
- 5.2 The SHMA Update includes projections for future housing requirements, for both affordable and market housing, in those wards Coastal West Sussex whose population fall predominantly within the National Park. Figure 5.1 presents trend-based projections (based on 10 year migration trends) for population and dwellings, and the level of change in the resident workforce that this will support.
- 5.3 The projection indicates that over the 20 year period, should past population trends continue, just over 3,000 homes would be required within those parts of the National Park which fall within Coastal West Sussex.

⁴ CLG (March 2012) *National Planning Policy Framework*

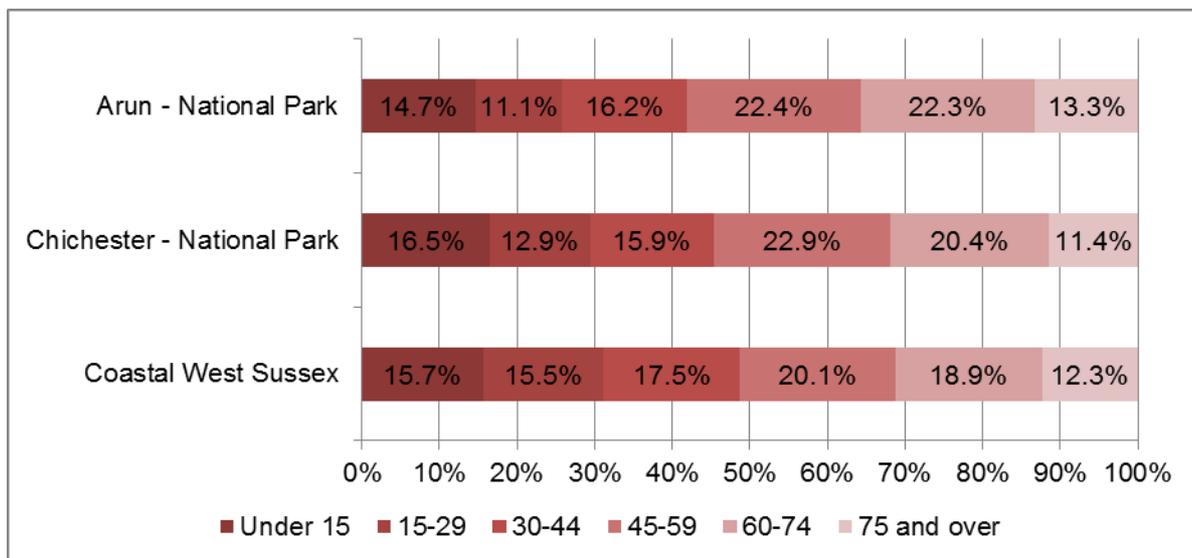
Figure 5.1: Demographic Projection, 2011-31

Area	Population Growth		Housing Numbers		Employment Growth	
	Total	% change	Total	% change	Total	% change
Arun – National Park	1,373	18.10%	787	22.80%	490	13.50%
Chichester – National Park	4,242	13.40%	2,240	16.20%	566	3.60%
Coastal West Sussex	64,957	15.00%	36,436	18.90%	16,844	8.30%

- 5.4 The statutory purposes of the National Park provide a strong rationale for restricting levels of development. It needs to be recognised that there are a number of wider strategic development constraints which may restrict the ability of the local authorities within the Housing Market Area to meet identified development needs. These include issues associated with flooding; the National Park’s designation which affords a strong level of protection from development pressures; and infrastructure including those associated with the impact on the A27 and other key road links.
- 5.5 The demographic projections prepared within the SHMA Update indicate overall housing need/demand across the Sussex Coast Housing Market for between 63,400 – 69,900 homes over the period between 2011-31 (3170-3500 homes per annum) based on past demographic trends. It however seems highly unlikely given the land availability and infrastructure constraints across the sub-regional housing market that this level of housing provision can be achieved. The potential identified in current or emerging Local Plan policies could support (in broad terms) between 44,000 – 45,500 homes over the 2011-31 period.
- 5.6 Given the evident development constraints across the Sussex Coast Housing Market, the SHMA Update recommends that a common statement is jointly prepared which articulates the strategic development constraints which exist. It recommends that the local authorities across the sub-region collaborate to consider further options for strategic development which could be brought forward in the longer-term such as through a future review of Local Plans, together with appropriate strategic infrastructure to support this. It will be important that the SDNPA engages in this work in accordance with the Duty to Cooperate introduced in the Localism Act.
- 5.7 Restricted housing provision within the National Park is likely to influence migration trends. Figure 5.2 profiles the age structure in the wards in Arun and Chichester District which predominantly fall within the National Park. It shows that these areas have a higher proportion of people aged 45-74 relative to the rest of the sub-region (and a higher proportion aged over 75 for those parts of the

Park which are in Arun District). Moving forward we can expect growth in the population of older persons.

Figure 5.2: Age Structure, 2010



Source: ONS

Need for Different Sizes of Affordable Housing

- 5.8 Based on analysis of demographic trends, potential housing supply policies and consideration of how households occupy homes, the SHMA Update has estimated requirements for different sizes of affordable homes. The findings for the National Park are shown in Figure 5.3.
- 5.9 Compared to the sub-regional profile, there is a higher requirement for two- and three-bedroom affordable properties in those parts of Chichester District which fall within the National Park. In Arun District in contrast, there is a higher requirement for 1-bed affordable properties and for those with 4 or more bedrooms.

Figure 5.3: Estimated Size of Dwellings Required 2011 to 2031 – Affordable Housing

Sub-area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Arun National Park	48%	29%	16%	7%
Chichester National Park	27%	40%	31%	2%
Coastal West Sussex	30%	38%	28%	3%

- 5.10 The SHMA Update brings together this demographic-driven analysis with consideration of size requirements of households on housing registers (considering those overall and in priority groups). On this basis it recommends the following affordable housing tenure mix at a local authority level:

Figure 5.4: Recommended Affordable Housing Mix by Size

	1-bed	2-bed	3-bed	4+ bed
Arun	15-20%	35-40%	30-35%	10-15%
Chichester	10-15%	30-35%	35-40%	15-20%

- 5.11 In applying these to individual development sites, regard should be had to the nature of the development site and character of the area, and to up-to-date evidence of need as well as the existing mix and turnover of properties at the local level (village/neighbourhood)

Market Housing

- 5.12 The SHMA Update has used a demographic-driven approach to assess market housing requirements, taking account of how the population structure is expected to change and requirements for different types and sizes of homes. The findings of this analysis are shown in Figure 5.3 below.
- 5.13 Across the National Park the demographic driven analysis indicates that 25% of the market housing needed would be for smaller one- and two-bed properties, 50% for 3-bed properties, and 25% for properties with four or more bedrooms. This takes account of the potential that older households may downsize to release equity from existing homes.

Figure 5.5: Estimated Size of Dwellings Required 2011 to 2031 – Market Housing

Sub-area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Arun National Park	9%	38%	42%	11%
Chichester National Park	4%	21%	47%	20%
Coastal West Sussex	8%	32%	47%	13%

- 5.14 The earlier analysis however demonstrates that there are significant affordability barriers for younger households in accessing suitable market housing in the National Park, influenced by both house prices and the nature of the existing housing stock (which is skewed toward larger and more expensive properties). On this basis we consider that a greater proportion of market housing should be targeted as smaller and lower value properties, in Council Tax Bands A-E.

5.15 We consider that the following mix of market housing would be appropriate for strategic planning purposes:

- 40% 1 and 2-bed properties;
- 40% 3-bed properties; and
- 20% 4+ bed properties.

5.16 It would also be appropriate to seek to control the growth as far as possible in second home ownership (such as through removing Council Tax discounts).

6 HOUSING NEEDS OF SPECIFIC GROUPS

6.1 As of 2011 it was estimated that 24.4% of the population of the National Park area (within Coastal West Sussex) was aged 65 or over, by 2031 this is expected to increase significantly to 32.5% (based on our 10-year trend-based projection). Older persons are more likely to under-occupy homes. We would expect under-occupation to increase. They are also more likely to live in social rented housing (especially single pensioner households). With the projected increases in older persons there may therefore be additional pressure on the affordable housing stock from such households.

6.2 The growing older population (particularly in the oldest age groups) will also result in growth in households with specific housing needs. This will create demand for alterations to properties (such as to bathrooms, showers and toilets, provision of emergency alarms or help maintaining homes). Many of these can be resolved in situ through adaptations to existing properties and through delivery of new properties which meet 'lifetime homes' standards and can be adapted to households' changing needs.

6.3 The growing older population is also likely to lead to some increase in requirements for specialist housing solutions. Over the 2011 to 2030 period a 68% growth in older population with dementia, and 58% increase in the older population with mobility problems is projected across the whole Coastal West Sussex area – similar increases can be expected in the National Park part of the study area. From a planning point of view, some of these people will require specialist housing such as sheltered or extra care provision. Increasing numbers of older people with health problems will also require joint-working between housing, social care and health (Councils and NHS). The analysis also suggests that the care home population can be expected to increase substantially to 2030.

- 6.4 The SHMA recommends that planning policy should promote delivery of housing for older persons, including lifetime homes and delivery of specific housing for older people as part of major development schemes. The Council might also consider working with Registered Providers to develop shared equity homes targeted at older persons, and consider developing a specific register of accessible housing.
- 6.5 The BME population in the National Park area of Coastal West Sussex is relatively small with an estimated 3.8% of the population being from a non-White (British/Irish) group in 2001 (a figure in line with the whole of the HMA). About two-thirds of the BME population can be described as White-Other. Whilst we do not have specific information for the National Park area; experimental data from ONS suggests that the proportion of the population from a non-White (British/Irish) group in has risen significantly since 2001.
- 6.6 There are very few BME households on the Councils' Housing Register despite some indication of likely housing problems relating to overcrowding, condition and security of tenure. Where possible BME groups should be encouraged to register for housing where there is a clear need for an affordable solution to be provided. BME households typically exhibit higher levels of overcrowding and are more likely to live in the Private Rented Sector. The SHMA recommends that specific research is progressed to further understand the housing support needs of BME groups and consider how these can be addressed through multi-agency working.