

Harworth & Bircotes

Housing Needs Assessment (HNA)

June 2023

Quality information

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Revision History

Revision	Date	Authorized	Position
1. First Draft	April 2023	Antonio Vinti	Environmental Consultant
2. Internal Review	April 2023	Paul Avery	Principal Housing Consultant
3. Group Review	May 2023	Karen Tarburton	Community Development and Funding Manager
4. Locality Review	June 2023	Annabel Osborne	Neighbourhood Planning Officer
5. Final Report	June 2023	Antonio Vinti	Environmental Consultant

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List of acronyms used in the text:

BDC Bassetlaw District Council

DLUHC Department for Levelling Up, Housing and Communities (formerly

MHCLG)

HEDNA Housing and Economic Development Needs Assessment

HMA Housing Market Area

HNA Housing Needs Assessment

HRF Housing Requirement Figure (the total number of homes the NA is

expected to plan for, usually supplied by LPAs)

HLIN Housing Learning and Improvement Network

HRP Household Reference Person

LA Local Authority

LHN Local Housing Need

LHNA Local Housing Needs Assessment

LPA Local Planning Authority

LSOA Lower Layer Super Output Area

MSOA Middle Layer Super Output Area

NA Neighbourhood Area

NPPF National Planning Policy Framework

NPSG Harworth & Bircotes Neighbourhood Plan Steering Group

OA Output Area

ONS Office for National Statistics

PPG Planning Practice Guidance

PRS Private Rented Sector

RQ Research Question

SHMA Strategic Housing Market Assessment

VOA Valuation Office Agency

Executive Summary

Affordability and Affordable Housing

Current Tenure Profile

Approximately 65% of Harworth & Bircotes' dwellings are in market ownership tenures. This percentage is below the ownership rates of Bassetlaw (68%), but higher than England (61%). Market rent tenures account for 15% of the Parish's total tenure mix – this is lower than the equivalent proportion for Bassetlaw (16%) and England (21%). Finally, Harworth & Bircotes has a relatively high offering of dwellings in affordable tenures, with Social Rent and Shared Ownership tenures accounting for 19% and 1% of its tenure mix, respectively. The proportion in Shared Ownership tenures is consistent across all three geographies, however, Harworth & Bircotes has a higher proportion of dwellings in Social Rent tenures compared to both Bassetlaw (15%) and England (17%).

Affordability

Average market rent in Harworth & Bircotes is generally considered affordable to households on average incomes for the area. Households of two lower quartile earners are also able to afford average market rents.

Average earning households, however, fall below the affordability threshold for average market ownership. These households may be able to afford entry level market ownership properties, although they would need to sacrifice slightly more salary for the property to become affordable.

The unaffordability of average market ownership for average earning households is likely driven by strong house price appreciation in the Parish over the past ten years; between 2013 and 2022, the median overall house price in Harworth & Bircotes rose by 92%.

The Need for Affordable Housing

An offering of Affordable Housing tenures will be necessary in Harworth & Bircotes to bring housing to attainable prices for many households of varying home ownership/renting aspirations:

- First Homes discounts (especially at the 40% and 50% discounts) would be valuable in bringing affordable ownership below the affordability threshold for average earning households and households with two lower quartile earners. A minimum share of 10% of all new housing, and 25% of all new affordable housing, is required to be delivered on First Homes tenures.
- Shared Ownership is also a viable route to home ownership for average earning households (at all equities) and households with two lower quartile earners (at the 10% and 25% equities).
- A small offering of Rent to Buy tenures will be useful for households who lack sufficient deposits rather than sufficient incomes.

 Social Rent tenures are vital for lower income households. This is especially the case for households with one lower quartile income earners, who without these discounts would likely be priced out of the area.

Affordable Housing policy

Harworth & Bircotes has been provided with a housing delivery allocation of 2,199 in the emerging Local Plan. It is understood that all of the dwellings have been allocated.

According to BDC, there are around 297 households in need of affordable rented housing in Harworth & Bircotes.

AECOM calculations suggest that over the Neighbourhood Plan period, affordable renting need will be accommodated in Harworth & Bircotes without any additional dwellings on social/affordable rent tenures. Conversely, AECOM calculation suggests that around 304 dwellings on affordable ownership tenures will be required to satisfy need by the end of the Neighbourhood Plan period.

A 50% rent to 50% ownership split is suggested for new Affordable Housing in Harworth & Bircotes to strike a balance between providing houses for those with the most acute needs in the short term (households seeking affordable rented tenures) whilst also addressing the affordability issues and larger scale of demand associated with market ownership.

Type and Size

The Current Housing Mix

The 2021 Census data presents that Harworth & Bircotes' housing stock is dominated by semi-detached dwellings, which account for 57% of all dwelling types. Terraced, detached, and flats are found in comparatively moderate frequencies, at 19%, 18%, and 4%, respectively.

Whilst Bassetlaw and England's dwelling mixes all have semi-detached as their most common type, Harworth & Bircotes' proportion of semi-detached is significantly higher than at the district and national level. This results in the two wider geographies having a more varied mix of dwelling types.

Similarly, the 2021 Census also presents that the Parish's dwelling size mix is dominated by a single category – three-bedroom dwellings, accounting for 58% of dwellings. Two-bedrooms, four-or-more-bedrooms, and one-bedrooms account for 21%, 12%, and 7% of the total size mix, respectively.

Population Characteristics

As with most areas in the UK, Harworth & Bircotes' population is ageing, and will continue to do so over the Neighbourhood Plan period; households in the 55-64 and 65-and-over age bands are expected to grow by 7% and 79%, respectively, between 2011 and 2043. All other household age bands are expected to reduce in size over the same period, except for 25-34, which is expected to grow by 8%. This trend of growth would see the 65-and-over household age band surpassing the 35-54 household age band as the most common in the Parish.

The issue of an ageing population is a key concern for NPSG, who perceive that the area's ageing population should be supported by policies in the emerging Neighbourhood Plan update. Focussing future delivery towards smaller-sized dwellings will be the best approach from a housing perspective to accommodate older households. This approach may also have positive knock-on effects to the wider property market as it may allow smaller households who currently occupy larger dwellings to downsize, which could increase the number of mid to larger sized dwellings available on the market.

Future Population and Size Needs

It may be appropriate for new dwellings in the Parish to work towards providing more variety in Harworth & Bircotes' dwelling stock, by offering a range of dwelling types and sizes, with a slight preference towards those in sizes other than three-bedrooms and in types other than semi-detached. It should be noted that no dwelling size or type should be completely excluded from future housing delivery, despite the aim of rebalancing the type and size mix to move away from those that currently dominate the housing stock. This is particularly the case for three-bedroom dwellings, which are outlined in BDC's HEDNA as a preferred dwelling size for future developments across the District.

Should NPSG desire to target provision of dwellings for older households, it is recommended that there would be more smaller dwellings built than larger dwellings; however, the provision of larger dwellings should still be considered as an option to balance the Parish's housing stock, and provide options to a range of household needs.

It is important to remember that other factors should be considered in determining the dwelling mix that is desirable in the parish or on any particular site. These include the specific characteristics of the nearby stock of housing (such as its condition and design), the role of the NA or site within the wider housing market area (linked to any Local Authority strategies or plans) and site-specific factors.

Specialist Housing for Older People

Current Stock and Demographics

In Harworth & Bircotes there are 279 specialist housing units for older people, and a total of 778 individuals aged 75 or over. Based on these figures, the current provision of specialist accommodation for individuals aged 75 or over in the Parish is 356 per 1,000 of the 75+ population (a common measure of specialist housing supply).

Future provision of specialist housing for older people will be needed to serve arising future demand, with population growth in Harworth & Bircotes expected to be driven by the older population age bands (a theme that was also identified in the 'Type and Size' chapter). Specifically, the number of 75+ individuals in the Parish is expected to almost double by 2043, and account for around five more percentage points of the total population compared to current levels. Without additional units of specialist housing in Harworth & Bircotes, it is likely that those in need will be forced to move out of the area.

Need for Specialist Housing for Older People

Our calculations suggest that Harworth & Bircotes will require in the range of 97 to 151 units of specialist housing for older people over Neighbourhood Plan period. These estimates are based on the projected growth of the older population, thereby assuming that today's older households are already well accommodated.

Emerging Local Plan policy ST31 provides explicit encouragement for development to accommodate specific groups such as older people, and is likely to support the delivery of new specialist accommodation for older people in Main Towns, such as Harworth & Bircotes.

The emerging Local Plan does not provide any specific guidance for the tenure of new specialist housing for older people. Should NPSG want to influence the tenure of specialist accommodation through Neighbourhood Plan policy, this should be done with consultation from Bassetlaw Council.

Wherever specialist housing is to be accommodated, partnership working with specialist developers is recommended, so as to introduce a greater degree of choice into the housing options for older people who wish to move in later life.

Need for Additional Care Home Units

Our calculations (which do not consider tenure types) suggest that 36 additional care home units in Harworth & Bircotes will be required to satisfy arising need over the Neighbourhood Plan period.

Alternative Solutions

In addition to seeking specialist supply through Harworth & Bircotes' Neighbourhood Plan housing delivery targets, another avenue open to NPSG is to discuss the standards of accessibility and adaptability in new development to be met in the Neighbourhood Plan with the Local Planning Authority. The emerging Local Plan targets that all new housing in the District should meet the M4(2) accessible and adaptable Building Regulations standard by 2038.

1. Context

Local Context

- 1. Harworth & Bircotes is a Neighbourhood Area (NA) located in the district of Bassetlaw in Nottinghamshire. The NA boundary overlaps with the boundary of Harworth & Bircotes parish and was designated in June 2013.
- 2. For the purposes of this Housing Needs Assessment (HNA), the Neighbourhood Plan is envisaged to start in 2024 and extend to the end of 2043, therefore covering a period of 20 years. The evidence supplied in this report will look forward to the Neighbourhood Plan end date of 2043, but where possible will also provide annualised figures which can be extrapolated to a different term if the Neighbourhood Plan period changes.
- 3. Harworth & Bircotes is a semi-rural NA, with one main settlement of the same name. The NA is located 10 miles south of Doncaster, and 9 miles north of Worksop.
- 4. The NA is served by many amenities, including a number of supermarkets, Harworth & Bircotes Sports Pavilion, a post office, health services (including a surgery and dentist), and schools (primary and secondary).
- 5. Harworth & Bircotes is well-equipped to accommodate travel by active and private methods, owing to its well-connected public footpath and road network. It also has convenient links to the wider area, with the A1 running through the west of the NA. Harworth & Bircotes also benefits from regular bus services to Doncaster and Worksop. Finally, there is no train station within Harworth & Bircotes or its immediate vicinity; the closest train stations are in Doncaster and Worksop.

The NA Boundary and Key Statistics

6. For Census purposes, the NA is made up, like the rest of England, of statistical units called Output Areas (OAs). A breakdown of the OAs relevant to Harworth & Bircotes is provided in Appendix A. A map of the Neighbourhood Plan area appears below in Figure 1-1.

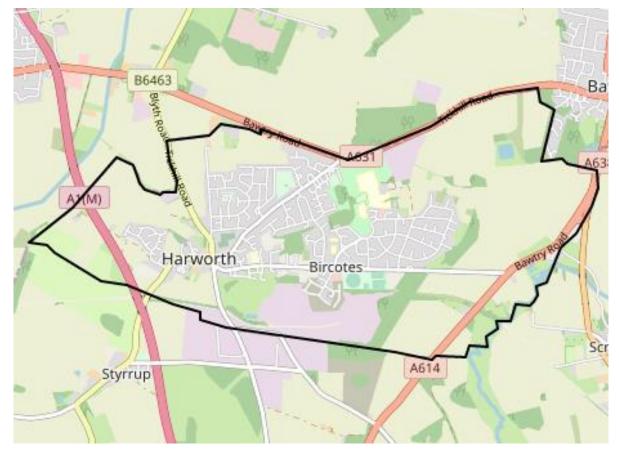


Figure 1-1: Map of the Harworth & Bircotes Neighbourhood Area

Source: Nomis 1

- 7. At the time of the 2011 Census the NA was home to 7,948 residents, formed into 3,338 households and occupying 3,490 dwellings. The 2021 Census indicates population growth of around 939 individuals (or 12%) since 2011², recording a total of 8,887 residents and 3,931 households. The average household size fell slightly over this period.
- 8. At the time of writing, the 2021 Census data for the number of dwellings at a local level has not yet been released. However, Bassetlaw District Council (BDC) have provided data on the new homes that have been registered in the Parish since March 2011. The net number of new homes built in that time was 883. Adding these completions to the 2011 Census dwelling figure (3,490 dwellings) produces an updated estimate for total number of dwellings in the Parish of 4,373 in March 2023. This rate of growth is slightly faster than the rate of population growth experienced in the Parish.
- 9. Further data from the 2021 Census is expected to be released in 2023, and will provide a more accurate picture of housing numbers.

Available at https://www.nomisweb.co.uk/reports/localarea?compare=E04007812

² It is worth noting that this figure is an estimate only, based on data which is mostly available at local authority level such as administrative registers of births and deaths, data on moves between local authorities, small-area population estimates and official population projections, and not based on a survey count.

The Housing Market Area Context

- 10. Whilst this HNA focuses on Harworth & Bircotes NA it is important to keep in mind that neighbourhoods are not self-contained housing market areas. Housing market areas are usually wider than local authority areas and often stretch across a number of districts or boroughs. This is because housing market areas are inherently linked to the labour market, employment patterns and travel to work areas. However, in the case of Harworth & Bircotes, the Bassetlaw Housing and Economic Development Needs Assessment (HEDNA)³ focusses solely on the local authority area. This means that when households who live in these authorities move home, the vast majority move within this geography. The housing market area also has links to other neighbouring areas however, including the Sheffield City Region.
- 11. At the neighbourhood scale it is not possible to be definitive about housing need and demand because neighbourhoods, including Harworth & Bircotes, are closely linked to other areas. In the case of Harworth & Bircotes, changes in need or demand in settlements nearby (such as Worksop and Doncaster) is likely to impact on the neighbourhood.
- 12. In summary, Harworth & Bircotes functions within a wider strategic area. As well as fostering good working relationships with the local planning authority (BDC), it is therefore useful to think about the *role* of the neighbourhood within the wider area. This HNA can provide evidence to understand this role and the specific features of the neighbourhood within this wider context. Neighbourhood Plans can have a significant impact in shaping their neighbourhoods, enhancing the positive role the neighbourhood plays within the wider housing market, or developing polices to change entrenched patterns and improve housing outcomes in the neighbourhood and wider area.

Planning Policy Context

- 13. Neighbourhood Plans are required to be in general conformity with adopted strategic local policies.⁴
- 14. The relevant adopted Local Plan for Bassetlaw consists of the Core Strategy and the Development Management Policies Development Plan Document (DPD)⁵, adopted in December 2011. The Core Strategy identifies the amount of new housing and development up to 2028 as well as the key settlements where development will be directed. Alongside the Core Strategy sits the Affordable Housing Supplementary Planning Document (SPD)⁶, adopted in January 2014.
- 15. The emerging Local Plan for Bassetlaw is due to supersede the adopted Core Strategy, with the Draft Bassetlaw Local Plan⁷ covering the period 2020-2038. The

³ Available at: https://www.bassetlaw.gov.uk/media/6017/bassetlaw-hedna-nov-2020.pdf

⁴ A description of the Basic Conditions of Neighbourhood Planning is available at https://www.gov.uk/guidance/neighbourhood-planning--2#basic-conditions-for-neighbourhood-plan-to-referendum

⁵ Available at https://www.bassetlaw.gov.uk/media/1543/cs1adoptedcorestrategy.pdf

⁶ Available at https://www.bassetlaw.gov.uk/media/2113/affordablehousingspd.pdf

⁷ The most recent version is the Publication Version (May 2022). Available at https://www.bassetlaw.gov.uk/media/6862/lp-second-addendum.pdf

Publication Version of the Local Plan along with its Second Addendum was submitted to the Secretary of State in July 2022, following a number of consultation stages and updates. Examination in Public was planned for Autumn/Winter 2022 with adoption anticipated for Summer 2023. Upon adoption, this emerging Local Plan will replace the Core Strategy and Development Management Policies DPD.

- 16. A detailed breakdown of the Local Plan policies relevant to housing need is provided in Appendix B. Here, it is worth summarising the most important points of the emerging Local Plan:
 - Emerging Local Plan Policy ST1 identifies an overall housing target of 10,476 homes per year for the district;
 - Policy ST1 also defines Harworth & Bircotes as a Main Town, which is the highest priority category for growth in the District. It specifies that over the Local Plan period, Harworth & Bircotes is expected to deliver 2,199 new dwellings.
 - Policy ST29 states that 20% of all new dwellings on brownfield sites, and 25% of all new dwellings on greenfield sites, are expected to be delivered as Affordable Housing on sites of 10 or more units, or sites larger than 0.5ha. The suggested tenure mix within Affordable Housing is 50% affordable rent to 50% affordable home ownership;
 - Policy ST31 sets out an expectation that 100% of new homes on market tenures will be built to Category M4(2) accessibility standards. There is no expectation set in relation to new dwellings in affordable tenures.

Quantity of Housing to Provide

- 17. The NPPF 2021 (paragraphs 66 and 67) requires LPAs to provide neighbourhood groups upon request with a definitive or an indicative number of houses to plan for over the Neighbourhood Plan period.
- 18. BDC has fulfilled that requirement by providing Harworth & Bircotes with a definitive figure of 2,199 dwellings to be accommodated within the NA by the end of the emerging Local Plan period. It is understood that no new allocations are expected in Harworth & Bircotes as the 2,199 figure is satisfied through completions and existing allocations.

2. Objectives and Approach

Objectives

19. This Housing Needs Assessment (HNA) is structured according to a number of themes or topics that were agreed at the outset of the research with the Harworth & Bircotes Neighbourhood Plan Steering Group (NPSG). These themes are broadly aligned with the kinds of housing policy areas available to neighbourhood plans, and each will form a distinct chapter of this report. The sub-sections below give a brief overview of the objectives of each chapter.

Affordability and Affordable Housing

- 20. Neighbourhood plans may include policies that influence the scale of Affordable Housing provision and the mix of different tenures and products provided through new housing development.
- 21. This chapter has three aims, each given its own sub-section:
 - To establish the existing tenure of homes within the NA at present (owner occupied, private rented, social/affordable rented, shared ownership);
 - To examine the **affordability** of different tenures by considering house prices, rents, local incomes and earnings; and
 - To estimate the scale of **need** for Affordable Housing, including the need for those who cannot afford to rent and those who cannot afford to buy.
- 22. The evidence gathered here can be used to justify planning policies in the Neighbourhood Plan, but it is likely that other supporting evidence may be needed, for example on viability. Local Plans typically include policies on Affordable Housing and whilst the Neighbourhood Plan must be in general conformity with these strategic policies, there is scope for Neighbourhood Plan policies to adopt some local variety where this is supported by the evidence.

Type and Size

- 23. It is common for neighbourhood plans to include policies that influence what form new housing should take in terms of type and size. This requires evidence of what local people need.
- 24. The focus of this chapter is to identify relevant trends and potential gaps in the market that can be used to justify planning policies. It has three aims, each given its own sub-section:
 - To establish what **mix** of housing exists in the NA at present;
 - To describe relevant characteristics of the local **population**; and
 - To look to the **future**, considering how the population is likely to evolve and what mix of homes would be most appropriate to build.
- 25. In addition to the direction of travel revealed by statistics, a variety of reasons sit behind people's housing choices that are less easy to predict, including wealth, accessibility requirements and personal preference. The conclusions and

recommendations given here are sufficient for justifying planning policies but are not definitive. It is also appropriate to take into account other factors and evidence if desired.

Specialist Housing for Older People

- 26. It may be appropriate for neighbourhood plans in areas with aging populations to include policies relating to specialist housing for older persons.
- 27. This chapter supplements the demographic evidence relating to Type and Size, including the potential demand for downsizing, to consider the quantity and characteristics of need for housing for older people with some form of additional care. Its approach is as follows:
 - To review the current provision of specialist housing in the NA;
 - To estimate the **potential demand** for this form of accommodation with reference to the projected growth in the older population and current rates of mobility limitation; and
 - To discuss the potential for meeting this need through adaptations to the mainstream stock and other **additional considerations**.
- 28. This element of the HNA recognises that the majority of older people will live in the mainstream housing stock and that there is no single way to meet their needs. It may also be inappropriate to focus excessively on the needs of one group or to promote a specialist scheme in a location that lacks adequate services. These issues will be drawn out.

Approach

- 29. This HNA assesses a range of evidence to ensure its findings are robust for the purposes of developing policy at the neighbourhood plan level. This includes data from the 2021 and 2011 Censuses and a range of other data sources, including:
 - ONS population and household projections for future years;
 - ONS population age estimates for parishes (as 2021 Census data does not yet include age profile at small scales);
 - Valuation Office Agency (VOA) data on the current stock of housing;
 - Land Registry data on prices paid for housing within the local market;
 - Rental prices from Home.co.uk;
 - Local Authority housing waiting list data; and
 - Bassetlaw Housing and Economic Development Needs Assessment, November 2020.8
- 30. Data from the 2021 Census continues to be released throughout 2023. At present, the available data covers population, households, tenure, and dwelling stock characteristics. Some data at the localised level, including parishes, will not be available until later in 2023, as well as data comparing numerous variables. As such, neighbourhood level HNAs will draw on the latest available data from the

⁸ Available at https://www.bassetlaw.gov.uk/media/6017/bassetlaw-hedna-nov-2020.pdf.

2021 Census where possible and will also continue to use other data sets, including 2011 Census, Valuation Office Agency data, and ONS parish projections to build up evidence at the neighbourhood level.

3. Affordability and Affordable Housing

Introduction

- 31. Neighbourhood plans may include policies that influence the scale of Affordable Housing provision and the mix of different tenures and products provided through new housing development.
- 32. This chapter has three aims, each given its own sub-section:
 - To establish the existing **tenure** of homes within the NA at present (owner occupied, private rented, social/affordable rented, shared ownership);
 - To examine the **affordability** of different tenures by considering house prices, rents, local incomes and earnings; and
 - To estimate the scale of **need** for Affordable Housing, including the need for those who cannot afford to rent and those who cannot afford to buy.
- 33. The evidence gathered here can be used to justify planning policies in the Neighbourhood Plan, but it is likely that other supporting evidence may be needed, for example on viability. Local Plans typically include policies on Affordable Housing and whilst the Neighbourhood Plan must conform with these policies, there is scope for Neighbourhood Plan policies to adopt some local variety where this is supported by the evidence.

Definitions

- 34. This section uses a range of technical terms which are useful to define at the outset:
 - Tenure refers to the way a household occupies their home. Broadly speaking, there are two categories of tenure: market housing (such as homes available to purchase outright or rent from a private landlord) and Affordable Housing (including subsidised products like social rent and shared ownership).
 - Affordability refers to the relationship between the cost of housing to buy or rent and the incomes and earnings of households.
 - The definition of Affordable Housing is set out in the NPPF 2021 (Annex 2) as 'Housing for sale or rent, for those whose needs are not met by the market...' We refer to Affordable Housing, with capital letters, to denote the specific tenures that are classified as affordable in the current NPPF (Annex 2). A relatively less expensive home for market sale may be affordable but it is not a form of Affordable Housing.
 - A range of affordable home ownership opportunities are included in the Government's definition of Affordable Housing, to meet the needs of those aspiring to own a home. As part of this, the Government has introduced a

- new product called First Homes, although this is not yet reflected in Annex 2 of the NPPF.9
- **First Homes** is a new product and expected to be an important part of the strategy for improving access to home ownership. Its key features are explained in greater detail in Appendix C.

Current Tenure Profile

- 35. The current tenure profile is a key feature of the Neighbourhood Area (NA). Patterns of home ownership, private renting and affordable/social renting reflect demographic characteristics including age (with older households more likely to own their own homes), and patterns of income and wealth which influence whether households can afford to rent or buy and whether they need subsidy to access housing.
- 36. Firstly, Table 3-1shows that the most common tenure type in Harworth & Bircotes is private ownership, accounting for 65% of the total mix this is higher than the equivalent proportions of private rent in England (61%), but lower than Bassetlaw (68%). Social rent and private rent account for much smaller proportions in Harworth & Bircotes' tenure mix (15% and 19%, respectively). It is noteworthy that Harworth & Bircotes has a higher proportion of social rent tenures than private rent tenures, whereas the inverse is true for Bassetlaw and England. Finally, all three geographies have under 1% of their total tenure mix in shared ownership tenures.
- 37. Table 3-1 presents data on tenure in Harworth & Bircotes compared with Bassetlaw and England from the 2021 Census.
- 38. Firstly, Table 3-1 shows that the most common tenure type in Harworth & Bircotes is private ownership, accounting for 65% of the total mix this is higher than the equivalent proportions of private rent in England (61%), but lower than Bassetlaw (68%). Social rent and private rent account for much smaller proportions in Harworth & Bircotes' tenure mix (15% and 19%, respectively). It is noteworthy that Harworth & Bircotes has a higher proportion of social rent tenures than private rent tenures, whereas the inverse is true for Bassetlaw and England. Finally, all three geographies have under 1% of their total tenure mix in shared ownership tenures.

Table 3-1: Tenure (households) in Harworth & Bircotes, 2021

Tenure	Harworth & Bircotes	Bassetlaw	England
Owned	65.3%	68.2%	61.3%
Shared ownership	0.5%	0.4%	1.0%
Social rented	19.3%	15.0%	17.1%
Private rented	14.9%	16.4%	20.6%

Sources: Census 2021, AECOM Calculations

39. It is also worth comparing how the tenure mix has changed in the last ten years, using the 2011 Census (see Table 4-2).

⁹ The shape that the new First Homes product will take is set out in a Ministerial Statement issued in May 2021, available here: https://questions-statements.parliament.uk/written-statements/detail/2021-05-24/hlws48. The relevant update to PPG is available here: https://www.gov.uk/guidance/first-homes#contents.

- 40. The most notable change in Harworth & Bircotes' tenure mix since 2011 is the growth in ownership tenures, increasing by 351 units (this is more than the growth of all the other tenure types combined).
- 41. Private rent tenures grew slightly more than social rent tenures (increasing by 169 compared to 107, respectively).
- 42. The tenure type that experienced the smallest growth was shared ownership, with 13 additional households in 2021 when compared to 2011.

Table 3-2: Tenure change (households) in Harworth & Bircotes, 2011-2021

Tenure	2011	2021	Actual Change	% Change
Owned	2,217	2,568	+351	15.8%
Shared ownership	8	21	+13	162.5%
Social rented	650	757	+107	16.5%
Private rented	416	585	+169	40.6%

Sources: Census 2021 and 2011, AECOM Calculations

Affordability

House Prices

- 43. House prices provide an indication of the level of demand for homes within an area. The relationship between house prices and incomes determines whether housing is affordable to local households and, to a large extent, what tenure, type and size of home they occupy. Changes in affordability over time can indicate pressures in the housing market. As such, it is useful for the evidence base for plans to examine trends in prices and consider what this reveals about the local housing market.
- 44. Figure 3-1 looks at the change in mean (the average), median (the middle value), and lower quartile (the value below which the lowest 25% of values fall) for house prices in Harworth & Bircotes based on Land Registry data. During the period of 2013-2022 house prices experienced a clear positive trend across the recorded measures. The 2022 mean house price in Harworth & Bircotes was £176,242, the median was £165,000, and the lower quartile was £149,496.
- 45. Compared to the wider area, Harworth & Bircotes' median house price is slightly cheaper than the rest of Bassetlaw, which has a median house price of £177,750 in 2022 (8% more than Harworth & Bircotes).

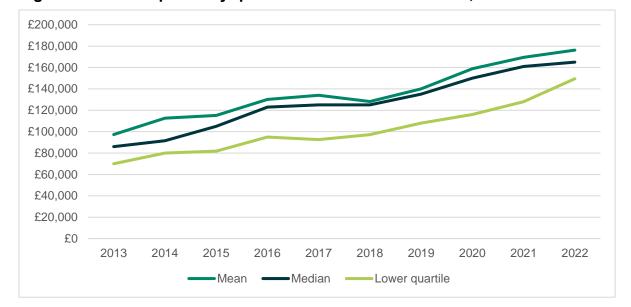


Figure 3-1: House prices by quartile in Harworth & Bircotes, 2013-2022

Source: Land Registry PPD

- 46. Table 3-3 breaks down house prices by type, presenting the median within each type. It shows that the average growth for median house prices across all types was 92%.
- 47. Looking closer at the different house types reveals that terraced and semidetached grew the most since 2013, by rates of 131% and 72%, respectively. Detached houses and flats also grew, but at lower rates – 50% and 36%, respectively.

Table 3-3: Median house prices by type in Harworth & Bircotes, 2013-2022

Туре	2013	2013	2014	2015	2016	2017	2018	2019	2020	2022	Growth
Detached	£160,000	£180,000	£164,000	£175,000	£189,999	£188,975	£199,999	£195,000	£235,000	£239,995	50%
Semi-detached	£94,000	£89,950	£96,000	£107,000	£105,250	£112,000	£124,500	£135,000	£140,000	£161,700	72%
Terraced	£67,000	£77,500	£80,000	£105,000	£104,000	£108,500	£120,395	£117,000	£127,500	£155,000	131%
Flats	£70,000	£70,000	-	£80,000	£80,000	£79,375	£85,500	£78,500	£70,000	£95,000	36%
All Types	£86,000	£91,525	£105,000	£123,000	£125,000	£125,000	£134,999	£150,000	£160,995	£165,000	92%

Source: Land Registry PPD

Income

- 48. Household incomes determine the ability of households to exercise choice in the housing market, and consequently the level of need for affordable housing products. Two sources of data are used to examine household incomes in the NA.
- 49. The first source is ONS's estimates of incomes in small areas. This is locally specific but limited to the overall average income (i.e. it does not provide the average income of lower earners). The average total household income locally was £35,600 in 2018 (the most recent year for this dataset). Discussion about the area to which this data applies is provided in Appendix A.
- 50. The second source is ONS's annual estimates of UK employee earnings. This provides lower quartile average earnings (i.e. the income of the lowest 25% of earners). However, it is only available at the Local Authority level. It also relates to

- individual earnings. While this is an accurate representation of household incomes where there is only one earner, it does not represent household income where there are two or more people earning. Bassetlaw's gross individual lower quartile annual earnings were £15,379 in 2020. To estimate the income of households with two lower quartile earners, this figure is doubled to £30,758.
- 51. It is immediately clear from this data that the spending power of average earning households and households of two lower quartile earners is similar. Whereas the spending power of these two groups is notable larger when compared to a household of one lower quartile earner.

Affordability Thresholds

- 52. To gain a clearer understanding of local affordability, it is useful to understand what levels of income are required to afford different tenures. This is done using 'affordability thresholds': the estimated amount of annual income required to cover the cost of rent or a mortgage given local housing prices.
- 53. AECOM has determined thresholds for the income required in Harworth & Bircotes to buy a home in the open market (average and entry-level prices), and the income required to afford private rent and the range of Affordable Housing tenures as set out in the NPPF. These calculations are detailed and discussed in more detail in Appendix C.
- 54. The key assumptions made in assessing the affordability of different tenures are explained alongside the calculations, but it is worth noting here that we have assumed that the maximum percentage of household income that should be spent on rent is 30% and that mortgage financing will be offered at a maximum of 3.5 times household income. These are standard assumptions across housing needs assessments at neighbourhood and local authority scale although different approaches are sometimes taken and a case can be made for alternatives. This is discussed in more detail at the start of Appendix C.
- 55. Table 3-4 summarises the estimated cost of each tenure, the annual income required to support these costs within the NA, and whether local incomes are sufficient. The income required column assumes the household already has access to a deposit (which we have assumed to be 10% of the value to be purchased) but does not reflect the possibility that households may already hold equity from an existing property. Although these factors may be crucial to whether housing will be affordable, they are highly dependent on individual circumstances that cannot be anticipated here.

Table 3-4: Affordability thresholds in Harworth & Bircotes (income required, £)

Tenure	Mortgage value (90% of price)	Annual rent	Income required	Affordable on average incomes?	Affordable on LQ earnings (single earner)? (£15,379)	Affordable on LQ earnings (2 earners)? (£30,758)
Market Housing				1		
Median House Price	£148,500	-	£42,429	No	No	No
Estimated NA New Build Entry-Level House Price	£180,000		£51,429	No	No	No
LQ/Entry-level House Price	£134,547	-	£38,442	Marginal	No	No
LA New Build Median House Price	£187,650	ı	£53,614	No	No	No
Average Market Rent	-	£9,072	£30,240	Yes	No	Yes
Entry-level Market Rent	-	£6,300	£21,000	Yes	No	Yes
Affordable Home Ownership						
First Homes (-30%)	£126,000	-	£36,000	Marginal	No	No
First Homes (-40%)	£108,000	-	£30,857	Yes	No	Marginal
First Homes (-50%)	£90,000	-	£25,714	Yes	No	Yes
Shared Ownership (50%)	£90,000	£2,500	£34,048	Yes	No	No
Shared Ownership (25%)	£45,000	£3,750	£25,357	Yes	No	Yes
Shared Ownership (10%)	£18,000	£4,500	£20,143	Yes	No	Yes
Affordable Rented Housing						
Affordable Rent	-	£5,056	£16,836	Yes	Marginal	Yes
Social Rent	-	£4,507	£15,010	Yes	Yes	Yes

Source: AECOM Calculations

56. Before considering each tenure category in turn, it is important to stress that these affordability thresholds have been calculated to give an indication of the costs of various tenures to inform Neighbourhood Plan policy choices. These figures rely on existing data and assumptions, and it is not possible to estimate every possible permutation. The income figures also disguise a large degree of variation. For simplicity the analysis below speaks in terms of tenure products being 'affordable' or 'not affordable' for different groups, but individual circumstances and the location, condition and other factors of specific properties in each category have a large impact. These conclusions should therefore be interpreted flexibly.

Market Housing for Purchase and Rent

- 57. Thinking about housing for purchase on the open market, it appears that local households on average incomes are unable to access even entry-level homes unless they have the advantage of a very large deposit. Market housing, even with the benefit of a higher than average income, is likely to remain out of reach to most. The median house price would require an annual income 19% higher than the current average.
- 58. Private renting is affordable to most households, including those with two lower quartile incomes; however, households made up of one lower quartile earners cannot afford the given rental thresholds. Affordability is improved if households

are able or willing to dedicate a larger proportion of their incomes to rental costs, although this has repercussions for other quality of life aspects and cannot be assumed to suit all individuals' circumstances.

Affordable Home Ownership

- 59. There is a relatively large group of households in Harworth & Bircotes who may be able to afford to rent privately but cannot afford home ownership. They are typically earning between around £21,000 per year (at which point entry-level rents become affordable) and £38,442 (at which point entry-level market sale homes become affordable). This 'can rent, can't buy' cohort may benefit from the range of affordable home ownership products such as First Homes and shared ownership.
- 60. First Homes are to be offered at a discount of at least 30% on equivalent market prices (i.e. new build, entry-level properties). Local authorities and neighbourhood plan qualifying bodies will have discretion to increase the discount on First Homes to 40% or 50% where there is evidence to suggest this is appropriate.
- 61. This report has estimated the income required to afford First Homes and tested the implications of 30%, 40% and 50% discount levels. Based on our calculations, First Homes at all discount levels would be valuable for bringing home ownership to within affordable levels for average earning households. Although the 30% discount level is sufficient, the higher First Homes discounts (at 40% and 50%) would also open up the possibility of home ownership to households of two lower quartile earners. However, those higher discounts may also bring values below build costs and as such be unviable on their own terms.
- 62. It is important to note that this evidence based on affordability does not provide a complete picture: evidence about the financial viability of the wider development is also relevant. The question is whether demanding higher discount levels on First Homes will create a financial burden on developers that leads them to argue either that the discount level is not feasible or that the total amount of Affordable Housing may need to be decreased. This could effectively sacrifice the provision of affordable rented housing to provide a more attractive First Homes product. The issue of development viability is a specialist matter involving analysis of land values and build costs that is outside the scope of this assessment. If the NPSG intend to set a higher First Homes discount level than that set at district level, further discussions with the LPA are advised.
- 63. Shared ownership appears to be more affordable than First Homes but is broadly accessible to the same groups. Government has recently announced that the minimum equity share for shared ownership will fall to 10% of the property value. 10 If this is delivered in the NA, it will make shared ownership easier to access for more people. However, while the income threshold for a 10% equity shared ownership home is lower, this product may not necessarily be more attractive than

¹⁰ The previous minimum equity share was 25%. This change took effect from 28 June 2021 and transitional arrangements are in place for planning policy documents that are prepared during the implementation timeframe. Changes are also introduced to make the process of staircasing to full ownership more gradual with lower minimum increments of 1%. The ministerial statement confirming and detailing the changes is available here: https://questions-statements.parliament.uk/written-statements/detail/2021-05-24/hlws48.

- the alternatives (such as shared ownership at higher equity shares and First Homes) for those who can afford them.
- 64. Rent to Buy provides households with the option to rent at a discount whilst saving for a deposit to buy their property within a set period (usually within seven years). The income required to access Rent to Buy is assumed to be the same as that required to afford market rents. However, affordability to local households would depend on how rents are set. If Rent to Buy is offered at a discount to *entry level* rents, this would expand this route to home ownership to a larger proportion of the population. Discounts on *average* rents would make Rent to Buy affordability, in terms of the household income required, comparable to First Homes at 40% discount and Shared Ownership at the higher equities. However, for some households, the availability of a deposit rather than income level per se is the key barrier to accessing home ownership. Rent to Buy may therefore offer a useful product to meet the needs of some households.
- 65. These three affordable home ownership products need to be considered in relation to what they offer occupants in the long term beyond simply being affordable to access or not:
 - First Homes allow for a greater ownership stake in the property, enabling occupiers to benefit from price appreciation over time. Monthly outgoings are also limited to mortgage costs alone, which tend to be cheaper than renting.
 - Shared ownership at high equity shares performs a similar function to First Homes, but there are additional costs associated with the rented portion.
 - Shared ownership at low equity shares can usually be accessed by lower earning households (than First Homes) and requires a smaller deposit. However, this is a potentially less attractive route to eventual ownership because monthly outgoings remain high. The occupant has to pay a significant monthly rent as well as service charges and other costs, so it can be harder for them to save funds to buy out a greater share in the property over time.
 - Rent to Buy requires no deposit, thereby benefitting those with sufficient incomes but low savings. It is more attractive than renting but results in a much slower accumulation of the funds that can provide an eventual route to ownership than the other tenures discussed above.

Affordable Rented Housing

- 66. Affordable rents set out in the table above are substantially below market rents. Whilst affordable rents can be set at up to 80% of market rents, in many locations Registered Providers (housing associations) set them to ensure that they are affordable to those claiming housing benefit, i.e. at or below Local Housing Allowance levels. This means that they are in practice below 80% of market levels. This appears to be the case in Harworth & Bircotes, with affordable rents closer to 50% of market levels.
- 67. Affordable rented housing is generally affordable to households with two lower quartile earners depending on their household size (average earning households are unlikely to be eligible). Additionally, households with a single lower earner

- appears to be able to afford affordable/social rented housing, proving to be their only accessible tenure type in the Neighbourhood Area. For those earning below the affordability thresholds for affordable rented housing, many such individuals will, if unable to secure a social rented dwelling, require additional subsidy through Housing Benefit to access housing.
- 68. The evidence in this chapter suggests that the affordable rented sector performs a vital function in Harworth & Bircotes as the only option for a segment of those in the greatest need. Social rents are cheaper and would therefore leave households on lower earnings better off and better able to afford their other living costs, such as food and fuel etc. Where households are supported by housing benefit the difference in the cost of affordable and social rents may be irrelevant as the level of housing benefit flexes according to the rent. This means that households supported by housing benefit may be no better off in social rented accommodation because they receive a lower rate of housing benefit to cover their rent.

Estimates of the Need for Affordable Housing

69. This section seeks to quantify the long-term potential need for Affordable Housing, which should be considered separately for affordable rented housing and affordable routes to ownership. The appropriate approach is taken based on the evidence available at Local Authority and NA scale.

AECOM Estimates

- 70. AECOM estimates limited long-term need for additional affordable rented homes in Harworth & Bircotes. The estimate and assumptions used are detailed in Appendix D and summarised in Table 3-5 below.
- 71. This result may initially be surprising since there is understood to be a current backlog of need (297 households see subsequent section). The reason for the affordable rented housing need being met over the long-term is that the model reflects the rate of turnover in the existing stock: of the affordable rented accommodation existing currently, it can be expected that some will come vacant in any given year as their current occupants move to a new location, pass away or cease to be eligible as their circumstances change. Because of the size of the existing stock, this is able to satisfy the projected newly arising need as well as some of the backlog, which is effectively spread out over the 20-year period to produce an annualized figure.
- 72. An important caveat to this finding is that the NA may be meeting wider needs within the district. As such, whilst it may be possible to address localised needs through the existing stock, new affordable rented housing may be required to continue to provide homes for households in acute need living elsewhere in the wider area.
- 73. A further caveat worth emphasizing is that one unit of Affordable Housing does not necessarily service one household worth of need, since the unit might have two bedrooms while the applicant household might require four bedrooms, may be located in an inappropriate location, or be otherwise unsuitable.

74. As such, it may be appropriate for Harworth & Bircotes to encourage the delivery of some affordable rented housing, with the understanding even if this would meet all of the localised need, it may also help to meet needs from elsewhere in the district. The NA's wider strategic role in the delivery of Affordable Housing should be discussed with the LPA.

Table 3-5: Estimate of need for Affordable Housing for rent in Harworth & Bircotes

Component of need or supply in the AECOM estimate	Per annum
Current need	16
Newly arising need	8
Supply	42
Net surplus	18

Source: AECOM model summary of estimates. Full estimate included in Appendix D

- 75. AECOM estimate potential demand for 16 affordable home ownership dwellings per annum in Harworth & Bircotes, equating to a total of 304 over the Neighbourhood Plan period. The estimate and assumptions used is detailed in Appendix D and summarised in Table 3-6 below.
- 76. It is important to keep in mind that the households identified in this estimate are, by and large, adequately housed in the private rented sector, Affordable Housing, or living in other circumstances. They do not necessarily lack their own housing but would prefer to buy rather than rent. They have been included in the national planning definition of those in need of Affordable Housing, but their needs are less acute than those on the waiting list for affordable rented housing.

Table 3-6: Estimate of need for Affordable Housing for rent in Harworth & Bircotes

Component of need or supply in the AECOM estimate	Per annum
Current need	14
Newly arising need	3
Supply	1
Net shortfall	16

Source: AECOM model summary of estimates. Full estimate included in Appendix D

Evidence in the Bassetlaw Housing and Economic Development Needs Assessment

77. A HEDNA was undertaken for Bassetlaw in 2020. This study estimates the need for affordable housing in the district based on analysis of the Council's housing

- waiting list and analysis of other data sets in line with Planning Practice Guidance at the time.
- 78. The HEDNA identifies the need for 12 additional affordable rented homes per annum and identifies a surplus of 14 affordable home ownership dwellings per annum in the 'Harworth' area (this includes Harworth & Bircotes and Blyth).
- 79. When the HEDNA figures are pro-rated to Harworth & Bircotes based on its fair share of the 'Harworth' population (79% in the 2021 Census), this equates to a need for nine dwellings on affordable rented tenures per annum or 180 homes over the Neighbourhood Plan period (2024-2043). As the HEDNA predicts there will be a surplus of affordable home ownership dwellings, no additional units are needed in the area. This finding is in direct opposition to the estimates in the HNA, which suggest there will be robust demand for affordable ownership but limited long-term need for affordable rent. This conflicting evidence points to the value of a compromise approach that allows for both tenure options.

Affordable Housing Policies in Neighbourhood Plans

80. This section outlines a common Neighbourhood Plan policy level around the tenure mix of affordable housing, provides a recommendation and summarises relevant considerations.

Application of Local Plan Policies

- 81. BDC's adopted policy on this subject, Policy ST29, states that 20% of all new dwellings on brownfield sites, and 25% of all new dwellings on greenfield sites, are expected to be delivered as Affordable Housing on sites of 10 or more units, or sites larger than 0.5ha. BDC's data on completions in the Parish since 2011 lists suggests that 15% of completions (134 of 883) were in affordable rent tenures and 72% (637 of 883) were delivered in private rent tenures. The remaining 13% of completions (119 of 883) had no tenure information. Based on this information, the delivery of dwellings in Harworth & Bircotes has either met or fallen slightly short of Policy ST29 (depending on what tenures the unknown dwellings were offered in).
- 82. The overall proportion of housing that must be affordable is not an area of policy that a Neighbourhood Plan can usually influence, but it is worth emphasizing that the HNA finds there to be robust evidence of need for Affordable Housing in the NA, and every effort should be made to maximise delivery where viable. Changing or influencing the overall proportion of housing that must be affordable is uncommon in Neighbourhood Plans and would demand a high standard of evidence to depart from the Local Plan. If this is of interest, it should first be discussed with the LPA to ensure their support and to determine what additional evidence (e.g. about development viability) would be needed.
- 83. How the Affordable Housing that comes forward through mainstream development sites is broken down into specific tenures such as the balance between rented

tenures and routes to home ownership – is specified as 50% social/affordable rent and 50% affordable ownership tenures in Policy ST29 of the emerging Local Plan.

Affordable Housing at Neighbourhood level

- 84. The HNA can provide more localised evidence and this may be used to support Neighbourhood Plan polices. This section agrees that the emerging Local Plan's suggested 50:50 split between affordable rented and affordable ownership tenures might be suitable for future affordable housing delivery in Harworth & Bircotes on the basis of identified housing need and a range of other considerations detailed in Appendix D.
- 85. Taken in isolation, the calculations outlined in Table 3-5 and Table 3-6 would suggest that 100% of new affordable dwellings in Harworth & Bircotes should be in affordable ownership tenures. However, this does not take into account the circumstances of households in the present day waiting for affordable renting (who may be waiting many years to be housed if solely relying on re-lets). It would also require the high average re-let rate to continue at current levels, and also overlooks the NA's role as a main town in meeting the needs of the wider district. Taking these factors into account, our indicative mix represents a balance between our affordability threshold calculations (which suggest a high need for affordable ownership tenures) and the need to accommodate those most in need in the present day.
- 86. Having said that, should NPSG wish to develop policy that deviates from that outlined in the Local Plan either by differing from the headline split between renting and ownership or by specifying a greater level of detail around subtenures, it is important that they liaise with BDC to determine what additional evidence (notably about development viability) may be needed, and to ensure that departures from the local policy context have their support.

Table 3-7: Indicative tenure split (Affordable Housing)

Tenure	Indicative mix	Considerations and uncertainties
Routes to home ownership, of which	50%	
First Homes	30%	Product untested so uncertainties around viability, developer, lenders and buyer appetite etc.
Shared ownership	15%	Recently confirmed changes to the model to allow purchases of 10% share - impact on viability unknown. RPs business plans currently reliant on shared ownership model. Impact of displacement by First Homes unknown.
Rent to Buy	10%	Emerging product with popularity and effectiveness as yet unknown. Impact of displacement by First Homes unknown.
Affordable Housing for rent, of which	50%	
Social rent	To be set by Registered Providers	Uncertain how much funding available to support this tenure in local area. Uncertain whether RPs willing to own/manage stock in this area.
Affordable rent	To be set by Registered Providers	Uncertain whether RPs willing to own/manage stock in this area.

Source: AECOM calculations

87. Table 3-8 summarises Harworth & Bircotes' position with regards to the expected delivery of Affordable Housing, and how this might ideally be apportioned among sub-categories of tenure to meet local needs over the Neighbourhood Plan period. This exercise shows the quantities of affordable housing for rent and sale that would be delivered if the tenure mix proposed in this HNA were to be rigidly enforced on the remining number of dwellings to be delivered in the Parish over the emerging Local Plan period.

Table 3-8: Estimated delivery of Affordable Housing in Harworth & Bircotes

	Step in Estimation	
А	Overall housing delivery over emerging Local Plan period	2,006
В	Affordable % of total housing delivery (assuming all schemes are over five units in size)	20-25%
С	Potential affordable housing delivery over Neighbourhood Plan period	401-502
D	Rented % (e.g. social/ affordable rented)	50%
Е	Rented number (A x B)	201-251
F	Affordable home ownership % (e.g. First Homes, Rent to Buy)	50%
G	Affordable home ownership number (A x D)	201-251

Source: AECOM estimate based on LPA's emerging affordable housing policies, AECOM's indicative tenure mix

Conclusions - Affordability and Affordable Housing

Current Tenure Profile

88. Beginning with housing tenures, this chapter finds that 65% of Harworth & Bircotes' dwellings are in market ownership tenures. This percentage is below the ownership rates of Bassetlaw (68%), but higher than England (61%). Market rent tenures account for 15% of the Parish's total tenure mix – this is lower than the equivalent proportion for Bassetlaw (16%) and England (21%). Finally, Harworth & Bircotes has a relatively high offering of dwellings in affordable tenures, with Social Rent and Shared Ownership tenures accounting for 19% and 1% of its tenure mix, respectively. The proportion in Shared Ownership tenures is consistent across all three geographies, however, Harworth & Bircotes has a higher proportion of dwellings in Social Rent tenures compared to both Bassetlaw (15%) and England (17%).

Affordability

- 89. Average market rent in Harworth & Bircotes is generally considered affordable to households on average incomes for the area. Households of two lower quartile earners are also able to afford average market rents.
- 90. Average earning households, however, fall below the affordability threshold for average market ownership. These households may be able to afford entry level market ownership properties, although they would need to sacrifice slightly more salary for the property to become affordable.
- 91. The unaffordability of average market ownership for average earning households is likely driven by strong house price appreciation in the Parish over the past ten years; between 2013 and 2022, the median overall house price in Harworth & Bircotes rose by 92%.

The Need for Affordable Housing

- 92. An offering of Affordable Housing tenures will be necessary in Harworth & Bircotes to bring housing to attainable prices for many households of varying home ownership/renting aspirations:
 - First Homes discounts (especially at the 40% and 50% discounts) would be valuable in bringing affordable ownership below the affordability threshold for average earning households and households with two lower quartile earners. A minimum share of 10% of all new housing, and 25% of all new affordable housing, is required to be delivered on First Homes tenures.
 - Shared Ownership is also a viable route to home ownership for average earning households (at all equities) and households with two lower quartile earners (at the 10% and 25% equities).
 - A small offering of Rent to Buy tenures will be useful for households who lack sufficient deposits rather than sufficient incomes.
 - Social Rent tenures are vital for lower income households. This is especially the case for households with one lower quartile income earners, who without these discounts would likely be priced out of the area.

Affordable Housing Policy

- 93. Harworth & Bircotes has been provided with a housing delivery allocation of 2,199 in the emerging Local Plan. It is understood that all of the dwellings have been allocated.
- 94. According to BDC, there are around 297 households in need of affordable rented housing in Harworth & Bircotes.
- 95. AECOM calculations suggest that over the Neighbourhood Plan period, affordable renting need will be accommodated in Harworth & Bircotes without any additional dwellings on social/affordable rent tenures. Conversely, AECOM calculation suggests that around 304 dwellings on affordable ownership tenures will be required to satisfy need by the end of the Neighbourhood Plan period.
- 96. A 50% rent to 50% ownership split is suggested for new Affordable Housing in Harworth & Bircotes to strike a balance between providing houses for those with the most acute needs in the short term (households seeking affordable rented tenures) whilst also addressing the affordability issues and larger scale of demand associated with market ownership.

4. Type and Size

Introduction

- 97. It is common for neighbourhood plans to include policies that influence what form new housing should take in terms of type and size. This requires evidence of what local people need.
- 98. This can be done using statistics to identify relevant trends and potential gaps in the market. That is the focus of this chapter of the HNA. The evidence gathered here can be used to justify planning policies either on its own or in combination with survey results expressing the specific wants and concerns of local residents. It will also build up a picture of the population and existing range of homes that may provide useful context for the neighbourhood plan.
- 99. This chapter has three aims, each given its own sub-section:
 - To establish what **mix** of housing exists in the NA at present;
 - To describe characteristics of the local **population** that are relevant to housing need; and
 - To look to the **future**, considering how the population is likely to evolve and what mix of homes would be most appropriate to build.
- 100. It is important to keep in mind that housing need is not an exact science. To get from a set of facts about the population to an ideal mix of homes requires making assumptions. For example, there are clear patterns about what size of home families tend to live in at different stages of life. However, a variety of other reasons sit behind people's housing choices that are less easy to predict, including wealth, accessibility requirements and personal preference. Some trends can also change rapidly over time, such as the increasing preference for home working.
- 101. The conclusions and recommendations given here are therefore not definitive. Rather, they are what the statistics suggest future needs will look like based on current trends. This is sufficient for justifying planning policies, but it is also appropriate to take into account other factors and evidence if desired.

Definitions

- **Dwelling type**: whether a home is detached, semi-detached, terraced, a flat, bungalow or other type. Which a household chooses to occupy tends to be more about wealth and preference than a specific need.
- Dwelling size: how many rooms or bedrooms a home contains. While this
 could also mean floor area or number of storeys, the number of bedrooms
 is most reliably recorded in housing statistics. Bedroom numbers are also
 closely linked to family size and life stage.
- Household: a unit of people who live together, commonly a family, couple
 or single person. Not all dwellings contain a household, including properties
 that are vacant and second homes, so the number of dwellings and the
 number of households in an area is usually different.

- Household composition: the specific combination of adults and children
 who form a household. The Census offers a number of categories, for
 example distinguishing between families with children who are dependent
 or non-dependent (i.e. adults). 'Other' households in the Census include
 house-sharers, groups of students, and multi-family households.
- Household life stage: the age of the lead member of a household –
 usually the oldest adult, or what used to be called the 'head of household'.
 Life stage is correlated with dwelling size as well as wealth.
- Housing mix: the range of home sizes and types in an area.
- Over- and under-occupancy: the degree to which the size and composition of a household lines up with the number of bedrooms in their home. If there are more bedrooms than the household would be expected to need, the home is considered under-occupied, and vice versa.

The Current Housing Mix

102. This section establishes the current housing mix of Harworth & Bircotes, highlighting recent changes to it and comparing the mix to wider averages.

Dwelling Type

- 103. Table 4-1 below shows the dwelling type mix in Harworth & Bircotes in 2011 and 2021.
- 104. The 2021 Census data shows that Harworth & Bircotes' dwelling type mix is dominated by semi-detached houses, accounting for 57% of the total mix. Detached and terraced account for similar, but smaller amounts, at around 18% each. Flats complete the type mix, accounting for around 4%.
- 105. Harworth & Bircotes' dwelling type mix has not changed much since 2021, with all dwelling types holding a similar (within 3%) share as they did in 2011. As was the case in 2021, the most common dwelling type in 2011 was also semi-detached, although it accounted for 3% more of the total mix.

Table 4-1: Dwelling type, Harworth & Bircotes, 2011-2023

Туре	2011 Census	2021 Census	
Detached	16%	18%	
Semi-detached	60%	57%	
Terrace	18%	19%	
Flat	5%	4%	

Source: ONS 2011 and 2021, AECOM Calculations

106. Table 4-2 compares the NA mix to wider benchmarks. Whilst Bassetlaw and England all have semi-detached as their most common dwelling type, Harworth & Bircotes' proportion of semi-detached is significantly higher than at the district and national level. Consequently, the two wider geographies having a more varied mix of dwelling types – this is especially true of England, where all dwelling types account for a minimum of 20% of the total type mix.

Table 4-2: Dwelling type, various geographies, 2021

Туре	Harworth & Bircotes	Bassetlaw	England
Detached	18%	35%	23%
Semi-detached	58%	41%	32%
Terrace	19%	16%	23%
Flat	4%	7%	22%

Source: Census 2021, AECOM Calculations

Dwelling Size

- 107. Table 4-3 below presents the current housing mix in terms of size. Similar to how The 2021 Census data shows that Harworth & Bircotes' dwelling type mix is dominated by semi-detached houses, accounting for 57% of the total mix. Detached and terraced account for similar, but smaller amounts, at around 18% each. Flats complete the type mix, accounting for around 4%.
- 108. Harworth & Bircotes' dwelling type mix has not changed much since 2021, with all dwelling types holding a similar (within 3%) share as they did in 2011. As was the case in 2021, the most common dwelling type in 2011 was also semi-detached, although it accounted for 3% more of the total mix.
- 109. showed a dominance of semi-detached units, Table 4-3 reveals that there is also a concentration of units in one particular dwelling size category in Harworth & Bircotes three-bedrooms, accounting for 2,260 units, or 60% of the total stock. The remaining dwelling sizes in Harworth & Bircotes are found in smaller frequencies: there were 837 two-bedroom units, 547 four-or-more-bedroom units and 287 one-bedroom units.
- 110. Overall, Harworth & Bircotes' size mix in 2021 is weighted towards mid-sized units, with around 80% of the total stock having two or three bedrooms.

Table 4-3: Dwelling size (bedrooms), Harworth & Bircotes, 2011-2021

Number of bedrooms	2011	%	2021	%
1	286	9%	287	7%
2	670	20%	837	21%
3	2,011	60%	2,260	58%
4+	369	11%	547	12%
Total	3,336		3,931	

Source: ONS 2021 and 2011, AECOM Calculations

111. Again, it is useful to look at the percentage breakdown of dwelling sizes in comparison with the wider district and country. Table 4-4 shows that Harworth & Bircotes' size mix is very similar to Bassetlaw at the smaller bedroom sizes, however, there is around a ten-percentage-point swing between three and four-or-more bedrooms, with Harworth & Bircotes having more of the former. England's size mix, as it was for the type mix, is more balanced than Harworth & Bircotes.

Table 4-4: Dwelling size (bedrooms), various geographies, 2021

Number of bedrooms	Harworth & Bircotes	Bassetlaw	England
1	7%	6%	12%
2	21%	23%	27%
3	58%	48%	40%
4+	14%	23%	21%

Source: Census 2021, AECOM Calculations

Population Characteristics

112. This section examines key characteristics of the local population that have a bearing on what housing might be needed in future years. Where available, recent data is used. However, for some information it is necessary to fall back on the 2011 Census.

Age

- 113. Table 5-5 shows 2021 Census data, alongside 2011 Census figures, for the age profile of Harworth & Bircotes.
- 114. In 2021 Harworth & Bircotes' age profile shows a healthy mix of ages. Just over 50% of the population is found in the economically active age bands (between 25 and 64). Around 30% of the population in Harworth & Bircotes is 24 years old or younger, leaving the remaining 20% aged 65 and over.
- 115. Between 2011-2021 the only age bracket that experienced a decline in actual numbers was 15-24, declining by 6%. All other age categories grew over the same period, at a fairly uniform rate of growth (between 10%-16%). This trend has meant that Harworth & Bircotes' age structure in 2021 has not changed significantly since 2011; in 2021 all age categories were within two percentage points of its 2011 equivalent share. This suggests that, contrary to the ageing pattern observed at wider scale, the NA has retained demographic balance through retention or attraction of younger families. This may be in part a function of its smaller-skewing housing stock.

Table 4-5: Age structure of Harworth & Bircotes, 2011 and 2021

Age group	2011 (Census)		2021 (Census)		Change
0-14	1,475	18.6%	1,688	19.0%	14.4%
15-24	1,002	12.6%	945	10.6%	-5.7%
25-44	1,997	25.1%	2,309	26.0%	15.6%
45-64	2,038	25.6%	2,339	26.3%	14.8%
65-84	1,266	15.9%	1,409	15.9%	11.3%
85 and over	170	2.1%	197	2.2%	15.9%
Total	7,948		8,887		

Source: ONS 2011, ONS 2021, AECOM Calculations

116. For context, it is useful to look at the NA population structure alongside that of the district and country. The 2021 Census data shows that Harworth & Bircotes' dwelling type mix is dominated by semi-detached houses, accounting for 57% of

- the total mix. Detached and terraced account for similar, but smaller amounts, at around 18% each. Flats complete the type mix, accounting for around 4%.
- 117. Harworth & Bircotes' dwelling type mix has not changed much since 2021, with all dwelling types holding a similar (within 3%) share as they did in 2011. As was the case in 2021, the most common dwelling type in 2011 was also semi-detached, although it accounted for 3% more of the total mix.
- 118. (using 2021 Census data) shows that Harworth & Bircotes has a much younger population than the wider district of Bassetlaw, but a similar age profile to England.

30.0%

50 25.0%

15.0%

10.0%

0.0%

0-14

15-24

25-44

45-64

65-84

85 and over

Figure 4-1: Age structure in Harworth & Bircotes, 2021

Source: ONS 2021, AECOM Calculations

Household Composition and Occupancy

- 119. Household composition (the combination and relationships of adults and children in a dwelling) is an important factor in the kinds of housing needed over the Neighbourhood Plan period. Table 4-6 reveals that the majority of households within all three geographies fall into the 'one family only' category, accounting for around 65% of the total mix. The second most common household category in all three geographies was 'one person household' at around 30%. Finally, 'other household types' was the smallest category for all geographies, at around 5%.
- 120. The sub-categories presented in Table 4-6 are also fairly consistent across all three geographies. However, the influence of Harworth & Bircotes' slightly younger population when compared to Bassetlaw reveals itself in the following subcategories: 'one family only all ages 66 and over', which is slightly less in Harworth & Bircotes when compared to both Bassetlaw and England; and 'one family only with dependent children' being higher in Harworth & Bircotes. These both point towards a slightly younger population in Harworth & Bircotes when compared to the wider area.
- 121. Note that non-dependent children refer to households in which adult children are living at home, or which students still call their primary residence despite living for

most of the year near to university. A marked increase in this category can be taken to indicate the relative unaffordability of entry-level homes, where young people are financially unable to move out and form their own households; however, this category remains at the same level in 2021 as it was in 2011 (around 10%).

Table 4-6: Household composition, Harworth & Bircotes, 2021

Household composition		Harworth & Bircotes	Bassetlaw	England
One person household	Total	31.0%	30.1%	30.1%
	Aged 66 and over	12.9%	14.1%	12.8%
	Other	18.2%	16.0%	17.3%
One family only	Total	65.4%	66.1%	63.1%
	All aged 66 and over	8.4%	11.6%	9.2%
	With no children	19.5%	19.7%	16.8%
	With dependent children	27.2%	24.3%	25.8%
	With non- dependent children ¹¹	9.8%	10.1%	10.5%
Other household types	Total	3.6%	3.8%	6.9%

Source: ONS 2021, AECOM Calculations

- 122. The tendency of households to over- or under-occupy their homes is another relevant consideration to the future size needs of the NA. A person is considered to under-occupy their home when there are more bedrooms in their home than a family of their size and composition would normally be expected to need. This is expressed as an occupancy rating of +1 or +2, indicating that there is one surplus bedroom or at least two surplus bedrooms (respectively). Over-occupancy works in the same way, with a rating of -1 indicating at least one bedroom too few.
- 123. The occupancy rating data from the 2011 Census, presented in Table 4-7, reveals an overall trend of underoccupancy in Harworth & Bircotes, with around 75% of households having at least one unused bedroom. The 'Single person 65+', followed by 'Family 65+' and 'Family under 65 no children' households are most likely to have a +2-occupancy rating. It may be the case that additional smaller-sized homes in the NA for households in these categories looking to downsize may free up some larger housing.

¹¹ Refers to households containing children who are older than 18 e.g students or young working people living at home.

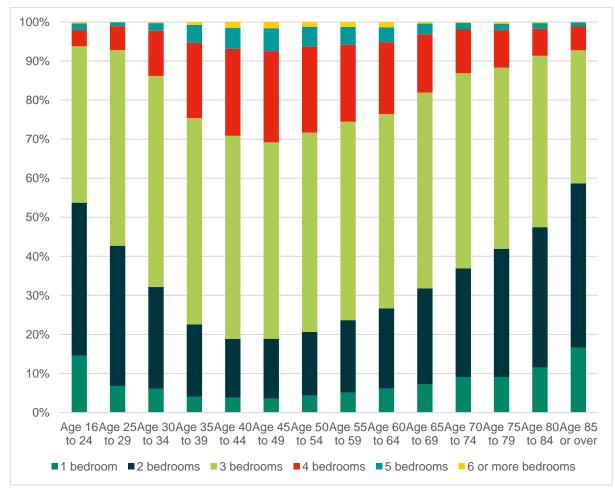
Table 4-7: Occupancy rating by age in Harworth & Bircotes, 2011

Household type	+2 rating	+1 rating	0 rating	-1 rating
Family 65+	55.9%	34.5%	9.6%	0.0%
Single person 65+	43.6%	30.4%	26.0%	0.0%
Family under 65 - no children	74.1%	21.1%	4.8%	0.0%
Family under 65 - dependent children	9.8%	49.5%	35.2%	5.5%
Family under 65 - adult children	11.4%	61.1%	26.0%	1.5%
Single person under 65	57.2%	23.6%	19.3%	0.0%
All households	38%	37%	23%	3%

Source: ONS 2011, AECOM Calculations

124. As noted in the introduction to this chapter, the life stage of households is strongly correlated with the size of home they tend to occupy. Figure 4-2 sets out this relationship for Bassetlaw in 2011 (because this data is not available at smaller scales). The graph shows how the youngest households tend to occupy the smallest dwellings, before rapidly taking up larger homes as their families expand, and then more gradually downsizing to smaller homes again as they age.

Figure 4-2: Age of household reference person by dwelling size in Bassetlaw, 2011



Source: ONS 2011, AECOM Calculations

Future Population and Size Needs

125. This section projects the future age profile of the population in Harworth & Bircotes at the end of the Neighbourhood Plan period and then estimates the mix of dwelling sizes they may need.

Age

- 126. The result of applying Local Authority level household projections to the age profile of Harworth & Bircotes households in 2011 is shown in Table 4-8. This makes clear that population growth can be expected to be driven by the oldest households, with the '55 to 64' and the '65 and over' household age brackets expected to grow by 7% and 79%, respectively, by 2043. Whilst the '25 to 34' household age bracket is expected to grow at 8%, this would not be enough to balance out the growth at the older age bands, especially considering the other younger/middle aged household age bands are expected to decline. This trend of growth would see the 65-and-over household age band surpassing the 35-54 household age band as the most common in the Parish.
- 127. Overall, it is expected that if current trends persist, and the goal is to accommodate these demographic shifts, then future housing delivery in Harworth & Bircotes should prioritise the provision of dwellings that would be appropriate to accommodate the area's growing elderly population. Based on these projections alone, it may, for example, be appropriate to focus on delivery of smaller-sized dwellings for older households who may be looking to downsize. However, the rate of future ageing across Bassetlaw may not be replicated for the NA because of its apparent ability to retain and attract a replacement younger population, likely for employment and lifestyle reasons. That being the case, the real rate of ageing may be lower than that suggested here. This would justify continuing to provide dwellings that appeal to a wider range of age groups.
- 128. It is also worth stating that with an increase in population, it is likely that there will need to be improvements to local infrastructure, in addition to housing, to accommodate the larger population. NPSG note that items such as road improvements at major junctions in the town, and improvements to the local Leisure Centre are already being considered in the Parish.

Table 4-8: Projected age of households, Harworth & Bircotes, 2011 - 2043

Year	24 and under	25 to 34	35 to 54	55 to 64	65 and over
2011	112	439	1,321	499	967
2043	101	473	1,278	535	1,730
% change 2011 – 2043	-9%	8%	-3%	7%	79%

Source: AECOM Calculations

129. The demographic change discussed above can be translated into an ideal mix of dwelling sizes. This is achieved through a model that maps the dwelling size preferences by life stage shown earlier (in Table 4-2, the rainbow bar graph) onto

- the projected age profile for the NA in Table 4-8 immediately above. The resulting 'ideal' future mix of dwelling sizes can then be compared to the current stock of housing to identify how future development might best fill the gaps.
- 130. This approach has limitations, in that it embeds existing size preferences and does not anticipate changes in what people want from their homes. As such, it is appropriate for the results to be taken as a baseline scenario what would occur if current trends persisted. It may well be the intention of the community to intervene to produce a different outcome more in line with their interpretation of emerging trends and their place- and community-shaping objectives. Layering these factors on top of the indicative picture provided by this model is appropriate for the purpose of drafting neighbourhood plan policies.
- 131. The result of this exercise is presented in Table 4-9. It suggests that Harworth & Bircotes' 'ideal' dwelling size mix by 2043 might be achieved by avoiding three-bedroom dwellings, given their existing abundance in the Parish. Instead, it is recommended that around 50% of dwellings should be two-or-fewer-bedrooms and 50% should be four-or-more-bedrooms.
- 132. Whilst Table 4-9 recommends that an extremely small proportion of future housing should be three-bedroom dwellings, in reality, this would not be appropriate. A range of dwelling sizes should be made available, especially in a large parish such as Harworth & Bircotes, so that a range of households' needs can be accommodated. Therefore, the recommendations in Table 4-9 should be considered to be a starting point for discussions.

Table 4-9: Suggested dwelling size mix to 2043, Harworth & Bircotes

Number of bedrooms	Current mix (2011)	Suggested mix (2043)	Balance of new housing to reach suggested mix
1	8.6%	7.2%	1.4%
2	20.1%	25.0%	46.2%
3	60.2%	49.0%	0.6%
4	9.6%	14.9%	37.5%
5+	1.5%	3.9%	14.4%

Source: AECOM Calculations

- 133. The following points sense-check the results of the model against other evidence and suggest ways to interpret them when thinking about policy options.
 - The Bassetlaw HEDNA offers the following guidance for the sizes of new dwellings in Bassetlaw, split by tenure type. It recommends a preference towards the delivery of three-bedroom dwellings. This is in direct opposition to the recommendations outlined in Table 4-9 and also overlooks the Parish's role as a main town in meeting the needs of the wider district. Therefore, a compromise between finding balance in the Parish's dwelling size mix, and the LPAs dwelling size delivery goals would be appropriate in this case.

Figure 4-3: Bassetlaw HEDNA suggested size mix

	1-bedroom	2-bedrooms	3-bedrooms	4+bedrooms
Market	Up to 10%	20-30%	45-55%	15-25%
Affordable home ownership	10-20%	35-45%	30-40%	5-15%
Affordable housing (rented)	25-30%	35-45%	20-30%	Up to 10%

Source: Bassetlaw HEDNA

- The preceding chapter found that affordability is an issue for market ownership in the parish. While the provision of Affordable Housing (subsidised tenure products) is one way to combat this, another is to ensure that homes come forward which are of an appropriate size, type and density for local residents' budgets. In relation to this particular issue, providing smaller homes with fewer bedrooms would help to address this situation.
- To best meet the needs of the growing cohort of older households expected
 to be present by the end of the Neighbourhood Plan period, it should also
 be considered whether the existing options are well tailored to older
 people's requirements in terms of space, flexibility, quality, location and
 accessibility.
- Variety should be sought within the smaller and mid-sized homes that are built in future to attract both newly forming households on lower budgets and older households with equity from their existing larger homes. While the number of bedrooms required may be similar, other preferences and levels of purchasing power could be very different. Facilitating downsizing among older households may also release those larger homes for use by families who need more bedrooms if the existing stock of larger homes is sufficiently affordable.

Tenure

- 134. The recommendation discussed immediately above applies to all housing in the NA over the Neighbourhood Plan period. This is considered proportionate for devising policy at neighbourhood scale. However, in practice different size mixes may be appropriate for market housing and Affordable Housing. While this distinction may not be appropriate to make in Neighbourhood Plan policy, since Local Authorities tend to define the precise mix of Affordable Housing required on applicable sites, it is worth thinking through the factors at play.
- 135. Generally speaking, the size mix needed within affordable tenures, particularly affordable and social rent, is smaller than the size mix of market housing. This is because there tend to be higher proportions of single people and couples in need of affordable rented housing, and they are likely to be eligible only for one- or two-bedroom properties. In contrast, people buying their own homes tend to want more space than they technically 'need', such as spare rooms for guests, home working or other uses. This fact is established in the data on under-occupancy presented earlier in this chapter.
- 136. There are three key sources of information for thinking through the size needs of different categories. These are:

- The relevant HEDNA for the Local Authority, which will (usually) set out the
 projected need by size within each tenure over the long-term. The
 Bassetlaw HEDNA does not set an overall size mix split, but does offer an
 individual size mixes for dwellings in market tenures, affordable rent, and
 affordable ownership (see Figure 4-3).
- The waiting list for affordable rented housing, kept by the Local Authority. This provides a more current snapshot of the size needs of applicant households. As this changes over time, individual planning applications can be decided in ways that meet evolving needs. In this case there are 297 households currently on the social housing waiting list, but they are not differentiated by the applicants' eligibility for different dwelling sizes.
- Any relevant household survey or consultation work in the NA can also highlight any specific gaps in the market within particular segments of the population. At the time of writing, however, no work of this kind has been undertaken.
- 137. To summarise, the overall size mix recommendation presented above applies generally to new housing in the NA. Within this mix, Affordable Housing might require a greater weighting towards smaller sizes while market homes focus on mid-sized homes and some larger options. It is not necessary (and is potentially not appropriate) for Neighbourhood Plans to be prescriptive about the size mix within different tenures, but a range of data sources exist that indicate a direction of travel, which Local Planning Authorities will draw upon when determining applications, and which it is possible for the neighbourhood planners to monitor.

Type

- 138. Planning policy also tends to be less prescriptive about the mix of dwelling types that are needed than the mix of home sizes. This is because the choice to occupy a terraced rather than a detached home, for example, is primarily a matter of wealth, personal preference, and the amount of outdoor space or other features sought than 'need' in the strict sense. This stands in contrast to the matter of dwelling size, where it can be more clearly established that a household with a certain number of members, closely correlated with age, requires a particular number of bedrooms.
- 139. The key distinctions when it comes to dwelling type are between flats and houses and, to a lesser extent, bungalows, each of which tend to appeal to occupants with different life circumstances. However, it remains difficult to generalise about this, particularly when drawing on demographic evidence.
- 140. The benefits of delivering a certain blend of dwelling types are more closely related to affordability, which is clearly established as an issue in Harworth & Bircotes, and which favours more dense options (e.g. terraces and flats). This imperative to improve affordability is often in conflict with matters of character, which in rural areas tend to favour lower density options that blend in with the existing built environment.
- 141. In summary, there is a balance to be struck between, on the one hand, improving affordability and choice in the market by encouraging flats and terraces, and, on the other hand, preserving the distinctive character and other features that

residents like about the NA today. How far the Neighbourhood Plan should guide on this issue, and in what direction, is a policy decision for the NPSG and community to consider.

Conclusions - Type and Size

142. This study provides an indication of the likely need for different types and sizes of homes based on demographic change. It is important to remember that other factors should be considered in determining the dwelling mix that is desirable in the parish or on any particular site. These include the specific characteristics of the nearby stock of housing (such as its condition and design), the role of the Neighbourhood Area or site within the wider housing market area (linked to any Local Authority strategies or plans) and site-specific factors which may justify a particular dwelling mix.

The Current Housing Mix

- 143. The 2021 Census data presents that Harworth & Bircotes' housing stock is dominated by semi-detached dwellings, which account for 57% of all dwelling types. Terraced, detached, and flats are found in comparatively moderate frequencies, at 19%, 18%, and 4%, respectively.
- 144. Whilst Bassetlaw and England's dwelling mixes all have semi-detached as their most common type, Harworth & Bircotes' proportion of semi-detached is significantly higher than at the district and national level. This results in the two wider geographies having a more varied mix of dwelling types.
- 145. Similarly, the 2021 Census also presents that the Parish's dwelling size mix is dominated by a single category three-bedroom dwellings, accounting for 58% of dwellings. Two-bedrooms, four-or-more-bedrooms, and one-bedrooms account for 21%, 12%, and 7% of the total size mix, respectively.

Population Characteristics

- 146. As with most areas in the UK, Harworth & Bircotes' population is ageing, and will continue to do so over the Neighbourhood Plan period; households in the 55-64 and 65-and-over age bands are expected to grow by 7% and 79%, respectively, between 2011 and 2043. All other household age bands are expected to reduce in size over the same period, except for 25-34, which is expected to grow by 8%. This trend of growth would see the 65-and-over household age band surpassing the 35-54 household age band as the most common in the Parish.
- 147. The issue of an ageing population is a key concern for NPSG, who perceive that the area's ageing population should be supported by policies in the emerging Neighbourhood Plan update. Focussing future delivery towards smaller-sized dwellings will be the best approach from a housing perspective to accommodate older households. This approach may also have positive knock-on effects to the wider property market as it may allow smaller households who currently occupy larger dwellings to downsize, which could increase the number of mid to larger sized dwellings available on the market.

Future Population and Size Needs

- 148. It may be appropriate for new dwellings in the Parish to work towards providing more variety in Harworth & Bircotes' dwelling stock, by offering a range of dwelling types and sizes, with a slight preference towards those in sizes other than three-bedrooms and in types other than semi-detached. It should be noted that no dwelling size or type should be completely excluded from future housing delivery, despite the aim of rebalancing the type and size mix to move away from those that currently dominate the housing stock. This is particularly the case for three-bedroom dwellings, which are outlined in BDC's HEDNA as a preferred dwelling size for future developments across the District.
- 149. Should NPSG desire to target provision of dwellings for older households, it is recommended that there would be more smaller dwellings built than larger dwellings; however, the provision of larger dwellings should still be considered as an option to balance the Parish's housing stock, and provide options to a range of household needs.
- 150. It is important to remember that other factors should be considered in determining the dwelling mix that is desirable in the parish or on any particular site. These include the specific characteristics of the nearby stock of housing (such as its condition and design), the role of the NA or site within the wider housing market area (linked to any Local Authority strategies or plans) and site-specific factors.

5. Specialist Housing for Older People

Introduction

- 151. It is relatively common for neighbourhood plans in areas with aging populations to include policies relating to specialist housing for older people. This chapter considers in detail the specialist housing needs of older people in Harworth & Bircotes. It focuses on specialist forms of provision but recognises that the majority of older people will live in the mainstream housing stock. The approach is as follows:
 - To review the **current provision** of specialist housing in the NA;
 - To estimate the potential demand for this form of accommodation with reference to the projected growth in the older population and current rates of mobility limitation; and
 - To discuss the potential for meeting this need through adaptations to the mainstream stock and other **additional considerations**.
- 152. Because of the wide variation in the level of support needed, as well as the financial capabilities of those affected, the estimates of need presented here should be viewed with caution as an idea of the broad scale of potential need rather than an obligatory target that must be met.
- 153. It is important to note that the need for housing for particular groups of people may well exceed, or be proportionally high in relation to, the total housing need or requirement. This is because the needs of particular groups will often be calculated having consideration to the whole population of an area as opposed to the projected new households which form the baseline for estimating housing need overall.¹²
- 154. This study covers the need for housing, i.e. buildings that the planning system classifies as Use Class C3 (private dwellings). Residences that fall into Use Class C2 (institutions including prisons, boarding schools and some care homes for older people) are largely beyond the scope of this research. However, it is possible to estimate the likely need for residential and nursing care over the Neighbourhood Plan period.
- 155. The distinction between care homes for older people that fall into use class C2 and those where accommodation is counted as C3 is blurred. As such, the findings of this chapter may justify the provision of extra-care C3 housing and/or C2 care home units, but it is not possible to state definitively how much of each would be required. C3 specialist accommodation is typically self-contained with its own front door, made available on an individual basis with support provided in the home or not at all if the resident does not require it, and offered for sale or rent on the open market.

¹² See Paragraph: 017 Reference ID: 2a-017-20190220, at https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments)

¹³ For a full description of Planning Use Classes, please refer to https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

Definitions

- Older people: people over retirement age, ranging from the active newly retired to the very frail elderly. Their housing needs tend to encompass accessible and adaptable general needs housing as well as the full spectrum of retirement and specialised housing offering additional care.
- Specialist housing for older people: a wide range of housing types specifically aimed at older people, which may often be restricted to those in certain older age groups. This could include residential institutions, sheltered housing, extra care housing, retirement housing and a range of other potential types of housing which has been designed and built to serve the needs of older people, including often providing care or other additional services.
- Sheltered Housing¹⁴: self-contained flats or bungalows where all the residents are older people. Schemes on the whole provide independent, self-contained homes, either to rent or buy. Properties in most schemes have features like raised electric sockets, lowered worktops, walk-in showers, and so on, as well as being linked to an emergency alarm service. Some will be designed to accommodate wheelchair users. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, guest flats and gardens.
- Extra Care Housing: housing which usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required. Residents are able to live independently with 24-hour access to support services and staff, and meals are often also available. In some cases, these developments are included in retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.
- Category M4(2): accessible and adaptable dwellings.
- Category M4(3): wheelchair user dwellings.

Specialist Housing for Older People

- 156. There is a total of 279 units of specialist accommodation in the NA at present. All of these are one- or two-bedroom bungalows/flats on social rent tenures. Details are provided in Appendix E.
- 157. Census 2021 population estimates suggest that there are currently around 778 individuals aged 75 or over in Harworth & Bircotes. This suggests that current provision is in the region of 356 units per 1,000 of the 75+ population (a common measure of specialist housing supply).

Demographic Characteristics

158. The starting point for estimating the need for specialist housing for older people is to project how the overall number of older people in Harworth & Bircotes is likely to change in future. This is calculated by extrapolating population projections from

¹⁴ See http://www.housingcare.org/jargon-sheltered-housing.aspx

- the ONS Sub-National Population Projections for Bassetlaw. The results are set out in Table 5-1.
- 159. The results suggest that the future population of Harworth & Bircotes will grow older towards the end of the Neighbourhood Plan period. The number of individuals aged 75+ is expected to almost double in size between 2021 and 2043 and take up a larger share of the population mix, increasing by five percentage points.
- 160. A key assumption for the estimate given at the end of this section is that the older people living in the NA currently are already suitably accommodated, either because they occupy the existing stock of specialist accommodation, have made appropriate adaptations to their own homes or do not require support or adaptations. This is unlikely to be completely true, but it is not possible to determine how many such individuals are inadequately housed without evidence from a household survey (which itself may not give a complete picture). As such, the growth in the older population rather than the total at the end of the Neighbourhood Plan period is the key output of this calculation.

Table 5-1: Modelled projection of older population in Harworth & Bircotes by end of Plan period

	202	1	2043		
Age group	Harworth & Bircotes (2021 Census)	Bassetlaw (2021 Census)	Harworth & Bircotes (AECOM Calculation)	Bassetlaw (ONS SNPP 2018)	
All ages	8,887	117,804	10,011	132,705	
75+	778	12,002	1,379	21,270	
%	8.8%	10.2%	13.8%	16.0%	

Source: ONS SNPP 2020, AECOM Calculations

- 161. The next step is to consider the need for different tenures of dwelling for older people. It is assumed that those currently occupying their own home will wish to do so for as long as practicably possible in future, even where downsizing or moving into specialist accommodation. Equally, those who currently rent, either in the private or social sectors, are projected to need affordable rented specialist accommodation.
- 162. The 55-75 age bracket is considered the best proxy for the group likely to fall into need for specialist accommodation during the Neighbourhood Plan period to 2043. The top row in Table 5-2 outlines the tenure mix among households aged 55-75 at Local Authority level, which indicates that four in five people aged over 75 years old owned their home in 2011.
- 163. The expected growth in the 75+ population in the NA is 601 additional individuals by the end of the Neighbourhood Plan period. This can be converted into 426 households based on the average number of people per household aged 75+ at Local Authority scale. Multiplying this figure by the percentages of 55–75-year-olds occupying each tenure gives a breakdown of which tenures Harworth &

Bircotes households are likely to need in 2043, and is shown in the bottom row of Table 5-2.

Table 5-2: Tenure of households aged 55-75 in Bassetlaw (2011) and projected aged 75+ in Harworth & Bircotes (2043)

	All owned	Owned outright	Owned (mortgage) or Shared Ownership	All Rented	Social rented	Private rented	Living rent free
Bassetlaw (2011 mix)	77.9%	57.0%	20.9%	22.1%	15.0%	5.6%	1.5%
Harworth & Bircotes (2043)	332	243	89	94	64	24	6

Source: Census 2011

164. It is also important to consider rates of disability by tenure. The tendency for people in rented housing to have higher disability levels is well established. It arises partly because people with more limiting disabilities tend to have lower incomes. It also reflects the fact that as people develop support and care needs they may find that the only suitable and affordable option to them is available in the social rented sector. Table E-2 in Appendix E presents this data for Harworth & Bircotes from the 2011 Census.

Future Needs for Specialist Accommodation and Adaptations

- 165. Based on the evidence outlined above, the number of households falling into potential need for specialist accommodation over the Neighbourhood Plan period is calculated to be 97.
- 166. AECOM's modelling, summarised in Table 5-3, is based on the assumption that those whose day-to-day activities are limited a lot may need housing with care (e.g. extra care housing, with significant on-site services, including potentially medical services), while those with their day to day activities limited only a little may simply need adaptations to their existing homes, or alternatively sheltered or retirement living that can provide some degree of oversight or additional services. However, it is important to note that, even those people who have high support or care needs can often be supported to live in their own homes. This is often reflected in policy of local authorities, with explicit aim to reduce the need to commission increasing numbers of care home beds.

Table 5-3: AECOM estimate of specialist housing need in Harworth & Bircotes by the end of the Neighbourhood Plan period

Туре	Affordable	Market	Total
Housing with care	14	35	49
Adaptations, sheltered, or retirement living	11	36	47
Total	25	71	97

Source: Census 2011, AECOM Calculations

167. It is worth comparing these findings with the recommendations of the Housing Learning and Improvement Network (HLIN), one of the most simple and widely used models estimating for the housing needs of older people. Table 5-4 in Appendix E reproduces the key assumptions of HLIN's Strategic Housing for Older People (SHOP) toolkit. Applying those assumptions to the growth in the older population of Harworth & Bircotes results in a total of 151 specialist dwellings that might be required to the end of the Neighbourhood Plan period. This is set out in Table 5-4.

Table 5-4: HLIN estimate of specialist housing need in Harworth & Bircotes by the end of the Neighbourhood Plan period

Туре	Affordable	Market	Total
Housing with care	19	24	43
Adaptations, sheltered, or retirement living	36	72	108
Total	55	96	151

Source: Housing LIN, AECOM calculations

Bassetlaw Housing and Economic Development Needs Assessment Findings

- 168. The Bassetlaw HEDNA outlines the following key points relevant to housing for older persons in Harworth & Bircotes:
 - It outlines the estimated need for wheelchair user homes in Bassetlaw between 2020 and 2037 is 503. If this is annualised it gives a figure of approximately 30 units a year. Pro-rated to Harworth & Bircotes (8% of Bassetlaw's population based on 2021 Census population figures) this gives an annual need of 2 wheelchair user homes in the NA, or 40 over the Neighbourhood Plan period.
 - In general, Bassetlaw has an older age structure and higher levels of disability compared with other areas.

Further Considerations

169. The above estimates suggest that potential need for specialist accommodation could be in the range of 97 to 151 units over the Neighbourhood Plan period. However, it may not be possible or appropriate to deliver this scale of new accommodation in the context of the community's wider needs and objectives.

- 170. In addition, specialist housing for older people should only be provided in sustainable, accessible locations that offer services and facilities, public transport options, and the necessary workforce of carers and others.
- 171. Alongside the need for specialist housing to be provided in accessible locations, another important requirement is for cost effectiveness and economies of scale. This can be achieved by serving the specialist older persons housing needs arising from a number of different locations and/or Neighbourhood Areas from a single, centralised point (i.e. what is sometimes referred to as a 'hub-and-spoke' model).
- 172. It is considered that Harworth & Bircotes is, in broad terms, a suitable location for specialist accommodation on the basis of the accessibility criteria and the considerations of cost-effectiveness above. As such, there is potential for such accommodation to be provided within the Neighbourhood Area (while noting there is no specific requirement or obligation to do so if there is potential to meet need arising from Harworth & Bircotes in other suitable locations near to but outside the Neighbourhood Plan area boundaries).
- 173. It is also important to emphasise that the potential need for specialist housing for older people overlaps with the need for care home bedspaces and the need for adaptations to mainstream housing. These topics are considered in the sections below.

Care Homes

- 174. Residential and nursing care homes are not defined as housing because they do not provide self-contained accommodation where an older person can live independently. Care home accommodation is defined as institutional accommodation rather than housing.
- 175. However, residents of care homes may be similar in terms of their care and support needs as those living in specialist housing, or even mainstream housing with appropriate care and support delivered in their homes. There may be some scope for older people who would otherwise have been accommodated in care homes to meet their needs within specialist or mainstream housing if sufficient appropriate accommodation can be provided. Nevertheless, there is likely to be continued need for care home accommodation to meet more acute and severe needs, and to offer choice to some older people and their families about how they are cared for and supported.
- 176. Given the overlap between people who might enter care home accommodation and those who might take up specialist housing or care and support in their own home if available, estimates of the future need for care home accommodation, as with estimates of the need for specialist housing above, are uncertain and depend on both local and national policies, delivery, and the appetite of private developers.
- 177. AECOM has estimated the likely need for care home accommodation over the Neighbourhood Plan period, based on the HLIN SHOP toolkit prevalence rates for residential and nursing care homes for older people (aged 75+). This estimate applied the prevalence rates in the 'More Choice, Greater Voice' 2008 report which

- informed the development of the HLIN toolkit. This report suggested that 65 residential care beds per 1,000 people aged 75+ was an appropriate rate. Based on this rate, applied to the growth in the older population for consistency with the calculations above, it is estimated that in 2043 there would be a need for an additional 36 care homes beds in the NA.
- 178. It is important to note that as these estimates relate to care homes (or the population in institutions) rather than independent housing, these figures are in addition to the overall need for housing in the NA. However, as discussed in this section, some of the need for care home beds might be met by independent housing accommodation and vice versa.

The Role of Mainstream Housing

- 179. The majority of older people live in mainstream housing and will continue to do so all of their lives. Based on the estimated number of older people and the tally of the existing stock in Appendix E, around 62% of the Harworth & Bircotes population aged 75 and over is likely to live in the mainstream housing stock.¹⁵
- 180. It is not possible to be precise about how well older people are accommodated within mainstream housing, in terms of whether their accommodation in suitable to their needs and whether adequate care or support is provided within the home when they need.
- 181. However, given that there is unlikely to be a large volume of additional specialist supply during the Neighbourhood Plan period, another key avenue to addressing those with relevant needs is to discuss the standards of accessibility and adaptability in new development to be met in the Local Plan with BDC.
- 182. It is relatively common for Local Plans to require that all or a majority of new housing meets Category M4(2) standards in response to the demographic shifts being observed nationwide. Government is considering mandating M4(2) on newly erected dwellings¹⁶, although changes to Building Regulations have not yet been made.
- 183. The emerging Local Plan policy ST31 Specialist Housing provides explicit encouragement for development to accommodate specific groups such as older people. It proposes a target for all new housing in the District to meet the M4(2) accessible and adaptable Building Regulations standard by 2038.
- 184. The proportion of new housing that might accommodate those using wheelchairs is harder to define at small scales. Typically, at Local Authority scale, this might be set with reference to the proportion of Affordable Housing applicants in the Local Authority area falling into this category or to wider data from surveys and other sources where available.
- 185. Table 5-5 sets out the proportion of wheelchair users in England as a whole, either using a wheelchair all of the time (0.6% of the population) or part of the time (3%

¹⁵ 778 over 75s in 2021, of which 279 are accommodated in specialist housing and a further 20 in care homes, leaving 479 people living in mainstream housing. This is approximate since some people in specialist housing and care homes will be under the age of 75.

¹⁶ See Raising accessibility standards for new homes: summary of consultation responses and government response - GOV.UK (www.gov.uk)

of the population). As a crude estimate, these percentages are applied to the 2,199 housing delivery figure within Harworth & Bircotes over the Neighbourhood Plan period, to suggest the number that might be encouraged to be wheelchair friendly or adaptable. This would imply a potential need for 13-66 wheelchair accessible dwellings over the Neighbourhood Plan period, which is in line with the pro-rated need outlined in the HEDNA.

186. It is worth noting that these national figures are for all age categories, not just older persons, although it is likely that a significant proportion of households using a wheelchair will be older persons.

Table 5-5: Wheelchair use Nationally Applied to Harworth & Bircotes

	Percentage in England	% applied to NA housing requirement figure (2,199 to end of plan period)
Households using wheelchair all the time	0.6%	13
Households using wheelchair either indoors or outdoors	3.0%	66

Source: Survey of English Housing 2018/19

Conclusions - Specialist Housing for Older People

Current stock and demographics

- 187. In Harworth & Bircotes there are 279 specialist housing units for older people, and a total of 778 individuals aged 75 or over. Based on these figures, the current provision of specialist accommodation for individuals aged 75 or over in the Parish is 356 per 1,000 of the 75+ population (a common measure of specialist housing supply).
- 188. This chapter determines that future provision of specialist housing for older people will be needed to serve arising future demand, with population growth in Harworth & Bircotes expected to be driven by the older population age bands (a theme that was also identified in the 'Type and Size' chapter). Specifically, the number of 75+ individuals in the Parish is expected to almost double by 2043, and account for around five more percentage points of the total population compared to current levels. Without additional units of specialist housing in Harworth & Bircotes, it is likely that those in need will be forced to move out of the area.

Need for Specialist Housing for Older People

- 189. Our calculations suggest that Harworth & Bircotes will require in the range of 97 to 151 units of specialist housing for older people over Neighbourhood Plan period. These estimates are based on the projected growth of the older population, thereby assuming that today's older households are already well accommodated.
- 190. Emerging Local Plan policy ST31 provides explicit encouragement for development to accommodate specific groups such as older people, and is likely

- to support the delivery of new specialist accommodation for older people in Main Towns, such as Harworth & Bircotes.
- 191. The emerging Local Plan does not provide any specific guidance for the tenure of new specialist housing for older people. Should NPSG want to influence the tenure of specialist accommodation through Neighbourhood Plan policy, this should be done with consultation from Bassetlaw Council.
- 192. Wherever specialist housing is to be accommodated, partnership working with specialist developers is recommended, so as to introduce a greater degree of choice into the housing options for older people who wish to move in later life.

Need for Additional Care Home Units

193. Our calculations (which do not consider tenure types) suggest that 36 additional care home units in Harworth & Bircotes will be required to satisfy arising need over the Neighbourhood Plan period.

Alternative Solutions

194. In addition to seeking specialist supply through Harworth & Bircotes' Neighbourhood Plan housing delivery targets, another avenue open to NPSG is to discuss the standards of accessibility and adaptability in new development to be met in the Neighbourhood Plan with the Local Planning Authority. The emerging Local Plan targets that all new housing in the District should meet the M4(2) accessible and adaptable Building Regulations standard by 2038.

6. Next Steps

Recommendations for Next Steps

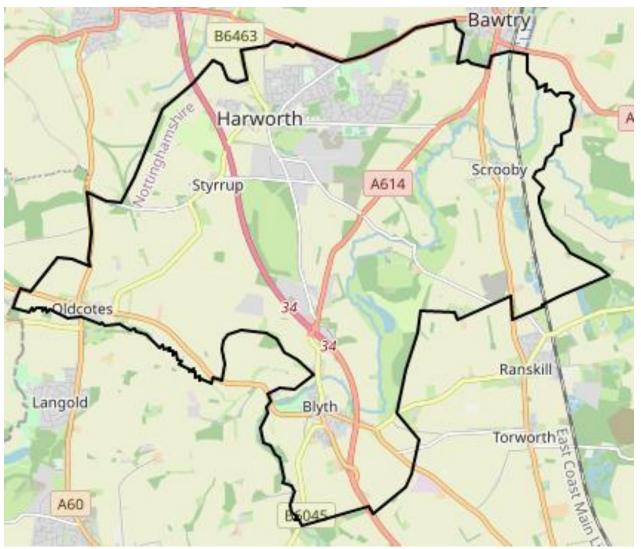
- 195. This Neighbourhood Plan housing needs assessment aims to provide NPSG with evidence on a range of housing trends and issues from a range of relevant sources. We recommend that the neighbourhood planners should, as a next step, discuss the contents and conclusions with BDC with a view to agreeing and formulating draft housing policies, bearing the following in mind:
 - All Neighbourhood Planning Basic Conditions, but in particular Condition E, which is the need for the Neighbourhood Plan to be in general conformity with the strategic policies of the adopted development plan;
 - The views of BDC:
 - The views of local residents:
 - The views of other relevant local stakeholders, including housing developers and estate agents; and
 - The numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by BDC.
- 196. This assessment has been provided in good faith by AECOM consultants on the basis of housing data, national guidance and other relevant and available information current at the time of writing.
- 197. Bearing this in mind, it is recommended that NPSG should monitor carefully strategies and documents with an impact on housing policy produced by the Government, BDC or any other relevant party and review the Neighbourhood Plan accordingly to ensure that general conformity is maintained.
- 198. At the same time, monitoring on-going demographic or other trends over the Neighbourhood Plan period will help ensure the continued relevance and credibility of its policies.

Appendix A: Assessment Geography

- 199. For Census purposes, the whole of England is divided into statistical units of similar population size called Output Areas (OAs) and their larger equivalents. OAs are the smallest units. They make up Lower Layer Super Output Areas (LSOAs), which in turn make up Middle Layer Super Output Areas (MSOAs). The NA equates to the following combination of OAs:
 - E00142799
 - E00142801
 - E00142790
 - E00142791
 - E00142796
 - E00142802
 - E00142789
 - E00142793
 - E00142809
 - E00142808
 - E00142794
 - E00142792
 - E00142787
 - E00142795
 - E00142805
 - E00142785
 - E00142798
 - E00142797
 - E00142786
 - E00142803
 - E00142800
 - E00142788
 - E00142806
 - E00142804
 - E00142807
- 200. Many other datasets besides the Census itself make use of OAs, but not necessarily down to the same level of detail. For example, Valuation Office Agency (VOA) data, which can be used to understand the type and size mix of housing, is only available down to the scale of LSOAs. The most relevant combination of LSOAs in this case, which will need to be used as a proxy for the NA, is:

- E01028024
- E01028025
- E01028026
- E01028027
- E01028028
- 201. Finally, as noted in the analysis of affordability in the main body of the report, household income data for small areas is only provided down to the scale of MSOAs. The relevant MSOA, in which the NA is located and which will need to serve as a proxy for it, is:
 - E02005835

Figure A-1: MSOA E02005835



Source: Nomis

Appendix B : Local Plan Context

Policies in the Adopted Local Plan

202. Table B-1 below summarises adopted Local Plan policies that are relevant to housing need and delivery in Harworth & Bircotes.

Table B-1: Summary of relevant adopted policies in the Core Strategy and the Development Management Policies Development Plan Document¹⁷

Hierarchy

CS1: Settlement Distribution of new development will be in accordance with the aims of the settlement hierarchy – to ensure that the scale of new development is appropriate in relation to the size, function and regeneration opportunities of each tier.

> Harworth & Bircotes Bircotes is identified as a 'Main Regeneration Settlement'. This is a regeneration opportunity town and a focus for development that will drive a step change in the nature of the settlement (Policy CS4).

CS4: Harworth & Bircotes

New development will significantly improve the range and quality of housing available, in order to ensure a more mixed community.

Housing

At least 22% (1560 houses) of the District's housing requirement will be delivered at Harworth & Bircotes through existing permissions and allocations in the Site Allocations DPD for the plan period 2010-2028. This is likely to include sustainable urban extensions. Residential development proposals will be supported within the Development Boundary, in line with other material considerations and planning policy requirements.

All housing development resulting in a net gain of one or more units will be required to contribute towards the achievement of an affordable housing target of at least 15% for Harworth & Bircotes. This will be either through on-site provision (where appropriate) or through a financial contribution to the delivery or improvement of affordable housing in Harworth & Bircotes.

Regeneration Opportunities

Support will be given to regeneration opportunities to include the appropriate re-development of the Harworth & Bircotes

¹⁷ Available at: https://www.bassetlaw.gov.uk/media/1543/cs1adoptedcorestrategy.pdf

Policy	Provisions
	Colliery site that serves to increase the range and quality of housing in the town.
DM3: General Development in	This policy applied to any area outside a Development Boundary as well as 'All Other Settlements'.
the Countryside	Proposals for the replacement of buildings outside Development Boundaries will be supported in line with the policy.
	Proposals for the re-use of previously developed land outside the Settlement Boundaries will be supported, other than where the site has naturally regenerated to the extent that it is of biodiversity value.
DM5: Housing Mix and Density	Proposals for new housing development will be expected to deliver housing of a size, type, and tenure appropriate to the site and locality.
	Proposals for new housing for the elderly, including supported and specialist accommodation, will be supported in suitable locations, in line with the role and size of settlement. The Council will support proposals for the delivery of houses meeting Lifetime Homes standards.
Affordable Housing SPD	Rural exception sites will be expected to deliver 100% Affordable Housing in perpetuity. The housing mix and tenure split of Affordable Housing on rural exception sites will be determined by the particular local need identified in the village or local area it serves.

Source: BDC Core Strategy and the Development Management Policies Development Plan

Policies in the Emerging Local Plan

203. Table B-2 below summarises emerging Local Plan policies that are relevant to housing need and delivery in Harworth & Bircotes.

Table 2-2: Summary of relevant emerging policies in the Bassetlaw Local Plan (Publication Version Second Addendum May 2022)¹⁸

Provisions Policy

ST1: Bassetlaw Spatial Strategy

Over the Neighbourhood Plan period 2020-2038, the spatial strategy will enable the provision of housing land for a minimum of 10,476 dwellings (582 new dwellings per annum).

The settlement strategy for Bassetlaw is:

- Main Town (Worksop, Retford, Harworth & Bircotes);
- Large Rural Settlements;
- Small Rural Settlements; and
- Countryside.

As a main town, Harworth & Bircotes has been allocated a housing delivery figure of approximately 2,199 dwellings over the Neighbourhood Plan period. In April 2020 to March 22 there were 198 completions in Harworth & Bircotes. These, combined with 2,006 outstanding commitments, means that there will be no new allocations for Harworth & Bircotes in the emerging Local Plan.

Windfall sites are expected to contribute 1,200 homes.

Housing

ST29: Affordable The provision of Affordable Housing will be sought from housing schemes of 10 or more units; or housing sites of 0.5ha or more; including conversions and change of use, to provide an appropriate mix of Affordable Housing.

> On brownfield sites 20% of housing will be required to be affordable, whilst 25% is required on greenfield sites.

> The tenure split for affordable housing is as follows: 25% First Homes; 25% social rent and 25% affordable rent; 25% other affordable home ownership products.

> Small scale rural exception sites or First Homes exception sites will be supported adjacent to the main built-up areas of the eligible Large Rural Settlements and Small Rural Settlements.

> In determining the type and size of affordable housing to be provided, the Council will also have regard to the latest Housing Market Needs Assessment informed by advice from the Council's Strategic Housing Team.

¹⁸ Available at: https://www.bassetlaw.gov.uk/media/6527/local-plan-publication-version-2020-2037.pdf

ST30: Housing Mix

All new residential development should assist in the creation of sustainable and inclusive communities through the provision of an appropriate mix of dwellings in terms of size, type, and tenure by:

- Making efficient use of land, while respecting the character of the area;
- Providing an appropriate mix and type of market housing, affordable housing, and specialist housing for older people and disabled persons, informed by the Council's most up-to-date evidence of housing need; and
- Supporting proposals for the development of community-led housing schemes.

The Council will support proposals for self-build and custom build housing that helps meet the needs of those on the Self Build and Custom Housebuilding Register, provided they are compliant with other Local Plan policies. On housing allocations of 100 dwellings or more, 2% of the proportion of developable plots should be set aside for self-build and custom housebuilding.

ST31: Specialist Housing

Proposals for well-designed specialist housing such as homes for older people, people with disabilities, or homes for other specific groups who may require properties will be supported in line with the policy.

Proposals for residential market housing in Class C3 should be designed to meet the requirements for accessible and adaptable dwellings under Part M4(2) of the Building Regulations.

Source: Bassetlaw Local Plan (Publication Version Second Addendum May 2022)

Appendix C : Affordability Calculations

204. This section outlines how the affordability thresholds discussed in the Affordability and Affordable Housing have been calculated.

C.1 Market Housing

205. Market housing is not subsidised and tends to be primarily accessible to people on higher incomes.

i) Market Sales

- 206. The starting point for calculating the affordability of a dwelling for sale from the perspective of a specific household is the loan to income ratio which most mortgage companies are prepared to agree. This ratio is conservatively estimated to be 3.5. In practice this can be highly variable. Multipliers up to 4.5 or even above 5 times income increasingly available, although the actual average in practice tends to be lower, particularly where applicants are dual earning. The Financial Conduct Authority uses 3.5 or more as its standard assumption for single applicants and 2.75 or more for dual applicants.
- 207. To produce a more accurate assessment of affordability, the savings required for a deposit should be taken into account in addition to the costs of servicing a mortgage. However, unlike for incomes, data is not available for the savings available to households in Harworth & Bircotes, and the precise deposit a mortgage provider will require of any buyer will be determined by their individual circumstances and the state of the mortgage market. An assumption is therefore made that a 10% purchase deposit is required and is available to the prospective buyer. In reality it is possible that the cost of the deposit is a greater barrier to home ownership than the mortgage costs.
- 208. The calculation for the purchase threshold for market housing is as follows:
 - Value of a median NA house price (2022) = £165,000;
 - Purchase deposit at 10% of value = £16,500;
 - Value of dwelling for mortgage purposes = £148,500;
 - Divided by loan to income ratio of 3.5 = purchase threshold of £42,429.
- 209. The purchase threshold for an entry-level dwelling is a better representation of affordability to those with lower incomes or savings, such as first-time buyers. To determine this threshold, the same calculation is repeated but with reference to the lower quartile rather than the median house price. The lower quartile average in 2022 was £149,496, and the purchase threshold is therefore £38,442.
- 210. It is also worth assessing the purchase threshold for new build homes, since this most closely represents the cost of the new housing that will come forward in future. Land Registry records 66 sales of new build properties in the NA in 2022,

- with an average sale price of £200,000. Using the same methodology previously used for affordability calculations generates a purchase threshold for new builds in Harworth & Bircotes of £53.614.
- 211. In order to provide a comparison with the wider local authority area, it is helpful to also look at the cost of new build housing across Bassetlaw in 2022. The median cost of new build dwellings in Bassetlaw was £208,500, with a purchase threshold of £53.614.

ii) Private Rented Sector (PRS)

- 212. It is assumed here that rented housing is affordable if the annual rent does not exceed 30% of the household's gross annual income. The percentage of income to be spent on rent before the property is considered affordable varies considerably for individuals, and it is increasingly common for households to dedicate a larger proportion of their earnings to rent. When considering affordability it is considered good practice to be conservative, and the 30% benchmark is used as ONS's current standard assumption.
- 213. This is an important assumption because it is possible that a household will be able to afford tenures that are deemed not affordable in this report if they are willing or able to dedicate a higher proportion of their income to housing costs. It is becoming increasingly necessary for households to do so. However, for the purpose of planning it is considered more appropriate to use this conservative lower benchmark for affordability on the understanding that additional households may be willing or able to access housing this way than to use a higher benchmark which assumes that all households can afford to do so when their individual circumstances may well prevent it.
- 214. The property website Home.co.uk shows rental values for property in the Neighbourhood Area. The best available data is derived from properties available for rent within the DN11 postcode area, which covers a larger area than the Neighbourhood Plan area itself but can be used as a reasonable proxy for it. Moreover, because it forms a larger geography with a greater number of rental properties offered, the larger sample size is likely to generate more robust findings.
- 215. According to home.co.uk, there were 27 properties for rent at the time of search in March 2023, with an average monthly rent of £756. There were three one-bed properties listed, with an average price of £525 per calendar month.
- 216. The calculation for the private rent income threshold for entry-level (one-bedroom) dwellings is as follows:
 - Annual rent = £525 x 12 = £6,300;
 - Multiplied by 3.33 (so that no more than 30% of income is spent on rent) = income threshold of £21,000.
- 217. The calculation is repeated for the overall average to give an income threshold of £30,240.

C.2 Affordable Housing

218. There are a range of tenures that constitute the definition of Affordable Housing within the NPPF 2021: social rent and affordable rent, discounted market sales housing, and other affordable routes to home ownership. More recently, a new product called First Homes has been introduced in 2021. Each of the affordable housing tenures are considered below.

i) Social Rent

- 219. Rents in socially rented properties reflect a formula based on property values and average earnings in each area, resulting in substantial discounts to market rents. As such, this tenure is suitable for the needs of those on the lowest incomes and is subject to strict eligibility criteria.
- 220. To determine social rent levels, data and statistical return from Homes England is used. This data is only available at Local Authority scale so must act as a proxy for Harworth & Bircotes. This data provides information about rents and the size and type of stock owned and managed by private registered providers and is presented for Bassetlaw in Table C-1.
- 221. To determine the income needed, it is assumed that no more than 30% of income should be spent on rent. This is an assumption only for what might generally make housing affordable or unaffordable it is unrelated to the eligibility criteria of Affordable Housing policy at Local Authority level. The overall average across all property sizes is taken forward as the income threshold for social rent.

Table C-1: Social rent levels (£)

Size	1 bed	2 beds	3 beds	4 beds	All
Average social rent per week	£70	£84	£92	£109	£87
Annual average	£3,658	£4,380	£4,796	£5,682	£4,507
Income needed	£12,182	£14,585	£15,971	£18,921	£15,010

Source: Homes England, AECOM Calculations

ii) Affordable Rent

- 222. Affordable rent is controlled at no more than 80% of the local market rent. However, registered providers who own and manage affordable rented housing may also apply a cap to the rent to ensure that it is affordable to those on housing benefit (where under Universal Credit the total received in all benefits to working age households is £20,000).
- 223. Even an 80% discount on the market rent may not be sufficient to ensure that households can afford this tenure, particularly when they are dependent on benefits. Registered Providers in some areas have applied caps to larger properties where the higher rents would make them unaffordable to families under Universal Credit. This may mean that the rents are actually 50-60% of market levels rather than 80%.

- 224. Data on the most realistic local affordable rent costs is obtained from the same source as social rent levels for Bassetlaw. Again it is assumed that no more than 30% of income should be spent on rent, and the overall average is taken forward.
- 225. Comparing this result with the average one-bedroom annual private rent above indicates that affordable rents in the NA are at the maximum rate of 80% of market rent, a feature that is necessary to make them achievable to those in need.

Table C-2: Affordable rent levels (£)

Size	1 bed	2 beds	3 beds	4 beds	All
Average affordable rent per week	£78	£96	£107	£91	£97
Annual average	£4,067	£4,971	£5,583	£4,715	£5,056
Income needed	£13,543	£16,552	£18,592	£15,700	£16,836

Source: Homes England, AECOM Calculations

iii) Affordable Home Ownership

- 226. Affordable home ownership tenures include products for sale and rent provided at a cost above social rent, but below market levels. The three most widely available are discounted market housing (a subset of which is the new First Homes product), shared ownership, and Rent to Buy. These are considered in turn below.
- 227. In paragraph 65 of the NPPF 2021, the Government introduces a recommendation that "where major housing development is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership." The recently issued Ministerial Statement and updates to PPG state that 25% of all Affordable Housing should be First Homes the Government's new flagship discounted market sale product. When the NPPF is next updated, it is expected that the 10% affordable home ownership requirement referenced above may be replaced by the First Homes requirement.

First Homes

- 228. Because First Homes are a new tenure product, it is worth explaining some of their key features:
 - First Homes should be available to buy with a minimum discount of 30% below their full market value (i.e. the value of an equivalent new home);
 - The discount level can be set higher than 30% at 40% or 50% where
 this can be suitably evidenced. The setting and justifying of discount levels
 can happen at neighbourhood as well as local authority scale;
 - After the discount is applied the initial sale price must not exceed £250,000 (or £420,000 in Greater London), and lower caps can be set locally;
 - Purchasers must be first-time buyers with an income less than £80,000 (or £90,000 in Greater London), and First Homes can be prioritised for local people and/or key workers;
 - They will be subject to legal restrictions ensuring the discount is retained for future occupants, and renting out or sub-letting will not normally be permitted;

- In addition to setting the discount level, local authorities and neighbourhood planning groups can apply additional criteria, such as a lower income cap, local connection test or prioritisation for key workers through adopted plans, emerging policy or Supplementary Planning Documents.
- 25% of all homes delivered through section 106 developer contributions on sites enabled through the planning process should be sold as First Homes. In simpler terms, 25% of all subsidised Affordable Housing on mainstream housing developments should be First Homes. This is likely to mean that First Homes will take the place of shared ownership housing in many circumstances, and in some cases may also displace social or affordable rented homes.
- 229. The starting point for considering whether First Homes are affordable is the average cost of new build entry-level housing in the NA in 2022 noted above of £200,000.
- 230. For the minimum discount of 30% the purchase threshold can be calculated as follows:
 - Value of a new home (estimated NA new build entry-level) = £200,000;
 - Discounted by 30% = £140,000;
 - Purchase deposit at 10% of value = £14,000;
 - Value of dwelling for mortgage purposes = £126,000;
 - Divided by loan to income ratio of 3.5 = purchase threshold of £36,000.
- 231. The income thresholds analysis in the Affordability and Affordable Housing chapter also compares local incomes with the costs of a 40% and 50% discounted First Home. This would require an income threshold of £30,857 and £25,714, respectively.
- 232. All of the income thresholds calculated here for First Homes are below the cap of £80,000 above which households are not eligible.
- 233. Note that discounted market sale homes may be unviable to develop if the discounted price is close to (or below) build costs. Build costs vary across the country but as an illustration, the build cost for a two-bedroom home (assuming 70 sq. m and a build cost of £1,750 per sq. m¹⁹) would be around £122,500. This cost excludes any land value or developer profit. This may be in issue in in Harworth & Bircotes for First Homes discounts of 40% and 50%, which would bring the discounted value to below this figure.
- 234. Table C-3 shows the discount required for First Homes to be affordable to the four income groups. The cost of a typical First Home in the NA and LA are presented, as well as median and entry-level existing prices locally to get a more complete picture. The discount levels required for these alternative benchmarks are given below.

¹⁹ It is estimated that in 2022, build costs for a house are between £1,750 and £3,000 per square metre https://urbanistarchitecture.co.uk/cost-to-build-a-house-uk/

Table C-3: Discount on sale price required for households to afford First Homes

House price benchmark	Mean household income	Single LQ earner	Dual LQ earning household
NA median house price	16%	64%	28%
NA new build entry-level house price	31%	70%	40%
NA entry-level house price	7%	60%	20%
LA median new build house price	34%	71%	43%

Source: Land Registry PPD; ONS MSOA total household income

Shared ownership

- 235. Shared ownership involves the purchaser buying an initial share in a property, typically of between 25% and 75% (but now set at a minimum of 10%), and paying rent on the share retained by the provider. Shared ownership is flexible in two respects, in the share which can be purchased and in the rental payable on the share retained by the provider. Both of these are variable. The share owned by the occupant can be increased over time through a process known as 'staircasing'.
- 236. In exceptional circumstances (for example, as a result of financial difficulties, and where the alternative is repossession), and at the discretion of the provider, shared owners may staircase down, thereby reducing the share they own. Shared equity is available to first-time buyers, people who have owned a home previously and council and housing association tenants with a good credit rating whose annual household income does not exceed £80,000.
- 237. To determine the affordability of shared ownership, calculations are again based on the estimated costs of new build housing as discussed above. The deposit available to the prospective purchaser is assumed to be 10% of the value of the dwelling, and the standard loan to income ratio of 3.5 is used to calculate the income required to obtain a mortgage. The rental component is estimated at 2.5% of the value of the remaining (unsold) portion of the price. The income required to cover the rental component of the dwelling is based on the assumption that a household spends no more than 30% of the income on rent (as for the income threshold for the private rental sector).
- 238. The affordability threshold for a 25% equity share is calculated as follows:
 - A 25% equity share of £200,000 is £50,000;
 - A 10% deposit of £5,000 is deducted, leaving a mortgage value of £45,000;
 - This is divided by the loan to value ratio of 3.5 to give a purchase threshold of £12,857;
 - Rent is charged on the remaining 75% shared ownership equity, i.e. the unsold value of £150,000;
 - The estimated annual rent at 2.5% of the unsold value is £3,750;
 - This requires an income of £12,500 (annual rent multiplied by 3.33 so that no more than 30% of income is spent on rent).
 - The total income required is £25,357 (£12,857 plus £12,500).

- 239. The same calculation is repeated for equity shares of 10% and 50% producing affordability thresholds of £20,143 and £34,048 respectively.
- 240. The income thresholds for all considered shared ownership tenures fall below the £80,000 cap for eligible households.

Rent to Buy

241. Rent to Buy is a relatively new and less common tenure, which through subsidy allows the occupant to save a portion of their rent, which is intended to be used to build up a deposit to eventually purchase the home. It is therefore estimated to cost the same as private rents – the difference being that the occupant builds up savings with a portion of the rent.

Help to Buy (Equity Loan)

- 242. The Help to Buy Equity Loan is not an affordable housing tenure but allows households to afford market housing through a loan provided by the government. With a Help to Buy Equity Loan the government lends up to 20% (40% in London) of the cost of a newly built home. The household must pay a deposit of 5% or more and arrange a mortgage of 25% or more to make up the rest. Buyers are not charged interest on the 20% loan for the first five years of owning the home.
- 243. It is important to note that this product widens access to market housing but does not provide an affordable home in perpetuity.

Appendix D : Affordable Housing Need and Policy

Affordable Housing Estimates

- 244. In Table D-1 AECOM has calculated, using PPG as a starting point,²⁰ an estimate of the total need for affordable rented housing in Harworth & Bircotes over the Neighbourhood Plan period. It should, however, be noted that the accuracy of the findings generated by the model is only as strong as the evidence available. However, given the test of proportionality for evidence supporting neighbourhood plans, and the need to be in conformity with Local Authority strategic polices, the calculations set out here are considered a reasonable basis for understanding and planning for neighbourhood-level affordable housing need.
- 245. It should also be noted that figures in Table D-1 are largely dependent on information provided by BDC in its capacity as manager of the local housing waiting list.

²⁰ Paragraphs 024-026 Reference ID: 2a-026-20140306, at https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment

Table D-1: Estimate of need for Affordable Housing for rent in Harworth & Bircotes

Stage and Step in Calculation	Total	Description			
STAGE 1: CURRENT NEED					
1.1 Current households in need	297.0	Data provided by BDC in March 2023.			
1.2 Per annum	15.6	Step 1.1 divided by the Neighbourhood Plan period to produce an annualised figure.			
STAGE 2: NEV	STAGE 2: NEWLY ARISING NEED				
2.1 New household formation	451.0	DLUHC 2018-based household projections for the LA between start and end of plan period. % increase applied to NA.			
2.2 Proportion of new households	34.8	(Steps 1.1 + 2.2.1 + 2.2.2) divided			
unable to rent in the market	%	by number of households in NA.			
2.2.1 Current number of social renters	757.0	2021 Census social rented			
in parish		occupancy			
2.2.2 Number of private renters on	223.5	Housing Benefit / Universal Credit			
housing benefits		with housing entitlement caseload			
		March 2021. Pro rata for NA.			
2.3 New households unable to rent	157.1	Step 2.1 x Step 2.2.			
2.4 Per annum	8.3	Step 2.3 divided by plan period.			
STAGE 3: TURNOVER OF AFFORDABLE HOUSING					
3.1 Supply of social/affordable re-lets	3%	Assumed proportion of stock re-let			
(including transfers) %		each year.			
3.2 Supply of social/affordable re-lets	42.0	Step 3.1 x NA social rented stock			
(including transfers)		(2.2.1).			
NET SURPLUS OF RENTED UNITS PER ANNUM					
Overall surplus per annum	-18.1	Step 1.2 + Step 2.4 - Step 3.2			
Source: AECOM model, using Census 2021, English Housing Survey 2018, DLUHC 2018 based househo					

Source: AECOM model, using Census 2021, English Housing Survey 2018, DLUHC 2018 based household projections and net additions to affordable housing stock. 2018 is the latest reliable data for some datasets so is used throughout for consistency. Figures may not sum due to rounding.

- 246. Turning to Affordable Housing providing a route to home ownership, Table D-2 estimates the potential demand in Harworth & Bircotes. This model aims to estimate the number of households that might wish to own their own home but cannot afford to. The model is consistent with methods used at Local Authority scale in taking as its starting point households currently living in or expected to enter the private rented sector who are not on housing benefit.
- 247. There may be other barriers to these households accessing home ownership on the open market, including being unable to save for a deposit, or being unable to afford a home of the right type/size or in the right location. The model also discounts 25% of households potentially in need, assuming a proportion will be renting out of choice. This assumption is based on consistent results for surveys and polls at the national level which demonstrate that most households (typically

80% or more) aspire to home ownership.²¹ No robust indicator exists for this area or a wider scale to suggest aspirations may be higher or lower in the NA.

Table D-2: Estimate of the potential demand for affordable housing for sale in Harworth & Bircotes

Stage and Step in Calculation	Total	Description		
STAGE 1: CURRENT NEED				
1.1 Current number of renters in parish	585.0	Census 2021 private rented occupancy.		
1.2 Percentage renters on housing benefit in LA	38.2%	% of renters in March 2021 on Housing Benefit / Universal Credit with housing entitlement ²² .		
1.3 Number of renters on housing benefits in parish	223.5	Step 1.1 x Step 1.2.		
1.4 Current need (households)	271.1	Current renters minus those on housing benefit and minus 25% assumed to rent by choice. ²³		
1.5 Per annum	14.3	Step 1.4 divided by plan period.		
STAGE 2: NEWLY ARISING NEED				
2.1 New household formation	451.0	LA household projections for plan period (2018 based) pro rated to NA.		
2.2 % of households unable to buy but able to rent	8.0%	(Step 1.4 + Step 3.1) divided by number of households in NA.		
2.3 Total newly arising need	35.9	Step 2.1 x Step 2.2.		
2.4 Total newly arising need per annum	2.8	Step 2.3 divided by plan period.		
STAGE 3: SUPPLY OF AFFORDABLE HOUSING				
3.1 Supply of affordable housing	21.0	Number of shared ownership homes in parish (Census 2021).		
3.2 Supply - intermediate resales	1.1	Step 3.1 x 5% (assumed rate of resale).		
NET SHORTFALL PER ANNUM				
Overall shortfall per annum	16.0	(Step 1.5 + Step 2.4) - Step 3.2.		
able to rent 2.3 Total newly arising need 2.4 Total newly arising need per annum STAGE 3: SUPPLY OF 3.1 Supply of affordable housing 3.2 Supply - intermediate resales NET SHORTE		NA. (Step 1.4 + Step 3.1) divided number of households in NA. Step 2.1 x Step 2.2. Step 2.3 divided by plan period. RDABLE HOUSING Number of shared ownersh homes in parish (Census 2021). Step 3.1 x 5% (assumed rate of sale). RANNUM		

Source: AECOM model, using Census 2021, English Housing Survey 2018, DLUHC 2018 based household projections and net additions to affordable housing stock. 2018 is the latest reliable data for some datasets so is used throughout for consistency.

²¹ http://www.ipsos-mori-generations.com/housing.html

²² Housing Benefit is in the process of being moved across to Universal Credit (with housing entitlement). DWP are aware that there may be some double counting of households (although this is believed to be minimal) and AECOM consider that it is more accurate to use the sum of both than solely the Housing Benefit figure

²³ The assumption of approximately 25% preferring to rent and 75% preferring to buy is AECOM's judgement, based on national level polls which consistently reveal that most households who prefer home ownership eg http://www.ipsos-mori-generations.com/housing.html and informed by our experience across numerous neighbourhood level HNAs. The assumption is based on the fact that some households choose to rent at certain stages in their life (e.g. when young, when needing flexibility in employment market, or when new migrants move into an area). While most households prefer the added security and independence of owning their own home, private renting is nevertheless a tenure of choice at a certain points in many households' journey through the housing market. The actual percentage of preference will differ between areas, being higher in large metropolitan areas with younger households and more new migrants, but lower in other areas. 25% is used as a reasonable proxy and for consistency across HNAs and similar assumptions are used in some larger scale assessments such as LHNAs and SHMAs. If the neighbourhood planning group feel this is not an appropriate assumption in their particular locality they could use the results of a local residents survey to refine or confirm this calculation.

- 248. There is no policy or legal obligation on the part either of the Local Authority or Neighbourhood Plan to meet affordable housing needs in full, though there are tools available to the Steering Group that can help ensure that it is met to a greater extent if resources permit (e.g. the ability to allocate sites for affordable housing).
- 249. It is also important to remember that even after the Neighbourhood Plan is adopted, the assessment of need for Affordable Housing, the allocation of affordable rented housing to those in need, and the management of the housing waiting list all remain the responsibility of the Local Authority rather than the neighbourhood planning group.

Affordable Housing Policy

250. The following table reviews the relevant factors in developing a policy on the Affordable Housing tenure mix, which inform the recommendation given in the main body of the report.

Table D-3: Wider considerations in developing Affordable Housing mix policy

Consideration

Local Evidence

A. Evidence of need for Affordable Housing:

The need for affordable rent and affordable home ownership is not directly equivalent: the former expresses the identified need of a group with acute needs and no alternative options; the latter expresses potential demand from a group who are generally adequately housed in rented accommodation and may not be able to afford the deposit to transition to ownership.

This HNA suggests that the NA requires no additional units of affordable rented housing and 16 units of affordable home ownership homes per annum over the Neighbourhood Plan period. Both forms of Affordable Housing appear to be valuable in meeting the needs of people on various incomes.

Taken in isolation, the relationship between these figures suggests that affordable home ownership should be prioritized over affordable rented housing.

B. Can Affordable Housing needs be met in full?

How far urgently needed the more affordable rented housing should prioritised in the tenure mix depends on the overall delivery quantity housing expected.

If the emerging Local Plan target of 20% on brownfield sites and 25% on greenfield sites were achieved on every site, assuming the delivery of the NA's outstanding commitments for 2,006 (as of March 2022) homes overall, between 401 and 502 affordable homes might be expected in the NA over Neighbourhood Plan period.

This level of potential affordable housing delivery would be sufficient to meet all of the need identified.

Whilst our calculations suggest that the current need for affordable rented housing will be accommodated by the end of the Neighbourhood Plan period without the need for any additional units, it would require many households waiting years for re-lets to become available.

C. Government policy (eg NPPF) requirements:

Current NPPF policy requires 10% of all homes to be delivered for affordable home ownership. There can be exceptions to this requirement if it would prevent the delivery of other forms of Affordable Housing.

For 10% of all housing to be affordable ownership in Harworth & Bircotes, where 20-25% of all housing should be affordable, 40-50% of Affordable Housing should be for affordable ownership. This does comply with the guideline tenure split sought in the emerging Local Plan.

D. Local Plan policy:

The emerging Local Plan seeks a tenure split of 25% First Homes; 25% social rent and 25% affordable rent; 25% other affordable home ownership products.

E. First Homes policy:

The Government recently concluded a consultation on the introduction of First Homes (to provide at least 30% discount on new build home prices). The proposals have now been enacted through a ministerial statement. A minimum of 25% of all Affordable Housing secured through developer contributions are now required to be First Homes.

After the 25% First Homes requirement has been met, the remaining 75% of Affordable Housing units should as a first priority protect the provision for social rent set out in the Local Plan. The remaining units should then be allocated to other tenure products in the relative proportions set out in the Local Plan.

AECOM is aware that some Local Planning Authorities are considering 'top slicing' their affordable housing quota to provide 25% First Homes and then allocating the remaining proportion according to their existing policy tenure split. Some LPAs are

This new minimum requirement may have the effect of displacing other products in any established tenure mix, and will reduce the amount of social or affordable rent if this was proposed to be more than 75% of Affordable Housing. This, however, would not be an issue in Bassetlaw.

considering this approach because of the existing business models of registered providers which have relied on shared ownership to cross subsidise affordable rented housing and uncertainty over whether First Homes could replace this model.	
F. Viability:	HNAs cannot take into consideration the factors which affect viability in the neighbourhood area or at the site-specific level. Viability issues are recognised in the Local Plan and it is acknowledged that this may affect the provision of affordable housing, the mix of tenures provided and the discounts that can be sought on First Homes properties.
G. Funding : The availability of funding to support the delivery of different forms of Affordable Housing may also influence what it is appropriate to provide at a particular point in time or on any one site.	NPSG may wish to keep this in mind so that it can take up any opportunities to secure funding if they become available.
H. Existing tenure mix in Harworth & Bircotes: The current stock of homes in an area, in terms of balance between ownership, rented and affordable provision may be a consideration in the mix of tenures provided on new development sites.	Approximately 20% of Harworth & Bircotes' tenure mix is in affordable tenures. Nineteen of those percentage points are for social rent tenures, and the remaining percentage point is for shared ownership tenures. The proportion of affordable tenures in Harworth & Bircotes is slightly higher than in both Bassetlaw and England.
I. Views of registered providers:	It is not within the scope of this HNA to investigate whether it would be viable for housing associations (registered providers) to deliver and manage affordable rented homes in the parish. The funding arrangements available to housing associations will determine rent levels.
J. Wider policy objectives:	NPSG may wish to take account of broader policy objectives for Harworth & Bircotes and/or the wider district. These could

include, but are not restricted to, policies to
attract younger households, families or
working age people to the NA. These wider
considerations may influence the mix of
Affordable Housing provided.

Appendix E : Specialist Housing for Older People

Background Data Tables

Table E-1: Existing specialist housing supply, Harworth & Bircotes

	Name	Description	Dwellings	Tenure	Туре
1	Welbeck, Beech & Sandrock Roads	Age exclusive housing	33	Rent (social landlord)	One and two bedroom bungalows
2	Lineby, Whitby & Beech Roads	Age exclusive housing	42	Rent (social landlord)	One and two bedroom bungalows
3	Devonshire Road	Age exclusive housing	21	Rent (social landlord)	One bedroom bungalows
4	Bawtry Road	Age exclusive housing	26	Rent (social landlord)	One and two bedroom bungalows
5	Sandy Mount East & West	Age exclusive housing	41	Rent (social landlord)	One and two bedroom bungalows / houses
6	Holderness Close & West Street	Age exclusive housing	30	Rent (social landlord)	Bungalows
7	Cumberland House	Age exclusive housing	47	Rent (social landlord)	One and two bedroom flats / bungalows
8	Westmorland House	Age exclusive housing	39	Rent (social landlord)	One and two bedroom flats
9	Brailsford House	Care home	20	Rent (self- funded)	Single rooms

Source: http://www.housingcare.org

Table E-2: Tenure and mobility limitations of those aged 65+ in Harworth & Bircotes, 2011 (65+ is the closest proxy for 75+ in this data)

Tenure	Day-to-day activities limited a lot		Day-to-day activities limited a little		Day-to-day activities not limited	
All categories	941	11.9%	885	11.2%	6,054	76.8%
Owned Total	570	10.6%	589	10.9%	4,243	78.5%
Owned outright	403	19.7%	384	18.8%	1,258	61.5%
Owned (mortgage) or shared ownership	167	5.0%	205	6.1%	2,985	88.9%
Rented Total	371	15.0%	296	11.9%	1,811	73.1%
Social rented	275	19.8%	223	16.1%	890	64.1%
Private rented or living rent free	96	8.8%	73	6.7%	921	84.5%

Source: DC3408EW Health status

HLIN Calculations

Table E-3: Recommended provision of specialist housing for older people from the HLIN SHOP toolkit

FORM OF PROVISION	ESTIMATE OF DEMAND PER THOUSAND OF THE RELEVANT 75+ POPULATION
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing (divided 50:50 between that for rent and that for sale) ³⁶	20
Extra care housing for rent	15
Extra care housing for sale	30
Housing based provision for dementia	6

Source: Housing LIN SHOP Toolkit

- 251. As Table 5-1 in the main report shows, Harworth & Bircotes is forecast to see an increase of 601 individuals aged 75+ by the end of the Neighbourhood Plan period. According to the HLIN tool, this translates into need as follows:
 - Conventional sheltered housing to rent = 60 x 0.601 = 36
 - Leasehold sheltered housing = 120 x 0.601 = 72
 - Enhanced sheltered housing (divided 50:50 between that for rent and that for sale) = 20 x 0.601 = 12
 - Extra care housing for rent = 15 x 0.601 = 9
 - Extra care housing for sale = 30 x 0.601 = 18
 - Housing based provision for dementia = 6 x 0.601 = 4

Appendix F : Housing Needs Assessment Glossary

Adoption

This refers to the final confirmation of a local plan by a local planning authority.

Affordability

The terms 'affordability' and 'affordable housing' have different meanings. 'Affordability' is a measure of whether housing may be afforded by certain groups of households. 'Affordable housing' refers to particular products outside the main housing market.

Affordability Ratio

Assessing affordability involves comparing housing costs against the ability to pay. The ratio between lower quartile house prices and the lower quartile income or earnings can be used to assess the relative affordability of housing. The Ministry for Housing, Community and Local Governments publishes quarterly the ratio of lower quartile house price to lower quartile earnings by local authority (LQAR) as well as median house price to median earnings by local authority (MAR) e.g. income = £25,000, house price = £200,000. House price: income ratio = £200,000/£25,000 = 8, (the house price is 8 times income).

Affordable Housing (NPPF Definition)

Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

- a) Affordable housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- b) Discounted market sales housing: is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.
- c) Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and

Rent to Buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

Affordable rented housing

Rented housing let by registered providers of social housing to households who are eligible for social rented housing. Affordable Rent is not subject to the national rent regime but is subject to other rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable). The national rent regime is the regime under which the social rents of tenants of social housing are set, with particular reference to the Guide to Social Rent Reforms (March 2001) and the Rent Influencing Regime Guidance (October 2001). Local market rents are calculated using the Royal Institution for Chartered Surveyors (RICS) approved valuation methods²⁴.

Age-Restricted General Market Housing

A type of housing which is generally for people aged 55 and over and active older people. It may include some shared amenities such as communal gardens but does not include support or care services.

Annual Monitoring Report

A report submitted to the Government by local planning authorities assessing progress with and the effectiveness of a Local Development Framework.

Basic Conditions

The Basic Conditions are the legal tests that are considered at the examination stage of neighbourhood development plans. They need to be met before a plan can progress to referendum.

Backlog need

The backlog need constitutes those households who are eligible for Affordable Housing, on account of homelessness, over-crowding, concealment or affordability, but who are yet to be offered a home suited to their needs.

Bedroom Standard²⁵

The bedroom standard is a measure of occupancy (whether a property is overcrowded or under-occupied, based on the number of bedrooms in a property and the type of household in residence). The Census overcrowding data is based on occupancy rating (overcrowding by number of rooms not including bathrooms and hallways). This tends to produce higher levels of overcrowding/ under occupation. A detailed definition of the standard is given in the Glossary of the EHS Household Report.

²⁴ The Tenant Services Authority has issued an explanatory note on these methods at http://www.communities.gov.uk/documents/planningandbuilding/pdf/1918430.pdf

²⁵ See https://www.gov.uk/government/statistics/english-housing-survey-2011-to-2012-household-report

Co-living

Co-living denotes people who do not have family ties sharing either a self-contained dwelling (i.e., a 'house share') or new development akin to student housing in which people have a bedroom and bathroom to themselves, but share living and kitchen space with others. In co-living schemes each individual represents a separate 'household'.

Community Led Housing/Community Land Trusts

Housing development, provision and management that is led by the community is very often driven by a need to secure affordable housing for local people in the belief that housing that comes through the planning system may be neither the right tenure or price-point to be attractive or affordable to local people. The principal forms of community-led models include cooperatives, co-housing communities, self-help housing, community self-build housing, collective custom-build housing, and community land trusts. By bringing forward development which is owned by the community, the community is able to set rents and/or mortgage payments at a rate that it feels is appropriate. The Government has a range of support programmes for people interested in bringing forward community led housing.

Community Right to Build Order²⁶

A community right to build order is a special kind of neighbourhood development order, granting planning permission for small community development schemes, such as housing or new community facilities. Local community organisations that meet certain requirements or parish/town councils are able to prepare community right to build orders.

Concealed Families (Census definition)²⁷

The 2011 Census defined a concealed family as one with young adults living with a partner and/or child/children in the same household as their parents, older couples living with an adult child and their family or unrelated families sharing a household. A single person cannot be a concealed family; therefore one older parent living with their adult child and family or an adult child returning to the parental home is not a concealed family; the latter are reported in an ONS analysis on increasing numbers of young adults living with parents.

Equity Loans/Shared Equity

An equity loan which acts as a second charge on a property. For example, a household buys a £200,000 property with a 10% equity loan (£20,000). They pay a small amount for the loan and when the property is sold e.g. for £250,000 the lender receives 10% of the sale cost (£25,000). Some equity loans were available for the purchase of existing stock. The current scheme is to assist people to buy new build.

²⁶ See https://www.gov.uk/guidance/national-planning-policy-framework/annex-2-glossary

²⁷ See http://webarchive.nationalarchives.gov.uk/20160107160832/http://www.ons.gov.uk/ons/dcp171776_350282.pdf

Extra Care Housing or Housing-With-Care

Housing which usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission (CQC). Residents are able to live independently with 24 hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are included in retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Fair Share

'Fair share' is an approach to determining housing need within a given geographical area based on a proportional split according to the size of the area, the number of homes in it, or its population.

First Homes

First Homes is another form of discounted market housing which will provide a discount of at least 30% on the price of new homes, introduced in 2021. These homes are available to first time buyers as a priority but other households will be eligible depending on agreed criteria. New developments will be required to provide 25% of Affordable Housing as First Homes. A more detailed explanation of First Homes and its implications is provided in the main body of the HNA.

Habitable Rooms

The number of habitable rooms in a home is the total number of rooms, excluding bathrooms, toilets and halls.

Household Reference Person (HRP)

The concept of a Household Reference Person (HRP) was introduced in the 2001 Census (in common with other government surveys in 2001/2) to replace the traditional concept of the head of the household. HRPs provide an individual person within a household to act as a reference point for producing further derived statistics and for characterising a whole household according to characteristics of the chosen reference person.

Housing Market Area

A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. It might be the case that housing market areas overlap.

The extent of the housing market areas identified will vary, and many will in practice cut across various local planning authority administrative boundaries. Local planning authorities should work with all the other constituent authorities under the duty to cooperate.

Housing Needs

There is no official definition of housing need in either the National Planning Policy Framework or the National Planning Practice Guidance. Clearly, individuals have their own housing needs. The process of understanding housing needs at a population scale is undertaken via the preparation of a Strategic Housing Market Assessment (see below).

Housing Needs Assessment

A Housing Needs Assessment (HNA) is an assessment of housing needs at the Neighbourhood Area level.

Housing Products

Housing products simply refers to different types of housing as they are produced by developers of various kinds (including councils and housing associations). Housing products usually refers to specific tenures and types of new build housing.

Housing Size (Census Definition)

Housing size can be referred to either in terms of the number of bedrooms in a home (a bedroom is defined as any room that was intended to be used as a bedroom when the property was built, any rooms permanently converted for use as bedrooms); or in terms of the number of rooms, excluding bathrooms, toilets halls or landings, or rooms that can only be used for storage. All other rooms, for example, kitchens, living rooms, bedrooms, utility rooms, studies and conservatories are counted. If two rooms have been converted into one they are counted as one room. Rooms shared between more than one household, for example a shared kitchen, are not counted.

Housing Type (Census Definition)

This refers to the type of accommodation used or available for use by an individual household (i.e. detached, semi-detached, terraced including end of terraced, and flats). Flats are broken down into those in a purpose-built block of flats, in parts of a converted or shared house, or in a commercial building.

Housing Tenure (Census Definition)

Tenure provides information about whether a household rents or owns the accommodation that it occupies and, if rented, combines this with information about the type of landlord who owns or manages the accommodation.

Income Threshold

Income thresholds are derived as a result of the annualisation of the monthly rental cost and then asserting this cost should not exceed 35% of annual household income.

Intercensal Period

This means the period between the last two Censuses, i.e. between years 2001 and 2011.

Intermediate Housing

Intermediate housing is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low-cost homes for sale and intermediate rent, but not affordable rented housing. Homes that do not meet the above definition of affordable housing, such as 'low-cost market' housing, may not be considered as affordable housing for planning purposes.

Life Stage modelling

Life Stage modelling is forecasting need for dwellings of different sizes by the end of the Neighbourhood Plan period on the basis of changes in the distribution of household types and key age brackets (life stages) within the NA. Given the shared behavioural patterns associated with these metrics, they provide a helpful way of understanding and predicting future community need. This data is not available at neighbourhood level so LPA level data is employed on the basis of the NA falling within its defined Housing Market Area.

Life-time Homes

Dwellings constructed to make them more flexible, convenient adaptable and accessible than most 'normal' houses, usually according to the Lifetime Homes Standard, 16 design criteria that can be applied to new homes at minimal cost: http://www.lifetimehomes.org.uk/.

Life-time Neighbourhoods

Lifetime neighbourhoods extend the principles of Lifetime Homes into the wider neighbourhood to ensure the public realm is designed in such a way to be as inclusive as possible and designed to address the needs of older people, for example providing more greenery and more walkable, better connected places.

Local Development Order

An Order made by a local planning authority (under the Town and Country Planning Act 1990) that grants planning permission for a specific development proposal or classes of development.

Local Enterprise Partnership

A body, designated by the Secretary of State for Communities and Local Government, established for the purpose of creating or improving the conditions for economic growth in an area.

Local housing need (NPPF definition)

The number of homes identified as being needed through the application of the standard method set out in national planning guidance (or, in the context of preparing strategic policies only, this may be calculated using a justified alternative approach as provided for in paragraph 60 of this Framework).

Local Planning Authority

The public authority whose duty it is to carry out specific planning functions for a particular area. All references to local planning authority apply to the District Council, London Borough Council, County Council, Broads Authority, National Park Authority or the Greater London Authority, to the extent appropriate to their responsibilities.

Local Plan

This is the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current core strategies or other planning policies form part of the Local Plan and are known as 'Development Plan Documents' (DPDs).

Lower Quartile

The bottom 25% value, i.e. of all the properties sold, 25% were cheaper than this value and 75% were more expensive. The lower quartile price is used as an entry level price and is the recommended level used to evaluate affordability; for example for first time buyers.

Lower Quartile Affordability Ratio

The Lower Quartile Affordability Ratio reflects the relationship between Lower Quartile Household Incomes and Lower Quartile House Prices, and is a key indicator of affordability of market housing for people on relatively low incomes.

Market Housing

Market housing is housing which is built by developers (which may be private companies or housing associations, or Private Registered Providers), for the purposes of sale (or rent) on the open market.

Mean (Average)

The mean or the average is, mathematically, the sum of all values divided by the total number of values. This is the more commonly used "average" measure as it includes all values, unlike the median.

Median

The middle value, i.e. of all the properties sold, half were cheaper and half were more expensive. This is sometimes used instead of the mean average as it is not subject to skew by very large or very small statistical outliers.

Median Affordability Ratio

The Lower Quartile Affordability Ratio reflects the relationship between Median Household Incomes and Median House Prices and is a key indicator of affordability of market housing for people on middle-range incomes.

Mortgage Ratio

The mortgage ratio is the ratio of mortgage value to income which is typically deemed acceptable by banks. Approximately 75% of all mortgage lending ratios fell below 4 in recent years²⁸, i.e. the total value of the mortgage was less than 4 times the annual income of the person who was granted the mortgage.

Neighbourhood Development Order (NDO)

An NDO will grant planning permission for a particular type of development in a particular area. This could be either a particular development, or a particular class of development (for example retail or housing). A number of types of development will be excluded from NDOs, however. These are minerals and waste development, types of development that, regardless of scale, always need Environmental Impact Assessment, and Nationally Significant Infrastructure Projects.

Neighbourhood plan

A plan prepared by a Parish or Town Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

Older People

People over retirement age, including the active, newly-retired through to very frail older people, whose housing needs can encompass accessible, adaptable general needs housing for those looking to downsize from family housing and the full range of retirement and specialised housing for those with support or care needs.

Output Area/Lower Super Output Area/Middle Super Output Area

An output area is the lowest level of geography for publishing statistics, and is the core geography from which statistics for other geographies are built. Output areas were created for England and Wales from the 2001 Census data, by grouping a number of households and populations together so that each output area's population is roughly the same. 175,434 output areas were created from the 2001 Census data, each containing a minimum of 100 persons with an average of 300 persons. Lower Super Output Areas consist of higher geographies of between 1,000-1,500 persons (made up of a number of individual Output Areas) and Middle Super Output Areas are higher than this, containing between 5,000 and 7,200 people, and made up of individual Lower Layer Super Output Areas. Some statistics are only available down to Middle Layer Super Output Area level, meaning that they are not available for individual Output Areas or parishes.

Overcrowding

There is no single agreed definition of overcrowding, however, utilising the Government's bedroom standard, overcrowding is deemed to be in households where there is more than one person in the household per room (excluding kitchens, bathrooms, halls and storage areas). As such, a home with one bedroom and one

²⁸ See https://www.which.co.uk/news/2017/08/how-your-income-affects-your-mortgage-chances/

living room and one kitchen would be deemed overcrowded if three adults were living there.

Planning Condition

A condition imposed on a grant of planning permission (in accordance with the Town and Country Planning Act 1990) or a condition included in a Local Development Order or Neighbourhood Development Order.

Planning Obligation

A legally enforceable obligation entered into under section 106 of the Town and Country Planning Act 1990 to mitigate the impacts of a development proposal.

Purchase Threshold

Purchase thresholds are calculated by netting 10% off the entry house price to reflect purchase deposit. The resulting cost is divided by 4 to reflect the standard household income requirement to access mortgage products.

Proportionate and Robust Evidence

Proportionate and robust evidence is evidence which is deemed appropriate in scale, scope and depth for the purposes of neighbourhood planning, sufficient so as to meet the Basic Conditions, as well as robust enough to withstand legal challenge. It is referred to a number of times in the PPG and its definition and interpretation relies on the judgement of professionals such as Neighbourhood Plan Examiners.

Private Rented

The Census tenure private rented includes a range of different living situations in practice, such as private rented/ other including households living "rent free". Around 20% of the private rented sector are in this category, which will have included some benefit claimants whose housing benefit at the time was paid directly to their landlord. This could mean people whose rent is paid by their employer, including some people in the armed forces. Some housing association tenants may also have been counted as living in the private rented sector because of confusion about what a housing association is.

Retirement Living or Sheltered Housing

Housing for older people which usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services, but provides some support to enable residents to live independently. This can include 24 hour on-site assistance (alarm) and a warden or house manager.

Residential Care Homes and Nursing Homes

Housing for older people comprising of individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.

Rightsizing

Households who wish to move into a property that is a more appropriate size for their needs can be said to be rightsizing. This is often used to refer to older households who may be living in large family homes but whose children have left, and who intend to rightsize to a smaller dwelling. The popularity of this trend is debatable as ties to existing communities and the home itself may outweigh issues of space. Other factors, including wealth, health, status and family circumstance also need to be taken into consideration, and it should not be assumed that all older households in large dwellings wish to rightsize.

Rural Exception Sites

Small sites used for affordable housing in perpetuity where sites would not normally be used for housing. Rural exception sites seek to address the needs of the local community by accommodating households who are either current residents or have an existing family or employment connection. Small numbers of market homes may be allowed at the local authority's discretion, for example where essential to enable the delivery of affordable dwellings without grant funding.

Shared Ownership

Housing where a purchaser part buys and part rents from a housing association or local authority. Typical purchase share is between 25% and 75% (though this was lowered in 2021 to a minimum of 10%), and buyers are encouraged to buy the largest share they can afford. Generally applies to new build properties, but re-sales occasionally become available. There may be an opportunity to rent at intermediate rent level before purchasing a share in order to save/increase the deposit level

Sheltered Housing²⁹

Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They usually contain between 15 and 40 properties, and range in size from studio flats (or 'bedsits') through to 2 and 3 bedroomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes will also

²⁹ See http://www.housingcare.org/jargon-sheltered-housing.aspx

usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden.

Strategic Housing Land Availability Assessment

A Strategic Housing Land Availability Assessment (SHLAA) is a document prepared by one or more local planning authorities to establish realistic assumptions about the availability, suitability and the likely economic viability of land to meet the identified need for housing over the Neighbourhood Plan period. SHLAAs are sometimes also called LAAs (Land Availability Assessments) or HELAAs (Housing and Economic Land Availability Assessments) so as to integrate the need to balance assessed housing and economic needs as described below.

Strategic Housing Market Assessment (NPPF Definition)

A Strategic Housing Market Assessment (SHMA) is a document prepared by one or more local planning authorities to assess their housing needs under the 2012 version of the NPPF, usually across administrative boundaries to encompass the whole housing market area. The NPPF makes clear that SHMAs should identify the scale and mix of housing and the range of tenures the local population is likely to need over the Neighbourhood Plan period. Sometimes SHMAs are combined with Economic Development Needs Assessments to create documents known as HEDNAs (Housing and Economic Development Needs Assessments).

Specialist Housing for Older People

Specialist housing for Older People, sometimes known as specialist accommodation for older people, encompasses a wide range of housing types specifically aimed at older people, which may often be restricted to those in certain older age groups (usually 55+ or 65+). This could include residential institutions, sometimes known as care homes, sheltered housing, extra care housing, retirement housing and a range of other potential types of housing which has been designed and built to serve the needs of older people, including often providing care or other additional services. This housing can be provided in a range of tenures (often on a rented or leasehold basis).

Social Rented Housing

Social rented housing is owned by local authorities and private registered providers (as defined in Section 80 of the Housing and Regeneration Act 2008.). Guideline target rents for this tenure are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with Homes England.³⁰

³⁰ See http://www.communities.gov.uk/documents/planningandbuilding/doc/1980960.doc#Housing

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