

Bassetlaw Housing and Economic Development Needs Assessment

Bassetlaw District Council

November 2020

Prepared by

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With

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it has been signed by the Originators and approved by a Business or Associate Director.

DATE
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Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

1.1 Bassetlaw District Council has commissioned GL Hearn with Icen Projects Ltd and Justin Gardner Consulting to undertake a Housing Needs Assessments and Economic Development Needs Assessment (update to 2019 report) for the district. The purpose of this now combined Housing and Economic Development Need Assessment (HEDNA) Study is to assess future development needs for housing (both market and affordable) and employment land across Bassetlaw District.

1.2 This study forms part of the evidence base which Bassetlaw District Council (the Council) will use in preparing and updating their Local Plan and will inform emerging planning policies. The document does not set the housing target for the Council but provides the evidence to inform their starting position.

NPPF (2019) and PPG

1.3 The methodology used in this report responds to the NPPF (2018 and update 2019) which sets out the Government's objective to significantly boost housing supply, and the current Planning Practice Guidance (PPG) on Housing and Economic Needs Assessments.

1.4 Chapter 5 of the NPPF (2019) relates to delivering a sufficient supply of homes with Paragraph 60 setting out that "To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard methodology", which is addressed in this report. However, in exceptional circumstances, an alternative approach could be justified.

1.5 The PPG was updated in February 2019 to reflect the Government's standard methodology on objectively assessed housing need. The standard methodology seeks to simplify the approach to housing need and has three components:

- Starting Point or Baseline;
- Market Signals Adjustment; and
- Cap.

1.6 In line with national planning practice guidance, the starting point is the 2014-based projections. This is despite these not being the latest projections. The approach takes an average annual household growth from these for the period 2020 to 2030.

1.7 The baseline household growth is then modified to account for market signals. Specifically, the local median price of homes relative to local workplace median earnings. To ensure that the proposed housing need is as deliverable as possible, the housing need is capped.

1.8 For locations such as Bassetlaw where the Local Plan is older than 5 years old, the housing need number is capped at 40% above the Local Plan target or the households projections whichever is higher.

1.9 Paragraph 61 of the NPPF (2019) sets out that “Within this context, the size, type and tenure of housing needed for different groups in the community should be assessed”. It adds these specific groups include but are not limited to:

“those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes”.

1.10 It is also clear from the NPPF (2019) and the PPG that the OAN derived from the standard methodology is to act as a minimum and there is ample scope and indeed it is encouraged for local authorities to provide housing in excess of this.

1.11 Paragraph 10 of the PPG¹ sets out the circumstances when a higher figure than the standard method needs to be considered include but are not limited to:

- “growth strategies for the area that are likely to be deliverable, for example where funding is in place to promote and facilitate additional growth (e.g. Housing Deals);
- strategic infrastructure improvements that are likely to drive an increase in the homes needed locally; or
- an authority agreeing to take on unmet need from neighbouring authorities, as set out in a statement of common ground;

There may, occasionally, also be situations where previous levels of housing delivery in an area, or previous assessments of need (such as a recently-produced Strategic Housing Market Assessment) are significantly greater than the outcome from the standard method. Authorities will need to take this into account when considering whether it is appropriate to plan for a higher level of need than the standard model suggests.”

1.12 It should be emphasised that this report does not set housing targets. It provides an assessment of housing need, based on Government guidance at the time of writing, which is intended to provide input to plan-making alongside wider evidence including on land availability, environmental and other development constraints and infrastructure.

1.13 Chapter 6 of the NPPF focuses on building a strong, competitive economy. It notes that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Planning policies should:

- set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;

¹ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/687239/Draft_planning_practice_guidance.pdf

- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and d) be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.

1.14 Since the publication of the 2019 Economic Development Needs Assessment (EDNA) the employment land being promoted through the Local Plan process has significantly increased, as has interest in the District as an employment investment area. As a result, BDC has asked GL Hearn to test and consider the employment implications of a rate of development and resulting labour demand that would be required to support a greater rate of development.

1.15 For employment matters this report considers, amongst other matters:

- 2020 econometric forecasts for the district and how these compare with the 2019 report
- The key sectors and influences by the D2N2 LEP (and Sheffield City Region Combined Authority)
- How the potential supply of employment sites will generate needs for workers in the district

Geographies

1.16 The 2019 EDNA study for Bassetlaw provided commentary and a series of recommendations on the Bassetlaw Functional Economic Market Area (FEMA). Overall, the report identified a mixed picture with the analysis neither supporting a stand-alone Bassetlaw FEMA, nor does it clearly identify a strong single centre of influence over Bassetlaw.

1.17 In response the report took a pragmatic approach which considered the multiple linkages and influences on the district's economy and recommended a duty co-operate with neighbouring authorities over the Plan period to ensure that the needs of businesses and commuting residents are being effectively met through the Local Plan.

1.18 Much of the analysis used in the 2019 report has not changed in the last year so we have not sought to review the FEMA boundaries.

1.19 However, it is worth touching upon the findings of the Sheffield City Region (SCR) Statement of Common Ground (January 2020)² which includes Bassetlaw and recognises that:

“The definition of the FEMAs is not always straightforward and there can often be overlaps. At the SCR scale, therefore, there are also strong links between the different market areas and current travel to work patterns suggest that it is reasonable to consider the whole of SCR as a Strategic FEMA; which would sit above the local FEMAs defined in Local Plans.”

2

<https://governance.sheffieldcityregion.org.uk/documents/s2265/Appendix%201%20Draft%20SCR%20Statement%20of%20Common%20Ground.pdf>

1.20 However, it goes on to examine the SCR as a strategic FEMA to ensure the optimum supply of land aligns with wider infrastructure studies adding that “It would not prejudice the work done by any individual district in developing their Local Plans”. It is perhaps of note that Bassetlaw’s resident self-containment of 61% is lower than Sheffield’s of 77.7% but higher than Rotherham’s at 55.0%, as set out in the 2019 EDNA.

1.21 Finally, the above Sheffield City Region report was slightly contradicted by the later Sheffield City Council Employment Land Review (March 2020) publication which states concludes that:

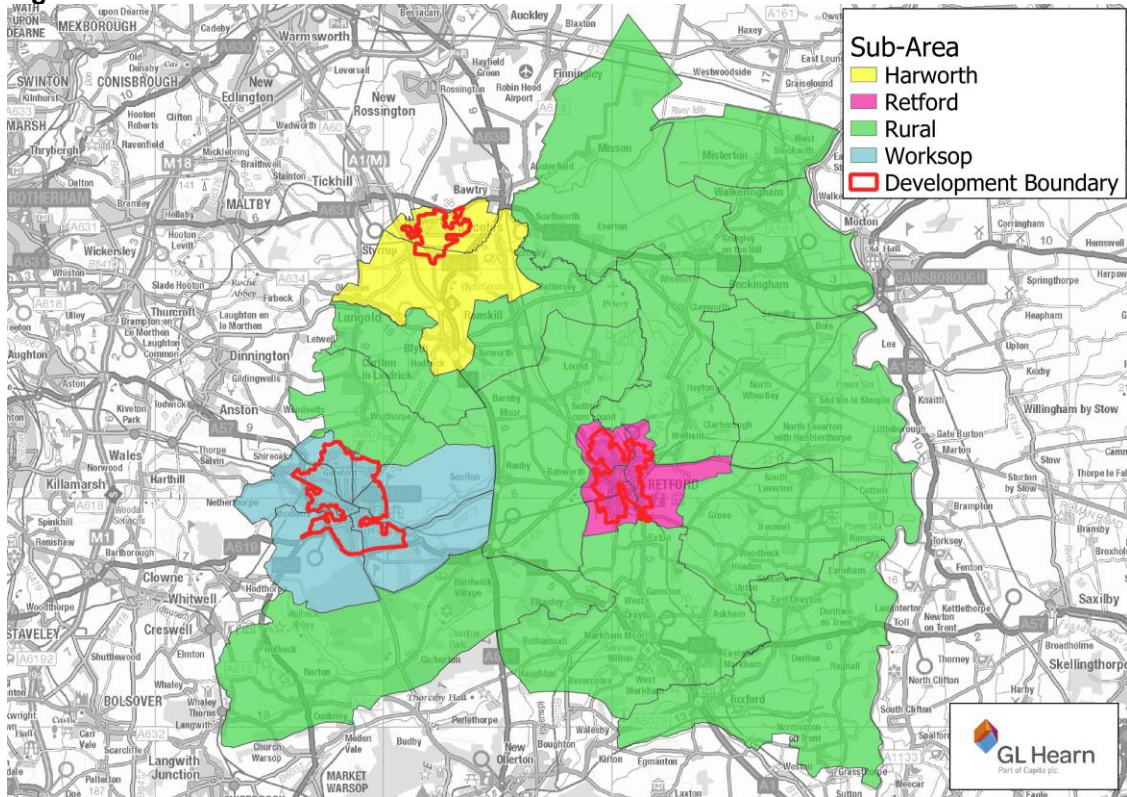
“Sheffield and Rotherham should be viewed as comprising of a single FEMA. However, both authorities are progressing separate Local Plans at different timescales and for pragmatic reasons the employment land needs and responding supply are not considered jointly. Notwithstanding this, the interrelationship between the two authority areas in terms of economic functionality suggests that close co-operation on employment land supply balance is recommended.”

1.22 We do not consider the findings of the 2019 Bassetlaw EDNA are at odds with either of the other positions set out above. Different parts of the district are strongly influenced by neighbouring areas (and vice versa) - and that there remains a duty to cooperate with neighbouring authorities. This includes those to the north in the Sheffield City Region and those to the south in the D2N2 LEP.

Sub Areas

1.23 In order to develop local plan policies this document has also examined affordable housing need and housing mix at a sub-area basis. These are based on the districts main settlements which have been translated to sub-areas based on a best fit of wards to development boundaries as illustrated in the Figure below.

Figure 1: Bassetlaw Sub-Area



Source: GL Hearn based on ONS and OS data

1.24 The four sub-areas comprise the following wards:

Table 1: Makeup of sub-areas used in analysis

Sub-area	Wards
Worksop	Worksop East, Worksop North, Worksop North East, Worksop North West, Worksop South, Worksop South East
Retford	East Retford East, East Retford North, East Retford South, East Retford West
Harworth	Harworth, Blyth
Rural	Beckingham, Carlton, Clayworth, East Markham, Everton, Langold, Misterton, Rampton, Ranskill, Sturton, Sutton, Tuxford and Trent, Welbeck

2 DEMOGRAPHICS

2.1 The analysis below looks at some key statistics about demographic trends in Bassetlaw; particularly focussing on past population growth and the reasons for changes (components of change). This information is provided to help give some context for analysis to follow.

Current (2018) Population and Age Structure

2.2 The table below shows the estimated population in each sub-area (as of 2018) and the proportion of the District total this amounts to. This analysis shows that around two-fifths of the population lives in Worksop and a further fifth in Retford. The rural areas make up just under a third of all people and Harworth just under a tenth.

Table 2: Estimated population by sub-area (2018)

	Estimated population	% of population
Worksop	46,012	39.4%
Retford	23,566	20.2%
Harworth	10,559	9.0%
Rural	36,702	31.4%
Total	116,839	100.0%

Source: ONS mid-year population estimates

2.3 The table below shows the population profile of Bassetlaw in five-year age bands compared with a range of other areas. Generally, the data shows an older age structure when compared with the County (which excludes Nottingham City), regional and national position. A further key difference is the low proportion of people in their late teens and early 20s – this will be as a result of people moving from the area for the purposes of further education (e.g. to go to University).

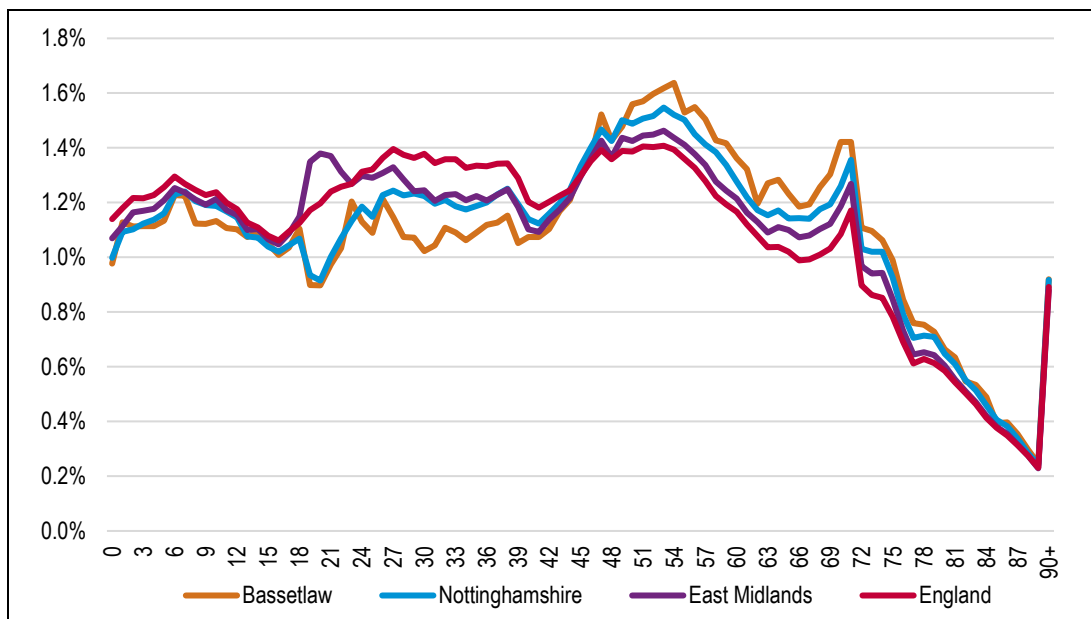
Table 3: Population profile (2018)

	Bassetlaw		Nottinghamshire	East Midlands	England
	Population	% of population	% of population	% of population	% of population
0-4	6,361	5.4%	5.5%	5.7%	6.0%
5-9	6,813	5.8%	6.0%	6.1%	6.3%
10-14	6,436	5.5%	5.6%	5.7%	5.8%
15-19	5,955	5.1%	5.1%	5.7%	5.5%
20-24	6,121	5.2%	5.3%	6.6%	6.3%
25-29	6,538	5.6%	6.1%	6.5%	6.8%
30-34	6,225	5.3%	6.0%	6.1%	6.8%
35-39	6,473	5.5%	6.1%	6.1%	6.6%
40-44	6,578	5.6%	5.9%	5.7%	6.1%
45-49	8,307	7.1%	7.1%	6.9%	6.8%
50-54	9,325	8.0%	7.6%	7.2%	7.0%
55-59	8,678	7.4%	7.1%	6.6%	6.4%
60-64	7,517	6.4%	6.0%	5.7%	5.4%
65-69	7,211	6.2%	5.8%	5.5%	5.0%
70-74	7,139	6.1%	5.7%	5.3%	4.9%
75-79	4,763	4.1%	3.8%	3.5%	3.3%
80-84	3,351	2.9%	2.8%	2.6%	2.5%
85+	3,048	2.6%	2.6%	2.4%	2.4%
All Ages	116,839	100.0%	100.0%	100.0%	100.0%

Source: ONS mid-year population estimates

- 2.4 The differences between Bassetlaw and other areas can more clearly be seen in the figure below. This identifies that the population of the District is relatively high in age bands from about 45 to 75 when compared with regional and national data. The figure also shows the impact of the student population.

Figure 2: Population profile (2018)



Source: ONS mid-year population estimates

2.5 The analysis below summarises the above information by assigning population to three broad age groups (which can generally be described as a) children, b) working-age and c) pensionable age). This analysis shows that, compared with the region and national position, Bassetlaw has a higher proportion of people aged 65 and over (22%) and a lower proportion of children. The proportion of people of 'working-age' is also slightly lower than seen in other areas. Differences when compared with Nottinghamshire (excluding Nottingham City) are less marked.

Table 4: Population profile (2018) – summary age bands

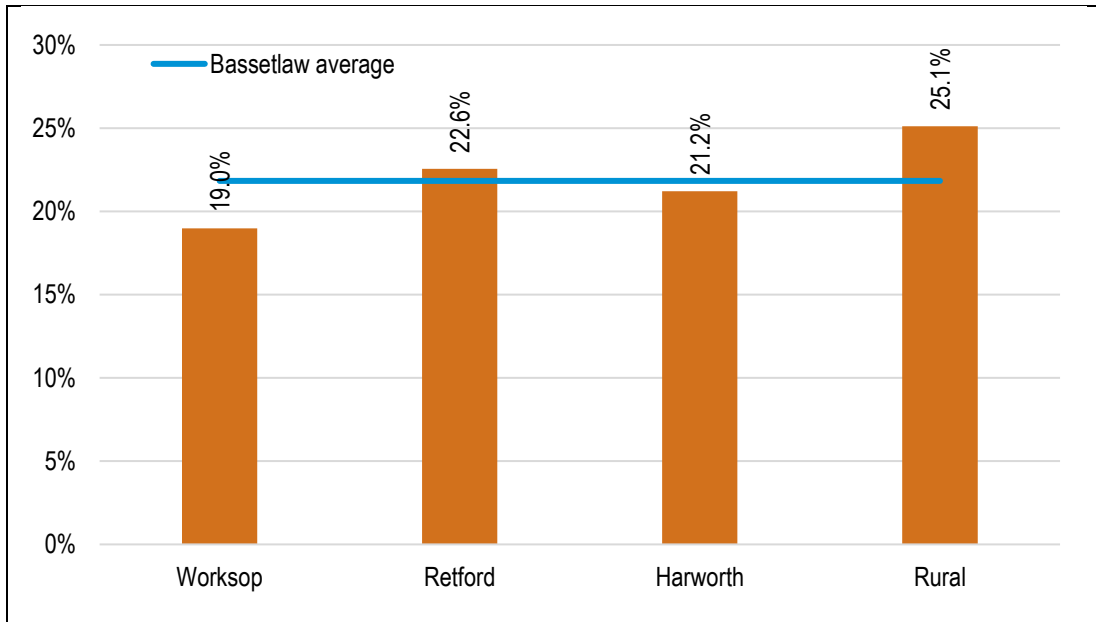
	Bassetlaw		Nottinghamshire	East Midlands	England
	Population	% of population	% of population	% of population	% of population
Under 16	20,836	17.8%	18.2%	18.6%	19.2%
16-64	70,491	60.3%	61.2%	62.1%	62.6%
65+	25,512	21.8%	20.7%	19.3%	18.2%
All Ages	116,839	100.0%	100.0%	100.0%	100.0%

Source: ONS mid-year population estimates

2.6 The figure below briefly considers the age structure of the population in different locations – focussing on the population aged 65 and over. The analysis identifies some variation in the proportion of people

in this age group in different locations with a higher proportion being seen in the Rural area and Worksop seeing the lowest proportion.

Figure 3: Proportion of population aged 65 and over by sub-area (2018)

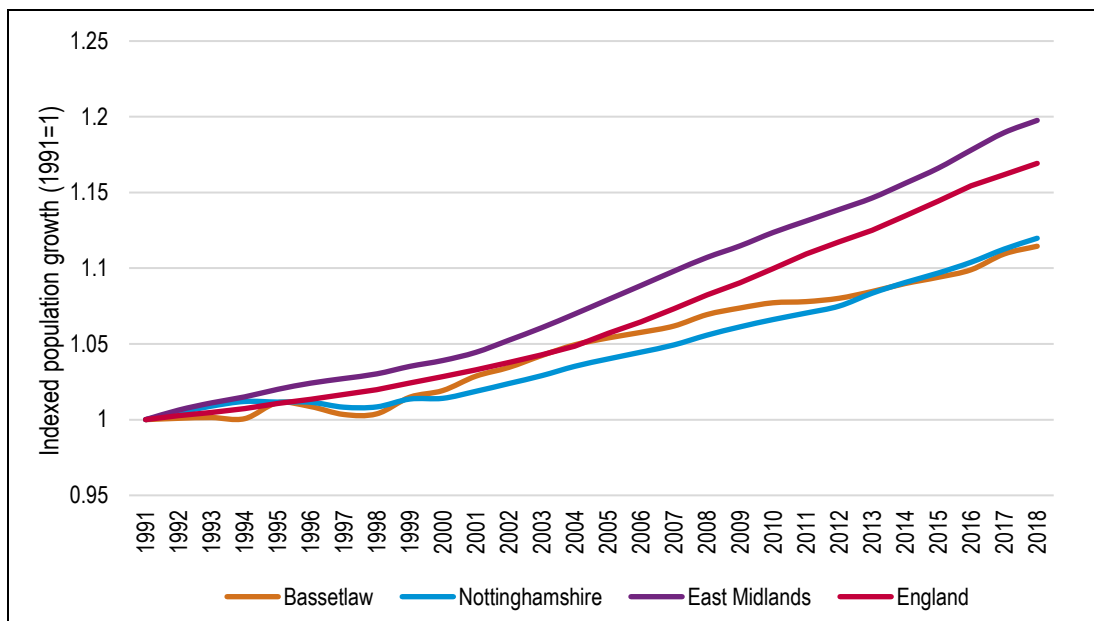


Source: ONS mid-year population estimates

Past Population Growth

2.7 The figure below considers population growth in the period from 1991 to 2018. The analysis shows over this period that the population of Bassetlaw has risen at a lower rate in comparison with other locations (the region and nationally). In 2018, it was estimated that the population of the District had risen by 11% from 1991 levels, this is in contrast with a 12% increase across the County, a 20% rise across the region and a 17% increase nationally.

Figure 4: Indexed population growth (1991-2018)



Source: ONS (mid-year population estimates)

2.8 As well as looking at the population profile, analysis has been carried out (below) to look at overall population change over the 7-year period to 2018 (a 7-year period being chosen as the start point of 2011 has data that is likely to be fairly accurate as it draws on information in the Census). The analysis shows over the period that the population of Bassetlaw increased by 3.4%, but with significant variation across areas in terms of the location of this growth. Retford has seen the strongest population growth, with far more modest levels seen in Rural locations. It is likely that to some degree, levels of population growth are influenced by the locations of new housing.

Table 5: Change in population (2011-18) by sub-area

	2011	2018	Change	% Change
Worksop	44,458	46,012	1,554	3.5%
Retford	22,359	23,566	1,207	5.4%
Harworth	10,184	10,559	375	3.7%
Rural	36,002	36,702	700	1.9%
Total	113,003	116,839	3,836	3.4%

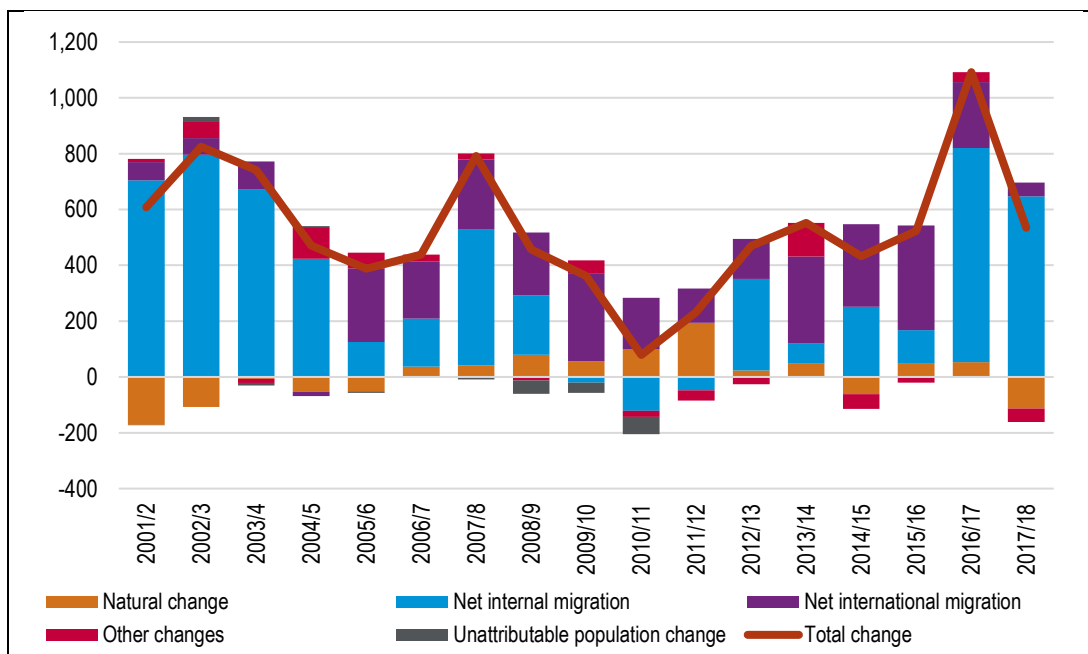
Source: ONS mid-year population estimates

Components of Population Change

2.9 The figure below considers the drivers of population change 2001 to 2018. The main components of change are natural change (births minus deaths), net migration (internal/domestic and international) and other changes. There is also an Unattributable Population Change (UPC) which is a correction made by ONS upon publication of Census data if population has been under- or over-estimated.

2.10 The data shows a varying level of natural change throughout the period, with a negative level from 2001-6 (i.e. more deaths than births) followed by a period where it was positive for 8 consecutive years. The last four years has seen some positive and some negative levels of natural change and generally, natural change is a relatively small component of all population change in any given year (averaging 5 more deaths than births over the past 5-years).

Figure 5: Components of population change, mid-2001 to mid-2018 – Bassetlaw



Source: ONS

2.11 Given levels of natural change, it can be seen that population growth is largely driven by net in-migration, and in particular internal (domestic) migration. For virtually all years, the District has seen net in-migration from the rest of the UK although this is highly variable over time. Over the last five years, net internal migration has averaged 371 people per annum.

2.12 International migration is also a positive component of population growth, with a positive number of people moving to the District from abroad in all years bar one since 2001. International net migration also looks to have become stronger in the recent past (excluding 2017/18). Over the past five years international migration has averaged 254 people per annum (net).

2.13 The data also shows a small and generally negative level of UPC, suggesting that between 2001 and 2011, ONS may have overestimated population growth within population estimates (and this was corrected once Census data had been published). If this overestimation of population growth is a systematic problem with ONS data, then it could be the case that population estimates to 2018 are also over-estimated although it should be clarified that levels of UPC are pretty modest.

Other measures of past population growth

2.14 The analysis above has focussed on data from the ONS mid-year population estimates (MYE). It is possible to contrast estimates of population growth in this source with other measures – the main one being the Patient Register (PR). The table below shows estimated population growth in both the MYE and the PR – data is shown for Bassetlaw, Nottinghamshire (excluding Nottingham City), the East Midlands and England.

2.15 For all areas the PR source shows a higher level of population growth (in both absolute numbers and as a percentage growth) and therefore Bassetlaw seems to follow trends in other locations. Whilst population growth is estimated to be higher using the PR data, there are some doubts about how robust a source this is when looking at population (both levels and change) and the MYE is generally preferred. For Bassetlaw, given that the trends follow those seen in other areas it is not suggested that this evidence points to anything substantially wrong with the MYE.

Table 6: Comparing ONS mid-year population estimates with estimates of population from the Patient Register

		2011	2018	Change	% Change
Bassetlaw	MYE	113,030	116,880	3,850	3.4%
	Patient Register	115,420	120,670	5,250	4.5%
Nottinghamshire	MYE	786,800	823,150	36,350	4.6%
	Patient Register	803,360	845,560	42,200	5.3%
East Midlands	MYE	4,537,450	4,804,170	266,720	5.9%
	Patient Register	4,690,790	5,024,160	333,370	7.1%
England	MYE	53,107,200	55,977,180	2,869,980	5.4%
	Patient Register	55,312,750	59,456,460	4,143,710	7.5%

Source: ONS

2018-based Subnational Population Projections (SNPP)

- 2.15 The latest (2018-based) set of subnational population projections (SNPP) were published by ONS in March 2020 (replacing a 2016-based release). The projections provide estimates of the future population of local authorities, assuming a continuation of recent local trends in fertility, mortality and migration which are constrained to the assumptions made for the 2018-based national population projections.
- 2.16 The 2018-based SNPP contain a number of assumptions that have been changed from the 2016-based version, these assumptions essentially filtering down from changes made at a national level. The key differences are:
- 2.17 ONS' long-term international migration assumptions have been revised upwards to 190,000 per annum compared to 165,000 in the 2016-based projections. This is based on a 25-year average;
- 2.18 The latest projections assume that women will have fewer children, with the average number of children per woman expected to be 1.78 compared to 1.84 in the 2016-based projections; and
- 2.19 Life expectancy increases are less than in the 2016-based projections as a consequence of the continued limited growth in life expectancy over the last two years.
- 2.20 As well as providing a principal projection, ONS has developed a number of variants. In all cases the projections use the same fertility and mortality rates with differences being applied in relation to migration. The key variants in terms of this assessment can be described as:
- Principal projection
 - an alternative internal migration variant
 - a 10-year migration variant
- 2.21 In the principal projection, data about internal (domestic) migration uses data for the past 2-years and data about international migration from the past 5-years. The use of 2-years data for internal migration has been driven by ONS changing their methodology for recording internal moves, with this data being available from 2016 only.
- 2.22 The alternative internal migration variant uses data about migration from the last 5-years (2013-18), as well as also using 5-years of data for international migration. This variant is closest to replicating the methodology used in the 2016-based SNPP although it does mean for internal migration that data used is collected on a slightly different basis.

2.23 The 10-year migration variant (as the name implies) uses data about trends in migration over the past decade (2008-18). This time period is used for both internal and international migration.

2.24 The table below shows the outputs from each of these three variant scenarios along with comparisons from the 2016- and 2014-based SNPP. This shows that the 2018-based principal projection shows projected population growth of 11.0%, with the alternative internal migration scenario being lower than this (5.9%) – both of these are higher than the 10-year trend variant. Population growth in both the 2016- and 2014-based projections sit towards the bottom of the range shown from the 2018-based figures. The comparison with the 2014-based SNPP is particularly important as it underpins the 2014-based SNHP which is used in the Standard Method).

Table 7: Projected population growth (2018-2037) – Bassetlaw – range of SNPP releases

	Population 2018	Population 2037	Change in population	% Change
2018 (principal)	116,839	129,648	12,809	11.0%
2018 (alternative internal)	116,839	123,696	6,857	5.9%
2018 (10-year trend)	116,839	121,554	4,715	4.0%
2016-based	115,859	121,198	5,339	4.6%
2014-based	115,368	121,363	5,996	5.2%

Source: ONS

2.25 As noted, the 2018-based SNPP has three main scenarios and rather than provide data from all three, the analysis below looks at a preferred scenario. In this case it is considered that the alternative internal migration variant is likely to be the most robust in a local context and has been used as a baseline later in this report.

2.26 This has been chosen as it is considered that the principal SNPP has too short a data period when looking at internal migration whilst the 10-year alternative is not thought likely to reflect recent changes seen in Bassetlaw (such as an uplift in housing completions).

2.27 With the overall change in the population will also come changes to the age profile. The table below summarises findings for key (5 year) age groups. The largest growth will be in people aged 65 and over. In 2037 it is projected that there will be 35,700 people aged 65 and over. This is an increase of 10,200 from 2018, representing growth of 40%. The population aged 85 and over is projected to increase by an even greater proportion, 95%. Looking at the other end of the age spectrum the data shows that there is projected to be a modest decrease in the number of children (those aged Under 15), with decreases shown for most adult age groups (40-44 being the main exception).

Table 8: Population change 2018 to 2037 by five-year age bands – Bassetlaw (2018-based SNPP – alternative internal migration assumptions)

	Population 2018	Population 2037	Change in population	% change from 2018
Under 5	6,361	5,974	-387	-6.1%
5-9	6,813	6,223	-590	-8.7%
10-14	6,436	6,547	111	1.7%
15-19	5,955	6,420	465	7.8%
20-24	6,121	5,912	-209	-3.4%
25-29	6,538	6,529	-9	-0.1%
30-34	6,225	6,047	-178	-2.9%
35-39	6,473	6,437	-36	-0.6%
40-44	6,578	7,437	859	13.1%
45-49	8,307	7,824	-483	-5.8%
50-54	9,325	7,634	-1,691	-18.1%
55-59	8,678	7,507	-1,171	-13.5%
60-64	7,517	7,492	-25	-0.3%
65-69	7,211	8,779	1,568	21.7%
70-74	7,139	8,715	1,576	22.1%
75-79	4,763	7,132	2,369	49.7%
80-84	3,351	5,156	1,805	53.9%
85+	3,048	5,931	2,883	94.6%
Total	116,839	123,696	6,857	5.9%

Source: ONS

2.28 The analysis below summarises the above information by assigning population to three broad age groups (which can generally be described as a) children, b) working-age and c) pensionable age). This analysis emphasises the projected increase on the population aged 65 and over, of the total projected population increase of 6,900 people, over 100% (10,200) is projected to be in the 65+ age group.

Table 9: Population change 2018 to 2037 by broad age bands – Bassetlaw (2018-based SNPP – alternative internal migration assumptions)

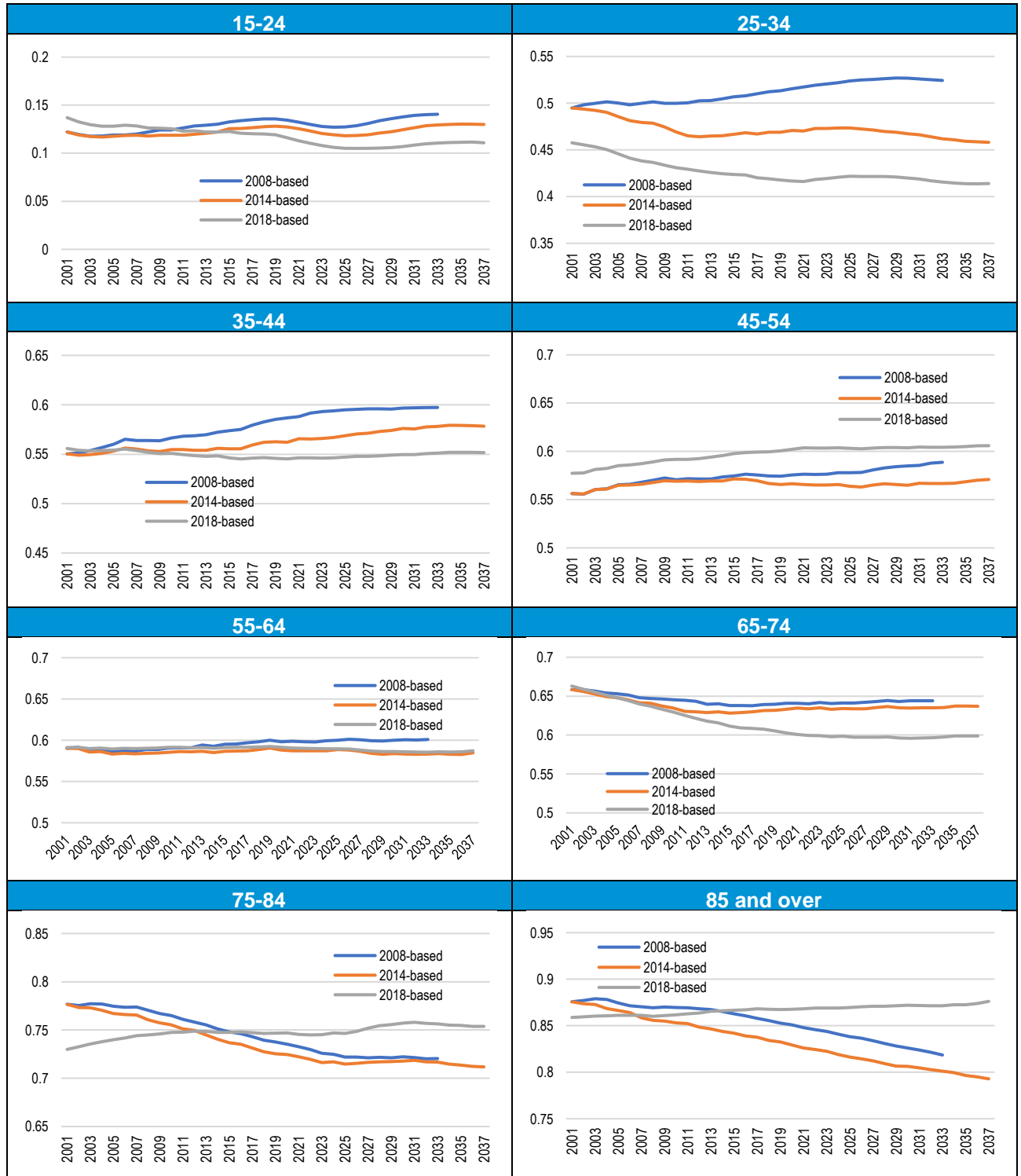
	Population 2018	Population 2037	Change in population	% change from 2020
Under 16	20,836	20,094	-742	-3.6%
16-64	70,491	67,888	-2,603	-3.7%
65 and over	25,512	35,713	10,201	40.0%
Total	116,839	123,696	6,857	5.9%

Source: ONS

Household Representative Rates (Household Formation)

- 2.29 Having studied the population size, the next step in the process is to convert this information into estimates of the number of households in the area. To do this the concept of household representative rates (HRR) is used. HRRs can be described in their most simple terms as the number of people who are counted as heads of households (or in this case the more widely used Household Reference Person (HRP)).
- 2.30 The latest HRRs are as contained in the ONS 2018-based subnational household projections (SNHP) – these were published in June 2020. These projections follow the same methodology as the 2016-based SNHP and it would be fair to say that the 2016-based SNHP have come under some criticism, this is largely because they are based only on data in the 2001-11 Census period which would suggest that it builds in the suppression of household formation experienced in that time. The previous (2014-based) projections used a longer time-series (all Census points back to 1971) and therefore do cover a wider housing market cycle.
- 2.31 Because of the criticisms of the 2016-based SNHP (and by implication the 2018-based version), and the fact that these have driven the Government decision to not use the 2016-based figures in the Standard Method (which is directly linked to official household projections) it is considered prudent in this report to look at both the 2018- and 2014-based figures.
- 2.32 The figure below compares HRRs in the 2014- and 2018-based SNHP – the figures are essentially the proportion of a particular age group that is considered to be the 'head of household' (HRP as described above). Overall, the analysis would suggest that the 2018-based figures may be building in more suppression than the 2014-based figures – this can be seen by the 2018-based figures (for younger age groups and notably those aged 25-34) typically having lower HRRs than is seen in other projection releases.
- 2.33 Looking at some of the older age groups, it can be seen that the 2018-based SNHP are projecting for there to be some increases in HRRs (particularly the 85 and over group). Whilst an increase is possible (and does appear to be the trend) it is thought that overall HRRs for older groups are actually more likely to fall over time. This is due to slightly improving mortality rates and therefore the likelihood that households will remain as couples for longer. The 2014-based figures do show a decrease in the HRRs for older age groups and are arguably therefore more realistic.

Figure 6: Projected Bassetlaw Household Representative Rates by age of head of household



Source: Derived from ONS and CLG data

- 2.34 Overall, the 2018-based figures appear to potentially be building in more suppression than the 2014-based data, and it is considered when looking more widely across all age groups that the 2014-based data may be more realistic. These issues are discussed and addressed further within the Economic-Led Housing Need chapter.
- 2.35 The figure also shows the same information from the 2008-based SNHP. Generally, for younger age groups these older projections show a more positive level of household formation and whilst they are quite dated, they are a source that is regularly used to develop scenarios with a more positive view about household formation of younger people. We have used this approach later in the report when examining economic-led housing need.

Demographics: Key Messages

- As of 2018 the population of Bassetlaw was 116,839. It is estimated that the population of the District had risen by 11% from 1991 levels, this is in contrast with a 12% increase across the County, a 20% rise across the region and a 17% increase nationally.
- The largest settlements of Worksop (39.4%) and Retford (20.2%) and Harworth (9.0%) are home to around 70% of the districts population.
- Natural change in the district has been variable with population growth is largely driven by net in-migration, and in particular internal (domestic) migration.
- The 2018-based principal population projection shows projected population growth of 11.0% which is a significantly higher level of growth than the 2016- and 2014-based projections with the latter feeding into the Standard Method.
- However, the preferred population projections which draw on longer term internal migration trends result in a lower population growth of 5.9%

3 LOCAL HOUSING NEED

3.1 This section sets out GL Hearn’s initial findings as regards the Local Housing Needs (LHN) for Bassetlaw. The relevant geography for calculating the LHN is the local authority as the calculation draws on household projections and affordability ratios published at this level.

Housing Need and the Standard Method

3.2 The Ministry of Housing, Communities and Local Government (MHCLG) three-step methodology takes the official household projections as the starting point. This is adjusted based on the medial affordability ratio. However, that adjustment is then capped to 40% above a shifting figure depending on the status of the local authority’s local plan and the scale of its housing requirement relative to the household projections. These steps are set out below.

Step 1: Setting the baseline

3.3 The initial revisions to the Planning Practice Guidance made it clear that national household projections should provide the demographic baseline for every local authority. After a period of consultation in February 2019, the MHCLG confirmed that local authorities should revert to the 2014-based household projections (rather than the subsequently published 2016-based or 2018-based projections) when calculating their LHN using the standard methodology. This was to ensure the government’s stated target of 300,000 per annum could be achieved.

3.4 The Standard Method proposes that the demographic baseline should be the annual average household growth over 10 years with the current year being the first year. As this document is being published in 2020 then the period examined is 2020 -2030. However, as paragraph 12 of the PPG states, “The method provides authorities with an annual number, based on a 10 year base line, which can be applied to the whole plan period.” and Bassetlaw can therefore be applied to 2037.

3.5 As set out in the table below there is expected to be a 2,515 growth in households in Bassetlaw over the 2020 to 2030 or 252 households per annum. This equates to a 5.0% increase in households over the same period.

Table 10: Step 1 – Household Growth in Bassetlaw

	Bassetlaw
Households 2020	50,619
Households 2030	53,134
Change in households	2515
Per annum change (Step 1)	252

Source: GL Hearn calculations

Step 2: Adjustment to take account of affordability

- 3.6 The methodology seeks to adjust the demographic baseline based on local affordability. The adjustment increases the housing need where house prices are high relative to workplace incomes. This uses the median workplace-based affordability ratios published by ONS. That is the ratio between median workplace earnings in a given area and the median house price in the same location.
- 3.7 Specifically, the PPG says that ‘for each 1% increase in the ratio of house prices to earnings, where the ratio is above 4, the average household growth should be increased by a quarter of a per cent’. The equation to work out the adjustment factor is as follows:

$$\text{Adjustment factor} = \left(\frac{\text{Local affordability ratio} - 4}{4} \right) \times 0.25$$

- 3.8 In 2019, the median workplace affordability ratio was 6.35 (i.e. median house prices were 6.35 times the median earnings of those working in Bassetlaw. As set out in the table below this means a 15% adjustment for the district.

Table 11: Step 2 - Affordability Uplift in Bassetlaw

	Bassetlaw
Per annum change (Step 1)	252
Affordability ratio (2019)	6.35
Uplift to household growth	115%
Total need (per annum)	288

Source: GL Hearn calculations

Step 3: Capping the level of any increase

- 3.9 The final step in the standard method is to cap the market signals uplift if necessary. In the PPG it is noted that “the market adjustment could lead to a significant increase in the local housing need in some parts of the country. To help ensure the method is deliverable, a cap on the local housing need may be applied”.
- 3.10 How the cap is applied depends on the age and scale of growth within adopted Local Plans. Where an authority has reviewed their plan (including developing an assessment of housing need) or adopted a plan (including spatial development strategies within the last five years) the need may be capped at 40% above the requirement figure set out in the plan.

- 3.11 The second situation is where plans and evidence are more than five years old. In such circumstances, a cap may be applied at 40% of the higher of the projected household growth or the housing requirement in the most recent plan (where this exists).
- 3.12 In Bassetlaw, the Core Strategy was adopted in December 2011 and had a housing target of 6,384 over the 18 year period from 2010-2028 or 350 per annum. Therefore, the cap should be applied at any figure 40% above the housing target as this is higher than the household growth.
- 3.13 The 40% cap would nominally cap any growth in Bassetlaw to 497 dpa however as Step 2 of the Standard Method only reaches 288 dpa the cap is effectively redundant. **The LHN for Bassetlaw is therefore 288 dpa over the plan period 2020 to 2037.**

Consultation Standard Method

- 3.14 In August 2020 MHCLG launched a consultation³ seeking views on a range of proposed changes to the current planning system including changes to the standard method for assessing local housing need.
- 3.15 The consultation document set out a two stage approach which seeks to deliver the Government's commitment to plan for the delivery of 300,000 new homes a year but also ensuring a more appropriate distribution of homes, and on targeting more homes into areas where they are least affordable.
- 3.16 The first step attempts to provide more stability and certainty by incorporating a blend of household projections and stock. Specifically step 1 should be the higher of 0.5% of existing housing stock in each local authority OR the latest projected average annual household growth over a 10-year period.
- 3.17 As the table below sets out there are 52,181 homes in Bassetlaw 0.5% of which would equate to 261 dpa. This is below the annual projected household growth of 394 dpa. Note that this differs from the previous calculation because it is based on the 2018-based household projections rather than the 2014-based projections. Therefore Step 1 of the Consultation Methodology is calculated as 394 dpa

3

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/907215/200805_Changes_to_the_current_planning_system_FINAL_version.pdf

Table 12: Step 1- Baseline Need Using Consultation Standard Methodology

	Bassetlaw
Households 2020	50,661
Households 2030	54,601
Average Annual Change	394
Housing Stock	52,181
0.5% Of Housing Stock	261
Step 1 = Higher of Stock or Growth	394

Source: GL Hearn based on ONS data

- 3.18 The second step of the Methodology again adjusts the need to reflect affordability. However, as well as taking into account the most recent affordability ratio the consultation approach also factors in how that has changed over the last 10 years. Specifically, the equation is as follows

$$\begin{aligned}
 & \textit{Adjustment Factor} \\
 & = \left[\left(\left(\frac{\textit{Local affordability ratio}_{t=0} - 4}{4} \right) \times 0.25 \right) \right. \\
 & \quad \left. + \left(\left(\textit{Local affordability ratio}_{t=0} - \textit{Local affordability ratio}_{t=-10} \right) \times 0.25 \right) \right] \\
 & \quad + 1
 \end{aligned}$$

Where $t = 0$ is current year and $t = -10$ is 10 years back.

- 3.19 As the table below sets out the affordability Ratio in Bassetlaw has increased from 5.21 in 2009 to 6.35 in 2019. This results in an adjustment of 143% which when applied to the household growth gives a need for 564 dpa.

Table 13: Step 2- Adjusting for Market Signals Using Consultation Standard Methodology

	Bassetlaw
Step 1	394
Affordability Ratio 2009	5.21
Affordability Ratio 2019	6.35
Adjustment Factor	143%
OAN	564
% Change Per Annum	1.1%

Source: GL Hearn based on ONS data

- 3.20 There is no Step 3 in the consultation methodology therefore the LHN would remain at 564 dpa under the Consultation proposals. However, it should be stressed that this approach is only a consultation number and presently has no basis in policy.

Exceeding the Standard Method

- 3.21 PPG requires local authorities when setting a housing target, within either a Joint Strategic Plan or in individual Local Plans, to also consider when it might be appropriate to plan for a higher housing need figure than the standard method indicates [010-2a Housing and economic needs assessment]. The paragraph states:

“The government is committed to ensuring that more homes are built and supports ambitious authorities who want to plan for growth. The standard method for assessing local housing need provides a minimum starting point in determining the number of homes needed in an area. It does not attempt to predict the impact that future government policies, changing economic circumstances or other factors might have on demographic behaviour. Therefore, there will be circumstances where it is appropriate to consider whether actual housing need is higher than the standard method indicates.

This will need to be assessed prior to, and separate from, considering how much of the overall need can be accommodated (and then translated into a housing requirement figure for the strategic policies in the plan). Circumstances where this may be appropriate include, but are not limited to situations where increases in housing need are likely to exceed past trends because of:

- *growth strategies for the area that are likely to be deliverable, for example where funding is in place to promote and facilitate additional growth (e.g. Housing Deals);*
- *strategic infrastructure improvements that are likely to drive an increase in the homes needed locally; or*
- *an authority agreeing to take on unmet need from neighbouring authorities, as set out in a statement of common ground;*

There may, occasionally, also be situations where previous levels of housing delivery in an area, or previous assessments of need (such as a recently-produced Strategic Housing Market Assessment) are significantly greater than the outcome from the standard method. Authorities will need to take this into account when considering whether it is appropriate to plan for a higher level of need than the standard model suggests.”

- 3.22 However, the guidance does not state that where such circumstances are in place it is necessary to increase the overall need but rather it is for local authorities to consider “whether it is appropriate to plan for a higher level of need than the standard model suggests”.

- 3.23 Furthermore Paragraph 24 of the PPG (Reference ID: 2a-024-20190220) states that:

“The total affordable housing need can then be considered in the context of its likely delivery as a proportion of mixed market and affordable housing developments, taking into account the probable percentage of affordable housing to be delivered by eligible market housing led developments. An increase in the total housing figures included in the plan may need to be considered where it could help deliver the required number of affordable homes.”

3.24 In addition, the PPG allows local authorities to consider alternatives to the Standard Method with paragraph 15 stating:

“Where a strategic policy-making authority can show that an alternative approach identifies a need higher than using the standard method, and that it adequately reflects current and future demographic trends and market signals, the approach can be considered sound as it will have exceeded the minimum starting point.

Where an alternative approach results in a lower housing need figure than that identified using the standard method, the strategic policy-making authority will need to demonstrate, using robust evidence, that the figure is based on realistic assumptions of demographic growth and that there are exceptional local circumstances that justify deviating from the standard method.”

3.25 However, the PPG is clear that:

“Any method which relies on using the 2016-based household projections will not be considered to be following the standard method as set out in paragraph 60 of the National Planning Policy Framework. As explained above, it is not considered that these projections provide an appropriate basis for use in the standard method.”

3.26 To put these parts of the guidance in the Bassetlaw context this report does not examine any alternative approach to the Standard method. There is no strategic infrastructure planned for the district and no local authorities have approached the Council to address their unmet need.

3.27 However, there are clearly economic growth plans in the district and there will be a need for affordable housing. Both these aspects are examined later in this document and their impact on overall housing need is explored.

Local Housing Need: Key Messages

- The National Planning Policy Framework (NPPF) of February 2019 introduced a Standard Method for assessing housing need.
- Step 1 of the methodology links to 2014-based subnational household projections (SNHP); this suggests household growth of about 252 per annum,
- Step 2 of the standard method based on local affordability increases household growth by 15% or 36dpa.
- Step 3 of the standard method caps the increase in Step 2 but this is not required in Bassetlaw as the increase is not great enough to justify it.
- **Recommendations: Based on the calculated local housing need the district should seek to deliver as a minimum 288 dpa**

4 ECONOMIC GROWTH AND JOBS FORECASTS

Introduction

- 4.1 This section considers the existing evidence base of strategic documents related to economic growth in Bassetlaw, along with feedback from consultations of key stakeholders. It then considers demand led employment forecasts.

Policy Review

- 4.2 As Bassetlaw District falls under the D2N2 LEP, which includes Derby, Derbyshire, Nottingham and Nottinghamshire, the strategic documents have been reviewed in order to understand priorities that would have specific employment implications. Bassetlaw was previously also included under Sheffield City Region LEP and given the spatial proximity we have also reviewed Sheffield City Region documents, however Bassetlaw is no longer listed as part of their constituency.

D2N2 LEP Local Industrial Strategy, 2020

- 4.3 The draft LIS document is based on several “Guiding principles” which are listed below:
- Lead a bold new way of bringing together the education and skills frameworks to support businesses to deliver the talent for the current and next generation of business;
 - Lead the most ambitious carbon turn-around in the country; and
 - Deliver connectivity-led growth to all parts of the region.
- 4.4 In terms of relating to employment sectors, there are specific propositions in place to capitalise on existing institutions and the manufacturing base to build high quality jobs. This means that there is a specific emphasis on sectors with a high concentration of research and development. Specific areas of innovation include:
- University of Nottingham Innovation Park;
 - Nottingham Science Park;
 - BioCity;
 - MediCity; and
 - Infinity Park.
- 4.5 In addition, a decarbonisation agenda would mean that additional emphasis will be placed on energy and related sectors to switch to carbon-neutral sources.

Vision 2030: Strategic Economic Plan (SEP), D2N2 LEP (2018)

- 4.6 The document’s overarching purpose is to set a target for the economy by 2030, stating that their vision is to “which is prosperous, healthy and inclusive, and one of the most productive in Europe”.

4.7 The document also calls Bassetlaw, amongst other areas in the LEP, social mobility “cold-spots” where social mobility is limited. There are challenges related to productivity, a higher concentration of low-paying jobs, little new labour and career mobility.

4.8 Eight “Key Actions” from the document include:

- Stronger LEP and Effective Local Industrial Strategy
- Productivity Focus for the Growth Hub
- Innovation Led Productivity Growth
- Careers Inspiration For Our Future Workforce
- Inclusion and Progression in the Labour Market
- Skills & Leadership for Productivity Growth
- World Class Infrastructure and Connectivity

4.9 Targets for 2030 specific to these actions include:

- Be in top quarter of productive local economies in Europe;
- Increase the overall value of economy to £70bn with £9bn being added as a result of plan;
- Enjoy prosperity levels in the top quarter of all LEP areas;
- Raise real wages and narrow inequality through a rise in median weekly earnings of at least 40% across D2N2 with wage disparities within D2N2 narrowed;
- Maintain a high and stable employment rate maintained with a workforce of some 1 million people;
- Reduce the gap in economic activity levels between places in D2N2; and
- Eliminate the gap in workforce qualifications between the UK and D2N2.

4.10 The LEP aims to direct investment to specific sectors in the LEP. Priority sectors include:

- Transport Equipment Manufacturing;
- Food and Drink Manufacturing;
- Life Sciences;
- Creative & Digital;
- Visitor Economy;
- Logistics & E-Commerce;
- Construction;
- Extractive Industries;
- Retail;
- Health / Social Care;
- Professional / Business Services.

Industrial Strategy, Sheffield City Region, 2019

4.11 The industrial strategy for Sheffield city region sets out the LEP’s long-term plan to improve the region through boosting productivity and business activity. This includes the investment of £47m for research facilities at the University of Sheffield’s three Engineering Research Centres. The aim of this funding is to raise the skills profile and reputation of the region along with encouraging business activity through the form of start-ups.

Strategic Economic Plan 2020-40, Sheffield City Region

- 4.12 The Sheffield SEP is an ambitious document outlining targets for the LEP area. Specific targets related to employment include:
- Inclusive growth with productivity gains of £7.6bn in GVA per annum
 - 33,000 upskilled workers
 - A zero- carbon City Region
 - IR&D investment totaling £1.1bn per annum (up from £323m pa).
- 4.13 These ambitions are aligned with D2N2 growth strategies, particularly in regard to upskilling and productivity.

Stakeholder Engagement

D2N2 LEP

- 4.14 Discussions with the D2N2 LEP revealed that Bassetlaw has a key role in achieving their strategic objectives. Key sectors in Bassetlaw include the warehousing and logistics sector, along with low-carbon energy through the existing decommissioned power stations within the district. The logistics sector in the future could also be positioned to integrate with other sectors, such as robotics, information technology and analytics.
- 4.15 In terms of the provision of a Garden Village in Bassetlaw District, the LEP indicated that the provision could be a unique opportunity, and that funding could be available through DfT in relation to the train station development. Notable modern methods of construction businesses exist in Bassetlaw, meaning that new technology in housebuilding could be utilised in the construction of the population centre.

Bassetlaw Council Growth Officers

- 4.16 Consultations with council officers has identified that Bassetlaw economic growth expectations are aligned with the recently completed D2N2 LIS, and that the strategy of Bassetlaw of late has been focused on a COVID economic recovery programme.
- 4.17 Opportunities for sectors include modern methods of construction, particularly Laing O'Rourke which is located within the District and utilises modern methods of construction along with training for local workers. Businesses like these are an example of an existing base which could be improved upon through the completion of a garden village. The expansion of Laing O'Rourke's Explore Steetley site is also an indicator of the advanced manufacturing and assembly in modern construction in the District.

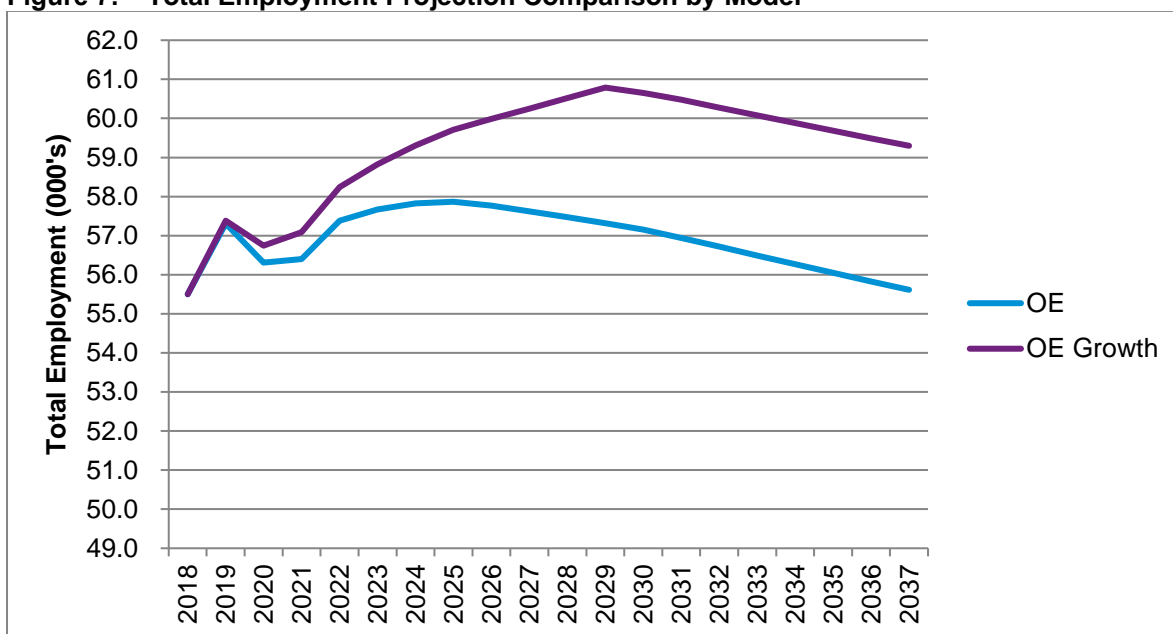
- 4.18 Bassetlaw was noted to have key sector strengths in Food and Drink Manufacturing, General Manufacturing, the Visitor Economy, Education and Retail.
- 4.19 There is also an opportunity to capitalise on the green energy opportunities at High Marnham Green Energy Hub. Proposals include low carbon energy production and storage 'energy hub'; an energy efficient business area; and solar energy and green energy production area. These are supported by the site promotor, who has significant experience in using energy generation and low carbon uses.

Employment Forecasts – Demand Led

- 4.20 GL Hearn prepared the 2019 Bassetlaw Economic Development Needs Assessment (EDNA). This forecast employment growth of around 3,400 jobs and a need of approximately 63 Ha of employment land alongside an employment led housing need of 390 dwellings per annum.
- 4.21 Bassetlaw District Council has asked GL Hearn to update the EDNA position based on the latest data and taking into account the implications of the proposed employment land allocations on employment labour demand and housing demand
- 4.22 The 2019 EDNA forecast was for 3,400 additional jobs over the Plan period (to 2035) drawing on Oxford Economics (OE) data and adjusting for strengths locally in manufacturing and transport employment. 2020 OE data has been acquired for July 2020, reflecting the forecaster's views of the COVID-19 pandemic implications. GL Hearn has considered the data and is of the view that uplifts to the same sectors as in 2019 are justified based on the nature of local investments and the district and LEP aligned key sectors.
- 4.23 The 2020 position indicates that the latest forecast, adjusted for growth sectors, is 3,800 additional jobs to 2037 (reflecting a slightly longer period). The unadjusted OE forecast is 112 jobs only which is caused by any gains in health and social care jobs being offset by expected losses in manufacturing.
- 4.24 Comparatively Experian baseline forecast data provided by Sheffield City Region LEP indicates 3,928 jobs growth (FTE) over the same period with a more positive outlook in particular for transport & storage and manufacturing compared to OE, however Experian does start from a lower jobs base which does not align with OE or the 2018 BRES reported employment position.
- 4.25 GL Hearn is of the view it remains valid to test a growth scenario where manufacturing and transport jobs forecast by OE perform more strongly. Later in this section a supply led policy on jobs model is explored.

4.26 The 2019 EDNA drew on datasets from OE, Experian and CE. As above, for this 2020 update, data has been purchased from OE and provided via Sheffield City Region LEP from Experian derived from the Regional Economic Model. FTEs are included in the Experian data and not total workforce jobs. The 2019 EDNA ratios provided by Experian from FTEs to jobs generated inconsistencies with the jobs in 2019 reported by OE and BRES, being 57,000 and 58,000 respectively, compared with c49,700 from Experian. As a result, this is not shown on the chart below. Of note, the Experian data does align with employee job counts but these exclude self-employment, which is likely to exceed 5,000 in Bassetlaw, however sectoral distribution of this cannot be measured.

Figure 7: Total Employment Projection Comparison by Model



Source: GLH Analysis of CE, Experian and OE forecasts

4.27 The 2019 EDNA provided a growth scenario based on the OE baseline forecast but provided an uplift in the key sectors of Manufacturing and Transport & storage. This was based on recent performance of those sectors and an understanding of the local strengths in the District economy. As above, GL Hearn is of the view that these adjustments remain valid in 2020 given the nature of stakeholder discussions and the focus of investment sites in the district.

4.28 The table below sets out the change by sector 2018-37 using the most recent data. The July 2020 purchased from OE data includes any adjustments considered necessary by OE to reflect the COVID-19 situation.

Table 14: Employment Forecast Comparison, Total Change 2018-37

	Employment Change by sector 2018-37		
	EXP '20*	OE '20	OE '20 Growth
Agriculture	-20	-92	-92
Mining	-64	-15	-15
Manufacturing	-563	-2,936	-1,284
Utilities	94	-142	-142
Construction	320	313	313
Wholesale & Retail	186	231	231
Transport & Storage	1,135	-206	1,827
Hospitality	166	-22	-22
Info & Comms	32	222	222
Finance & Business	-52	1,048	1,048
Government Services	2,802	1,377	1,377
Other Services	-108	333	333
Total	3,928	112	3,796

Source: GLH Analysis of Experian and OE Data

* Experian jobs derived from 2019 Experian FTE / jobs ratios

- 4.29 As demonstrated in the table above, OE has an overall pessimistic view of the economy compared to Experian, particularly in the Manufacturing and Transport and Storage sectors, and to a lesser extent government services.
- 4.30 The OE growth scenario account for specific uplifts to the Manufacturing sector along with Transport and Storage, however this was discounted by a 50% return to trend from 2030 onwards to allow for a greater incorporation of the OE underlying indicators.

Policy on employment position (supply led)

- 4.31 Given that a significant supply of sites is well progressed and being actively promoted, as set out the following chapter, a policy on employment position can be explored which replaces modelled growth assumptions under the demand led scenario with job assumptions explicitly considered on a site by site basis. This takes into account the potential of each site as well as issues of additionality.

Additionality

- 4.32 Additionality (as per the HCA Additionality Guide 2014) considers displacement, multipliers and leakage (the latter is dealt with under commuting issues in chapter 5). Displacement is comparable to the replacement demand model, in that jobs at new sites are not all new and are in fact displacing existing jobs being 'moved around'. Given uncertainties in how historic replacement demand will manifest in the future, GL Hearn reverts to a 'medium' displacement rate of 50% (HCA Additionality Guide 2015) for the site supply in general (excluding the larger warehousing sites of Snape Lane and Apleyhead Junction) totalling 3,064.

4.33 As a sense check, this has been compared to the replacement demand model. It was estimated in the 2019 EDNA that around 2.0 Ha per annum of employment land is needed to replace for losses of existing employment sites to other uses. In the case of replacement demand, it is assumed that the workforce is already present in the district and therefore these areas of employment are supported by the existing workforce. This is estimated to be 3,172 as set out below. This indicates that the 3,064 displacement figure is appropriate in terms of the general supply.

Table 15: Replacement Demand Absorption

Type	Density	Plot Ratio	Ha (2018-35)	Ha (2018-37)	FTE (2018-27)	Jobs (0.93)
B2	38	0.4	17	18	2,000	-
B8	80	0.4	17	18	950	-
Total	-	-	34*	38	2,950	3,172

* Bassetlaw EDNA Part 1 pg76

4.34 The two larger sites at Snape Lane and Apleyhead Junction offer large scale units that would not typically be taken up by local businesses. Therefore, displacement is brought down to a 'low' 25%.

4.35 We also consider it appropriate to include multiplier effect benefits on new sites. This is only applied to the net growth jobs that are not considered to be displacement jobs. For the general supply of sites, we assume a typical local level of 25% but for two larger sites given the nature of potential larger distribution units we assume a lower multiplier rate of 10%.

Supply Scenarios

4.36 Below two scenarios for future supply are considered, the known supply including permissions and allocations for local needs; and separately the larger site at Apleyhead Junction.

4.37 The existing supply portfolio benefitting from permission includes Symmetry Park and Snape Lane (Mulberry Logistics Park Doncaster), the latter particularly focused on larger scale units which can accommodate logistics and other larger occupier requirements.

4.38 Of the proposed allocations at High Marnham, Retford and Bassetlaw Garden Village the nature of these proposals indicates they are orientated to more local business growth and investment opportunities.

4.39 Apleyhead Junction is the only further proposed site capable of attracting large scale inward investment of a regional or sub regional nature – as discussed in section 9. As a result it is considered separately from the main permitted / allocated supply.

4.40 The total job figures from all sites have been converted from the full time equivalents (see assumptions arising in Appendix A) at a rate of 0.93 which is derived from BRES ratios of employment to employees in the predominant sectors of transport & storage and manufacturing. Appendix A supported by chapter 9 sets out the details of each site. Because of the scale of Apleyhead Junction and uncertainties in occupier type, a low and a higher range are included.

Table 16: Employment Needs Job (converted from FTEs)

Scenario	OE baseline jobs change	Sites Capacity (jobs)	Displacement	Multiplier	Total Job Growth
Proposed Allocations	112	6,127	(3,064)	766	3,942
Snape Lane	-	2,183	(587)	176	1,937
Sub total	112	8,475	(3,651)	942	5,878
Apleyhead Junction (A)	-	6,040	(1,624)	487	5,358
Apleyhead Junction (B)	-	4,675	(1,169)	451	3,857
All	112	-	-	-	9,735 - 11,236

4.41 The additional employment, resulting from the scenarios is 5,878 jobs or 11,236 jobs including Apleyhead Junction higher range, which at this scale alone contributes almost half of this growth.

4.42 This compares with 3,800 jobs in the OE data modelled growth scenario and Experian's 3,928 FTEs or around 3,260 jobs. Broadly, the general supply (excluding Snape Lane) is comparable to the Experian position or OE growth scenario. The larger warehousing sites increase the jobs outcomes, Apleyhead substantially so.

Economic Growth and Jobs Forecast: Key Messages

- Bassetlaw sites are within D2N2 LEP. Key sectors most relevant to Bassetlaw include transport and logistics, clean energy and manufacturing with an emphasis on modern methods of construction.
- The 2020 baseline jobs forecast from Oxford Economics suggests around only 100 new jobs between 2020 and 2037. However, applying uplifts to the transport and manufacturing sectors, as undertaken in the 2019 EDNA, suggests around 3,800 jobs could be generated through the period. This is comparable to the figure from Experian in their baseline for 2020.
- Bassetlaw has a significant supply of active employment sites. Taking account of displacement and multiplier effects, these could generate around 5,900 jobs rising to between 9,735 and 11,200 if Apleyhead Junction is brought forward and delivered.

5 ECONOMIC LED HOUSING NEED

5.1 As set out earlier in this report there is a need for local authorities to consider an increase to housing need to reflect changing economic circumstances and growth strategies in the district. The previous Chapter in this report examined a range of potential economic growth scenarios this chapter examines the housing need associated with that level of growth.

5.2 In order to make this calculation a range of factors need to be taken into account; these include:

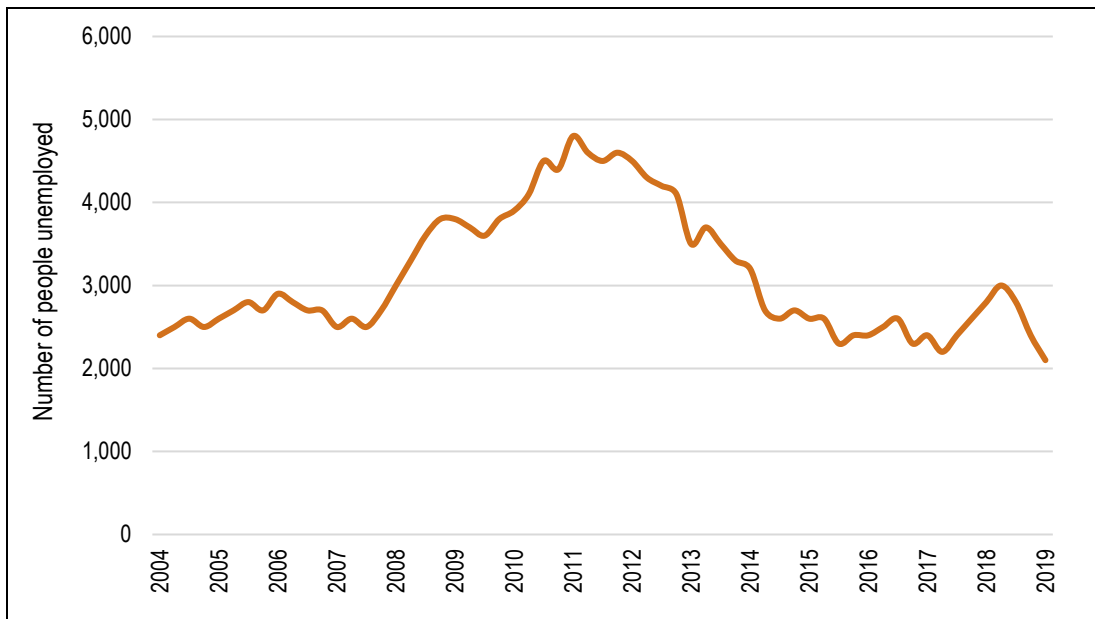
- Unemployment – if unemployment were to fall then the growth in the economically active population would not need to be as large as the growth in jobs (and vice versa).
- Double jobbing – some people hold down more than one job and therefore the number of workers required will be slightly lower than the number of jobs;
- Commuting patterns – where an area sees more people out-commute for work than in-commute it may be the case that a higher level of increase in the economically active population would be required to provide a sufficient workforce for a given number of jobs (and vice versa where there is net in-commuting); and
- Economic Activity Rates – recognises that not all of the population will be economically active and that this wider population growth will also require accommodation.

Unemployment

5.3 When looking at the link between jobs and resident labour supply unemployment is a consideration. Essentially, this is considering if there is any latent labour force that could move back into employment to take up new jobs. The figure below shows the number of people who are unemployed and how this has changed back to 2004. The analysis shows a clear increase in unemployment until about 2011 and that since then, the number of people unemployed has dropped notably – by 2019, the number of unemployed people was back close to the level observed in 2004. This would indicate that there may be limited scope for further improvements and for the purposes of analysis in this report it has been assumed that there are no changes to the number of people who are unemployed moving forward to 2037.

5.4 However, unemployment will have increased in 2020 due to COVID 19, with August 2020 claimant count at 5.3% albeit lower than the national average of 6.5%. The Office for Budget Responsibility's central COVID scenario indicates around 4 year to return to near pre COVID unemployment levels.

Figure 8: Number of people unemployed (2004-2019) – Bassetlaw

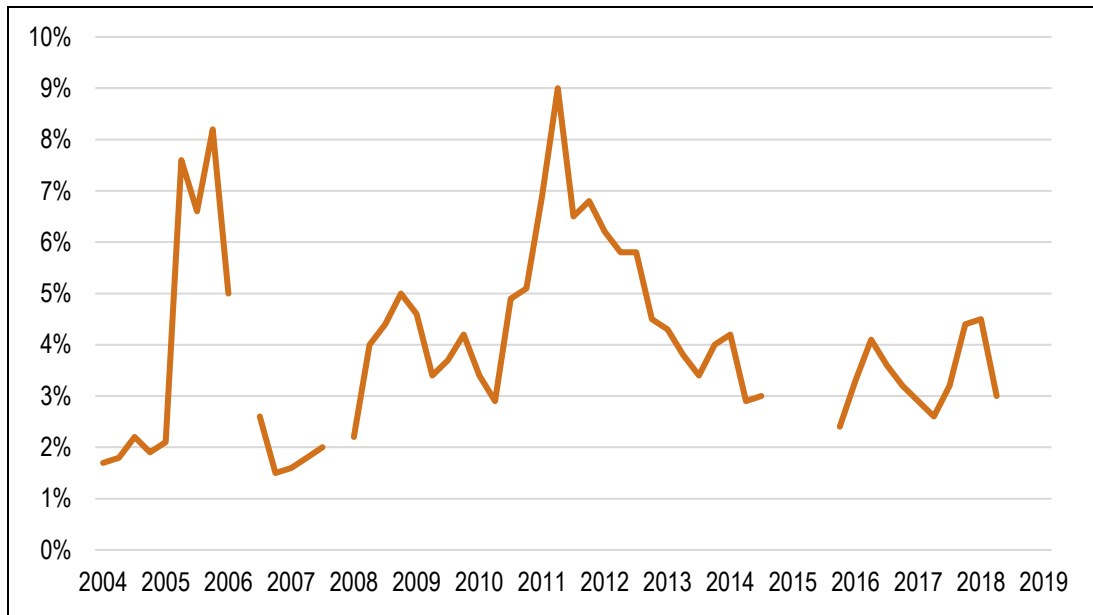


Source: Annual Population Survey (modelled unemployment data)

Double Jobbing

- 5.5 The analysis also considers that a number of people may have more than one job (double jobbing). This can be calculated as the number of people working in the local authority divided by the number of jobs. Data from the Annual Population Survey (available on the NOMIS website) suggests across the District that typically between about 4.0% of workers have a second job – levels of double jobbing have been variable over time (mainly due to the accuracy of data at a local level).

Figure 9: Percentage of all people in employment who have a second job (2004-2019) – Bassetlaw



Source: Annual Population Survey (from NOMIS)

5.6 For the purposes of this assessment it has been assumed that around 4.0% of people will have more than one job moving forward. A double jobbing figure of 4.0% gives rise to a ratio of 0.960 (i.e. the number of jobs supported by the workforce will be around 4.0% higher than workforce growth). It has been assumed in the analysis that the level of double jobbing will remain constant over time, although the apparent upward trend should be noted.

Commuting Patterns

5.7 The table below shows summary data about commuting to and from Bassetlaw from the 2011 Census. Overall, the data shows that the District sees a small level of out-commuting for work with the number of people resident in the area who are working being about 2% higher than the total number who work in the area. This number is shown as the commuting ratio in the final row of the table and is calculated as the number of people living in an area (and working) divided by the number of people working in the area (regardless of where they live).

Table 17: Commuting patterns in Bassetlaw

	Number of people
Live and work in Local Authority (LA)	26,770
Home workers	5,624
No fixed workplace	3,534
In-commute	16,220
Out-commute	17,164
Total working in LA	52,148
Total living in LA (and working)	53,092
Commuting ratio	1.018

Source: 2011 Census

5.8 In translating the commuting pattern data into growth in the labour-force, a core assumption is that typically commuting ratio remains at the same level as shown by the 2011 Census. It is arguable that some changes to the commuting ratio could be modelled although keeping the ratio constant is considered to be a reasonably balanced approach to use, but it does mean that estimates of potential job growth should be treated with some degree of caution.

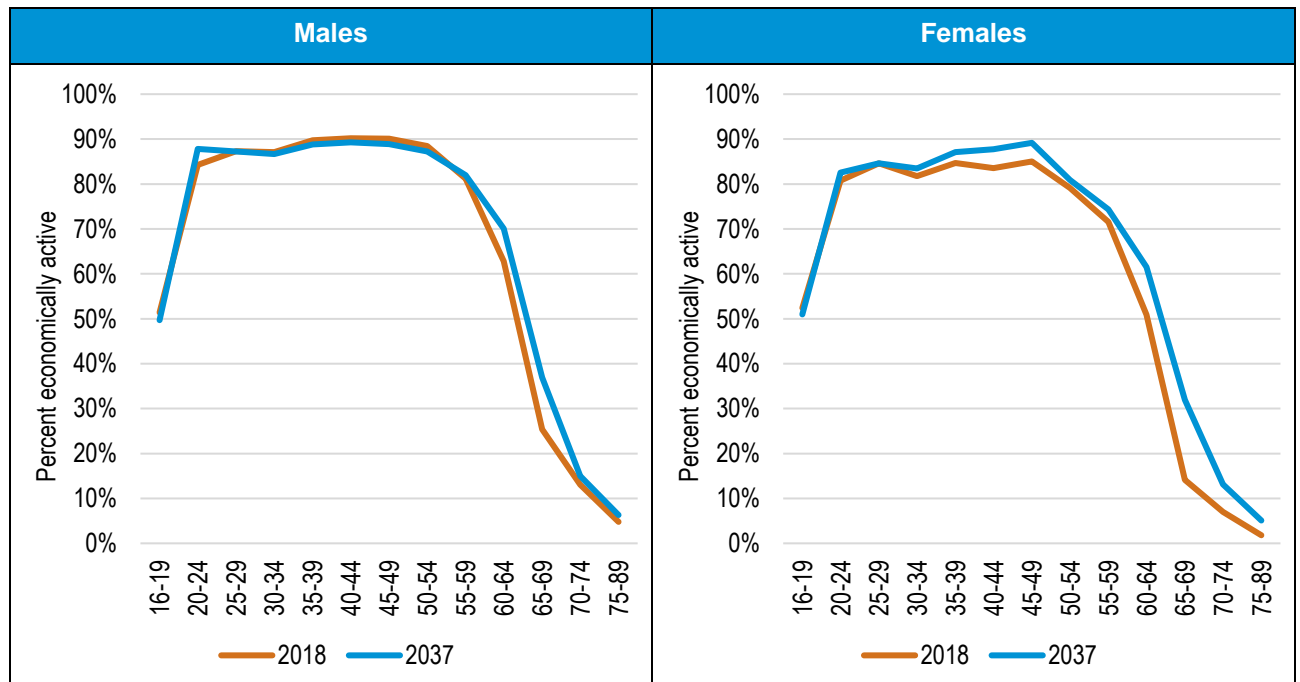
5.9 In some instances, it is justifiable to consider how alternative commuting patterns may influence housing need. Apleyhead Junction's scale, location and function as a more strategic site is likely to generate different commuting patterns from the wider district and is influential due to its potential scale of employment. We have therefore considered a more nuanced approach (considered below).

Economic Activity Rates

5.10 The approach taken in this report is to derive a series of age and sex specific economic activity rates and use these to estimate how many people in the population will be economically active as projections develop. This is a fairly typical approach with data being drawn in this instance from the Office for Budget Responsibility (OBR) – July 2018 (Fiscal Sustainability Report).

5.11 The figure and table below show the assumptions made. The analysis shows that the main changes to economic activity rates are projected to be in the 60-69 age groups – this will to a considerable degree link to changes to pensionable age, as well as general trends in the number of older people working for longer (which in itself is linked to general reductions in pension provision).

Figure 10: Projected changes to economic activity rates (2018 and 2037) – Bassetlaw



Source: Based on OBR and Census (2011) data

Table 18: Projected changes to economic activity rates (2018 and 2037) – Bassetlaw

	Males			Females		
	2018	2037	Change	2018	2037	Change
16-19	51.4%	49.7%	-1.7%	52.4%	51.0%	-1.4%
20-24	84.2%	87.8%	3.6%	80.7%	82.5%	1.8%
25-29	87.3%	87.2%	0.0%	84.6%	84.6%	0.0%
30-34	87.1%	86.7%	-0.4%	81.8%	83.5%	1.7%
35-39	89.7%	88.8%	-1.0%	84.7%	87.1%	2.4%
40-44	90.2%	89.3%	-0.9%	83.5%	87.8%	4.2%
45-49	90.1%	88.9%	-1.2%	85.0%	89.2%	4.1%
50-54	88.4%	87.2%	-1.2%	79.1%	80.9%	1.8%
55-59	81.2%	81.9%	0.8%	71.5%	74.4%	2.8%
60-64	62.8%	70.1%	7.3%	50.9%	61.5%	10.7%
65-69	25.4%	36.9%	11.5%	14.1%	31.9%	17.8%
70-74	13.0%	15.0%	2.0%	7.0%	13.1%	6.2%
75-89	4.8%	6.3%	1.5%	1.8%	5.1%	3.3%

Source: Based on OBR and Census (2011) data

Economic led need

- 5.12 The table below illustrates the calculation of jobs to labour force growth from the various jobs growth scenarios. This is effectively a multiplier effect with commuting adjustment and double jobbing assumptions.
- 5.13 The resident labour force is then translated into a population growth using economic activity rates and households growth using household representative rates (adjusted to take account of suppression in younger age groups) and finally into a housing need by including a vacancy allowance.
- 5.14 We have examined a range of baseline and growth scenarios however the focus should be on the housing need associated with the four outcomes, driven by Apleyhead Junction, which are as follows:
- A lower employment figure for Apleyhead Junction (see section 4) of 3,857 jobs
 - A higher employment figure for Apleyhead Junction (see section 4) of 5,358 jobs
 - Commuting of all jobs at the Census 2011 ratios i.e. 1.018 or largely balanced
 - Commuting of all jobs at the Census 2011 ratios i.e. 1.018 or largely balanced – with the exception of Apleyhead Junction at an adjusted ratio of 0.58 as explained below.
- 5.15 GL Hearn also considers that it is appropriate to test an alternate commuting ratio for Apleyhead Junction. As set out in section 9, the site is highly accessible and can generate a high level of employment.
- 5.16 It is unrealistic to consider it will be as balanced as the district as a whole in commuting terms and it is reasonable to say that it will attract a higher level of in-commuting than the average sites in the District and because of its scale this could have implications on local demographic growth and housing need.
- 5.17 We have therefore sought to run a sensitivity analysis based on more localised commuting patterns. This is based on commuting to existing employment on the site MSOA as reported by the Census 2011. This source indicates that only 58% of the jobs in the area are taken Bassetlaw residents and 42% taken up by people residing outside of the district (including Bolsover, Rotherham and Mansfield).
- 5.18 The outcomes arising from the four key variables, as well as the wider implications of other scenarios are set out below and include the housing need arising:

Table 19: Economic led need scenarios

	Commuting Assumption	Jobs growth	Commuting adjustment	Double-Jobbing adjustment = Resident labour Force growth	Housing Need pa
Baseline (EXP)	1:1	3,796	3,796	3,644	405
Baseline (OE)	1:1	112	112	107	236
Growth Sc (OE)	1:1	4,837	4,837	4,643	373
Local Supply (LS)	1:1	5,878	5,878	5,643	450
All sites (AHJ, jobs low)	1:1	9,735	9,735	9,345	591
All sites (AHJ, B jobs high)	1:1	11,236	11,236	10,786	646
All sites (AHJ, jobs low)	1:1 / 0.57 AHJ	9,735	8,076	7,753	530
All sites (AHJ, B jobs high)	1:1 / 0.57 AHJ	11,236	8,932	8,754	562

Source: GL Hearn based on ONS Data

- 5.19 As shown, there is a considerable difference between the OE baseline at 236 dpa and the higher scenarios up to 646 dpa. Only the OE baseline would be supported by the standard method for assessing housing need (288 dpa). All of the other scenarios would require the Council to consider increasing housing need to meet their economic aspirations.
- 5.20 GL Hearn considers that the most realistic and reasonable upper range for Bassetlaw to test in its local plan is **562 – 591 dwellings per annum**. The lower jobs range for Apleyhead could be achieved while maintaining a greater share of the jobs for local residents, as per 1:1 commuting ratio. This would result in a housing need of 591 dpa.
- 5.21 The higher jobs at Apleyhead Junction, which are ambitious, should only really be countenanced with changes to commuting. This alternative commuting pattern results in housing need of 562 dwellings per annum. If this approach is taken forward there would still be a need to agree, through the Duty to Cooperate, with neighbouring authorities for them to take a greater share of the housing need associated with the higher jobs growth.
- 5.22 However, both scenarios could also be mitigated through improvements to employment rates. This would be a policy on approach and would need to be supported by specific demonstrable actions however there is considerable uncertainty at the present time due to COVID 19, although this should be taken into account in the OE baseline.

- 5.23 As the table below shows, at present, there are approximately only 415 people receiving jobs seekers allowance in the district therefore the supply of personnel is likely to be quite limited and therefore the mitigation in Bassetlaw also limited.
- 5.24 However, there are greater numbers in the neighbouring and nearby authorities with approximately 12,200 people claiming jobseekers allowance in June 2020. It should be noted that this is a 23% increase from a year previous and will likely be Covid-19 related. If the Economy recovers quickly then the 9,937 figure may be more appropriate.

Table 20: Job-Seekers Allowance Claimants

Local Authority	June 2019	June 2020	% Change
Bassetlaw	268	415	55%
Barnsley	792	1,062	34%
Doncaster	700	1,171	67%
North Lincolnshire	457	833	82%
Rotherham	1,189	1,378	16%
Sheffield	3,606	3,238	-10%
Ashfield	697	859	23%
Bolsover	196	326	66%
Chesterfield	305	428	40%
Lincoln	408	522	28%
Mansfield	439	631	44%
Newark and Sherwood	285	512	80%
North East Derbyshire	218	374	72%
West Lindsey	377	456	21%
Total	9,937	12,205	23%

Source: Nomis, Job Seeker Claimants, 2020

- 5.25 Suggesting this group of people outside of the Borough could be drawn on may be more difficult to justify as it would require coordination across many local authorities. Alternatively, the various LEPs may be able to support this through policies and interventions such as investing in training on the roles being delivered.
- 5.26 In addition, while the sites are accessible this is primarily by road and public transport for lower-paying jobs is not yet in place, therefore making it more difficult to justify drawing on this labour supply. This could be addressed through improvements to public transport but also incentivising through ride-share schemes etc.

Population Growth

- 5.27 In order to inform latter stages of this report we have translated the housing growth of 591 dwellings per annum into a population growth and associated age profile for Bassetlaw. The approach to this seeks to increase migration and improve household formation rates to the point where 591 dpa are occupied (excluding a level of vacant homes to allow for churn in the market).
- 5.28 This approach reflects Paragraph 6 of the PPG (Reference ID: 2a-006-20190220) which although relates to a response to affordability issues seeks to increase housing need to allow for household formation rate to improve as “new households cannot form if there is nowhere for them to live;” and to reflect the fact that “people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.” This would subsequently increase migration to address this.
- 5.29 Our approach to household formation responds to the information set out in Chapter 2 of that report. As set out earlier in the report there is a clear suppression of households in the district and in response we have used rates which are halfway between the pre-recession 2008-based and 2014-based rates which are consistent with standard method and also provide a greater level of granularity to adjust.
- 5.30 The adjustment to household formation rates only goes some way to filling the 591 dpa. The remaining homes are then occupied by further increases to migration. The approach to this takes the 2018-based projections (alternative internal migration scenario) as a starting point and adjusts migration (both in and out) to the point when population growth matches that required to occupy 591 dpa when the adjusted household rates are applied.
- 5.31 As the Table below sets out the delivery of 591 dpa would result in a population growth 20,747 people. This is around 7,200 higher than the official projections over the same period. This is taken forward to later analysis in this report.

Table 21: Population change 2018 to 2037 by five-year age bands – Bassetlaw (linked to provision of 591 dwellings per annum)

	Population 2018	Population 2037	Change in population	% change from 2020
Under 5	6,361	7,104	743	11.7%
5-9	6,813	7,318	505	7.4%
10-14	6,436	7,470	1,034	16.1%
15-19	5,955	7,106	1,151	19.3%
20-24	6,121	6,745	624	10.2%
25-29	6,538	7,538	1,000	15.3%
30-34	6,225	7,268	1,043	16.8%
35-39	6,473	7,733	1,260	19.5%
40-44	6,578	8,617	2,039	31.0%
45-49	8,307	8,773	466	5.6%
50-54	9,325	8,362	-963	-10.3%
55-59	8,678	8,085	-593	-6.8%
60-64	7,517	7,991	474	6.3%
65-69	7,211	9,306	2,095	29.1%
70-74	7,139	9,181	2,042	28.6%
75-79	4,763	7,476	2,713	57.0%
80-84	3,351	5,369	2,018	60.2%
85+	3,048	6,144	3,096	101.6%
Total	116,839	137,586	20,747	17.8%

Source: GL Hearn Modelling

- 5.32 As the table also sets out there remains a significant growth in older persons which is also seen in the official projections. However, reflecting the profile of migrants there is now expected to be a significant increase in those aged 25 to 44.

Economic Led Housing Need: Key Messages

- A number of assumptions have been used to develop an economic led need for Bassetlaw which enables a higher level of housing provision to support jobs in the District
- The standard methodology would only support the Oxford Economics baseline scenario which sees only around 100 jobs created by 2037.
- The total economic led need depends on the number of jobs created at the largest site, Apleyhead Junction, and the way in which commuting to that site occurs.
- It is recommended that the council test **562 – 591 dpa** as their economic led need, which considers a higher job growth but also higher in commuting which is realistic leading to 562 dpa, or lower job growth but greater self-containment at 591 dpa.
- The higher end of this range would result in a population growth of 20,747 over the plan period. This figure has been taken forward to inform later parts of this document.

6 AFFORDABLE HOUSING NEED

6.1 This section provides an assessment of the need for affordable housing in Bassetlaw and the four sub-areas. The analysis follows the PPG (Sections 2a-018 to 2a-024) to provide an assessment of the annual need for affordable housing. The section provides two main outputs, linked to Annex 2 of the NPPF – this is firstly an assessment of the need for social/affordable rented housing and secondly to consider the need for affordable home ownership products.

6.2 The analysis also briefly considers First Homes, which look likely to become a new tenure (potentially replacing other forms of affordable home ownership). Further information about First Homes was set out in the Government’s consultation document ‘Changers to the current planning system’ in August 2020.

Methodology

6.3 The method for studying the need for affordable housing has been enshrined in Government practice guidance for many years, with an established approach to look at the number of households who are unable to afford market housing (to either rent or buy). The methodology for looking at the need for rented (social/affordable) housing considers the following:

- **Current affordable housing need:** an estimate of the number of households who have a need now, at the point of the assessment, based on a range of data modelled from local information – this figure is then annualised so as to meet the current need over a period of time;
- **Projected newly forming households in need:** using demographic projections to establish gross household formation, and then applying an affordability test to estimate numbers of such households unable to afford market housing;
- **Existing households falling into need:** based on studying past trends in the types of households who have accessed social/affordable rented housing; and
- **Supply of affordable housing:** an estimate of the likely number of lettings that will become available from the existing social/affordable housing stock.

6.4 The first three bullet points above are added together to identify a gross need, from which the supply of relets of existing properties is subtracted to identify a net annual need for additional affordable housing. For the purposes of this assessment, this analysis is used to identify the overall (net) need for social/affordable rented housing.

6.5 This approach has traditionally been used to consider the needs of households who have not been able to afford market housing (either to buy or to rent). As the income necessary to afford to rent homes without financial support is typically lower than that needed to buy, the ability of households to afford private rents has influenced whether or not they are in need of affordable housing.

- 6.6 The NPPF and associated guidance has expanded the definition of those in affordable housing need to include households who might be able to rent without financial support but who aspire to own a home and require support to do so. Such households are now considered to have an affordable housing need. The PPG includes households that “*cannot afford their own homes, either to rent, or to own, where that is their aspiration*” as having an affordable housing need.
- 6.7 This expanded definition has been introduced by national Government to support increased access to home ownership, given evidence of declining home ownership and growth in private renting over the last 10-15 years. PPG does not however provide specific guidance on how the needs of such households should be assessed and so this study adopts a broadly consistent methodology to that identified in the PPG, and consider a current need; a newly-arising need on an annual basis; existing households falling into need; and an annual estimate of supply.
- 6.8 For some of the analysis in this section it has been necessary to draw on other sources of data (applied to local information) to make estimates of the need. The approach is consistent with the PPG (Housing and economic needs assessment – see 2a-020 for example) and includes linking local Census data to national changes (as evidenced in national surveys such as the English Housing Survey).
- 6.9 Additionally, information drawn from local surveys previously undertaken by JGC across the country have been used to look at potential prevalence rates for some elements of need where comprehensive local data is lacking. This includes considering what proportion of households in the private rented sector might have a need due to potential loss of accommodation (e.g. tenancies ending) although again such rates are applied to local information about the size of the sector.
- 6.10 This approach is considered to provide a reasonable view about likely local needs and is an approach that has been accepted through a range of Local Plan Examinations over the past five or more years. Our analysis of affordable housing need is therefore structured to consider the need for rented affordable housing, and separately the need for affordable home ownership. The overall need is expressed as an annual figure, which can then be compared with likely future delivery (as required by 2a-024).
- 6.11 Whilst the need for social/affordable rented housing and affordable home ownership are analysed separately, there are a number of pieces of information that are common to both assessments. In particular, this includes an understanding of local housing costs, incomes and affordability. The sections below therefore look at these factors.

Local Price and Rents

- 6.12 An important part of the affordable needs model is to establish the entry-level costs of housing to buy and rent. The affordable housing needs assessment compares prices and rents with the incomes of households to establish what proportion of households can meet their needs in the market, and what proportion require support and are thus defined as having an 'affordable housing need'. For the purposes of establishing affordable housing need, the analysis focuses on overall housing costs (for all dwelling types and sizes).
- 6.13 The analysis below considers the entry-level costs of housing to both buy and rent across the Council area. The approach has been to analyse Land Registry data to establish lower quartile prices and rents. Using a lower quartile figure is consistent with the PPG and reflects the entry-level point into the market recognising that the very cheapest properties may be of sub-standard quality.
- 6.14 Data from the Land Registry for the year to March 2020 (i.e. Q2-Q4 of 2019 and Q1 of 2020) shows estimated lower quartile property prices in the District by dwelling type. The data shows that entry-level costs to buy are estimated to start from about £74,000 for a flat and rising to £200,000 for a detached home. Looking at the lower quartile price across all dwelling types the analysis shows a lower quartile 'average' price of £115,000.
- 6.15 The analysis is also split between newly built and existing dwellings which shows higher prices for new homes. For the purposes of analysis in this section, the main focus is on the pricing of existing homes within the District.

Table 22: Lower quartile cost of housing to buy – year to March 2020 – Bassetlaw District

	Existing dwellings	Newly-built dwellings	All dwellings
Flat/maisonette	£73,000	-	£74,000
Terraced	£81,000	£95,000	£83,000
Semi-detached	£110,000	£148,000	£112,000
Detached	£191,000	£237,000	£200,000
All Dwellings	£110,000	£150,000	£115,000

Source: Land Registry

- 6.16 The table below provides analysis of the price of existing dwellings by type in each of the four sub-areas. The analysis shows lower prices in Worksop and higher costs in the Rural area, although to some extent the overall averages are influenced by the profile of dwellings sold in different locations.

Table 23: Lower quartile cost of housing to buy (existing dwellings) – year to March 2020

	Worksop	Retford	Harworth	Rural	All
Flat/maisonette	£73,000	£73,000	£81,000	-	£73,000
Terraced	£67,000	£86,000	£92,000	£98,000	£81,000
Semi-detached	£100,000	£122,000	£100,000	£115,000	£110,000
Detached	£182,000	£195,000	£169,000	£209,000	£191,000
All Dwellings	£95,000	£110,000	£102,000	£132,000	£110,000

Source: Land Registry

- 6.17 It is also useful to provide estimates of property prices by the number of bedrooms in a home. Analysis for this draws together Land Registry data with an internet search of prices of homes for sale (using sites such as Rightmove). There was insufficient information about the price of 1-bedroom homes (very few available in the market) and so the pricing starts from a 2-bedroom dwelling.

Table 24: Lower Quartile House Prices by Size – existing dwellings (year to March 2020) – Bassetlaw District

	Worksop	Retford	Harworth	Rural	All
2-bedrooms	£77,000	£87,000	£77,000	£92,000	£83,000
3-bedrooms	£111,000	£126,000	£112,000	£133,000	£120,000
4-bedrooms	£196,000	£223,000	£197,000	£234,000	£212,000
All Dwellings	£95,000	£110,000	£102,000	£132,000	£110,000

Source: Land Registry and Internet Price Search

- 6.18 A similar analysis has been carried out for private rents using ONS data – this covers a 12-month period to March 2020. For the rental data, information about dwelling sizes is provided (rather than

types); the analysis shows an average lower quartile cost (across all dwelling sizes) of £450 per month.

Table 25: Lower Quartile Market Rents, year to March 2020 – Bassetlaw District

	Lower Quartile rent, pcm
Room only	£325
Studio	£290
1-bedroom	£350
2-bedrooms	£450
3-bedrooms	£525
4-bedrooms	£695
All properties	£450

Source: ONS

6.19 Analysis was also carried out to consider if private rent levels varied across the four sub-areas. Overall, it was difficult to pin down exact costs (particularly for specific sizes of accommodation) although the evidence did point to rents in the Rural area being slightly higher (and lowest in Worksop). Across all dwelling sizes, the following are estimates of lower quartile rents by location (figures per month):

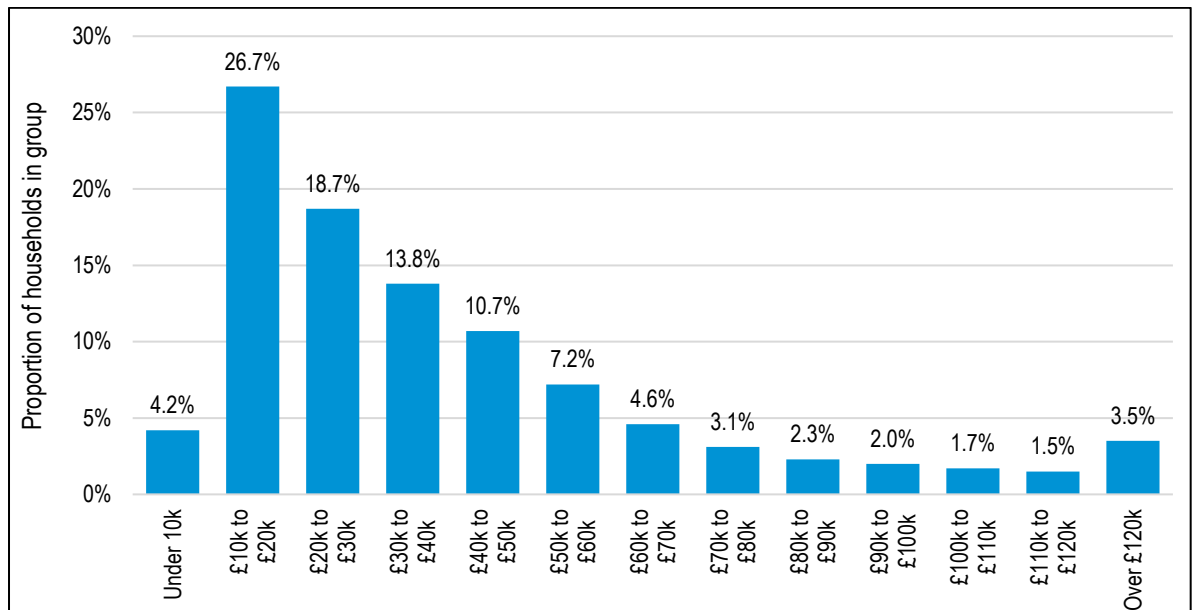
- Worksop – £400
- Retford – £460
- Harworth – £420
- Rural – £520

Household Incomes

6.20 Following on from the assessment of local prices and rents it is important to understand local income levels as these (along with the price/rent data) will determine levels of affordability (i.e. the ability of a household to afford to buy or rent housing in the market without the need for some sort of subsidy). Data about total household income has been based on ONS modelled income estimates, with additional data from the English Housing Survey (EHS) being used to provide information about the distribution of incomes.

6.21 Drawing all of this data together an income distribution for the whole Council area has been constructed for 2019. The figure below shows that around a third of households have incomes below £20,000 with a further third in the range of £20,000 to £40,000. Overall, the average (mean) income is estimated to be around £40,000, with a median income of £30,300; the lower quartile income of all households is estimated to be £17,600.

Figure 1: Distribution of household income (2019) – Bassetlaw



Source: Derived from a range of data as discussed

6.22 Analysis has also been undertaken to estimate how incomes vary by sub-area, with the table below showing the estimated median household income in each area and how this varies from the overall District average. The analysis suggests there are only small differences between areas, with the exception of Rural areas where incomes are somewhat higher.

Table 26: Estimated Household Income by sub-area, 2019

	Median income	As a % of District
Worksop	£28,900	95%
Retford	£28,500	94%
Harworth	£28,300	93%
Rural	£33,700	111%
District	£30,300	100%

Source: Derived from a range of data as discussed

Affordability Thresholds

6.23 To assess affordability two different measures are used; firstly to consider what income levels are likely to be needed to access private rented housing (this establishes those households in need of social/affordable rented housing) and secondly to consider what income level is needed to access owner occupation (this, along with the first test helps to identify households in the 'gap' between renting and buying). This analysis therefore brings together the data on household incomes with the estimated incomes required to access private sector housing. Additionally, different affordability tests

are applied to different parts of the analysis depending on the group being studied (e.g. recognising that newly forming households are likely on average to have lower incomes than existing households).

- 6.24 A household is considered able to afford market rented housing in cases where the rent payable would constitute no more than a particular percentage of gross income. The choice of an appropriate threshold is an important aspect of the analysis – the PPG does not provide any guidance on this issue. CLG SHMA guidance prepared in 2007 suggested that 25% of income is a reasonable start point, it also noted that a different figure could be used. Analysis of current letting practice suggests that letting agents typically work on a multiple of 40%. Government policy (through Housing Benefit payment thresholds) would also suggest a figure of 40%+ (depending on household characteristics).
- 6.25 The threshold of income to be spent on housing should be set by asking the question '*what level of income is expected to be required for a household to be able to access market housing without the need for a subsidy?*' The choice of an appropriate threshold is therefore judgement based. The key consideration to understand here is that local income levels are not setting the threshold but are simply being used to assess how many can or cannot afford market housing. It is important to consider what residual income is left, after households have paid for housing.
- 6.26 At £450 per calendar month, lower quartile rent levels in Bassetlaw are relatively low in comparison to those seen nationally (lower quartile rent of £550 for England in the year to March 2020). This would suggest that a proportion of income to be spent on housing could be towards the bottom end of the range (the range being from 25% to 40%). Across England the lowest lower quartile rents are around £400 per month (areas with rents at or below this level include Hull and Burnley and there were a total of 12 local authorities with lower quartile rents not exceeding £400 per month). If these areas are considered to be at the bottom end of the range (i.e. 25% of income to be spent on housing) then this would leave a residual income of £1,200 per month. With the same residual income applied to Bassetlaw, the gross household income required to afford a £450 PCM lower quartile rent would be £1,650 and so the percentage spent on housing would be 27%.
- 6.27 However, it needs to be considered that the cost of living in different areas will vary, and it is likely that areas where rents are higher will also generally have higher living costs. Therefore, a pragmatic approach to determining a reasonable proportion of income has been to take a midpoint between the bottom (25%) and the equivalent residual income figure (27% if looking at Bassetlaw). In this example a threshold of 26% would therefore be considered as reasonable.

6.28 There are however small differences in housing costs in different parts of the District and so this analysis has been carried out for locations individually. Below are the affordability thresholds used in analysis for each location:

- Worksop – 25%
- Retford – 26%
- Harworth – 25%
- Rural – 28%
- District average – 26%

6.29 In reality, many households may well spend a higher proportion of their income on housing and therefore would have less money for other living costs – for the purposes of this assessment these households would essentially be assumed as ideally having some form of subsidised rent so as to ensure a sufficient level of residual income.

6.30 Generally, the income required to access owner-occupied housing is higher than that required to rent and so the analysis of the need for social/affordable rented housing is based on the ability to afford to access private rented housing. However, local house prices (and affordability) are important when looking at the need for affordable home ownership.

6.31 For the purposes of this assessment, the income thresholds for owner-occupation assume a household has a 10% deposit and can secure a mortgage for four times their salary. These assumptions are considered to be broadly in line with typical lending practices although it is recognised that there will be differences on a case by case basis.

6.32 The table below shows the estimated incomes required to both buy and rent (privately) in each sub-area. This shows a ‘gap’ in all areas, suggesting the potential for there to be a number of households able to rent a home but not buy – the gap is particularly large in Rural areas.

Table 27: Estimated Household Income Required to Buy and Privately Rent by sub-area

	To buy	To rent (privately)	Income gap
Worksop	£21,400	£19,200	£2,200
Retford	£24,800	£20,900	£3,800
Harworth	£23,000	£19,800	£3,200
Rural	£29,700	£22,600	£7,100
District	£24,800	£20,700	£4,100

Source: Based on Housing Market Cost Analysis

Need for Social/Affordable Rented Housing

6.33 The sections below work through the various stages of analysis to estimate the need for social/affordable housing in each sub-area. Final figures are provided as an annual need (including an allowance to deal with current need). As per 2a-024 of the PPG, this figure can then be compared with likely delivery of affordable housing.

Current Need

6.34 In line with PPG paragraph 2a-020, the current need for affordable housing has been based on considering the likely number of households with one or more housing problems. The table below sets out the categories in the PPG and the sources of data being used to establish numbers. The PPG also includes a category where households cannot afford to own despite it being their aspiration – this category is considered separately in this report (under the title of the need for affordable home ownership).

Table 28: Main sources for assessing the current unmet need for affordable housing

	Source	Notes
Homeless households (those in temporary accommodation)	MHCLG Statutory Homelessness data	Household in temporary accommodation at end of quarter.
Households in overcrowded housing	Census table LC4108EW	Analysis undertaken by tenure and updated by reference to national changes (from the English Housing Survey (EHS))
Concealed households	Census table LC1110EW	Number of concealed families
Existing affordable housing tenants in need	Modelled data linking to past survey analysis	Excludes overcrowded households – tenure estimates updated by reference to the EHS
Households from other tenures in need	Modelled data linking to past survey analysis	

Source: PPG [2a-020]

6.35 It should be noted that there may be some overlap between categories (such as overcrowding and concealed households, whereby the overcrowding would be remedied if the concealed household moved). The data available does not enable analysis to be undertaken to study the impact of this and so it is possible that the figures presented include a small element of double counting (although this is likely to be small). Additionally, some of the concealed households may be older people who have moved back in with their families and might not be considered as in need.

6.36 The table below shows the initial estimate of the number of households within the study area with a current housing need. These figures are before any 'affordability test' has been applied to assess the ability of households to meet their own housing needs; and has been termed 'the number of households in unsuitable housing'. Overall, the analysis estimates that there are currently just under 2,800 households living in unsuitable housing (or without housing).

Table 29: Estimated Number of Households Living in Unsuitable Housing

	Homeless/ concealed household	Households in over- crowded housing	Existing affordable housing tenants in need	Households from other tenures in need	Total
Worksop	156	555	72	423	1,206
Retford	54	267	43	226	590
Harworth	54	119	16	90	279
Rural	116	228	40	307	691
District	380	1,170	171	1,046	2,766

Source: Derived from a range of data as discussed

6.37 In taking this estimate forward, the data modelling next estimates housing unsuitability by tenure. From the overall number in unsuitable housing, households living in affordable housing are excluded (as these households would release a dwelling on moving and so no net need for affordable housing will arise). The analysis also excludes 90% of owner-occupiers under the assumption (which is supported by analysis of survey data) that the vast majority will be able to afford housing once savings and equity are taken into account.

6.38 Once these households are removed from the analysis, the remainder are taken forward for affordability testing. The table below shows it is estimated that there were 1,500 households living in unsuitable housing (excluding current social tenants and the majority of owner-occupiers).

Table 30: Unsuitable Housing by Tenure and Number to Take Forward into Affordability Modelling (Bassetlaw)

	In Unsuitable Housing	Number to Take Forward for Affordability Testing
Owner-occupied	843	84
Affordable housing	523	0
Private rented	1,020	1,020
No housing (homeless/concealed)	380	380
Total	2,766	1,484

Source: Derived from a range of data as discussed

- 6.39 Having established this figure, it needs to be considered that a number of these households might be able to afford market housing without the need for subsidy. To consider this, the income data has been used, with the distribution adjusted to reflect a lower average income amongst households living in unsuitable housing – for the purposes of the modelling an income distribution that reduces the average household income to 88% of the figure for all households has been used to identify the proportion of households whose needs could not be met within the market (for households currently living in housing). A lower figure of 42% has been used to apply an affordability test for the concealed/homeless households who do not currently occupy housing.
- 6.40 These two percentage figures have been based on a consideration of typical income levels of households who are in unsuitable housing (based mainly on estimates in the private rented sector) along with typical income levels of households accessing social rented housing (for those without accommodation).
- 6.41 The figures have been based on analysis of the English Housing Survey (mainly looking at relative incomes of households in each of the private and social rented sectors) as well as consideration of similar information collected through household surveys across the country by JGC. These modelling assumptions are considered reasonable and have not been challenged through the Local Plan process in other locations (where the same assumptions have been used).
- 6.42 Overall, just under half of households with a current need are estimated to be likely to have insufficient income to afford market housing and so the estimate of the total current need is from 700 households in the study area. The table below also shows how this is estimated to vary by sub-area.

Table 31: Estimated Current Affordable Housing Need (for social/affordable rented housing)

	In unsuitable housing (taken forward for affordability test)	% Unable to Afford Market Housing (without subsidy)	Revised Gross Need (including Affordability)
Worksop	636	45.5%	289
Retford	314	47.4%	149
Harworth	152	51.8%	79
Rural	382	48.0%	183
District	1,484	47.2%	701

Source: Derived from a range of data as discussed

- 6.43 The estimated figure shown above (701) represents the number of households with a need currently. For the purposes of analysis, it is assumed that the local authority would seek to meet this need over

a period of time. Given that this report typically looks at needs in the period to 2037, the need is annualised by dividing by 17 (to give an annual need for 41 dwellings across all areas). This does not mean that some households would be expected to wait 17-years for housing as the need is likely to be dynamic, with households leaving the current need as they are housed but with other households developing a need over time.

- 6.44 The estimate of need from secondary sources can be compared with data from the Council's Housing Register (provided in June 2020). Overall, there were 3,712 households registered as having an active application. Of these, some 565 were in Bands A to C (Severe/Urgent Need, High Need or Some Need) with a further 1,611 being in Low Need (Band D) – therefore 2,176 with a low or more acute need. Removing those households already living in some form of affordable housing (mainly social rented housing rented from Bassetlaw Council) leaves a total of 431 households in need (Bands A-C) or 1,479 in need (Bands A-D). The modelled estimate of 701 households in need is within this range and is likely to form a reasonable view of the number of households with a current need in the District.

Newly Forming Households

- 6.45 The number of newly forming households has been estimated through demographic modelling with an affordability test also being applied. This has been undertaken by considering the changes in households in specific 5-year age bands relative to numbers in the age band below, 5 years previously, to provide an estimate of gross household formation.
- 6.46 The number of newly-forming households is limited to households forming who are aged under 45 – this is consistent with CLG guidance (from 2007) which notes after age 45 that headship (household formation) rates 'plateau'. There may be a small number of household formations beyond age 45 (e.g. due to relationship breakdown) although the number is expected to be fairly small when compared with formation of younger households.
- 6.47 The number of newly forming households has been estimated through demographic modelling (linked to 2018-based SNPP and 2014-based SNHP). This is considered to provide the best view about trend-based household formation, but without building in any additional constraints to household formation.
- 6.48 In assessing the ability of newly forming households to afford market housing, data has been drawn from previous surveys undertaken nationally by JGC. This establishes that the average income of newly forming households is around 84% of the figure for all households. This figure is remarkably

consistent across areas (and is also consistent with analysis of English Housing Survey data at a national level).

6.49 The analysis has therefore adjusted the overall household income data to reflect the lower average income for newly forming households. The adjustments have been made by changing the distribution of income by bands such that average income level is 84% of the “all household” average. In doing this it is possible to calculate the proportion of households unable to afford market housing. For the purposes of the need for social/affordable rented housing this will relate to households unable to afford to buy OR rent in the market.

6.50 The assessment suggests that overall, around two-fifths of newly forming households will be unable to afford market housing (to rent privately) and this equates to a total of 321 newly forming households having a need per annum on average. The table below provides a breakdown by sub-area.

Table 32: Estimated Need for Social/Affordable Rented Housing from Newly Forming Households (per annum)

	Number of new households	% unable to afford	Annual newly forming households unable to afford to rent
Worksop	342	39.0%	133
Retford	176	43.4%	76
Harworth	65	41.2%	27
Rural	216	39.3%	85
District	798	40.2%	321

Source: Projection Modelling/Affordability Analysis

Existing Households Falling into Affordable Housing Need

6.51 The second element of newly arising need is existing households falling into need. To assess this, information about past lettings in social/affordable rented has been used. The assessment looked at households who have been housed in general needs housing over the past three years – this group will represent the flow of households onto the Housing Register over this period. From this, newly forming households (e.g. those currently living with family) have been discounted as well as households who have transferred from another social/affordable rented property. An affordability test has also been applied.

6.52 This method for assessing existing households falling into need is consistent with the 2007 SHMA guide which says on page 46 that *‘Partnerships should estimate the number of existing households*

falling into need each year by looking at recent trends. This should include households who have entered the housing register and been housed within the year as well as households housed outside of the register (such as priority homeless household applicants)'.

6.53 Following the analysis this suggests a need arising from 127 existing households each year. The table below breaks this down by sub-area.

Table 33: Estimated Need for Social/Affordable Rented Housing from Existing Households Falling into Need (per annum)

	Total Additional Need	% of Total
Worksop	52	41.3%
Retford	33	26.1%
Harworth	12	9.6%
Rural	29	23.0%
District	127	100.0%

Source: Derived from a range of data as discussed

Supply of Social/Affordable Rented Housing Through Relets

6.54 The future supply of affordable housing through relets is the flow of affordable housing arising from the existing stock that is available to meet future need. This focusses on the annual supply of social/affordable rent relets.

6.55 The Practice Guidance suggests that the estimate of likely future relets from the social rented stock should be based on past trend data which can be taken as a prediction for the future. Information from CoRe and Local Authority Housing Statistics (LAHS) has been used to establish past patterns of social housing turnover. The figures are for general needs lettings but exclude lettings of new properties and also exclude an estimate of the number of transfers from other social rented homes. These exclusions are made to ensure that the figures presented reflect relets from the existing stock.

6.56 On the basis of past trend data it has been estimated that 275 units of social/affordable rented housing are likely to become available each year moving forward for occupation by newly forming households and existing households falling into need from other tenures. The table below shows the estimated supply of affordable housing from relets in each sub-area. The sub-area figures have been based on consideration of the size of the stock in each sub-area as of 2011 (Census data).

Table 34: Estimated Future Supply of Relets from Existing Stock – based on data for 2016/17 – 2018/19 (per annum)

	Lettings to New Tenants	% of Total
Worksop	115	41.8%
Retford	64	23.3%
Harworth	31	11.4%
Rural	64	23.5%
District	275	100.0%

Source: CoRe/LAHS/Census (2011)

6.57 The PPG model also includes the bringing back of vacant homes into use and the pipeline of affordable housing as part of the supply calculation. These have however not been included within the modelling in this report. Firstly, there is no evidence of any substantial stock of vacant homes (over and above a level that might be expected to allow movement in the stock). Secondly, with the pipeline supply, it is not considered appropriate to include this as to net off new housing would be to fail to show the full extent of the need, although in monitoring it will be important to net off these dwellings as they are completed.

Net Need for Social/Affordable Rented Housing

6.58 The table below shows the overall calculation of affordable housing need. The analysis shows that there is a need for 214 dwellings per annum to be provided with an affordable need being seen in all sub-areas within the District.

Net Need = Current Need (allowance for) + Need from Newly-Forming Households + Existing Households falling into Need – Supply of Affordable Housing

Table 35: Estimated Need for Social/Affordable Rented Housing by sub-area (per annum)

	Current Need	Newly Forming Households	Existing Households Falling into Need	Total Gross Need	Relet Supply	Net Need
Worksop	17	133	52	202	115	88
Retford	9	76	33	118	64	54
Harworth	5	27	12	43	31	12
Rural	11	85	29	125	64	60
District	41	321	127	489	275	214

Source: Derived from a range of data as discussed

6.59 Given the different sizes of sub-areas, it is also useful to look at a standardised measure. The table below does this by comparing the estimated annual level of affordable need with the population in 2018 (with figures expressed as a per 1,000 population figure). This shows the highest need to be in Retford (standardised as 2.29 dwellings per 1,000 people) and lower in Harworth.

Table 36: Annual need for Social/Affordable Rented Housing standardised by population in 2018

	Net affordable need (per annum)	Population (2018)	Affordable need per 1,000 population
Worksop	88	46,012	1.90
Retford	54	23,566	2.29
Harworth	12	10,559	1.15
Rural	60	36,702	1.64
District	214	116,839	1.83

Source: Analysis of a range of sources as discussed

The Relationship Between Affordable Need and Overall Housing Need

6.60 In interpreting the estimate of affordable housing need it should be recognised that this figure includes a number of households who are already living in housing and therefore should not be directly compared with the overall housing need (in this case determined by the Standard Method) which is the overall need for additional homes (in all tenures).

6.61 The affordable housing needs modelling contains a current need which includes many households already living in accommodation (e.g. where they are overcrowded) as well as a category in the projection of '*existing households falling into need*'. Both of these categories of household already have accommodation and hence if they were to move to alternative accommodation, they would release a dwelling for use by another household – there is no net need to provide additional homes.

6.62 It is possible to investigate this in more detail by re-running the model and excluding those already living in accommodation. This is shown in the table below which identifies that meeting these needs would lead to an affordable need for 63 homes per annum. This figure is theoretical and should not be seen to be minimising the need (which is clearly acute). It does however serve to show that there is a substantial difference in the figures when looking at overall housing shortages.

Table 37: Estimated Need for Affordable Housing (social/affordable rented) excluding households already in accommodation – Bassetlaw

	Excluding existing households	Including existing households
Current need	16	41
Newly forming households	321	321
Existing households falling into need	0	127
Total Gross Need	337	489
Re-let Supply	275	275
Net Need	63	214

Source: Range of data sources as described

- 6.63 It is also relevant to consider the role played by the Private Rented Sector (PRS) in providing housing for some households who are unable to access market housing without some form of subsidy. Whilst the PRS does not fall within the types of affordable housing set out in the NPPF (other than affordable private rent which is a specific tenure separate from the main 'full market' PRS), it has evidently been playing a role in meeting the needs of households who require financial support in meeting their housing need. Government recognises this, and indeed legislated through the 2011 Localism Act to allow Councils to discharge their "homelessness duty" through providing an offer of a suitable property in the PRS. As such the role played by the private rented sector should be recognised – it is evidently part of the functioning housing market.
- 6.64 Data from the Department of Work and Pensions (DWP) has been used to look at the number of Housing Benefit supported private rented homes. As of May 2020, it is estimated that there were around 3,250 benefit claimants in the private rented sector in the District (Housing Benefit and Universal Credit with a housing entitlement). From this it is clear that the PRS contributes to the wider delivery of 'affordable homes' with the support of benefit claims and further complicates any attempts to find a relationship between affordable need and overall housing need.
- 6.65 Regardless of the discussion above, the analysis identifies a notable need for affordable housing, and it is clear that provision of new affordable housing is an important and pressing issue in the District. It does however need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided. The evidence does however suggest that affordable housing delivery should be maximised where opportunities arise.
- 6.66 Furthermore, paragraph 24 of the PPG encourages local authorities to consider an increase "to the total housing figures included in the plan ... where it could help deliver the required number of

affordable homes.” However, as set out in the previous chapter the Local Authority is already planning above the standard method to address economic growth. This would in turn also deliver greater levels of affordable housing through developer contribution therefore a further uplift is unlikely to be required.

Split Between Social and Affordable Rented Housing

6.67 The analysis above has studied the overall need for social and affordable rented housing with a focus on households who cannot afford to rent in the market. These households will therefore have a need for some form of rented housing at a cost below typical market rates. Typically, there are two main types of rented affordable accommodation (social and affordable rented) with the analysis below initially considering what a reasonable split might be between these two tenures.

6.68 An analysis has been undertaken to compare the income distribution of households with the cost of different products. For affordable rented housing it has been assumed that this would be available at a cost which is 80% of the established lower quartile costs set out earlier in this section. Any household able to afford a rent between 80% of the market and the full market cost is assumed able to afford an affordable rent, with other households only able to afford a social rent; which would therefore be households paying less than 80% of the lower quartile market rent. The analysis identifies that around a fifth of the group of households unable to afford market housing to rent would fall in the gap between the market and 80% of the market, with limited variation by sub-area.

Table 38: Estimated need for affordable rented housing

	% of need for affordable rent
Worksop	20%
Retford	17%
Harworth	19%
Rural	20%
District	19%

Source: Affordability analysis

6.69 The finding that 19% of households have an identified need for affordable rent does not automatically lead to a policy conclusion on the split between the two types of housing. For example, many households who will need to access rented accommodation will be benefit dependent and as such could technically afford an affordable rent (as long as the full rent is covered by Housing Benefit) – hence a higher proportion of affordable rented housing might be appropriate. On the flip side, providing more social rents might enable households to return to work more easily, as a lower income would potentially be needed to afford the lower social (rather than affordable) rent.

- 6.70 There will be a series of other considerations both at a strategic level and for specific schemes. For example, there may be funding streams that are only available for a particular type of housing, and this may exist independently to any local assessment of need. Additionally, there will be the consideration of the balance between the cost of housing and the amount that can be viably provided, for example, it is likely that affordable rented housing is more viable, and therefore a greater number of units could be provided. Finally, in considering a split between social and affordable rented housing it needs to be considered that having different tenures on the same site (at least at initial occupation) may be difficult – e.g. if tenants are paying a different rent for essentially the same size/type of property and services.
- 6.71 On this basis, it is not recommended that the Council has a rigid policy for the split between social and affordable rented housing, although the analysis is clear that both tenures of homes are likely to be required in all areas.
- 6.72 For information, the table below shows average social and affordable rents (taken from the Regulator of Social Housing (RSH)) and compares these with lower quartile and median market rents. This analysis shows that social rents are generally slightly lower than recent affordable rents; the analysis also shows that affordable rents are less than both lower quartile and median market rents, although some differences between rent levels are quite small (e.g. a 1-bedroom affordable rent is only 3% lower than the equivalent lower quartile private sector rent).

Table 39: Comparison of rent levels for different products – Bassetlaw

	Social rent	Affordable rent (AR)	Lower quartile (LQ) market rent	Median market rent	AR as % of LQ	AR as % of median
1-bedroom	£305	£339	£350	£395	97%	86%
2-bedrooms	£365	£414	£450	£495	92%	84%
3-bedrooms	£400	£465	£525	£575	89%	81%
4-bedrooms	£474	-	£695	£795	-	-

Source: RSH and ONS

Establishing a Need for Affordable Home Ownership

- 6.73 The Planning Practice Guidance confirms a widening definition of those to be considered as in affordable need; now including *‘households which can afford to rent in the private rental market but cannot afford to buy despite a preference for owning their own home’*. However, at the time of writing, there is no guidance about how the number of such households should be measured.
- 6.74 The methodology used in this report therefore draws on the current methodology, and includes an assessment of current needs, and projected need (newly forming and existing households). The key

difference is that in looking at affordability an estimate of the number of households in the ‘gap’ between buying and renting is used. There is also the issue of establishing an estimate of the supply of affordable home ownership homes – this is considered separately below.

Gross Need for Affordable Home Ownership

- 6.75 The first part of the analysis seeks to understand what the gap between renting and buying actually means in the study area – in particular establishing the typical incomes that might be required. The information about incomes required to both buy and rent in different locations has already been provided earlier in this section and so the discussion below is a broad example.
- 6.76 Using the income distributions developed (as set out earlier in this section) along with data about price and rents, it has been estimated that of all households living in the private rented sector, around 53% already have sufficient income to buy a lower quartile home, with 8% falling in the rent/buy ‘gap’. The final 38% are estimated to have an income below which they cannot afford to rent privately (i.e. would need to spend more than the calculated threshold of their income on housing costs) although in reality it should be noted that many households will spend a higher proportion of their income on housing. These figures have been based on an assumption that incomes in the private rented sector are around 88% of the equivalent figure for all households (a proportion derived from the English Housing Survey) and are used as it is clear that affordable home ownership products are likely to be targeted at households living in or who might be expected to access this sector (e.g. newly forming households).
- 6.77 The table below shows an estimate of the proportion of households living in the private rented sector who are able to afford different housing products by sub-area. This shows a slightly higher proportion of households in the rent/buy gap in Rural areas, and a lower proportion in Worksop – these findings are related to the varying cost of housing in different locations.

Table 40: Estimated proportion of households living in Private Rented Sector able to buy and/or rent market housing

	Can afford to buy OR rent	Can afford to rent but not buy	Cannot afford to buy OR rent
Worksop	58%	5%	37%
Retford	51%	8%	41%
Harworth	54%	7%	39%
Rural	50%	13%	37%
District	53%	8%	38%

Source: Derived from Housing Market Cost Analysis and Affordability Testing

- 6.78 The finding that a significant proportion of households in the private rented sector are likely to have an income that would allow them to buy a home is also noteworthy and suggests that for many households, barriers to accessing owner-occupation are less about income/the cost of housing and more about other factors (which could for example include the lack of a deposit or difficulties obtaining a mortgage (for example due to a poor credit rating or insecure employment)). However, some households will choose to privately rent, for example as it is a more flexible option that may be more suitable for a particular household's life stage (e.g. if moving locations with employment).
- 6.79 To study current need, an estimate of the number of household living in the Private Rented Sector (PRS) has been established, with the same (rent/buy gap) affordability test (as described above) then applied. The start point is the number of households living in private rented accommodation; as of the 2011 Census there were some 6,000 households living in the sector across the District. Data from the English Housing Survey (EHS) suggests that since 2011, the number of households in the PRS has risen by about 22% - if the same proportion is relevant to the District then the number of households in the sector would now be around 7,300.
- 6.80 Additional data from the EHS suggests that 60% of all PRS households expect to become an owner at some point (4,400 households if applied to the study area) and of these some 25% (1,100 households) would expect this to happen in the next 2-years. The figure of 1,100 is therefore taken as the number of households potentially with a current need for affordable home ownership before any affordability testing.
- 6.81 As noted above, on the basis of income it is estimated that around 8% of the private rented sector sit in the gap between renting and buying (depending on location). Applying this proportion to the 1,100 figure would suggest a current need for around 85 affordable home ownership units (5 per annum if annualised over a 17-year period).
- 6.82 In projecting forward, the analysis can consider newly forming households and also the remaining existing households who expect to become owners further into the future. Applying the same affordability test (albeit on a very slightly different income assumption for newly forming households) suggests an annual need from these two groups of around 79 dwellings (64 from newly forming households and 15 from existing households in the private rented sector).
- 6.83 Bringing together the above analysis suggests that there is a need for around 84 affordable home ownership homes (priced for households able to afford to rent but not buy) per annum. This is before any assessment of the potential supply of housing is considered.

Table 41: Estimated Gross Need for Affordable Home Ownership by sub-area (per annum)

	Current need	Newly forming households	Existing households falling into need	Total Gross Need
Worksop	1	16	4	22
Retford	1	15	4	19
Harworth	0	5	1	6
Rural	2	29	6	37
District	5	64	15	84

Source: Analysis of a range of sources as discussed

Potential Supply of Housing to Meet the Affordable Home Ownership Need

- 6.84 As with assessing the need for affordable home ownership, it is the case that at present the PPG does not include any suggestions about how the supply of housing to meet these needs should be calculated. The analysis below therefore provides a general discussion.
- 6.85 By definition, a quarter of all homes sold will be priced at or below a lower quartile level. According to the Land Registry, there were a total of 1,591 resales (i.e. excluding newly-built homes) in the last year (year to March 2020) and therefore around 398 would be priced below the lower quartile. This is 398 homes that would potentially be affordable to the target group for affordable home ownership products and is a potential supply that is well in excess of the level of need calculated.
- 6.86 However, it is the case that market housing is not allocated in the same way as social/affordable rented homes (i.e. anyone is able to buy a home as long as they can afford it and it is possible that a number of lower quartile homes would be sold to households able to afford more, or potentially to investment buyers). In the absence of any guidance about how to deal with the supply of affordable home ownership, a broad further assumption has been used that around half of the lower quartile homes would be available to meet the needs of households with an income in the gap between buying and renting – this amounts to around 199 dwellings per annum.
- 6.87 In addition, data from CoRe about resales of affordable housing (likely to mainly be shared ownership) shows an average of around 2 resales per annum (based on data for the 2015-18 period). These properties would also potentially be available for these households and can be included within the potential supply. Therefore, a total supply of 201 dwellings per annum is estimated.
- 6.88 The table below therefore brings together an estimate of the need for affordable home ownership, across the study area and for the sub-areas. This shows no real need for affordable home ownership

products per annum across the study area (a net surplus of 117 units per annum) – all areas show a negative level of need.

Table 42: Estimated Need for Affordable Home Ownership by local authority (per annum)

	Total Gross Need	Resale Supply (half of LQ)	LCHO Supply	Total Supply	Net Need
Worksop	22	77	1	78	-56
Retford	19	45	0	46	-26
Harworth	6	20	0	20	-14
Rural	37	58	1	58	-21
District	84	199	2	201	-117

Source: Analysis of a range of sources as discussed

Implications of the Analysis

- 6.89 Whilst there are clearly some household in the gap between renting and buying, there is also a potential supply of homes within the existing stock that can make a contribution to this need. The evidence points to a clear and acute need for rented affordable housing from lower income households, and it is important that a supply of rented affordable housing is maintained to meet the needs of this group including those to which the authorities have a statutory housing duty.
- 6.90 Such housing is notably cheaper than that available in the open market and can be accessed by many more households (some of whom may be supported by benefit payments). Notably, social rents also enable access to employment for lower income families. On this basis it would be reasonable to conclude that there is no need to provide housing under the new definition of 'affordable home ownership'.
- 6.91 However, the gross need identified coupled with the growth in PRS homes since 2001 indicates that owner-occupation is being restricted by access to capital (e.g. for deposits, stamp duty, legal costs) as well as potentially some mortgage restrictions (e.g. where employment is temporary) rather than simply being due to the cost of housing to buy.
- 6.92 Furthermore, low cost home ownership products can also be used to support development viability even if the notional need is negligible. It is also important to recognise that some households will have insufficient savings to buy on the open market and low cost home ownership properties will therefore continue to play a role in supporting some households in this respect.
- 6.93 On balance, it would seem reasonable for the Council to meet the NPPF requirement for 10% of all new homes to be affordable home ownership properties on eligible sites.

How Much Should Affordable Home Ownership Homes Cost?

- 6.94 The analysis and discussion above suggests that there are a number of households likely to fall under the new PPG definition of affordable housing need (i.e. in the gap between renting and buying) but that the potential supply of housing to buy makes it difficult to fully quantify this need. However, given the NPPF, it seems likely that the Council may need to consider some additional homes on larger sites as some form of home ownership.
- 6.95 This report recommends shared ownership as the most appropriate form of affordable home ownership and also encourages consideration of other packages such as providing support for deposits. However, it is possible that some housing would come forward as other forms of housing such as Starter Homes or discounted market sale. If this is the case, it will be important for the Council to ensure that such homes are sold at a price that is genuinely affordable for the intended target group. The analysis below considers the potential costs (in a Bassetlaw context) of Discounted Market Sales Housing and Shared Ownership – it is considered that these are the two products most likely to be offered or made available.

Discounted Market Sales Housing

- 6.96 On this basis, it is worth discussing what sort of costs affordable home ownership properties should be sold for. The Annex 2 (NPPF) definitions suggest that such housing should be made available at a discount of at least 20% from Open Market Value (OMV). The problem with having a percentage discount is that it is possible in some locations or types of property that such a discount still means that housing is more expensive than that typically available in the open market.
- 6.97 The preferred approach in this report is to set out a series of affordable purchase costs for different sizes of accommodation. These are based on current lower quartile prices and also consideration of the income required to access the private rented sector and then estimating what property price this level of income might support (assuming a 10% deposit and a 4 times mortgage multiple). Below is an example of a calculation based on a 3-bedroom home:
- Previous analysis has shown that the lower quartile rent for a 3-bedroom home in the District is £525 per month;
 - On the basis of a household spending no more than 26% of their income on housing, a household would need an income of about £2,000 per month to afford ($525/0.26$) or £24,100 per annum (rounded);
 - With an income of £24,100, it is estimated that a household could afford to buy a home for around £107,100. This is based on assuming a 10% deposit and a four times mortgage multiple – calculated as $£24,100 \times 4/0.9$; and

- The lower quartile price to buy a 3-bedroom home is estimated to be £120,000 and the midpoint of the two figures (£107,100 and £120,000) is £113,600;
- £113,600 is a suggested purchase price to make discounted home ownership affordable for around half of the group of households in the rent/buy gap;
- To estimate what level of discount this might represent, it has been assumed that the Open Market Value (OMV) of a home would be 20% above the overall lower quartile price (15% is a typical national newbuild 'premium' whilst data presented earlier suggests a higher figure in Bassetlaw);
- In this instance the price of £113,600 would be around 79% of an estimated newbuild OMV (£144,000, calculated as £120,000*1.2) and therefore a 21% discount would be appropriate.

6.98 Therefore, it is suggested that for a 3-bedroom affordable home ownership property to be affordable to households able to rent but not buy it should be priced at £114,000 (rounded to nearest thousand). This sale price will meet the needs of around half of households in the gap between buying and renting. Setting higher prices would mean that such housing would not be available to many households for whom the Government is seeking to provide an 'affordable' option.

6.99 The table below therefore sets out a suggested purchase price for affordable home ownership in the District for different sizes. For 2-bedroom homes, the equalised price based on private renting is actually slightly higher than the estimated lower quartile cost and it is therefore unclear if a 2-bedroom discounted market home would be affordable in a local context – the same is likely to be true for 1-bedroom accommodation (although there is insufficient information about the cost of 1-bedroom homes in the existing stock due to a relative lack of supply to confirm this). Despite these comments, it should be recognised that there may be specific situations where such housing could be affordable (e.g. if provided in a higher value location). For the purposes of analysis below it is suggested that a 2-bedroom affordable home ownership home should not be priced above the equivalent lower quartile price in the second-hand market (£83,000 across the District).

6.100 As well as confirming the estimate that 3-bedroom homes would need to be provided at around a 20% discount, the table shows a higher discount (of about 30%) being required to make a 4-bedroom home affordable. It should be noted that these calculations are based on a specific set of data for prices and rents. Any individual scheme proposing discounted market housing would need to be tested to ensure that it is reasonably affordable in a local context.

Table 43: Affordable home ownership prices – data for year to March 2020 – Bassetlaw

	Affordable Price	Estimated Newbuild OMV	Discount Required
2-bedrooms	£83,000	£100,000	17%
3-bedrooms	£114,000	£144,000	21%
4+-bedrooms	£177,000	£254,000	30%

Source: Derived from a range of sources as described

Shared Ownership

- 6.101 For shared ownership, a buyer will buy a share in a property (typically between 25% and 75%) and then pay rent on the remaining share. One advantage in affordability terms is that a lower deposit is likely to be required than for full or discounted purchase, whilst the rental part of the cost will typically be subsidised by a Registered Provider. For shared ownership to be affordable, it is considered that total outgoings should not exceed that needed to rent privately.
- 6.102 Because shared ownership is based on buying part of a property, it is the case that the sale will need to be at open market value. Where there is a large gap between the typical incomes required to buy or rent, it may be the case that lower equity shares are needed for homes to be affordable (at the level of renting privately). The analysis below therefore seeks to estimate the typical equity share that might be affordable for different sizes of property. The key assumptions used in the analysis are:
- OMV at LQ price plus 20% (reflecting likelihood that newbuild homes will have a premium attached and that they may well be priced above a LQ level);
 - 10% deposit on the equity share;
 - Rent at 2.75% pa on unsold equity;
 - Repayment mortgage over 25-years at 4%;
 - Service charge of £100 per month for flatted development (assumed to be 2-bedroom homes);
 - It is also assumed that shared ownership would be priced for households sitting towards the bottom end of the rent/buy gap and so the calculations assume that total outgoings should be no higher than the equivalent private rent (lower quartile) cost for that size of property.
- 6.103 The table below shows that to make shared ownership affordable, equity shares of about 50% could work for 2- and 3-bedroom homes but that lower shares are likely to be required for larger homes (with 4+-bedrooms). The analysis does suggest that it may be quite difficult to make shared ownership 'work' for homes with 4+-bedrooms.
- 6.104 It should also be noted that the analysis below is predicated on a particular set of assumptions (notably about likely OMV). In reality costs do vary across the District and will vary from site to site. Therefore, this analysis should be seen as indicative with specific schemes being tested individually to determine if the product being offered is genuinely (or reasonably) affordable.

Table 44: Estimated Affordable Equity Share by Size – Bassetlaw

	2-Bedrooms	3-Bedrooms	4+-Bedrooms
OMV	£99,600	£144,000	£254,400
Share	50%	55%	18%
Equity Bought	£49,402	£79,200	£45,538
Mortgage Needed	£44,461	£71,280	£40,984
Monthly Cost of Mortgage	£235	£376	£216
Retained Equity	£50,198	£64,800	£208,862
Monthly Rent on Retained Equity	£115	£149	£479
Service Charge per month	£100	£0	£0
Total Cost per month	£450	£525	£695

Source: Data based on Housing Market Cost Analysis

- 6.105 If the Council do seek for some additional housing to be in the affordable home ownership sector (whether Discounted Market Sale or Shared Ownership), it is additionally recommended that they set up a register of people interested in these products (in a similar way to the current Housing Register). This will enable any properties to be ‘allocated’ to households whose circumstances best meet the property on offer.

First Homes

- 6.106 The analysis above is based on the 2019 NPPF and related practice guidance (notably in relation to the definition of affordable housing). The Government’s consultation on *Changes to the current planning system* however proposes to change national policy such that policy compliant planning applications would be expected to deliver a minimum of 25% affordable housing as First Homes, with the likelihood that the Council would be able to specify the requirement for the remaining affordable housing. This would replace the minimum 10% figure in the NPPF (10% of all housing on larger sites). The consultation also sets out that the minimum discount for First Homes should be 30% from market price with local authorities having discretion to increase the discount to 40% or 50%.
- 6.107 Although this report has not analysed First Homes in any detail, it is considered that the analysis of the need for affordable home ownership would broadly demonstrate the need for this type of accommodation. As noted above, there are clearly households who would have a need for First Homes, but there will also be some supply of cheaper (second-hand) market homes that will be available.
- 6.108 Overall, it is considered that if First Homes do become part of policy then a figure of 25% of affordable delivery may be appropriate for Bassetlaw – although given evidence of the need for affordable home

ownership products the Council would be justified to seek a lower proportion (or even none) of this tenure. A 30% discount on open market values is also likely to be justified for First Homes and requiring higher discounts should be considered carefully given the potential for this to inhibit scheme viability and therefore reduce delivery of other forms of affordable housing.

- 6.109 Given that the total affordable housing need is not likely to be met in full, it is considered that the remaining 75% of affordable housing (were the Council to choose this figure) should prioritise delivery of social or affordable rented housing as this will meet the needs of those with few other housing options, unless there is an existing over-concentration of rented affordable housing in the relevant neighbourhood and therefore a mixed and balanced communities case for an alternative affordable housing mix.
- 6.110 Where grant is available or schemes are brought forwards by registered providers, the Council should encourage delivery of a proportion of housing at social rent levels and/or shared ownership housing.

Affordable Housing Need: Key Messages

- Analysis has been undertaken to estimate the need for affordable housing in the 2020-37 period (on an annual basis). The analysis is split between a need for social/affordable rented homes and is based on households unable to buy or rent in the market and the need for affordable home ownership (essentially an 'additional' category of need introduced by the NPPF/PPG) – this includes housing for those who can rent privately but cannot afford to buy a home.
- The analysis takes account of local housing costs (to both buy and rent) along with estimates of household income. Additionally, when looking at rented needs, consideration is given to estimates of the supply of social/affordable rented housing. For affordable home ownership, consideration is given to the potential supply (from Land Registry data) of cheaper accommodation to buy.
- When looking at rented needs, the analysis suggests a need for 214 affordable homes per annum and therefore the Council is justified in seeking to secure additional affordable housing. There is also a need shown in all parts of the District.
- The analysis suggests that there will be a need for both social and affordable rented housing – the latter will be suitable for particularly for households who are close to being able to afford to rent privately and also for some households who claim full Housing Benefit. On this basis, it is not recommended that the Council has a rigid policy for the split between social and affordable rented housing, although the analysis is clear that both tenures of homes are likely to be required.
- When looking at the need for affordable home ownership products it is clear that there are a number of households likely to be able to afford to rent privately but who cannot afford to buy a suitable home. However, there is also a potential supply of homes within the existing stock that can contribute to meeting this need. It is therefore difficult to robustly identify an overall need for these products.
- However, it does seem that there are many households in Bassetlaw who are being excluded from the owner-occupied sector. The analysis would therefore suggest that a key issue in the District is about access to capital (e.g. for deposits, stamp duty, legal costs) as well as potentially mortgage restrictions (e.g. where employment is temporary) rather than simply the cost of housing to buy.
- The evidence does not show any basis to increase the provision of affordable home ownership above the 10% figure currently suggested in the NPPF and indeed does provide evidence that the 10% figure could be challenged if the Council wished to do so. If the Council does seek to provide some housing as affordable home ownership, then it is suggested that shared ownership is the most appropriate option. This is due to the lower deposit requirements and lower overall costs (given that the rent would also be subsidised).
- In August 2020, Government confirmed its desire to introduce a new First Homes tenure which is expected to be sold at a discount of at least 30% from Open Market Value and would make up 25% of affordable housing delivery. Whilst this report has not studied First Homes in detail it is considered that the 25% (delivery) and 30% (discount) figures may be sound (although the 25% figure could be challenged on the basis of the evidence in this report). The balance of the affordable housing (i.e. 75%) should be provided as social/affordable rented housing.
- Overall, the analysis identifies a notable need for affordable housing, and it is clear that provision of new affordable housing is an important and pressing issue in the District. It does however need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided. The evidence does however suggest that affordable housing delivery should be maximised where opportunities arise.

7 FAMILY HOUSEHOLDS AND APPROPRIATE MIX OF HOUSING

7.1 This section draws together analysis in the preceding main sections to consider the appropriate mix of housing across the study area having due regard to opportunities for larger and more aspirational housing, family housing and smaller units to diversify the market. This section looks at a range of statistics in relation to families (generally described as households with dependent children) before moving on to look at how the numbers are projected to change moving forward. The analysis considers the mix of housing across the whole of Bassetlaw (covering all household groups and tenures); before providing some commentary about how this might vary across different sub-areas.

Background Data

7.2 The number of families in the District (defined for the purpose of this assessment as any household which contains at least one dependent child) totalled 13,400 as of the 2011 Census, accounting for 28% of households. This proportion is similar to that seen across the County, regionally and nationally. There are however some differences across sub-areas with Worksop having a relatively high proportion of households with dependent children.

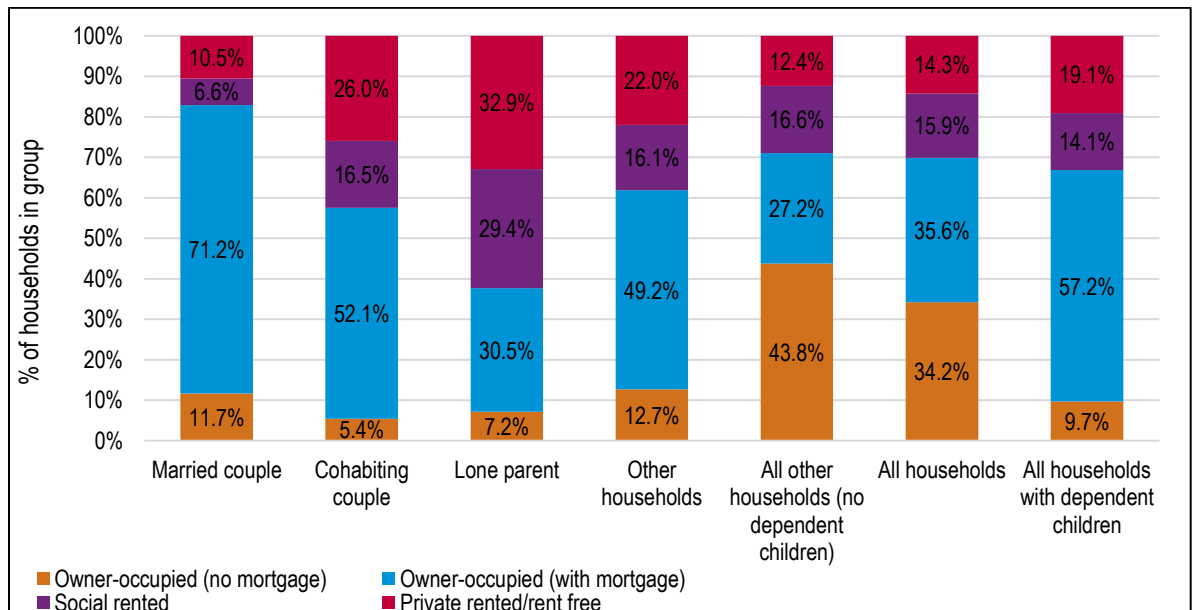
Table 45: Households with dependent children (2011)

		Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
Worksop	%	15.5%	5.7%	7.0%	2.2%	69.5%	100.0%	30.5%
Retford	%	13.2%	4.5%	7.0%	1.6%	73.7%	100.0%	26.3%
Harworth	%	14.4%	5.5%	7.0%	2.3%	70.7%	100.0%	29.3%
Rural	%	15.6%	3.9%	4.8%	1.7%	74.0%	100.0%	26.0%
Bassetlaw	No.	7,127	2,332	3,024	923	34,261	47,667	13,406
	%	15.0%	4.9%	6.3%	1.9%	71.9%	100.0%	28.1%
Nottinghamshire	%	15.5%	4.7%	6.5%	1.8%	71.5%	100.0%	28.5%
East Midlands	%	15.3%	4.5%	6.7%	2.3%	71.3%	100.0%	28.7%
England	%	15.3%	4.0%	7.1%	2.6%	70.9%	100.0%	29.1%

Source: Census (2011)

7.3 The figure below shows the current tenure of households with dependent children. There are some considerable differences by household type with lone parents having a high proportion living in the social rented sector and also in private rented accommodation. Only 38% of lone parent households are owner-occupiers compared with 83% of married couples with children.

Figure 2: Tenure of households with dependent children – Bassetlaw



Source: Census (2011)

7.4 Household projections have been developed, linked to provision of 591 dwellings per annum to estimate growth in family households over the period to 2037. The detailed profile of these is set out in the table below; and shows growth of 23% equal to around 3,100 family households. The proportional projected increase in family households is above the overall level of household growth projected and accounts for 29% of all projected growth. Much of the increase in family households is projected to be smaller households (with one dependent child).

Table 46: Projected Change in Family Households in Bassetlaw, 2018-37

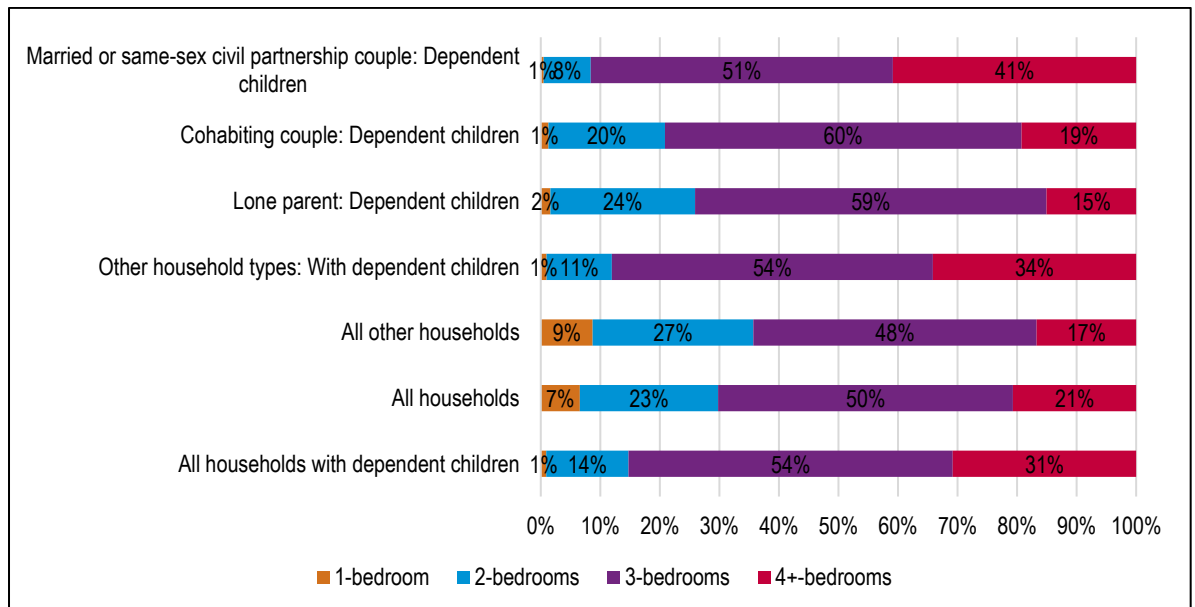
	2018	2037	Change in Households	% Change
Households with one dependent child	6,627	8,638	2,011	30.3%
Households with two dependent children	4,919	5,446	527	10.7%
Households with three dependent children	2,002	2,612	610	30.5%
All other households	36,726	44,483	7,757	21.1%
Total Households	50,274	61,179	10,905	21.7%
Total households with dependent children	13,548	16,696	3,148	23.2%

Source: Demographic Projections

7.5 The level of growth in family households does not automatically translate into an equivalent need for family-sized accommodation, not least as many older households will continue to live in family-sized properties that offer space for friends and relatives to come and stay.

7.6 The figure below shows the number of bedrooms for family households at the point of the 2011 Census. The analysis shows the differences between married, cohabiting and lone parent families. Across the District, the tendency is for family households (irrespective of household composition) to occupy 3+-bedroom housing with varying degrees of 2-bedroom properties depending on the household composition. The data also, unsurprisingly, highlights the small level of 1-bed stock occupied by families across the board. As a result, we could expect continued demand for 3+-bedroom properties; although, given the affordable housing need profile, and the projected growth in smaller family households, a greater balance of homes of medium sized properties should also be factored into any recommendations.

Figure 3: Number of Bedrooms by Family Household Type, 2011 – Bassetlaw



Source: 2011 Census

7.7 Delivery of family sized housing remains a requirement in both urban and rural locations of the District. This includes providing family housing in the widest possible choice and mix of housing locations including town centres, and through the sustainable expansion of rural and smaller settlements (particularly helping to support economic and social vitality).

7.8 It is important to deliver a range of housing sizes and to actively promote this through appropriate planning policies and consideration of the operation of the market. There may still be limitations as to the affordability of larger properties in the context of continued growth in sales prices evident across the District in recent years.

- 7.9 In more rural areas, the opportunity to broaden and secure a choice and mix of family sized accommodation alongside smaller accommodation should be explored in order to diversify the market and provide for local housing demand. Whilst in towns, subject to the availability of land, the provision of family-sized accommodation should be supported.

The Mix of Housing

- 7.10 A model has been developed that starts with the current profile of housing in terms of size (bedrooms) and tenure. Within the data, information is available about the age of households and the typical sizes of homes they occupy. By using demographic projections linked to the local housing need calculated through the Standard Method, it is possible to see which age groups are expected to change in number, and by how much.
- 7.11 On the assumption that occupancy patterns for each age group (within each tenure) remain the same, it is therefore possible to assess the profile of housing needed is over the assessment period to 2037 (from 2018).
- 7.12 An important starting point is to understand the current balance of housing in the area. The table below profiles the sizes of homes in different tenure groups and how this compares with the regional and national position. Overall, the analysis suggests the housing stock in Bassetlaw is fairly balanced in terms of comparisons with other areas. Some small differences regarding Bassetlaw are highlighted below:
- Owner-occupied stock in the District is relatively large with a higher proportion of homes with 3+-bedrooms and relatively few 2-bedroom properties;
 - The social stock sees fewer 1-bedroom homes and a greater proportion of homes with 2-bedrooms (although differences from other areas are generally slight); and
 - The private rented sector is relatively large with a higher proportion of homes with 3+-bedrooms; whilst the proportion of 1-bedroom homes looks to be low in a national context it should be noted that the figures for England are to some degree influenced by the stock profile of London.
- 7.13 The finding of a low proportion of a particular size of home in a particular tenure does not necessarily point towards a shortage of that type of housing. To some extent the profile of stock will reflect the role and function of different areas. For example, the extent to which Bassetlaw has traditionally been an area that is attractive to family households may partly explain the larger stock in the owner-occupied sector. Observations about the current mix feed into conclusions about future mix later in this section.

Table 47: Number of Bedrooms by Tenure, 2011

		Bassetlaw	Nottinghamshire	East Midlands	England
Owner-occupied	1-bedroom	1%	1%	2%	4%
	2-bedrooms	18%	20%	22%	23%
	3-bedrooms	55%	54%	51%	48%
	4+-bedrooms	27%	25%	26%	25%
	Total	100%	100%	100%	100%
Social rented	1-bedroom	26%	29%	29%	31%
	2-bedrooms	38%	34%	34%	34%
	3-bedrooms	33%	34%	34%	31%
	4+-bedrooms	3%	3%	3%	4%
	Total	100%	100%	100%	100%
Private rented	1-bedroom	11%	12%	15%	23%
	2-bedrooms	35%	39%	39%	39%
	3-bedrooms	44%	39%	35%	28%
	4+-bedrooms	10%	10%	11%	10%
	Total	100%	100%	100%	100%

Source: 2011 Census

Overview of Methodology

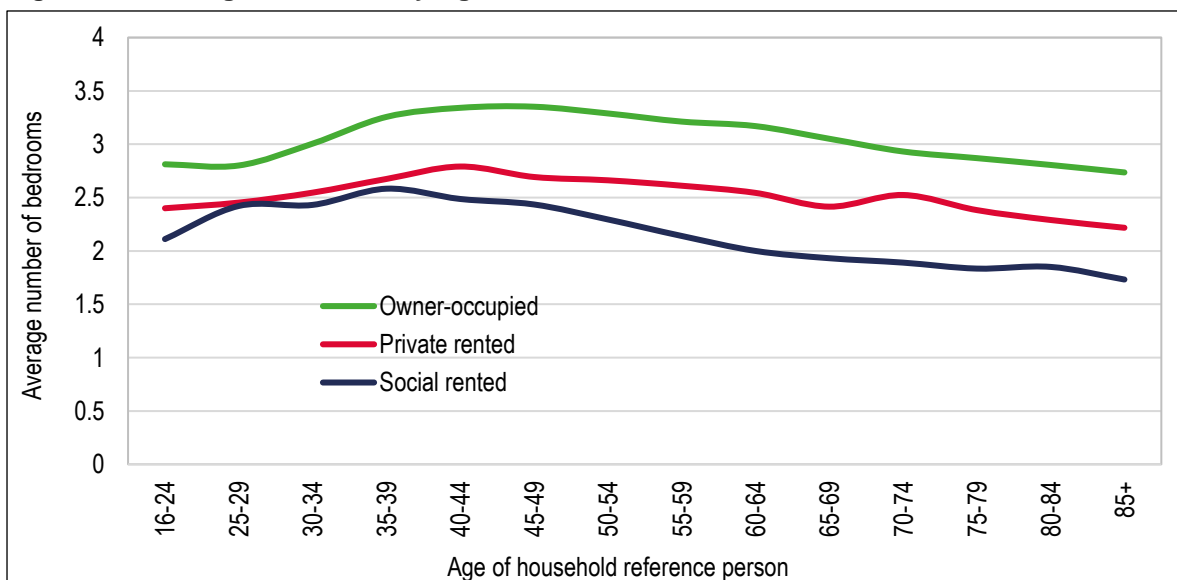
- 7.14 The method to consider future housing mix looks at the ages of the Household Reference Persons and how these are projected to change over time. The sub-sections to follow describe some of the key analysis.

Understanding how Households Occupy Homes

- 7.15 Whilst the demographic projections provide a good indication of how the population and household structure will develop, it is not a simple task to convert the net increase in the number of households into a suggested profile for additional housing to be provided. The main reason for this is that in the market sector, households are able to buy or rent any size of property (subject to what they can afford) and therefore knowledge of the profile of households in an area does not directly transfer into the sizes of property to be provided.
- 7.16 The size of housing which households occupy relates more to their wealth and age than the number of people they contain. For example, there is no reason why a single person cannot buy (or choose to live in) a 4-bedroom home as long as they can afford it, and hence projecting an increase in single person households does not automatically translate into a need for smaller units.

- 7.17 That said, issues of supply can also impact occupancy patterns, for example it may be that a supply of additional smaller bungalows (say 2-bedrooms) would encourage older people to downsize but in the absence of such accommodation these households remain living in their larger accommodation.
- 7.18 The issue of choice is less relevant in the affordable sector (particularly since the introduction of the social sector size criteria) where households are allocated properties which reflect the size of the household, although there will still be some level of under-occupation moving forward with regard to older person and working households who may be able to under-occupy housing (e.g. those who can afford to pay the 'bedroom tax').
- 7.19 The approach used is to interrogate information derived in the projections about the number of household reference persons (HRPs) in each age group and apply this to the profile of housing within these groups. The data for this analysis has been formed from a commissioned table by ONS (Table CT0621 which provides relevant data for all local authorities in England and Wales from the 2011 Census).
- 7.20 The figure below shows an estimate of how the average number of bedrooms varies by different ages of HRP and broad tenure group for Bassetlaw. As shown in the owner-occupied sector the average size of accommodation rises over time to typically reach a peak around the age of 50.

Figure 4: Average Bedrooms by Age and Tenure in Bassetlaw



Source: Derived from ONS Commissioned Table CT0621

- 7.21 A similar pattern (but with smaller dwelling sizes and an earlier peak age group) is seen in both the social and private rented sector. After peaking, the average dwelling size decreases – as typically some households downsize as they get older.
- 7.22 Replicating the existing occupancy patterns at a local level would however result in the conclusions being skewed by the existing housing profile. On this basis a further model has been developed that applies regional occupancy assumptions for the East Midlands region. Assumptions are applied to the projected changes in Household Reference Person by age discussed below.
- 7.23 The analysis has been used to derive outputs for three broad categories. These are:
- **Market housing** – which is taken to follow the occupancy profiles in the owner-occupied sector
 - **Affordable Home Ownership** – which is taken to follow the occupancy profile in the private rented sector (this is seen as reasonable as the Government’s desired growth in home ownership looks to be largely driven by a wish to see households move out of private renting); and
 - **Rented Affordable Housing** – which is taken to follow the occupancy profile in the social rented sector. The affordable sector in the analysis to follow would include social and affordable rented housing.

Changes to Households by Age

- 7.24 The table below presents the projected change in households by age of household reference person, this clearly shows particularly strong growth as being expected in older age groups (and to some extent some younger age groups e.g. 40-44). Households headed by someone aged 50-59 are projected to see a decrease in household numbers.

Table 48: Projected Change in Household by Age of HRP in Bassetlaw

	2018	2037	Change in Households	% Change
16-24	1,519	1,824	305	20.1%
25-29	2,596	3,172	576	22.2%
30-34	3,052	3,824	771	25.3%
35-39	3,469	4,369	901	26.0%
40-44	3,647	4,844	1,197	32.8%
45-49	4,472	4,789	317	7.1%
50-54	5,359	4,710	-649	-12.1%
55-59	4,998	4,640	-358	-7.2%
60-64	4,453	4,637	184	4.1%
65-69	4,397	5,662	1,265	28.8%
70-74	4,604	5,975	1,371	29.8%
75-79	3,251	5,016	1,765	54.3%
80-84	2,440	3,762	1,323	54.2%
85 & over	2,016	3,953	1,936	96.0%
Total	50,274	61,179	10,905	21.7%

Source: Demographic Projections

Modelled Outputs

- 7.25 By following the methodology set out above and drawing on the sources shown, a series of outputs have been derived to consider the likely size requirement of housing within each of the three broad tenures at a local authority level. Two tables are provided, considering both local and regional occupancy patterns. The data linking to local occupancy will to some extent reflect the role and function of the local area, whilst the regional data will help to establish any particular gaps (or relative surpluses) of different sizes/tenures of homes when considered in a wider context.
- 7.26 The analysis for rented affordable housing can also draw on data from the local authority Housing Register with regards to the profile of need. The data has been taken from Local Authority Housing Statistics (LAHS) and relates to April 2019. This shows a pattern of need which is focussed on 1- and 2-bedroom homes but also showing over a quarter of those registered as requiring 3+- bedroom homes (including 6% in the 4+-bedroom category – analysis of current stock suggested only 3% of socially rented homes in the District have 4- or more bedrooms).

Table 49: Size of Social/Affordable Rented Housing – Housing Register Information – Bassetlaw

	Number of households	% of households
1-bedroom	1,608	46%
2-bedrooms	834	24%
3-bedrooms	831	24%
4+-bedrooms	220	6%
Total	3,493	100.0%

Source: Local Authority Housing Statistics, 2019

7.27 The tables below show that for most tenures the modelled outputs of need are similar regardless of the choice of modelling assumptions. Key differences include a lower need for 3+-bedroom market accommodation when using regional data and a higher need for 1-bedroom rented affordable housing. This data is used, along with a general understanding of the current stock (and the Housing register information) to draw conclusions about a suitable mix of housing for the District.

Table 50: Modelled Mix of Housing by Size and Tenure in Bassetlaw (linked to local occupancy patterns)

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	2%	24%	55%	19%
Affordable home ownership	13%	37%	42%	8%
Affordable housing (rented)	29%	43%	25%	2%

Sources: Housing Market Model

Table 51: Modelled Mix of Housing by Size and Tenure in Bassetlaw (linked to regional occupancy patterns)

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	3%	29%	51%	17%
Affordable home ownership	16%	40%	35%	9%
Affordable housing (rented)	34%	35%	28%	3%

Sources: Housing Market Model

Indicative Targets for Different Sizes of Properties by Tenure across Bassetlaw

Social/Affordable Rented Housing

7.28 Bringing together the above, several factors are recognised. This includes recognising that it is unlikely that all affordable housing needs will be met and that it is likely that households with a need for larger homes will have greater priority (as they are more likely to contain children). The analysis also takes account of the likelihood that 1-bedroom accommodation sees greater turnover and is less

flexible to changing family circumstances. However, there is also a recognition that the District currently has a relatively low level of 1-bedroom social housing and that this is the largest category on the Housing Register.

7.29 Furthermore, the Housing Register data is based on a strict determination of need based on a bedroom standard and there will be some households able to afford a slightly larger home or who can claim benefits for a larger home than they strictly need (i.e. are not caught by the 'bedroom tax' – this will include older person households).

7.30 In taking account of the modelled outputs, the Housing Register and the discussion above, it is suggested that the following mix of social/affordable rented housing would be appropriate:

- 1-bedroom: 25-35%
- 2-bedrooms: 35-45%
- 3-bedrooms: 20-30%
- 4+-bedrooms: Up to 10%

Affordable Home Ownership

7.31 In the affordable home ownership and market sectors a profile of housing that more closely matches the outputs of the modelling is suggested. It is considered that the provision of affordable home ownership should be focused on delivering smaller family housing for younger households. Based on this analysis, the following mix of affordable home ownership would be appropriate:

- 1-bedroom: 10-20%
- 2-bedrooms: 35-45%
- 3-bedrooms: 30-40%
- 4+-bedrooms: 5-15%

7.32 Whilst the need for affordable home ownership properties is focused on younger households, the conclusions also recognise the affordability challenges for family housing.

Market Housing

7.33 Finally, in the market sector, a balance of dwellings is suggested that takes account of both the demand for homes and the changing demographic profile (as well as observations about the current mix when compared with other locations). This sees a slightly larger recommended profile compared with other tenure groups. The following mix of market housing is suggested:

- 1-bedroom: Up to 10%
- 2-bedrooms: 20-30%
- 3-bedrooms: 45-55%

- 4+-bedrooms: 15-25%

7.34 The figures above can be used to develop a housing mix policy as part of any Local Plan review. It is however recommended that flexibility is applied to these figures on a site-by-site basis depending on site characteristics – for example, a town centre brownfield site might be better suited to (smaller) flatted development, with greenfield sites on the edge of towns or villages potentially being better suited to higher proportions of family homes. It should also be noted that demand can change over time linked to macro-economic factors and local supply. Policy aspirations could also influence the mix sought.

7.35 As well as using the figures to help frame Local Plan policies, they can also be used as a monitoring tool to ensure that future delivery is not unbalanced when compared with the likely requirements as driven by demographic change in the area. The recommendations can also be used as a set of guidelines to consider the appropriate mix on larger development sites, and the Council should expect justification for a housing mix on such sites which significantly differs from that suggested above. As noted however, site location and area character are also however relevant considerations the appropriate mix of market housing on individual development sites.

7.36 Within this mix a range of homes should be provided. For example, within the 4-bedroom+ allocation this would include basic accommodation for larger families as well as executive homes. Similarly, the 1- and 2-bedroom developments should include flats for young professionals as well as older people. The design and location of each is likely to be distinct.

7.37 This can be achieved by providing a wide portfolio of allocated sites. Even within these sites, particularly the larger sites, areas can be zoned for different uses and densities. This can help achieve a wide variety of homes which would also assist in absorption of new homes.

Smaller-area Housing Mix

7.38 The analysis above has focussed on overall District-wide needs; given clear spatial differences between locations it is however worth considering the potential mix at a smaller-area level. The table below shows the profile of housing by tenure for the four sub-areas.

Table 52: Number of bedrooms by tenure and sub-areas (2011) – Bassetlaw

		Worksop	Retford	Harworth	Rural	Bassetlaw
Owner-occupied	1-bedroom	1%	1%	1%	1%	1%
	2-bedrooms	18%	22%	17%	15%	18%
	3-bedrooms	56%	54%	63%	52%	55%
	4+-bedrooms	25%	23%	20%	32%	27%
	Total	100%	100%	100%	100%	100%
Social rented	1-bedroom	27%	26%	32%	23%	26%
	2-bedrooms	39%	42%	27%	37%	38%
	3-bedrooms	31%	29%	38%	37%	33%
	4+-bedrooms	2%	4%	3%	4%	3%
	Total	100%	100%	100%	100%	100%
Private rented	1-bedroom	12%	15%	13%	6%	11%
	2-bedrooms	36%	42%	25%	29%	35%
	3-bedrooms	43%	35%	54%	50%	44%
	4+-bedrooms	9%	8%	8%	16%	10%
	Total	100%	100%	100%	100%	100%

Source: 2011 Census

- 7.39 Focussing on the owner-occupied sector, the analysis shows very strong concentrations of 3-bedroom homes in Harworth with a particularly large proportion of 4+-bedroom homes in the Rural area – Harworth seeing the lowest proportion of 4+-bedroom homes. Arguably this might suggest that areas with fewer larger homes have a greater need for that size of accommodation to help balance the stock. However, as previously noted, it should also be remembered that the current mix is likely to some extent reflect the role and function of different areas (e.g. areas with higher proportions of larger homes may traditionally be areas more highly sought by family households and/or slightly wealthier households).
- 7.40 On this basis, whilst there are clear differences in the current stock, and indeed the profile of the population it is not considered that these are sufficient to suggest a different mix of housing at a sub-area level. If developments were provided in-line with the suggested mix in this report, then over time there would be some degree of balancing the stock across areas, whilst still recognising the general role and function of different locations.
- 7.41 In the social rented sector, there are modest differences across areas, with Harworth seeing the highest proportion of 1-bedroom homes, but also the highest proportion of homes with 3+-bedrooms. As with the owner-occupied sector, it is the case that the current profile may to some extent reflect the role of different areas and the extent to which certain household groups might seek housing in

different types of location. Therefore, as with market housing, it is not suggested that the finding of a different profile of housing should necessarily lead to suggestions of a different local housing mix.

7.42 Finally, the table did consider the profile of private rented accommodation for the purposes of completeness. Again, there are some difference between areas, but it is not considered that this leads to a need to consider the future mix of housing in this tenure (this report does not recommend any 'targets' for increasing the size of this sector in the future).

7.43 Overall, therefore, the analysis does not suggest that a different mix should be proposed for smaller areas although there may be a case on a site-by-site basis, or at a specific point in time for some minor adjustments. This is summarised below:

- Whilst there are differences in the stock profile in different locations this should not necessarily be seen as indicating surpluses or shortfalls of particular types and sizes of homes;
- As well as looking at the stock, an understanding of the role and function of areas is important. For example, higher priced rural areas are typically sought by wealthier families and therefore such areas would be expected to provide a greater proportion of larger homes;
- That said, some of these areas will have very few small/cheaper stock and so consideration needs to be given to diversifying the stock;
- The location/quality of sites will also have an impact on the mix of housing. For example, brownfield sites in the centre of towns may be more suited to flatted development (as well as recognising the point above about role and function) whereas a rural site on the edge of an existing village may be more appropriate for family housing. Other considerations (such as proximity to public transport) may impact on a reasonable mix at a local level;
- Overall, it is suggested that Council should broadly seek the same mix of housing in all locations but would be flexible to a different mix where specific local characteristics suggest. The Council should also monitor what is being built to ensure that a reasonable mix is provided in a settlement overall. For example, if a recent housing site has provided nothing but 4+-bedroom 'executive' homes, then it could be expected that the next site to come along might provide a mix which includes more homes for younger/smaller family households and childless couples;
- Additionally, in the affordable sector it may be the case that Housing Register data for a smaller area identifies a shortage of housing of a particular size/type which could lead to the mix of housing being altered from the overall suggested requirement.

Built form

7.44 A final issue is a discussion of the need/demand for different built-forms of homes. In particular this discussion focusses on bungalows and the need for flats vs. houses.

Bungalows

7.45 The sources used for analysis in this report make it difficult to quantify a need/demand for bungalows in the District as Census data (which is used to look at occupancy profiles) does not separately identify

this type of accommodation. However, it is typical (where discussions are undertaken with local estate agents) to find that there is a demand for this type of accommodation.

- 7.46 Bungalows are often the first choice for older people seeking suitable accommodation in later life and there is generally a high demand for such accommodation when it becomes available. This is different from specialist accommodation for older people (see chapter 10 which provide a level of care or support is provided).
- 7.47 As a new build option, bungalows are, however, the case that bungalow accommodation is often not supported by either house builders or planners (due to potential plot sizes and their generally low densities). There may, however, be instances where bungalows are the most suitable house type for a particular site; for example, to overcome objections about dwellings overlooking existing dwellings or preserving sight lines.
- 7.48 There is also the possibility of a wider need/demand for retirement accommodation. Retirement apartments can prove very popular if they are well located in terms of access to facilities and services, and environmentally attractive (e.g. have a good view). However, some potential purchasers may find high service charges unacceptable or unaffordable and new build units may not retain their value on re-sale.
- 7.49 Overall, the Council should consider the potential role of bungalows as part of the future mix of housing. Such housing may be particularly attractive to older owner-occupiers (many of whom are equity-rich) which may assist in encouraging households to downsize. However, the downside to providing bungalows is that they are relatively land intensive.
- 7.50 In addition, many modern older persons accommodation come in multi-storey development. If there is an operational lift and units are across a single storey such development would potentially meet some of the same need.

Flats vs. Houses

- 7.51 Although there are some 1-bedroom houses and 3-bedroom flats, it is considered that the key discussion on built-form will be for 2-bedroom accommodation, where it might be expected that there would be a combination of both flats and houses. At a national level, 81% of all 1-bedroom homes are flats, 35% of 2-bedroom homes and just 4% of homes with 3-bedrooms.
- 7.52 The table below shows (for 2-bedroom accommodation) the proportion of homes by tenure that are classified as a flat, maisonette or apartment in both Bassetlaw and England. This shows a relatively

low proportion of flats in Bassetlaw (just 12% of all 2-bedroom homes) and this would point to the majority of 2-bedroom homes in the future also being houses. The analysis does however show a higher proportion of flats in the social sector (around a quarter of 2-bedroom homes are flats). Across England the proportion of flats is notably higher for all tenures.

Table 53: Proportion of 2-bedroom that are a flat, maisonette or apartment (by tenure)

	Bassetlaw	England
Owner-occupied	3%	21%
Social rents	24%	48%
Private rented	21%	50%
All (2-bedroom)	12%	35%

Source: 2011 Census

7.53 As noted, this analysis would suggest that most 2-bedroom homes should be built as houses (or bungalows) rather than flats. However, any decisions will still have to take account of site characteristics, which in some cases might point towards flatted development as being most appropriate. The analysis would suggest that the affordable sector might be expected to see a higher proportion of flats than for market housing, although it is still the case that houses are likely to be the majority need in this sector.

Family Households and the Appropriate Mix of Housing: Key Messages

- The proportion of households with dependent children is similar to the regional and national average. Projecting forward, there is expected to be an increase in the number of households with dependent children – increasing by 23% over the 2018-37 period when linking to delivery of 591 dwellings per annum – the majority of this increase is projected to be within smaller family households (with just one dependent child).
- There are a range of factors which will influence demand for different sizes of homes, including demographic changes; future growth in real earnings and households' ability to save; economic performance and housing affordability. The analysis linked to long-term demographic change concludes that **the following represents an appropriate mix of affordable and market homes, this takes account of both household changes and the ageing of the population:**

	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%

- The strategic conclusions in the affordable sector recognise the role which delivery of larger family homes can play in releasing a supply of smaller properties for other households. Also recognised is the limited flexibility which 1-bed properties offer to changing household circumstances, which feed through into higher turnover and management issues. The conclusions also take account of the current mix of housing in the District (by tenure) which conversely recognises that Bassetlaw currently has a low stock of 1-bedroom social rented homes.
- The mix identified above could inform strategic policies although a flexible approach should be adopted. In applying the mix to individual development sites, regard should be had to the nature of the site and character of the area, and to up-to-date evidence of need such as the housing register as well as the existing mix and turnover of properties at the local level. The Council should also monitor the mix of housing delivered.
- Based on the evidence, it is expected that the focus of new market housing provision will be on 2- and 3-bed properties. Continued demand for family housing can be expected from newly forming households. There may also be some demand for medium-sized properties (2- and 3-beds) from older households downsizing and looking to release equity in existing homes, but still retaining flexibility for friends and family to come and stay.
- Analysis also considered the population profile and the current mix of housing at a smaller-area level. Whilst there were some differences between areas, it is not considered that they are substantial enough to suggest a different mix of housing as being needed in different locations. That said, the mix on any specific site could be influenced by site characteristics, and any localised evidence of need, such as that drawn from the Housing Register.

8 OLDER AND DISABLED PERSONS NEEDS AND SPECIFIC GROUPS

8.1 This section studies the characteristics and housing needs of the older person population and the population with some form of disability. The two groups are taken together as there is a clear link between age and disability. It responds to Planning Practice Guidance on *Housing for Older and Disabled People* published by Government in June 2019. It includes an assessment of the need for specialist accommodation for older people and the potential requirements for housing to be built to M4(2) and M4(3) housing technical standards (M4(3) being related to wheelchair users and further split into (a) 'wheelchair adaptable' and (b) wheelchair accessible').

Understanding the Implications of Demographic Changes

8.2 The population of older persons is increasing, driven by demographic changes including increasing life expectancy. This is a key driver of the need for housing which is capable of meeting the needs of older persons.

Current Population of Older People

8.3 The table below provides baseline population data about older persons in the District and compares this with other areas. The population data has been taken from the published 2018 ONS mid-year population estimates (MYE). The table shows that Bassetlaw has a relatively old age structure, with 22% of the population being aged 65 and over in 2019. This compares with 19% regionally and 18% nationally. The proportion of the population aged 75 and over is also slightly higher than seen in other locations.

Table 54: Older Persons Population, 2018

	Bassetlaw	Nottinghamshire	East Midlands	England
Under 65	78.2%	79.3%	80.7%	81.8%
65-74	12.3%	11.5%	10.8%	9.9%
75-84	6.9%	6.6%	6.1%	5.8%
85+	2.6%	2.6%	2.4%	2.4%
Total	100.0%	100.0%	100.0%	100.0%
Total 65+	21.8%	20.7%	19.3%	18.2%
Total 75+	9.6%	9.2%	8.5%	8.3%

Source: ONS Mid-Year Population Estimates

8.4 The table below shows the same information for sub-areas, this shows some variation in the proportion of people aged 65 and over, ranging from 19% in Worksop, up to 25% in the Rural area.

Table 55: Older Persons Population, 2019 – sub-areas

	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
Worksop	81.0%	10.7%	5.9%	2.3%	100.0%	19.0%	8.2%
Retford	77.4%	11.9%	7.3%	3.3%	100.0%	22.6%	10.6%
Harworth	78.8%	11.2%	7.4%	2.7%	100.0%	21.2%	10.0%
Rural	74.9%	14.8%	7.9%	2.5%	100.0%	25.1%	10.4%
Total	78.2%	12.3%	6.9%	2.6%	100.0%	21.8%	9.6%

Source: ONS Mid-Year Population Estimates

Projected Future Change in the Population of Older People

- 8.5 Population projections can next be used to provide an indication of how the numbers of older persons might change in the future compared with other areas.
- 8.6 Bassetlaw is projected to see a notable increase in the older person population, with the total number of people aged 65 and over projected to increase by 47% over the 19-years to 2037. This compares with overall population growth of 18% and a more modest increase in the Under 65 population of 10%.
- 8.7 In total population terms, the projections show an increase in the population aged 65 and over of 12,000 people. This is against a backdrop of an overall increase of 20,700 – population growth of people aged 65 and over therefore accounts for 58% of the total projected population change.

Table 56: Projected Change in Population of Older Persons, 2018 to 2037 – Bassetlaw (based on delivery of 591 dwellings per annum)

	2018	2037	Change in population	% change
Under 65	91,327	100,110	8,783	9.6%
65-74	14,350	18,487	4,137	28.8%
75-84	8,114	12,845	4,731	58.3%
85+	3,048	6,144	3,096	101.6%
Total	116,839	137,586	20,747	17.8%
Total 65+	25,512	37,476	11,964	46.9%
Total 75+	11,162	18,989	7,827	70.1%

Source: Demographic Projections

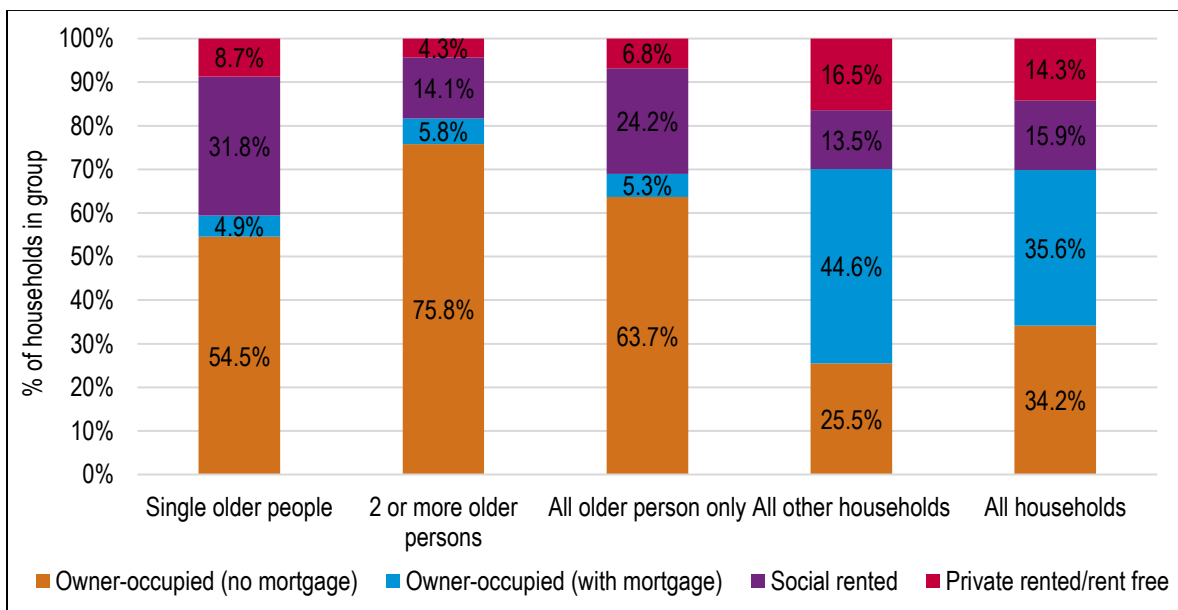
Characteristics of Older Person Households

8.8 The tenures in which older persons currently live provides a useful indication of the potential tenure profile of demand for new-build development.

8.9 The figure below shows the tenure of older person households. The data has been split between single older person households and those with two or more older people (which will largely be couples). The data shows that the majority of older persons households (69%) are owner occupiers, and indeed 64% are owner occupiers with no mortgage and thus may have significant equity which can be put towards the purchase of a new home. Some 24% of older persons households across the district live in the social rented sector. The proportion of older person households living in the private rented sector is relatively low (about 7%).

8.10 There are also notable differences for different types of older person households with single older people having a lower level of owner-occupation than larger older person households – this group also has a much higher proportion living in the social rented sector.

Figure 5: Tenure of Older Persons Households in Bassetlaw, 2011

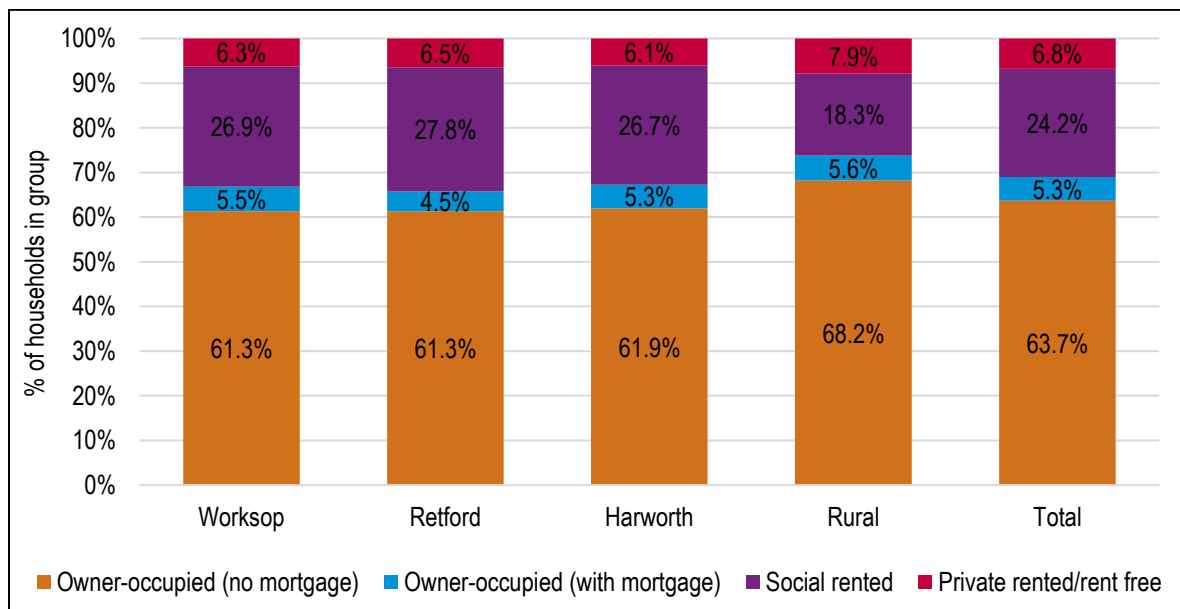


Source: 2011 Census

8.11 The figure below shows the same information for sub-areas – the data is provided for all older person households. The data shows that the tenure profile of older person households is similar across much of the study area; the main notable difference is the high level of owner-occupation amongst older

people in Rural areas – this area was previously notable for the high proportion of older people in the population.

Figure 6: Tenure of Older Persons Households in Bassetlaw, 2011



Source: 2011 Census

Prevalence of Disabilities (all ages)

- 8.12 The table below shows the proportion of people with a long-term health problem or disability (LTHPD) drawn from 2011 Census data, and the proportion of households where at least one person has a LTHPD. The data suggests that some 38% of households contain someone with a LTHPD. This figure is higher than that seen in other areas (including a 33% figure for the whole of England). The figures for the population with a LTHPD again show a similar pattern in comparison with other areas (an estimated 22% of the population of the study area having a LTHPD). The analysis also shows some differences between different parts of the study area, with Harworth seeing a higher proportion of the population with a LTHPD.

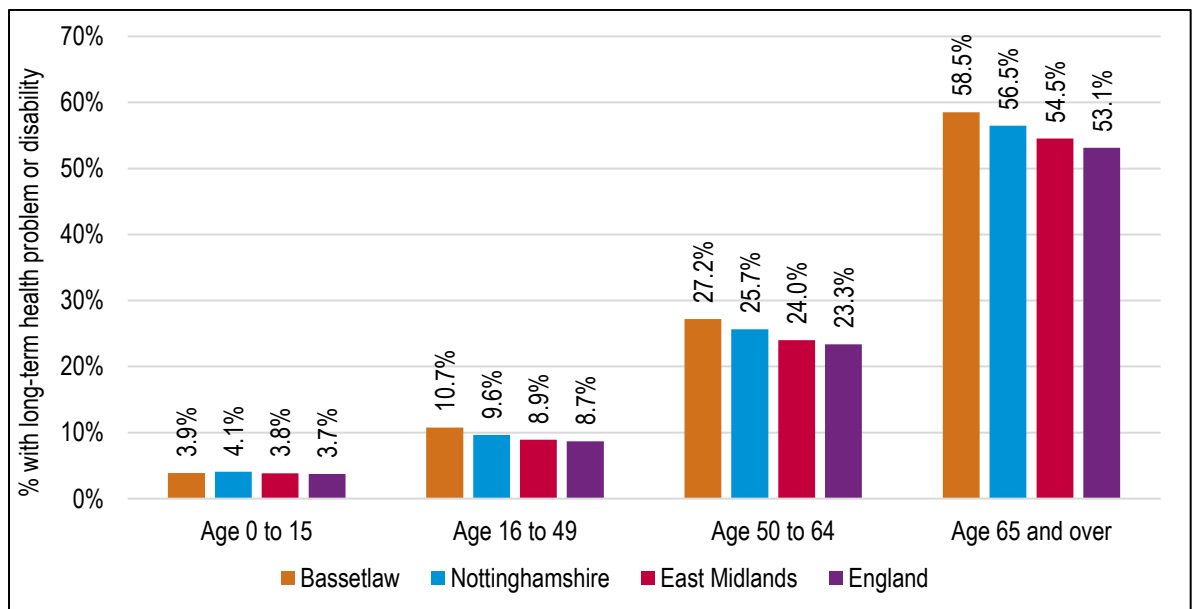
Table 57: Households and People with a Long-Term Health Problem or Disability, 2011

	Households Containing Someone with a Health Problem		Population with a Health Problem	
	No.	%	No.	%
Worksop	7,229	38.6%	9,628	21.7%
Retford	3,630	36.4%	4,857	21.7%
Harworth	1,721	40.1%	2,362	23.2%
Rural	5,584	38.0%	7,764	21.6%
District	18,164	38.1%	24,611	21.8%
Nottinghamshire	120,678	36.1%	159,672	20.3%
East Midlands	644,852	34.0%	844,297	18.6%
England	7,217,905	32.7%	9,352,586	17.6%

Source: 2011 Census

8.13 It is likely that the age profile will impact upon the numbers of people with a LTHPD, as older people tend to be more likely to have a LTHPD. The figure below shows the age bands of people with a LTHPD. It is clear from this analysis that those people in the oldest age bands are more likely to have a LTHPD. The analysis also shows higher levels of LTHPD in most age bands within Bassetlaw when compared with other areas.

Figure 7: Population with Long-Term Health Problem or Disability by Age



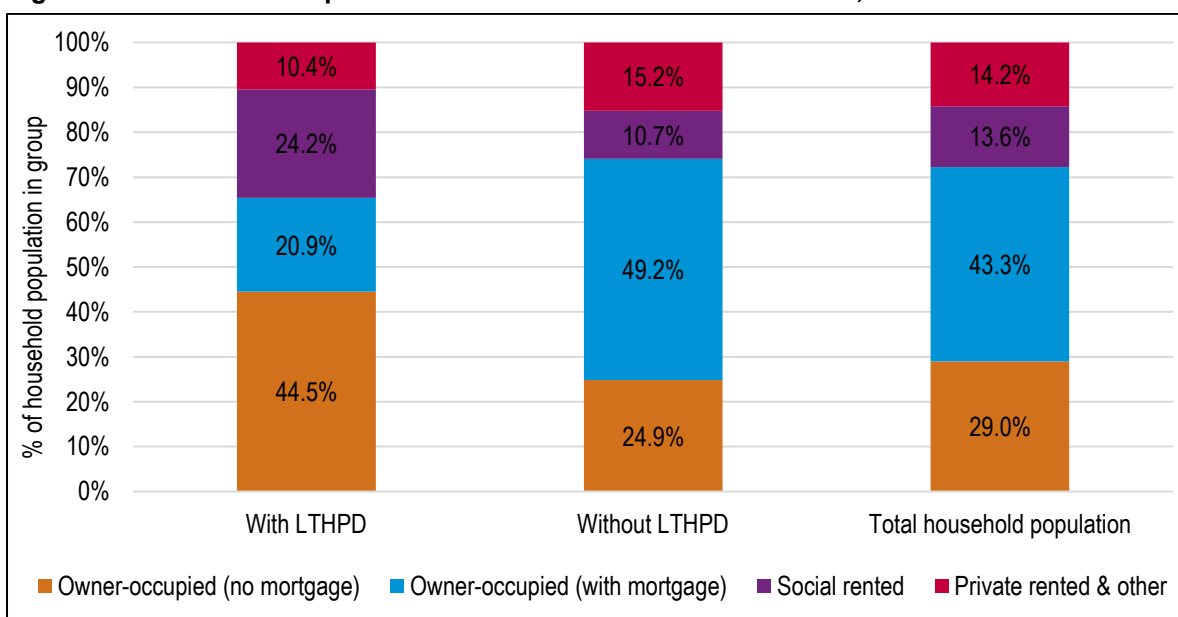
Source: 2011 Census

8.14 The figure below shows the tenures of people with a LTHPD – it should be noted that the data is for 'population living in households' rather than 'households'. The analysis clearly shows that people with

a LTHPD are more likely to live in social rented housing and are also more likely to be outright owners (this will be linked to the age profile of the population with a disability).

8.15 Given that typically the lowest incomes are found in the social rented sector, and to a lesser extent for outright owners (many of whom are retired), the analysis would suggest that the population/households with a disability are likely to be relatively disadvantaged when compared to the rest of the population in terms of income levels and therefore the ability to afford goods and services (as well as to access the housing market in many instances).

Figure 8: Tenure of People with LTHPD vs those without a LTHPD, 2011 – Bassetlaw



Source: 2011 Census

8.16 In addition, data taken from the same source as above suggests that 37% of all people living in the social rented sector have a LTHPD, compared with 18% of people in other tenures.

Health Related Population Projections

8.17 The incidence of a range of health conditions is an important component in understanding the potential need for care or support for a growing older population.

8.18 The analysis undertaken covers both younger and older age groups and draws on prevalence rates from the PANSI (Projecting Adult Needs and Service Information) and POPPI (Projecting Older People Population Information) websites. In all cases the analysis applies the relevant prevalence rates to estimates of population growth linked to the Standard Method.

8.19 Of particular note are the large increases in the number of older people with dementia (increasing by 69% from 2018 to 2037) and mobility problems (60% increase over the same period). Changes for younger age groups are smaller, reflecting the fact that projections are expecting older age groups to see the greatest proportional increases in population. When related back to the total projected change to the population, the increase of 2,700 people with a mobility problem represents 12% of the total projected population growth.

8.20 It should be noted that there will be an overlap between categories (i.e. some people will have both dementia and mobility problems). Hence the numbers for each of the illnesses/disabilities should not be added together to arrive at a total.

Table 58: Projected Changes to Bassetlaw Population with a Range of Disabilities

Disability	Age Range	2018	2037	Change	% Change
Dementia	65+	1,671	2,826	1,155	69.1%
Mobility problems	65+	4,505	7,195	2,690	59.7%
Autistic Spectrum Disorders	18-64	684	739	55	8.0%
	65+	242	360	118	48.6%
Learning Disabilities	15-64	1,746	1,911	165	9.4%
	65+	533	777	244	45.7%
Challenging behaviour	15-64	32	35	3	9.1%
Impaired mobility	16-64	4,038	4,196	159	3.9%

Source: POPPI/PANSI and Demographic Projections

8.21 The growth shown in those with disabilities provides clear evidence justifying delivering ‘accessible and adaptable’ homes as defined in Part M4(2) of Building Regulations. The Council should ensure that the viability of doing so is also tested as part of drawing together its evidence base.

Need for Specialist Accommodation for Older Persons

8.22 Given the ageing population and higher levels of disability and health problems amongst older people, there is likely to be an increased requirement for specialist housing options moving forward. The box below considers different types of older persons housing which are considered.

Definitions of Different Types of Older Persons' Accommodation

Age-restricted general market housing: This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens but does not include support or care services.

Retirement living or sheltered housing (housing with support): This 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.

Extra care housing or housing-with-care (housing with care): This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an on-site 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 known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Residential care homes and nursing homes (care bedspaces): These have 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.

Source: Planning Practice Guidance [63-010]

- 8.23 The need for specialist housing for older persons is typically modelled by applying prevalence rates to current and projected population changes and considering the level of existing supply. There is no standard methodology for assessing the housing and care needs of older people. The current and future demand for elderly care is influenced by a host of factors including the balance between demand and supply in any given area and social, political, regulatory and financial issues. Additionally, the extent to which new homes are built to accessible and adaptable standards may over time have an impact on specialist demand (given that older people often want to remain at home rather than move to care) – this will need to be monitored.
- 8.24 There are a number of 'models' for considering older persons needs, but they all essentially work in the same way. The model results are however particularly sensitive to the prevalence rates applied,

which typically describe the proportion of people aged over 75 who could be expected to live in different forms of specialist housing.

8.25 Whilst there are no definitive rates, the PPG [63-004] notes that *'the future need for specialist accommodation for older people broken down by tenure and type (e.g. sheltered housing, extra care) may need to be assessed and can be obtained from a number of online tool kits provided by the sector, for example SHOP@ for Older People Analysis Tool'*. The PPG does not specifically mention any other tools and therefore seems to be indicating that SHOP@ would be a good starting point for analysis. Since the PPG was published the Housing Learning and Information Network (Housing LIN) has removed the Shop@ online toolkit although the base rates used for analysis are known and can be used alongside demographic projections to provide an indication of the potential level of additional specialist housing that might be required for older people in the future.

8.26 This report therefore uses the SHOP@ rates as a start point, but it is of interest to briefly set out other sources for comparative purposes. As the table below shows, different sources use different rates and, in some cases, do not provide estimates for particular types of housing. Overall, the SHOP@ figures tend to fit in the middle of the range shown.

Table 59: Range of suggested baseline prevalence rates from a number of tools and publications

Type/Rate	SHOP @ (2008) ⁴	Housing in Later Life (2012) ⁵	2016 Housing LIN Review	HOPSR (2017) ⁶
Age-restricted general market housing	-	-	25	55
Retirement living or sheltered housing (housing with support)	125	180	100	153
Extra care housing or housing-with-care (housing with care)	45	65	30-40 ('proactive range')	20
Residential care homes	65	(no figure apart from 6 for dementia)	40	111
Nursing homes (care bedspaces), including dementia	45		45	

Source: Range of sources as identified

⁴ Based on the More Choice Greater Voice publication of 2008 (https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Reports/MCGVdocument.pdf). It should be noted that although these rates are from 2008, they are the same rates as were being used in the online toolkit when it was taken offline in 2019.

⁵ https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Toolkit/Housing_in_Later_Life_Toolkit.pdf

⁶ <https://www4.shu.ac.uk/research/cresr/news/housing-older-people-supply-recommendations-hopsr>

8.27 As noted, this report uses the SHOP@ figures as a starting point. However, it is clear that:

- the prevalence rates used should be assessed taking account of an authority's strategy for delivering specialist housing for older people. The degree for instance which the Council want to require extra care housing as an alternative to residential care provision would influence the relative balance of need; and
- The Housing LIN model has been influenced by existing levels of provision and their view on what future level of provision might be reasonable taking account of how the market is developing, funding availability etc. There is a degree to which the model and assumptions within it may not fully capture the growing recent private sector interest and involvement in the sector.

8.28 The baseline rates applied in this assessment are discussed below – specific local adjustments are considered following the setting of baselines in the bullet points below.

- Age-restricted housing – The SHOP@ tool does not provide rates for this type of housing and it is unclear if new provision is to be expected. For this study, the modelling takes forward overall national prevalence rates to provide some indication of what the need might be (essentially showing the position in Bassetlaw compared with other parts of the county). The baseline rates applied are a need for 25 units per 1,000 population aged 75 and over in the affordable sector and 5 per 1,000 in market housing. No further adjustments have been made to these prevalence rates. Figures for age-restricted housing are to some extent included to be consistent with the PPG and it should be noted that as housing provision for older people has changed, the need for further provision in this category may not be required. That said, it is possible that certain types of housing (e.g. bungalows) would meet some of this need (i.e. bungalows only available to older people but which do not have any related care or support package);
- Housing with Support (retirement/sheltered housing) – Housing LIN suggests a base level of 125 units per 1,000 population aged 75 and over and it is considered that this is a reasonable starting point. Adjustments are made to this figure to reflect local levels of health in the older person population. The suggested tenure split is for 50% of homes to be market housing in more deprived areas up to 67% in less deprived locations;
- Housing with Care (enhanced sheltered and extra-care housing) – Housing LIN suggests a base level of 45 units per 1,000 population aged 75 and over. It is considered that this level of provision is a reasonable longer-term aim but that this is quite a high figure in the context of current supply (estimated nationally to be around 18 units per 1,000 population aged 75 and over. Therefore, the baseline modelling sets a need figure of 25 units per 1,000 initially, rising to 45 by the end of the projection period. Again, adjustments are made to this figure to reflect local levels of health in the older person population. The tenure split is taken to be the same as for housing with support (again adjusted depending on levels of deprivation); and
- Residential care bedspaces – Housing LIN suggests a base level of 65 units (bedspaces) per 1,000 population aged 75 and over. This figure is considered to be a reasonable start point. However, given that the analysis seeks to increase the need for extra-care housing it seems reasonable to expect that there might be some reduction in the need for residential care. Therefore, the analysis looks at reducing the need for this accommodation type down to 45 per 1,000 by the end of the projection period. Again, adjustments are made to this figure to reflect local levels of health in the older person population. Residential care bedspaces do not have an associated tenure; and
- Nursing care bedspaces – Housing LIN suggests a base level of 45 units (bedspaces) per 1,000 population aged 75 and over and this is considered reasonable as both a current need

estimate and projecting forward. Again, adjustments are made to this figure to reflect local levels of health in the older person population and there is no associated tenure. The figures for nursing care bedspaces would be expected to include some for dementia care and whilst not separated out in this report a typical figure for dementia bedspaces would be around 6 per 1,000 people aged 75 and over.

- 8.29 In considering the rates for residential and nursing care it should be noted that the needs assessment is fee neutral and some care would be provided at local authority rates. The actual delivery of such housing could therefore be impacted by financial issues rather than any known need for these types of home.
- 8.30 Following the Housing LIN methodology, an initial adjustment has then been made to these rates to reflect the relative health of the local older person population (applied to all groups apart from age-restricted housing). This has been based on Census data about the proportion of people aged 65 and over who have a long-term health problem or disability compared with the England average. In Bassetlaw, the data shows slightly worse health in the older person population and so the prevalence rates used have been increase slightly (by an average of about 10%) – this figure is based on comparing the proportion of people aged 65 and over with a LTHPD in Bassetlaw (58.5%) with the equivalent figure for England (53.1%).
- 8.31 A second local adjustment has been to estimate a tenure split for the housing with support and housing with care categories. This again draws on suggestions in the Shop@ toolkit which suggests that less deprived local authorities could expect a higher proportion of their specialist housing to be in the market sector. Using 2019 Index of Multiple Deprivation (IMD) data, the analysis suggests Bassetlaw is the 108th most deprived local authority in England (out of 317). This suggests a higher need for affordable homes for older people in Bassetlaw than would be assumed in an area sitting more in the middle of the deprivation index. To be clear this is affordable housing within the categories described above (e.g. housing with support and housing with care).
- 8.32 The table below shows estimated needs for different types of housing linked to the population projections. The analysis is separated into the various different types and tenures although it should be recognised that there could be some overlap between categories (i.e. some households might be suited to more than one type of accommodation. Below is a brief summary of the findings:
- Age-restricted – the analysis suggests a potential surplus of accommodation both currently and by 2037 – this is driven by a large current supply of such accommodation in the affordable sector. Indeed, the analysis does suggest a potential modest shortfall of market accommodation in this sector.
 - Housing with support (sheltered/retirement housing) – the analysis suggests a shortfall in both the affordable and market sectors with a total shortfall by 2037 of 2,000 units – 69% of this being in the market sector.

- Housing with care (e.g. Extra-care housing) – a total shortfall of 900 units is estimated by 2037, of which 58% is in the market sector. The estimates of need in this sector are in part due to the assumptions made about a need to increase the prevalence rate of this accommodation type).
- Residential/nursing care bedspaces – the analysis estimates a total need for an additional 600 bedspaces by 2037 (including a current shortfall of around 70).

8.33 Where market housing is shown in the table below, it is considered that this could include an element of leasehold shared ownership – this would particularly help older owner-occupiers who have lower levels of equity. The analysis in this report does not attempt to estimate the need for shared ownership and the exact proportions of the market housing delivered as shared ownership will depend on a number of factors (including viability). At a national level, less than 5% of all market housing with care is of a shared ownership tenure and it is considered that the Council might consider a higher figure than this (say 10%) where opportunities arise.

Table 60: Specialist Housing Need using adjusted SHOP@ Assumptions, 2018-37 – Bassetlaw

		Housing demand per 1,000 75+		Current supply	Current demand	Current shortfall / surplus (-ve)	Additional demand to 2037	Shortfall /surpluses by 2037
		Start	Finish					
Age-restricted	Market	5	5	22	56	34	39	73
	Affordable	25	25	938	279	-659	196	-463
Total (age-restricted)		30	30	960	335	-625	235	-390
Housing with support	Market	77	77	56	857	801	601	1,402
	Affordable	61	61	541	680	139	477	616
Total (housing with support)		138	138	597	1,537	940	1,078	2,018
Housing with care	Market	15	28	0	171	171	354	525
	Affordable	12	22	31	136	105	281	386
Total (housing with care)		28	50	31	307	276	634	911
Residential care bedspaces		72	50	646	799	153	142	296
Nursing care bedspaces		50	50	634	553	-81	388	308
Total bedspaces		121	99	1,280	1,353	73	530	603

Source: Derived from Demographic Projections and Housing LIN/EAC

8.34 The provision of a choice of attractive housing options to older households is a component of achieving good housing mix. The availability of such housing options for the growing older population may enable some older households to downsize from homes which no longer meet their housing needs or are expensive to run. The availability of housing options which are accessible to older people will also provide the opportunity for older households to 'rightsize' which can help improve their quality of life.

- 8.35 It should also be noted that within any category of need there may be a range of products. For example, many market extra-care schemes are towards the 'top-end' of the market and may have significant service charges (due to the level and quality of facilities and services). Such homes may therefore only be affordable to a small proportion of the potential market, and it will be important for the Council to seek a range of products that will be accessible to a wider number of households if needs are to be met.
- 8.36 The tables above should be considered as providing an indicative view of need based on a single set of prevalence rates (which have drawn on a range of sources). The ultimate level of provision the Council seeks to support will be influenced by its broader strategy for older persons housing and care.
- 8.37 The analysis has not attempted to break these figures down into the four sub-areas. However, the data previously provided in this section would help to indicate how needs might vary across locations. In particular, it is notable that the population of older persons does vary across the District, with those areas with higher proportions potentially expected to see a higher demand for older person accommodation.

Older Persons' Housing, Use Classes and Affordable Housing Policies

- 8.38 The issue of use classes and affordable housing generally arises in respect of extra care/ assisted living development schemes. The Planning Practice Guidance defines extra care housing or housing with care as follows:
- 8.39 "This 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 known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses".
- 8.40 There is a degree to which different terms can be used for this type of development inter-changeably, with reference sometimes made to extra care, assisted living, continuing care retirement communities, or retirement villages. Accommodation units typically include sleeping and living accommodation, bathrooms and kitchens; and have their own front door. Properties having their own front doors is not however determinative of use.

- 8.41 The distinguishing features of housing with care is the provision of personal care through an agency registered with the Care Quality Commission, and the inclusion of extensive facilities and communal space within these forms of development, which distinguish them from blocks of retirement flats.

Use Classes

- 8.42 Use classes are defined in the Town and Country Planning (Use Classes) Order 1987. Use Class C2: Residential Institutions is defined as *“use for the provision of residential accommodation and care to people in need of care (other than a use within class C3 (dwelling houses).”* C3 (dwelling houses) are defined as *“use as a dwelling house (whether or not as a sole or main residence) a) by a single person or by people living together as a family; or b) by no more than 6 residents living together as a single household (including a household where care is provided for residents).”*
- 8.43 Care is defined in the Use Class Order as meaning “personal care for people in need of such care by reason of old age, disablement, past or present dependence on alcohol or drugs or past or present mental disorder, and in class C2 also includes the personal care or children and medical care and treatment.”
- 8.44 Personal care has been defined in Regulations⁷ as “the provision of personal care for persons who, by reasons of old age, illness or disability are unable to provide it for themselves, and which is provided in a place where those persons are living at the time the care is provided.”
- 8.45 Government has released new Planning Practice Guidance of *Housing for Older and Disabled People* in June 2019. In respect of Use Classes, Para 63-014 therein states that:
- “It is for a local planning authority to consider into which use class a particular development may fall. When determining whether a development for specialist housing for older people falls within C2 (Residential Institutions) or C3 (Dwelling house) of the Use Classes Order, consideration could, for example, be given to the level of care and scale of communal facilities provided.”*
- 8.46 The relevant factors identified herein are the level of care which is provided, and the scale of communal facilities. It is notable that no reference is made to whether units of accommodation have separate front doors. This is consistent with the Use Class Order, where it is the ongoing provision of care which is the distinguishing feature within the C2 definition. In a C2 use, the provision of care is an essential and ongoing characteristic of the development and would normally be secured as such through the S106 Agreement.
- 8.47 A range of appeal decisions have addressed issues relating to how to define the use class of a development. These are fact specific, and there is a need to consider the particular nature of the

⁷ Schedule 1 of the Health and Social Care Act 2008 (Regulated Activities) Regulations 2010.

scheme. What arises from this, is that schemes which have been accepted as a C2 use commonly demonstrate the following characteristics:

- Occupation restricted to people (at least one within a household) in need of personal care, with an obligation for such residents to subscribe to a minimum care package. Whilst there has been debate about the minimum level of care to which residents must sign-up to, it is considered that this should not be determinative given that a) residents' care needs would typically change over time, and in most cases increase; and b) for those without a care need the relative costs associated with the care package would be off-putting.
- Provision of access to a range of communal areas and facilities, typically beyond that of simply a communal lounge, with the access to these facilities typically reflected in the service charge.

NPPF Policies on Affordable Housing

- 8.48 Use Class on its own need not be determinative on whether affordable housing provision could be applied. In all cases we are dealing with residential accommodation. But nor is there a clear policy basis for seeking affordable housing provision or contributions from a C2 use in the absence of a development plan policy which seeks to do so.
- 8.49 The 2019 NPPF sets out in Para 34 that Plans should set out the contributions expected from development, including levels of affordable housing. Such policies should not undermine the deliverability of the Plan. Para 62 states that where a need for affordable housing is identified, planning policies should specify the type of affordable housing required, and expect it to be met on-site unless off-site provision or a financial contribution can be robustly justified; and the agreed approach contributes to the objective of creating mixed and balanced communities.
- 8.50 Para 63 states that affordable housing should not be sought from residential developments that are not major developments. Para 64 sets out that specialist accommodation for a group of people with specific needs (such as purpose-built accommodation for the elderly or students) are exempt from the requirement for 10% of homes (as part of the affordable housing contribution) to be for affordable home ownership. But neither of these paragraphs set out that certain types of specialist accommodation for older persons are exempt from affordable housing contributions.
- 8.51 The implication for Bassetlaw is that:
- The ability to seek affordable housing contributions from a C2 use at the current time is influenced by how its current development plan policies were constructed and evidenced; and
 - If policies in a new development plan are appropriately crafted and supported by the necessary evidence on need and viability, affordable housing contributions could be sought from a C2 use through policies in a new Local Plan.

8.52 Within any review of the local plan, it would be possible to craft a policy in such a way that affordable housing could be sought on extra care housing from both C2 and C3 use classes and it should be noted that in July 2020 the High Court rejected claims that 'extra care' housing should not contribute affordable homes because it falls outside C3 use (CO/4682/2019). It is however important to recognise that the viability of extra care housing will differ from general mixed tenure development schemes, and there are practical issues associated with how mixed tenure schemes may operate.

Viability

8.53 There are a number of features of a typical extra care housing scheme which can result in substantively different viability characteristics relative to general housing. In particular:

- Schemes typically include a significant level of communal space and on-site facilities, such that the floorspace of individual units might equate to 65% of the total floorspace, compared to 100% for a scheme of houses and perhaps 85% for typical flatted development. There is a significant proportion of space from which value is not generated through sales;
- Higher construction and fit out-costs as schemes need to achieve higher accessibility requirements and often include lifts, specially adapted bathrooms, treatment rooms etc. In many instances, developers need to employ third party building contractors are also not able to secure the same economies of scale as the larger volume housebuilders;
- Sales rates are also typically slower for extra care schemes, not least as older residents are less likely to buy 'off plan.' The combination of this and the limited ability to phase flatted schemes to sales rates can result in higher finance costs for a development.

8.54 There are a number of implications arising from this. Firstly, there is a need for viability evidence to specifically test and consider what level of affordable housing could be applied to different forms of older persons accommodation, potentially making a distinction between general market housing; retirement living/sheltered housing; and extra care/housing with care. It may well be that a differential and lower affordable housing policy is justified for housing with care.

8.55 Secondly, developers of extra care schemes can struggle to secure land when competing against mainstream housebuilders or strategic land promoters. One way of dealing with this is to allocate sites specifically for specialist older persons housing, and this may be something that the Councils wish to consider through the preparation of new Local Plans. There could be benefits of doing this through achieving relatively high-density development of land at accessible locations, and in doing so, releasing larger family housing elsewhere as residents move out.

Practical Issues

8.56 In considering policies for affordable housing provision on housing with care schemes, there is one further factor which warrants consideration relating to the practicalities of mixed-tenure schemes. The

market for extra care development schemes is currently focused particularly towards providers at the affordable and higher ends of the market, with limited providers currently delivering within the 'mid-market.' At the higher ends of the market, the level of facilities and services/support available can be significant, and the management model is often to recharge this through service charges.

- 8.57 Whilst recognising the benefits associated with mixed income/tenure development, in considering whether mixed tenure schemes can work it is important to consider the degree to which service charges will be affordable to those on lower incomes and whether Registered Providers will want or be able to support access to the range of services/facilities on site. In a range of instances, this has meant that authorities have accepted off-site contributions to affordable housing provision.

Wheelchair User Housing

- 8.58 The final analysis in this section concerns the need for accommodation for wheelchair users – in terms of new dwellings this will be covered by Building Regulations M4(3) Category 3: Wheelchair user dwellings M4(3), of which there are two standards: adaptable and accessible. M4(3) 'wheelchair user adaptable dwellings' are to be constructed to be adjustable for occupation by a wheelchair user, whereas accessible dwellings should be constructed for immediate occupation.
- 8.59 The analysis is mainly focussing on what proportion of new homes would need to meet the M4(3) standard although it should be noted that through the Council's Disabled Adaptation Works there will be some homes being brought up to the standard (or equivalent) each year – numbers are however likely to be fairly small.
- 8.60 Information about the need for housing for wheelchair users is difficult to obtain (particularly at a local level) National data within a research report by Habinteg Housing Association and London South Bank University (Supported by the Homes and Communities Agency) entitled *Mind the Step: An estimation of housing need among wheelchair users in England* (2010) has therefore been used. This report provides information at a national and regional level although there are some doubts about the validity even of the regional figures; hence the focus herein is on national data.
- 8.61 The report identifies that around 84% of homes in England do not allow someone using a wheelchair to get to and through the front door without difficulty and that once inside, it gets even more restrictive. Furthermore, it is estimated, based on English House Condition Survey data, that just 0.5% of homes meet criteria for 'accessible and adaptable', while 3.4% are 'visitable' by someone with mobility problems (information from the CLG Guide to available disability data (taken from the English Housing Survey) puts the proportion of 'visitable' properties at a slightly higher 5.3%).

- 8.62 Overall, the report estimates that there is an unmet need for wheelchair user dwellings equivalent to 3.5 per 1,000 households⁸. Moving forward, the report estimates a wheelchair user need from around 3% of households.
- 8.63 Applying both of these figures to the demographic projections (as set out in the table below) suggests a need for around 500 wheelchair user homes in Bassetlaw in the period to 2037. Comparing the need for wheelchair dwellings shown to the local housing need (based on 591 dwellings per annum), the need for wheelchair user dwellings equates to about 5% of the total housing need. This would therefore be a suitable policy benchmark for the level of provision required. This level of provision is considered to be appropriate for general needs dwellings and is therefore additional to the delivery of housing for older people (where it would be expected that a higher proportion would be at the M4(3) standard).

Table 61: Estimated Need for Wheelchair User Homes, 2020 to -2037

	Current Need	Projected Need (2020-37)	Total
Bassetlaw	176	327	503

Source: Derived from Demographic Projections and Habinteg Prevalence Rates

- 8.64 Information in the CLG Guide to available disability data also provides some historical national data about wheelchair users by tenure (data from the 2007/8 English Housing Survey). This showed around 7.1% of social tenants to be wheelchair users, compared with 2.3% of owner-occupiers (there was insufficient data for private renting, suggesting that the number is low).
- 8.65 This may impact on the proportion of different tenures that should be developed to be for wheelchair users (although it should be noted that the PPG (56-009) states that *‘Local Plan policies for wheelchair accessible homes should be applied only to those dwellings where the local authority is responsible for allocating or nominating a person to live in that dwelling’*). For market housing, policy can however require delivery of wheelchair-adaptable dwellings, this being a home that can easily be adapted to meet the needs of a household including wheelchair users.

Students

- 8.66 There are no higher education facilities in the area, therefore there is unlikely to be any demand for such housing in the Bassetlaw. Any proposal which comes forward for such housing should be treated on its merits and supported by a needs assessment and an agreement with a higher education provider.

⁸ This is described in the Habinteg report as the number of wheelchair user households with unmet housing need

Build to Rent

8.67 Built to rent has typically been focussed on urban areas and particularly areas with a University. It is therefore unlikely for there to be any demand for such housing in the Bassetlaw. However, there may still be a role for such accommodation to support certain sectors of the economy (contracting staff such as those used by the construction and healthcare industries) with better quality housing on a short-term basis. Any proposal which comes forward for such housing should be treated on its merits and supported by a needs assessment.

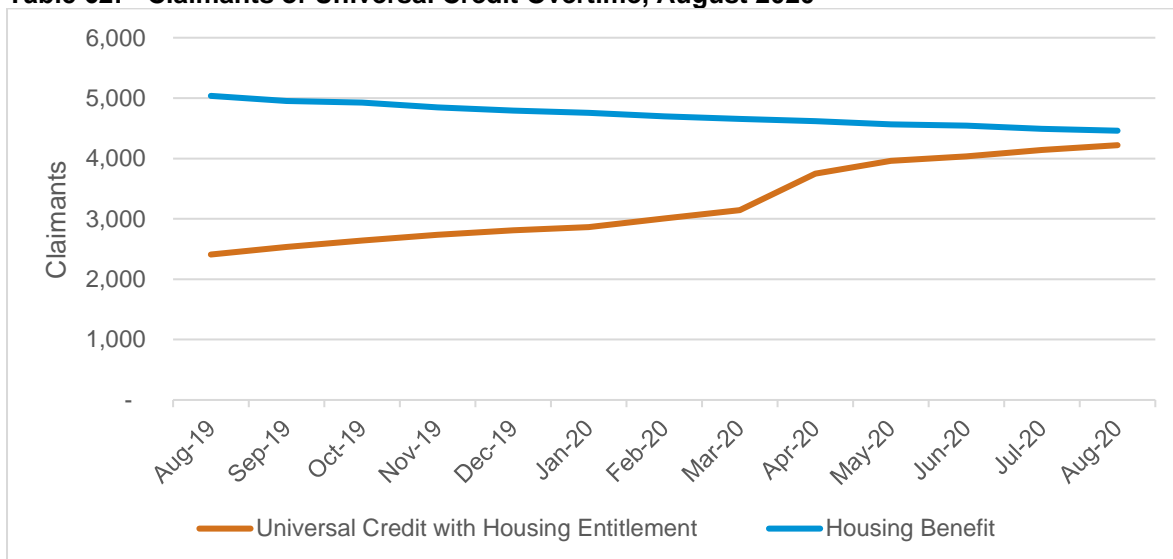
The Role of the Private Sector in Meeting Affordable Housing Need

8.68 To understand the role of the private sector in meeting affordable housing need in Bassetlaw, we have examined government data on Universal Credit and Housing Benefits and to what extent this is given to those living in the private rented sector (PRS).

8.69 The graph below shows how Housing Benefit (HB) and Universal Credit (UC) with a housing entitlement claims have changed over the last 15 months. The correlation between the two reflects UC gradual replacement of housing benefits - thus as UC grows, HB falls.

8.70 The overall number of claimants of either type of benefit has increase from around 7,500 in August 2019 to 8,600 in August 2020. This includes a notable increase in UC claimants in March and April this year which is likely to be COVID-19 related.

Table 62: Claimants of Universal Credit Overtime, August 2020

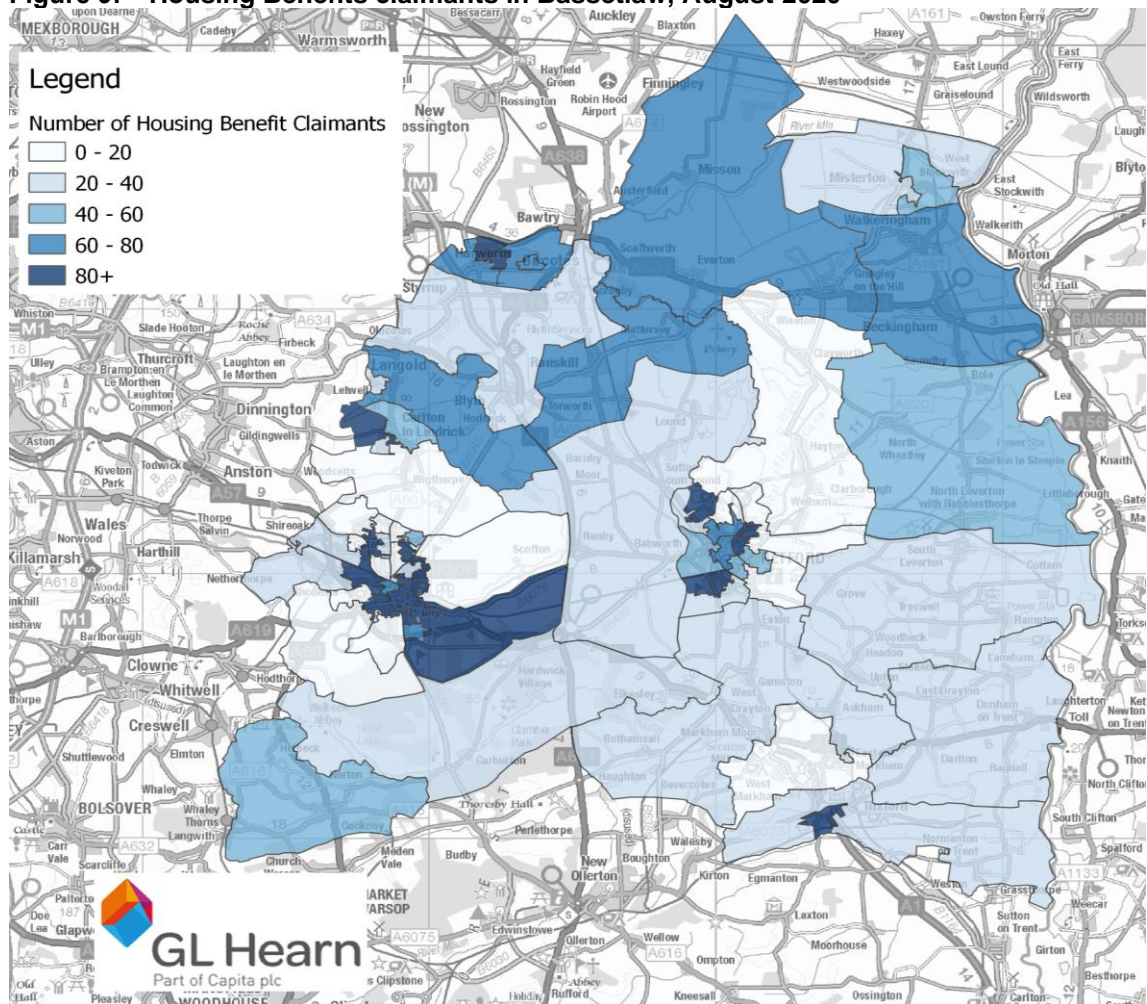


Source: Stat-Xplore

8.71 As of August 2020, there were 4,460 Housing Benefit Claimants and 4,220 Universal Benefit claimants that included a housing entitlement in Bassetlaw. Of these around 979 HB claimants (22%) and 2,381 Universal Credit with Housing Entitlement (55%) reside in the PRS. This illustrates the key role that the private sector has in providing accommodation to those who otherwise would require social housing.

8.72 In order to ensure that parts of the district do not become overly benefit dependent and to inform affordable housing strategy, it is worth highlighting area of the district with high numbers of claimants. As the figure below illustrates South East of Worksop, Retford, Harworth and in South Tuxford all have the highest-level housing benefit claimants. Although it should be noted that even within a local authority the roll out of universal credit can be confined to specific areas.

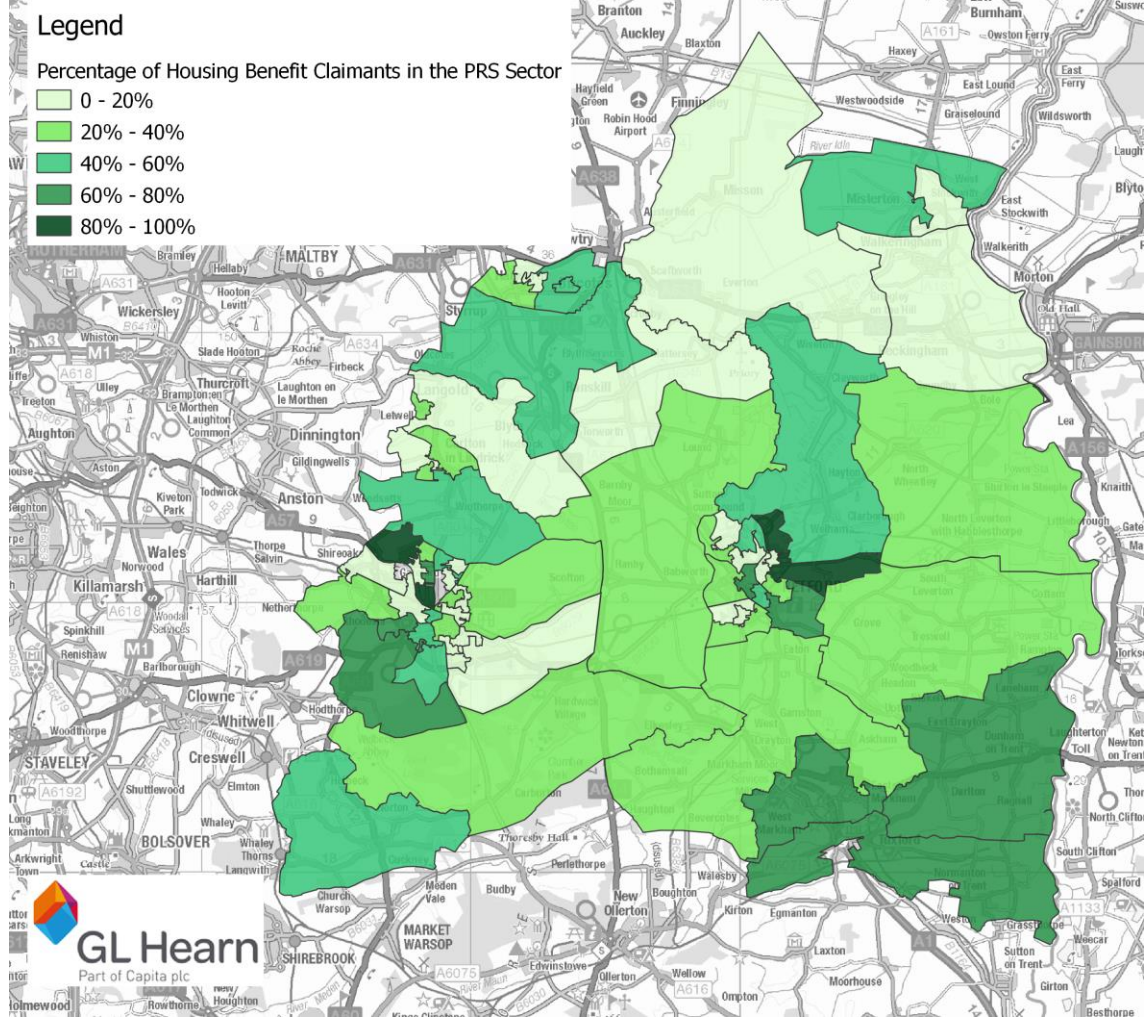
Figure 9: Housing Benefits claimants in Bassetlaw, August 2020



Source: GL Hearn analysis of Stat-Xplore

8.73 The map below illustrates the percentage of housing benefit claimants living in the private rented sector at the LSOA level. Again, there is a high concentration of housing benefits claimants living in the PRS around the settlements of Worksop and Retford.

Figure 10: Housing Benefits Claimants living in the PRS, August 2020



Source: GLH analysis of Stat-Xplore

Older and Disabled Persons Needs and Specific Groups: Key Messages

- The analysis responds to Planning Practice Guidance on *Housing for Older and Disabled People* published by Government in June 2019 and includes an assessment of the need for specialist accommodation for older people and the potential requirements for housing to be built to M4(2) and M4(3) housing technical standards (accessibility and wheelchair standards).
- The data shows in general that Bassetlaw has an older age structure and higher levels of disability compared with other areas. The older person population is projected to increase notably in the future and an ageing population means that the number of people with disabilities is likely to increase substantially. Key findings include:
 - A 47% increase in the population aged 65+ over 2018-2037 (potentially accounting for around 58 of total population growth);
 - A 69% increase in the number of people aged 65+ with dementia and a 60% increase in those aged 65+ with mobility problems (2018-37);
 - A need for around 2,000 housing units with support (sheltered/retirement housing) in both the market and affordable sectors – 2018-37;
 - A need for around 900 additional housing units with care (e.g. extra-care), around 40% in the affordable sector (2018-37);
 - A need for around 600 additional care bedspaces (both residential and nursing care) in the 2018-37 period; and
 - a need for around 500 dwellings to be for wheelchair users (meeting technical standard M4(3)) – 2018-37 – this would be in addition to any wheelchair user housing provided within specialist schemes.
- This would suggest that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair user dwellings as well as providing specific provision of older persons housing. **Given the evidence, the Council could consider (as a start point) requiring all dwellings (in all tenures) to meet the M4(2) standards (which are similar to the Lifetime Homes Standards) and at least 5% of homes meeting M4(3) – wheelchair user dwellings. It should however be noted that there will be cases where this may not be possible (e.g. due to viability or site-specific circumstances) and so any policy should be applied flexibly.**
- Where the authority has nomination rights M4(3) would be wheelchair accessible dwellings (constructed for immediate occupation – M4(3b)) and in the market sector they should be wheelchair user adaptable dwellings (constructed to be adjustable for occupation by a wheelchair user – M4(3a)). It should however be noted that there will be cases where this may not be possible (e.g. due to viability or site-specific circumstances) and so any policy should be applied flexibly.
- The Council should also consider if a different approach is prudent for market housing and affordable homes, recognising that Registered Providers may already build to higher standards, and that households in the affordable sector are more likely to have some form of disability.
- In seeking M4(2) compliant homes, the Council should also be mindful that such homes could be considered as 'homes for life' and would be suitable for any occupant, regardless of whether or not they have a disability at the time of initial occupation. Over time this might have an impact on specialist demand (given that older people often want to remain at home rather than move to care)

and will need to be monitored.

- There is unlikely to be a significant need for either student housing or build-to-rent in Bassetlaw District.
- The private rented sector plays a key role in providing affordable housing in Bassetlaw, as evidenced by analysis of Universal Credit Claimants over the past 15 months. There is a high concentration of housing benefits claimants living in the PRS around the main settlements of Worksop and Retford.

9 EMPLOYMENT SUPPLY UPDATE

9.1 This section considers the major employment sites supply in the district. The 2019 EDNA undertook a full set of assessments across a range of sites. As part of the 2020 HEDNA report site visits have not been revisited however discussions have been had with site promoters, developers and owners to understand the latest position and contribution to employment. Details on employment are noted below and set out in full in appendix A. Where limited site employment information is available, assumptions have been made drawing on typical HCA Employment Densities Guide floorspace densities.

9.2 This section also considers the role of strategic sites as a concept and how that is applicable in Bassetlaw.

Manton Wood Extension

9.3 The land sits on the west edge of Worksop, and the total site expansion is approximately 93,000 sqm for large scale units. It provides an estimated 400 full time jobs according to the occupier with some jobs transferring from the existing park. DHL, the main occupier, proposes the development over three phases comprising warehouse and some ancillary office floorspace.

Shireoaks Common

9.4 This site bordered by Gateford Road to the North and the A57 to the East. The development is part of a mixed-use scheme comprising 15 ha of land for commercial and industrial uses. Outline consent for the scheme has been granted. Occupiers include BP, M&S and Costa with a further mix of B class occupiers anticipated with an emphasis on B8.

Symmetry Park

9.5 The development is placed at Junction 34 North of the A1(M) and West of Blyth Road. Due to its proximity to the motorway it is primarily designed to provide large scale warehousing floorspace or other large occupiers. Current occupiers include Mosaic Tiles, a subsidiary of Travis Perkins that has light manufacturing and warehousing floorspace. Around 64,000 sqm of flexible B2/B8 floorspace is available to be developed and would create an estimated 1,004 jobs.

Welbeck Colliery

9.6 This site is a former colliery north of Meden Vale. It has been marketed for employment for three and a half years with no official inquiries. Possible plans included a rural enterprise hub. The site is also

relatively distant from motorway and A road connections. There is a masterplan for the site which includes employment space that provides street frontage with rear parking. Any expected employment would come forward during the plan period. An indicative level of employment provision of 172 jobs has been estimated based on the masterplan.

Carlton Forest

- 9.7 The site is north of the town of Worksop, West of Blyth Road on the Carlton Forest Distribution Centre. Part of a mixed use sustainable urban extension to Worksop. The site promoters anticipate around 1,000 additional jobs being brought forward within the local plan period.

High Marnham Energy Hub

- 9.8 The site is 60 hectares in total for green energy and low carbon technology businesses, with likely 38.4 ha provision by 2037 and the rest thereafter. It is located on the former High Marnham power station. Access to the national grid infrastructure exists through the onsite switching station. JG Pears is a nearby farm and have planning permission for storage space for feed ingredients.

Trinity Farm

- 9.9 The entire development comprises two plots positioned on opposite sides of North Road in the North of Hallcroft outside of Retford. One plot to the East of North Road, approximately 5 ha in size, is immediately next to employment land that is under construction. The proposed employment floorspace at this site would be a mixture of B1 and B8 floorspace.

Explore Steetley

- 9.10 The site is north of the A619 on Explore Way. Laing O'Rourke is building an extension of approximately 64,000 sqm of B8 and B2 floorspace. The site straddles the district boundary but the employment development sits within the District boundary. This site is labelled for manufacturing and assembly for modern methods of construction.

Apleyhead Junction, Worksop

- 9.11 The site is bound by the A57 to the south and the A1 to the East. It is directly East of the Mantonwood Business park. Although of an estimated site area of 189.7 ha there are major landscape and environmental issues reducing developable areas. There is an estimated provision of 413,000 sqm of either entirely B8 floorspace or a mixture of B8/B1c/B2 floorspace. The site promoters have estimated from 6,000 – 7,700 FTE jobs. Given the nature of the site and units GL Hearn consider the lower range of the figure to be optimistic and the upper end largely unrealistic given the nature of the

units, potentially all exceeding 100,000 sqft and two being over 1,000,000 sqft (based on the promoters documentation). Considering a potential distribution focused markets GL Hearn considers a lower range at 95 sqm per employee to generate closer to 4,400 jobs. Given the scale of the site testing a range is important in employment terms.

Snape Lane, Harworth

- 9.12 The site adjoins Snape Lane to the North, Bawtry Road to the East and Blyth Road to the West. The original planning consent was for smaller plot sizes however this has been reengineered towards strategic warehousing which is the current design of the site. The floorspace provision is approximately 200,000 sqm, and construction would take a little over a year, with four to five months to account for initial infrastructure works. At present there are no pre-lets for the site. Given the nature of the site and following discussions with the promoters a lower density assumption for employment has been used typifying large-scale warehousing.

Bassetlaw's Garden Village

- 9.13 Bassetlaw's Garden Village is adjacent to the A1/A57 junction and next to the Sheffield-Lincoln railway line. It provides an opportunity to deliver a mix of employment uses at a highly accessible location. It is being prioritised as an inward investment site in the district and in particular focused on the higher value manufacturing opportunities emerging in the district being the low energy and carbon sector as well as around modern methods of construction (MMC). This relates to emerging capabilities in the district including low energy production at High Marnham as well as expanding MMC capabilities such as the Laing O'Rourke Explore Steetley site.
- 9.14 These higher value sector investment opportunities at the garden village will be supported by traditional units and flexible modern workspaces and offices which are currently general lacking in the district.

Strategic Sites

- 9.15 Bassetlaw has a number of large-scale sites with several over 25 ha, of which 3 are over 50 ha, being at Snape Lane, Apleyhead Junction and High Marnham Energy Hub. Whilst High Marnham is large but this is attributed to its former power station nature rather than necessarily of having potential to capture investment that relates to its size.
- 9.16 Snape Lane and Apleyhead, as well as Symmetry Park, are orientated to larger scale occupiers which are likely to attract inward investors in the district rather than supporting existing established businesses. Given the nature of these sites an exploration is warranted to what degree they can be

considered as strategic - in the sense of playing an identifiable role in the sub regional or regional economy.

- 9.17 In considering the nature of strategic sites it is useful to refer to the former Regional Spatial Strategies (RSS). For example, the Birmingham Development Plan, adopted 2017, identifies 3 Regional Investment Sites, noting (para 7.9) “their origin being within the former Regional Spatial Strategy, which identified a need for large sites capable of attracting ‘footloose’ investment and able to support the diversification of the economy”.
- 9.18 In the absence of RSSs, identifying strategic sites has become less common. The West Midlands Strategic Employment Sites Study (2015) was commissioned to establish the need for strategic sites, with a phase 2 report to follow on to find sites should a shortfall be found. However, the follow-on report from this to identify sites specifically was due in 2019 but remains unpublished. This has led to difficulty at examinations in the West Midlands – including in GL Hearn’s experience in North Warwickshire – with a lack of clarity in terms of which authorities should accommodate sub regional needs where they are identified.
- 9.19 In the East Midlands, Leicester and Leicestershire have commissioned a series of documents⁹ relating to the need for strategic warehousing which determined a threshold for units over 9,000 sqm or 100,000 sqft. These reports set out criteria for strategic site locations (for warehousing) but did not designate sites.
- 9.20 As the 2005 East Midlands RSS(8) did not identify regional sites we have considered the criteria from the West Midlands RSS for Regional Investment Sites, Major Investment Sites and Regional Logistics Sites as below.
- Regional Investment Sites: Multi-occupied sites
 - Intended to attract high-quality occupiers who were nationally or internationally footloose, in Use Classes B1 or ‘where appropriate’ B2
 - In the order of 50 hectares
 - At least one RIS should be located in, or linked by public transport to, each Regeneration Zone and High-Technology Corridor;
 - Major Investment Sites
 - To accommodate very large single users with an international choice of location
 - In the order of 50 hectares or more
 - At least two should be immediately available at any one time
 - Regional Logistics Sites
 - For large-scale warehousing
 - In the order of 50 ha or more
 - The region should have a choice of RLSs available at any one time

⁹ <https://www.harborough.gov.uk/supporting-evidence#business> EMP6 & EMP7

9.21 Taking the above into account, GL Hearn is of the view that the following key attributes should be considered relevant to identifying a major strategic site in Bassetlaw:

- A site in close proximity to key strategic accessibility drivers namely the A1/A57;
- A site which could provide B1/B2/B8 employment functions connected with key sectors identified by the LEP;
- A site preferably with LEP support for delivery;
- A site supportive of the role of the key urban centre of Worksop;
- A site of a large scale (over 50 ha) offering occupier flexibility and large-scale investment potential for locally grown businesses or for inward investors if appropriate;
- A site with the ability to deliver significant regeneration or economic development benefits;
- A site with the benefit of specific on-site infrastructure which has the ability to attract a specific type of occupier.

9.22 Of these attributes, in GL Hearn's view the development of Apleyhead Junction would be the only site of the District's supply that would meet these characteristics as:

- It is at the A57 / A1 interchange;
- Although it is understood that no occupier has been identified at this time, with around 5million sqft of space orientated to larger units it is likely to attract larger scale warehousing through inward investment;
- It is likely to support transport / logistics or possibly manufacturing employment;
- Gross employment is expected to be around 6,000 full time equivalents;
- It is within a short distance of Worksop .

9.23 The site is also less than 3 miles from the district border and is likely to provide employment for surrounding authorities as well as Bassetlaw residents.

Employment Supply Update: Key Messages

- 2019 EDNA undertook a full set of assessments across a range of sites. GL Hearn has undertaken consultation with site promoters, developers and owners, along with any relevant planning documents, to revisit the main supply and detailed site employment assumptions have also been presented in Appendix A.
- The Bassetlaw Garden Village provision is an opportunity to satisfy a requirement for flexible and modern workspaces that is aligned with D2N2 LEP strategic objectives.
- Apleyhead is the only site in Bassetlaw that would qualify as a strategic site based upon criteria developed in the review.

10 EMPLOYMENT LAND DEMAND AND BALANCE

10.1 Chapter 4 sets out the latest employment growth forecasts implications for Bassetlaw. In the sections below, the implications on land need and the balance of supply are explored.

Employment Land Needs

10.2 Paragraphs 7.24 to 7.28 in the 2019 EDNA set out how employment forecasts are translated into floorspace and land needs. This involves converting jobs to full time equivalents, using BRES data, and then apportioning jobs to use classes. The use class assumptions are set out in appendix B. Densities are applied to each job drawing on the HCA 2015 Employment Densities Guide and converted to land using plot ratios. For reference the plot ratio assumptions were 0.35, 0.4, 0.5 for B1ab, B1c/B2, B8 respectively. All assumptions in this 2020 report align with that of the 2019 work with the exception of an increase in the proportion of those working in transport & storage anticipated to be based on B8 premises (see appendix B).

10.3 Using the 2020 OE data, an employment land need is provided below, keeping assumptions on replacement demand and the margin for flexibility the same as in 2019. Replacement demand, in particular, reflects a position where old employment sites are lost but existing employment activities require new sites that are not picked up in the jobs growth model.

Table 63: 2018-37 Land Need (Ha) Calculations

	OE Baseline				OE Growth				Completions excl. outliers	Completions (All)
	Net need	Margin	RD	BL Tot	Net need	Margin	RD	Growth Tot		
B1a/b	2.2	1.7		3.9	2.7	1.7		4.4	16.3	16.3
B1c	-0.3	1.3		1	0.0	1.3		1.3	12.3	12.3
B2	-17.3	6.2	19	7.9	-4.6	6.2	19	20.6	59.0	59.0
B8	-1.8	12.9	19	30.1	25.8	12.9	19	57.7	65.2	122.2
Total	-17.1	22.1	38	43	23.9	22.1	38	84	152.9	209.9

10.4 The 2020 OE forecasts data suggests that 84 ha of land is needed under the growth model, which is slightly higher than the 2019 figure of 63 ha. This is largely due to an update on the assumptions regarding floorspace requirements for those working in transport & storage.

10.5 However, GL Hearn recommends that the Council consider planning for the completions trend land figure for B2 and B8 uses for their plan-making purposes rather than the labour demand model but

maintain the growth scenario B1 needs. This is due to uncertainties in relating labour densities in industrial floorspace to business needs.

10.6 The overall recommendations are summarised below with those figures in bold translating to the recommended need in the final column.

10.7 Of note, the inclusion of 'outliers' referenced in the 2019 report paragraph 7.35 – being Steetley Colliery and Hive Storage, Retford – is considered appropriate given that the transport & storage sector is an important one for the district and demand is evident for further uses of this type.

Table 64: Recommended Land Need 2018-37 (ha)

	Baseline	Growth	Completions excl. outliers	Completions	Recommended
B1a/b	3.9	4.4	16.3	16.3	4.4
B1c	1.0	1.3	12.3	12.3	1.3
B2	7.9	20.6	59.0	59.0	59.0
B8	30.1	57.7	65.2	122.2	122.2
Total	43.0	84.0	152.9	209.9	186.9

10.8 The above level of need (186.9 Ha) has been brought together with the supply position in the table below to calculate the supply and demand balance. As the table below demonstrates the supply provides an excess when considering need – even drawing on the higher rate of completions trend. The site details are included in Appendix A and discussed further in the following chapter.

Table 65: Supply-Demand Balance 2018-37 (ha)

	B Class Uses
Needs	186.9
Constructions	10
Permissions	33.5
Allocations	59.9*
Snape Lane (Permitted)	80.9
Sub total	184.3
Apleyhead Junction	118.7
Supply	303.0

* High Marnham Energy Hub makes up 38.4 Ha but will not deliver employment (jobs) at a typical rate

10.9 The above table illustrates that assuming the Council plans for future B2/B8 land needs at the rate of past completions including outliers, it is possible that needs can almost completely be met using

known permitted or allocated supply. Snape Lane is set out separately given the scale of the site and its orientation to larger scale units. The table indicates that the Apleyhead Junction site is essentially additional to the current plan period local requirements and its inclusion would be a policy choice that could lead to a higher overall level of employment for the district if sufficient labour is available.

Employment Land Demand and Balance: Key Messages

- This chapter considered two labour demand forecasting scenarios (from Oxford Economics and Experian), a modelled growth scenario, and two completions trend scenarios. 2019 EDNA undertook a full set of assessments across a range of sites.
- The employment land need is recommended as below:

	Recommended Land Need (Ha)	Method
B1a/b	4.4	Growth Model
B1c	1.3	Growth Model
B2	59.0	Completions
B8	122.2	Completions
Total	186.9	

- Compared to pipeline supply, there is a broad balance, with Apleyhead delivering a higher rate of growth.

Supply-Demand Balance 2018-37 (ha)	B Class Uses
Needs	186.9
Constructions	10
Permissions	33.5
Allocations	59.9*
Snape Lane (Permitted)	80.9
Sub total	184.3
Apleyhead Junction	118.7
Supply	303.0

Appendices

APPENDIX A: Site Supply and FTE assumptions

					Land - Ha				SQM				FTE Employees			
Ref	Site Name	Total (Ha)	B Class Land (Ha)	Use Class	B1	B2	B8	Total	B1	B2	B8	Total	B1 (14 sqm/FTE)	B2 (38 sqm/FTE)	B8 (14 sqm/FTE)	Total FTEs estimated
Sites under construction 2019-2020																
EM001	Manton Wood Extension	24.6	10.73	B1, B2, B8	1	2	7	10	2,000	0	91,000	93,000	From application			400
Sites with planning permission																
EM002	Shireoaks Common	26	7.5	B1, B2, B8	1	2	4.5	7.5	5,806	10,535	31,606	47,947	332	277	395	1,004
EM003	Symmetry Park	21.95	9.85	B8	1	2	7	10		16,514	49,541	66,055	0	435	619	1,054
EM004	Explore Steetley	46.5	16	B1, B2, B8				16		19,200	44,800	64,000	From reps (50% in BDC)			500
EM005	Welbeck Colliery	29.6	3	B1, B2, B8									Estimate from emerging masterplan			172
EM006	Carlton Forest	10.6	10.6	B1, B2, B8									Information from developer			1,000
Local Plan Allocations																
EM007	High Marnham Energy Hub	60	38.4	B1, B2, B8				38.4			80,000	80,000	0	0	400	400
EM008	Trinity Farm, Retford	8	8	B1, B2, B8	1	1	3	5	1,839	3623	10,870	14,493	131	95	54	281
EM009	Bassetlaw GV	15	15	B1, B2, B8	2	5	8	15	6,000	20,000	32,000	58,000	343	526	400	888 (30% beyond Plan)
EM010	Snape Lane, Harworth	80.9	80.9	B2, B8				80.9			207,406	207,406	0		2,183	2,183
Site Under Construction with PP and Allocations Total		323.3	200		6	12	29.5	182.8				630,901				7,883

Strategic employment sites														
SEM1	Apleyhead Junction	189	118.7	B1, B2, B8				118.7			413,000	413,000	A) GL Hearn estimate at 95 sqm per job for large warehousing B) Information from developer	4,347 - 6,040
Strategic employment sites Total								118.7						4,347 - 6,040
Grand Total													12,230-13,923	

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