



1. HOUSING NEED

Our annual Local Housing Need has increased over time



2018¹ 2024²

WHY HAS OUR HOUSING NEED INCREASED?

- Ageing population
- Decreasing household sizes
- People having children later
- People moving to the area for jobs
- Personal choice
- Affordability
- Mismatched demand and supply



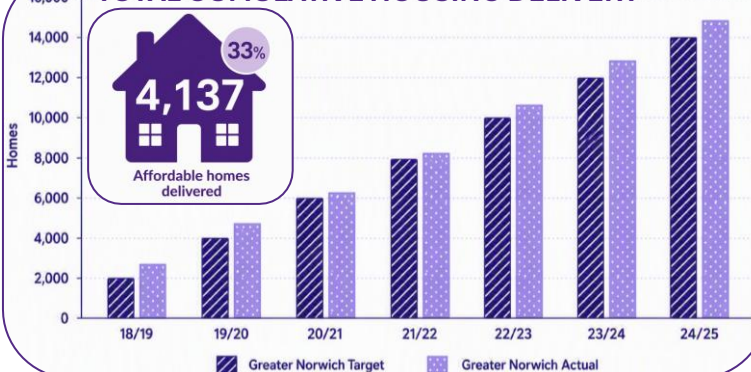
Total housing need for 2026-2045 has increased **34%**

We need to provide sites for around an additional **20,000 homes** from 2026-2045



2. DELIVERY AND PERFORMANCE

TOTAL CUMULATIVE HOUSING DELIVERY³



14,508

Total homes delivered 2018-2025³

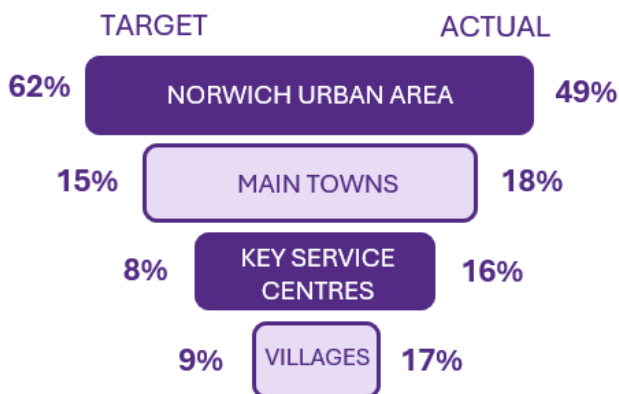
68%

on GNLP allocated sites³

32%

on non-allocated sites³

HOUSING DELIVERY ACROSS THE SETTLEMENT HIERARCHY⁴



3. POSSIBLE GROWTH OPTIONS

Brownfield intensification

New settlements

Dispersed growth in villages

Development around employment hubs

Urban extensions

Development in well-connected places