

Tollerton Neighbourhood Plan

Housing Needs Assessment

December 2017

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Glossary of acronyms used in text

| | |
|-------|---|
| AH | Affordable Housing |
| AMH | Affordable Market Housing |
| DCLG | Department for Communities and Local Government |
| GT | Gypsy and Traveller |
| GTAA | Gypsy and Traveller Accommodation Assessment |
| HNA | Housing Needs Assessment |
| LPA | Local Planning Authority |
| NDP | Neighbourhood Development Plan |
| NPG | Neighbourhood Planning Group |
| NPA | Neighbourhood Plan Area |
| NPPF | National Planning Policy Framework |
| ONS | Office for National Statistics |
| PPG | Planning Practice Guidance |
| PRS | Private Rented Sector |
| RBC | Rushcliffe Borough Council |
| RTF | Rural Town and Fringe |
| SHLAA | Strategic Housing Land Availability Assessment |
| SHMA | Strategic Housing Market Assessment 2007 |
| SHMAU | Strategic Housing Market Assessment Update 2012 |
| TNDP | Tollerton Neighbourhood Development Plan |
| TNPS | Tollerton Neighbourhood Plan Survey |
| TPC | Tollerton Parish Council |
| DCS | District Core Strategy |

1. Executive Summary

Introduction

1. The 2011 Localism Act introduced neighbourhood planning, allowing parishes, town councils or neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area.
2. As more and more parishes, towns and forums seek to address housing growth, including tenure and type of new housing, it has become evident that developing policies need to be underpinned by robust, objectively assessed housing data.
3. In the words of the national Planning Practice Guidance (PPG), establishing future need for housing is not an exact science, and no single approach will provide a definitive answer. The process involves making balanced judgments, as well as gathering numbers and facts. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority 'average', reflecting the fact that a single town, village or neighbourhood almost never constitutes a housing market area¹ on its own and must therefore be assessed in its wider context.
4. The guidance quoted above on housing needs assessment is primarily aimed at local planning authorities preparing Strategic Housing Market Assessments (SHMAs), which are used to determine housing need at a local authority level. However, it helpfully states that those preparing neighbourhood plans can use the guidance to identify specific local needs that may be relevant to a neighbourhood, but that any assessment at such a neighbourhood level should be proportionate.
5. Our brief was to advise on data at this more localised level to help Tollerton Parish Council (TPC) understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.

PPG-based assessment

6. This objective and independent housing needs advice note follows the PPG approach where relevant. This ensures that our findings are appropriately evidenced. The PPG advises that assessment of development needs should be thorough but proportionate and does not require planners to consider purely hypothetical future scenarios, only future scenarios that could be reasonably expected to occur.

Summary of methodology

7. Housing Needs Assessment (HNA) at neighbourhood plan level can be focused either on quantity of housing needed, type of housing needed, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
8. In the case of Tollerton, the current adopted Development Plan is the Rushcliffe Core Strategy (adopted December 2014). Rushcliffe Borough Council (RBC) is in the process of preparing a land and planning policies document which sets out non-strategic allocations and a number of development management policies. The Core Strategy has allocated a strategic development site within the parish and identifies a target of 4000 dwellings for the Neighbourhood Plan Area (NPA), 2,500 of which are planned up to 2028, and 1,500 post-2028. As a plan that post-dates the National Planning Policy Framework (NPPF), this should be used as a guiding authority on housing numbers. A key point of reference is the principal evidence base for the RBC's housing policies, the Strategic Housing Market Assessment Update (SHMAU2012).
9. The rationale for this recommended approach is that neighbourhood plans need to meet a number of Basic Conditions to be 'made' by the Local Planning Authority (LPA). One of these, Basic Condition E, requires the Neighbourhood Plan to be in 'general conformity with the strategic policies' of the Local Plan, in this case the Rushcliffe Core Strategy. The PPG indicates that the level of housing development is likely to count as a strategic policy.²

¹ Government define Housing Market Areas as a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. CLG, <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>, accessed 24th October 2017.

² See Planning Practice Guidance Paragraph: 006 Reference ID: 2a-006-20140306

10. In terms of the types of housing needed, there is generally more flexibility on what neighbourhood plans can cover. In order to understand the types of housing needed in Tollerton, we have gathered a wide range of local evidence and distilled this into policy recommendations designed to inform decisions on housing type.
11. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan.

Gathering and using a range of data

12. The PPG states that:

'no single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes.'

13. It continues:

'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance.'

14. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.
15. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. We have gathered data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data. Feedback from the Tollerton Neighbourhood Plan Group's local household survey was invaluable in providing both further quantitative and qualitative data.

Focus On demand rather than supply

16. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*
17. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on exercise.³

Quantity of housing needed

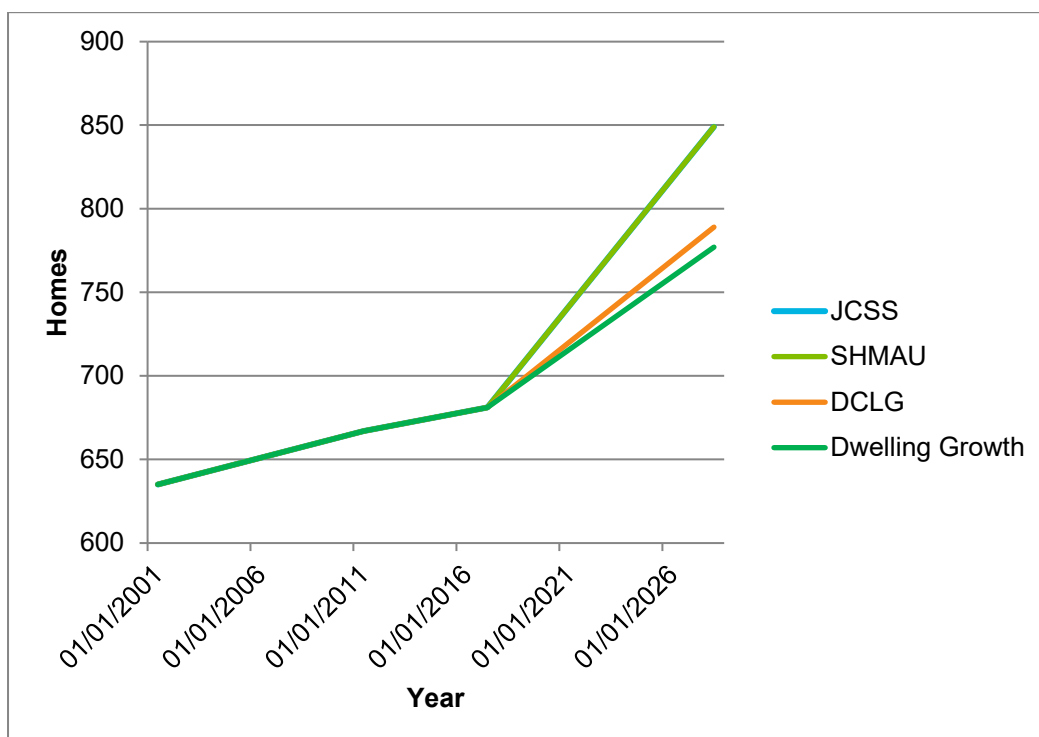
18. Our assessment of a wide range of data sources identified four separate projections of dwelling numbers for Tollerton between **171** and **36** over the plan period based on:

³ Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

- A figure derived from the adopted Core Strategy for Rushcliffe Borough Council (which gives a total of **171 dwellings**);
- A 'proportionate share' derived from the Objectively Assessed Need (OAN) figure in the SHMAU,⁴; total of **171 dwellings over the plan period** (rounded to the nearest whole number), or **14 dwellings per annum**;
- A figure derived from the Government (Department for Communities and Local Government, 'DCLG') household projections - of **104, or 9 dwellings per annum (rounded) over the plan period**.
- A projection forward of net dwelling completion rates 2001-2016 of **36 homes, or 3 per annum**

19. These dwelling number projections are illustrated in Figure 1 below.

Figure 1: Dwelling projections for the Client NP Area, 2017-2028



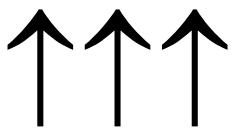


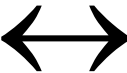
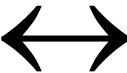
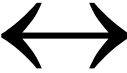
Source: Census 2001/2011, DCLG, Rushcliffe Borough Council

20. The starting point to arrive at an overall projection for housing numbers to be delivered in the NPA over the Plan Period is the average of the four projections set out above; we depart from this approach if we have reason to believe a given projection should be awarded more weight than others, or should be excluded. Taking the average of the four projections, **we arrive at a figure of 121 dwellings, or 12 dwellings per annum (rounded)**.
21. Moreover, a further assessment applied to this initial projection indicates that market signals (for example, the economic context in which the NPA sits, together with the performance of the housing market) are likely to impact on it. We have applied our professional judgment on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates 'some impact', two arrows 'stronger impact' and three arrows indicates an 'even stronger impact'. Factors are in alphabetical but no other order.

⁴ The OAN includes the baseline demographic need, plus any adjustments made to official forecasts to account for projected rates of household formation post 2021, past suppression of the formation of new households, the effect of past under-supply, employment forecasts, market signals and affordable housing need (as set out in paragraph ID2a-004 of the NPPG).

Table 1: Summary of factors specific to Tollerton NP with a potential impact on neighbourhood plan housing quantity

| Factor | Source(s) (detailed in Chapter 5) | Possible impact on future housing need | Rationale for judgement |
|--------------------------------------|---|---|---|
| Employment trends | Local Plan, Greater Nottingham Employment Background Paper (2012), Employment Land Forecasting Study (ELFS, 2015, NLP) Census 2001/11 |  | <p>The Local Plan is proposing significant levels of new mixed employment development within the NPA, and there are already a significant proportion of economically active residents in the NPA that either travel a relatively short distance to work or are mainly home based; aligned with the second highest rate of new enterprise registrations in the HMA, this could potentially drive up demand for housing in Tollerton.</p> <p>The ELFS also identifies potential for greater economic growth in Rushcliffe and repeated the LEP’s aim to focus on the City of Nottingham for future economic growth.</p> <p>As a result, an assessment of three up arrows has been deemed appropriate because of the current strength and predicted future growth of employment opportunities in the local area.</p> |
| Housing transactions (Prices) | Land Registry Price Paid Data for 2006-2016, |  | <p>Analysis of house prices for the NPA is to be treated with caution due to the low levels of stock. The average property price according to Land Registry data as at December 2016 was £310,494, although this is skewed somewhat by the sale of a terrace property for £380,000.</p> <p>In terms of specific increases in house prices, overall the average price of all types of properties has increased by 23% or 18% when you discount the single terrace property.</p> <p>As a result, an assessment of two up arrows has been deemed appropriate due to the relatively high increases in house prices experienced in the NPA when assessed against the District.</p> |
| Housing transactions (Volume) | Land Registry Price Paid Data for 2006-2016, Census 2001/2011 data, SHMA09 |  | <p>Analysis of housing transactions for the NPA is to be treated with caution due to the low levels of stock; however 302 transactions were recorded between 2007 and 2016.</p> <p>The stock is dominated by larger detached homes and semi-detached properties, with hardly any terraced or flat/ maisonette properties.</p> <p>As a result three up arrows have been considered appropriate due to the narrow choice of house types within the NPA; however this is dependent on new dwellings being suitable for those households forecast to grow (elderly, and those in the 25-44 age bracket).</p> |

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| Migration | Census data 2001, 2011 |  | Migration is not seen as significant factor in determining housing need given that just 20% of the 3.8% of Tollerton residents born outside of the UK arrived in the last 10 years. |
| Overcrowding | Census data 2001, 2011 |  | Tollerton has seen a decrease of 3.9% in the number of households with more than 0.5 and up to 1.0 persons per room, although there has been no change in those households with over 1.0 persons per room, which contrasts with the borough wide data which recorded decreases of 11% against more than 1.0 and up to 1.5 persons per room, and a decrease of 17.7% against those properties with over 1.5 persons per room. The NPA has experienced a slight increase (4.4%) of properties with up to 0.5 persons per room, although this increase is not sufficient to warrant any 'up' arrows given the relatively stable persons per room in the other categories in the NPA. |
| Concealment | Census data 2001, 2011 |  | ONS data shows that there are four concealed families in Tollerton, or 0.8% of families; this is slightly less than the figure for Rushcliffe (1.0%), and lower than the average for England as a whole (1.9%). This indicator does not indicate that concealed families (and therefore unmet additional demand for housing in the area from those already living there) is a significant issue for Tollerton. |
| Rate of development | RBC, Land Registry Data/AECOM Calculations |  | The data shows clearly that the rate of development in Tollerton is very low, for instance in 2015/16, only one new dwelling was completed. The low rate of development reflects the rural nature of the NPA. |

22. Market signals research has shown that Tollerton is located in an area with a high potential for jobs growth, as a result of its proximity to Nottingham, and the Core Strategy's strategic allocation within the NPA, alongside relatively high rates of home working and business start-up rates.
23. Moreover, there is strong evidence of disequilibrium between demand and supply within the housing market exhibited through increasing house prices and the lack of choice for those seeking smaller dwellings. This suggests that demand could be hidden due to the lack of homes that are within the range of the vast majority of first time buyers, causing people to be displaced from the area. This position is potentially exacerbated by the weak record of supply at the borough level, notwithstanding the construction of 41 dwellings over the last five years.
24. While we are mindful of these factors, we are also conscious of the 'settlement hierarchy' approach within the Local Plan which states that '*development can take place in villages solely to meet local needs*'; however, given the lack of choice apparent in the NPA, and the balance of local factors in Table 1 which has eight 'up' arrows and no 'down' arrows, along with the slow level of delivery in the NPA, we propose an uplift of 10% to the housing projection arrived at in Paragraph 20. With this in mind, we propose a final housing needs figure for Tollerton taking market signals into account **within a range of 130-140 dwellings** over the plan period.

Table 2: Summary of local factors specific to Tollerton NP with a potential impact on housing Type

| Factor | Source(s) (see Chapter 4) | Possible impact on housing needed | Conclusion |
|---|---|--|--|
| Affordable Housing (AH) | Census, Housing Waiting List Data, SHMA studies | <p>The current tenure profile of the area (dominated by owner occupation) leaves little suitable accommodation for those on low incomes.</p> <p>At the level of the NPA, a crisis of affordability is identified, with households on lower and median incomes unable to access affordable market housing (AMH).</p> <p>Households on mean and median incomes within Rushcliffe are unable to afford entry-level properties in the NPA.</p> | <p>Those households ineligible for affordable housing, but who cannot afford market housing, may struggle to access housing suitable for their needs, meaning they may need to move out of the area.</p> <p>The growth of shared ownership could be a plausible route to home ownership for those on low incomes, for example first time buyers, leading to the recommendation that a substantial share of AH quotas that come from housing development should be allocated to this tenure type.</p> <p>Household income levels generate a compelling argument for affordable private rent housing. These tenure types are particularly suitable for first time buyers.</p> |
| Demand/ need for smaller dwellings | Census, Land Registry Price Paid Data | <p>The current housing stock exhibits an exceptionally strong bias towards larger dwellings, and very few flats (six properties) or terraced (four) properties, therefore the effect on housing need could be acute with respect to those smaller properties.</p> | <p>Demand for smaller properties is difficult ascertain due to the very specific nature of stock. The lack of smaller dwellings is likely to lead to the displacement of households on lower incomes from the area.</p> <p>Findings from the housing transactions data should be treated with caution given the specific nature of the existing stock in the NPA.</p> |
| Demographic change | Census, SHMA studies | <p>An increase in the projected numbers of older people (65-84) is recorded, and this is forecast to continue to rise. In addition, increases in ages between 25-44, and 45-64 are recorded.</p> | <p>The increase in the proportion of the population accounted for by older people creates an imperative for housing policy to address their needs, for example dwellings of a manageable size designed to be 'age-friendly.'</p> <p>In arriving at an appropriate level of housing for older people of different types, we have applied the Housing Learning and Improvement Network's suggested numbers per 1,000 of the 75+ population.⁵ The data shows an estimate of the increase in the numbers of older people aged 75+ of 47 (203 in 2011 to 250 persons in 2031). This will result, over the plan period, in a need for:</p> <ul style="list-style-type: none"> • additional conventional sheltered housing units = 60 x 4.7% = 3 (rounded) • additional leasehold sheltered housing units = 120 x 4.7% = 6 (rounded) • additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale = 20 x 4.7% = 1 (rounded) • additional extra care housing units for rent = 15 x 4.7% = 1 (rounded) • additional extra care housing units for sale = 30 x 4.7% = 1 (rounded) • additional specialist dementia care home = 6 x |

⁵ Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: http://www.housinglin.org.uk/_library/Resources/Housing/SHOP/SHOPResourcePack.pdf

4.7% = 1 (rounded)

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| <p>Family-sized housing</p> | <p>Other changes in age structure reinforce the impression of a family orientated community, as well as a place of retirement.</p> | <p>Smaller and, to lesser extent, mid-sized dwellings should form an important part of the mix of types and sizes of homes provided over the plan period.</p> |
|------------------------------------|--|---|

Recommendations for next steps

25. This neighbourhood plan housing needs advice has aimed to provide Tollerton Parish with evidence on housing trends from a range of sources. We recommend that the parish should, as a next step, discuss the contents and conclusions with RBC with a view to agreeing and formulating draft housing policies, in particular the appropriate approach to identifying the level of need for new housing in the NPA, bearing the following in mind:
 - Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the adopted Rushcliffe Core Strategy;
 - the views of RBC – in particular in relation to the housing need figure that should be adopted;
 - the views of local residents;
 - the views of other relevant local stakeholders, including housing developers;
 - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the RBC, including but not limited to the SHLAA; and
 - the recommendations and findings of this study.

26. Recent changes to the planning system, forthcoming changes to the NPPF, as well as the implementation of the Housing and Planning Act, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.

27. This advice note has been provided in good faith by AECOM on the basis of housing data and national guidance current at the time of writing (alongside other relevant and available information).

28. Bearing this in mind, we recommend that the steering group should carefully monitor strategies and documents with an impact on housing policy produced by RBC or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.

29. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 1 and 2 would be particularly valuable.

2. Context

2.1 Local context

30. The parish of Tollerton to the south east of Nottingham consists of the village itself in the south of the NPA, whilst to the north is Nottingham City Airport. The village of Tollerton is situated four miles south of Nottingham, and is home to the 15th Century Tollerton Hall.
31. Radcliffe and Nottingham City station are the nearest railway stations, whilst the village is less than a mile from the A52 to the west and approximately four miles to the A46 to the east.
32. For the purposes of this study, Census data was downloaded from both the 2001 and 2011 Censuses to contribute to an assessment of the housing needs in the area. Whilst the 2011 Census data can be filtered down to the parish level, thereby ensuring exact accuracy, 2001 Census data is grouped according to a series of other geographical areas or units, not parishes, which are: Output Areas (OAs), Lower Layer Super Output Areas (LSOAs), and Medium Layer Super Output Areas (MSOAs).
33. In the case of the Tollerton NPA however, the area that covers the airport is within a strategic allocation, and therefore effectively outside the designated area, especially as the study is concerned with housing need for the settlement of Tollerton, that is current residents. Therefore for the purposes of this HNA it is recommended that the airport LSOA is removed from the results. Figures 4 and 5 illustrate the Output Areas (OA) that are considered to represent the appropriate datasets on which to base the Census data for the HNA. The OAs are E00144775, E00144776, E00144777, E00144778, and E00144780.

Figure 2: 2011 Census LSOA

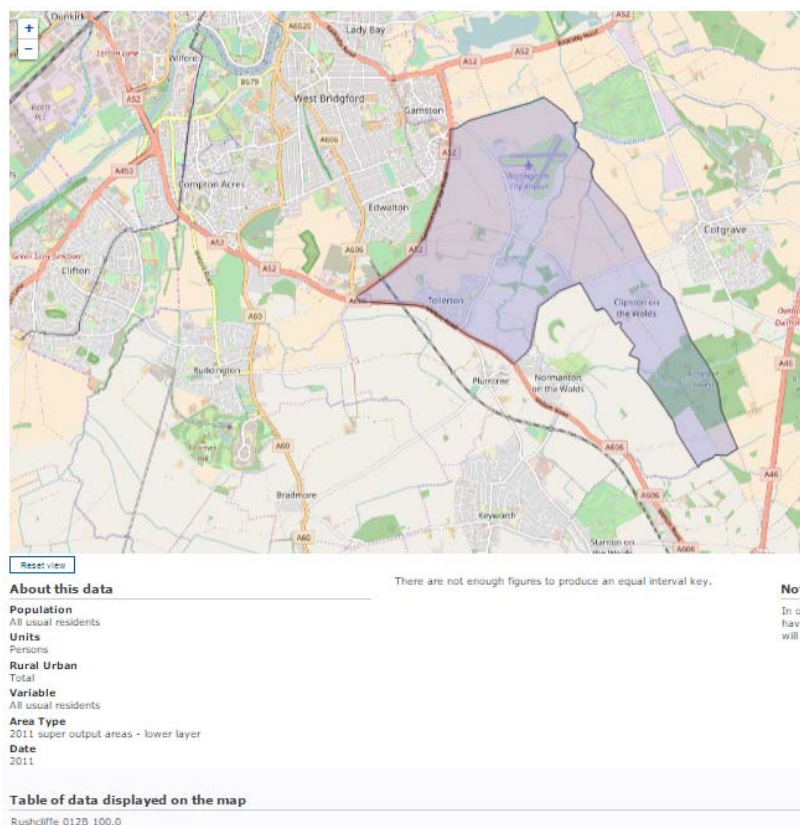
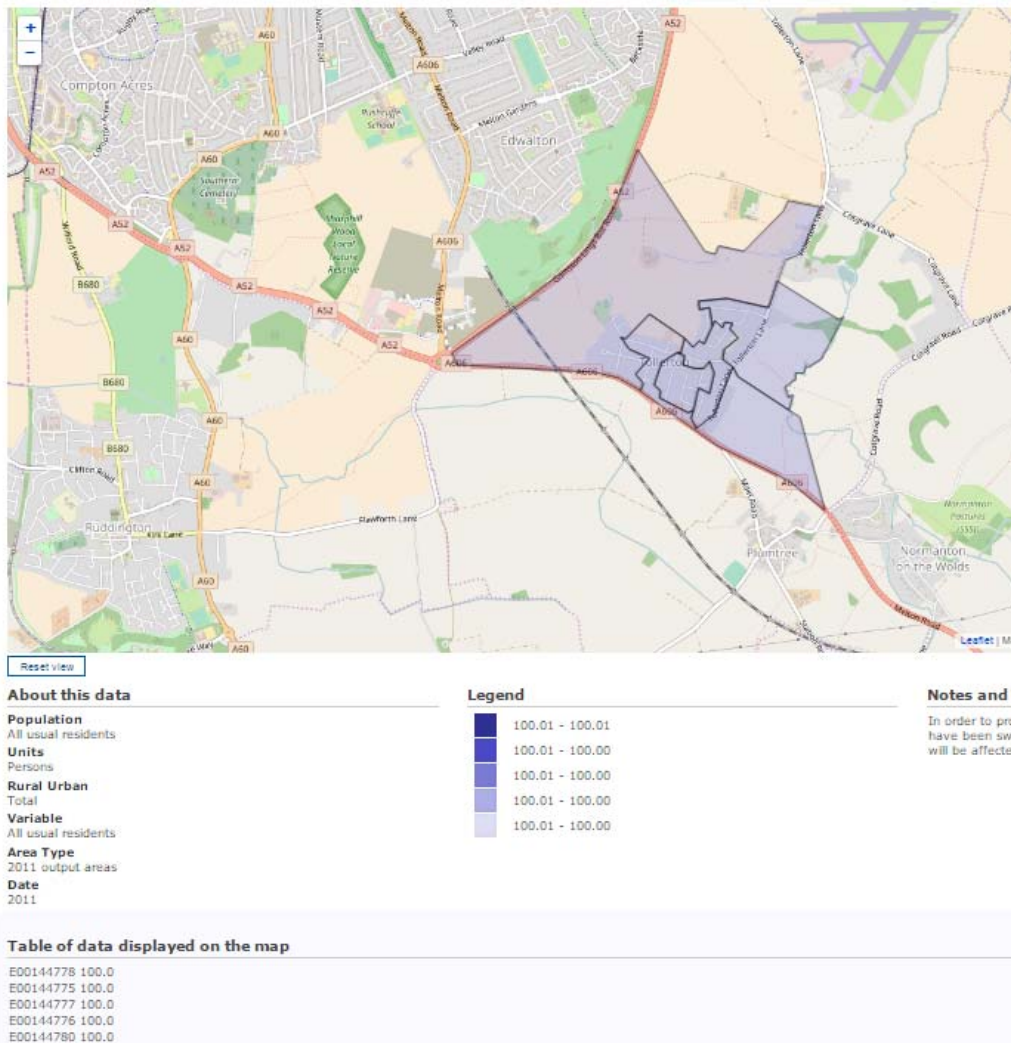


Figure 3: Census 2011: Output Areas without the Airport



2.2 Planning policy context

34. In line with the Basic Conditions of neighbourhood planning, Neighbourhood Development Plans (NDPs) are required to be in general conformity with the adopted strategic local policies. Consequently, there is a requirement for the relevant Local Plan to be reviewed as part of this HNA.
35. The Rushcliffe Borough Council Local Plan consists of a Core Strategy that was adopted in December 2014, alongside five 'saved' policies that were part of the 1996 Local Plan. The Core Strategy sets out the strategic planning framework for Rushcliffe including Tollerton. Significantly for the purposes of the HNA, the Core Strategy includes a strategic allocation that lies within the NPA. The allocation is for 4,000 dwellings, 2,500 prior to 2028, and 1,500 post 2028. This allocation is the largest in the Local Plan.
36. The justification for the allocation is that, in the view of RBC, the vast majority of Tollerton Airfield should be included in the allocation, and that protection of Tollerton as a distinct settlement is achievable by maintaining a Green Belt boundary to achieve a suitable separation between the proposed new settlement and the existing village.

37. The overall housing figure for RBC as expressed in the Core Strategy is a minimum of 13,150 dwellings from a base year of 2011 up to 2028. As well as the strategic allocation of 4,000 homes, the Core Strategy sets out that development can take place in villages that is 'solely to meet local needs'.
38. Policy 3 of the Core Strategy 'Spatial Strategy' sets out the strategy of development that supports a policy of urban concentration with regeneration of the whole of Greater Nottingham to 2028. Other relevant policies in the Core Strategy are Policy 8, 'Housing Size, Mix and Choice'. This states that throughout the plan area that "consideration should be given to the needs and demands of the elderly as part of the overall housing mix, especially in areas where there is a significant degree of under occupation and an ageing population".
39. Policy 8 also includes a threshold for affordable housing, which is set at up to 30% for strategic sites (including the site within Tollerton NPA). Elsewhere, "where there is robust evidence of local need, rural exception sites or sites allocated purely for affordable housing will be permitted within or adjacent to rural settlements".
40. With regards to the saved policies, there are no specific issues with regards to the NPA, as those that refer to Tollerton can be considered to have been superseded by the Core Strategy's strategic allocation.

3. Approach

41. The HNA is structured around a series of 'research questions' arrived at through discussion with TPC at the start of the project. These questions provide the focus for our research, and help ensure that the HNA addresses the vision and objectives of the emerging NDP.

3.1 Research questions

42. HNA at neighbourhood plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.

3.2 Quantity

43. As we have seen, RBC has allocated one strategic site to the NPA with a capacity of 4000 dwellings; the Council is also seeking an additional contribution from the rural areas towards fulfilment of its district housing target through allocating sites. Tollerton is subject to this rural requirement. A key question for the HNA is therefore what is the target for housing in the NPA given this policy context?

*RQ1: Given the Local Authority's housing targets, what is an appropriate **housing target** for Tollerton Neighbourhood Development Plan(TNDP)?*

3.3 Tenure

44. Tollerton Parish Council (TPC) has expressed an interest in seeing more affordable housing in the NPA, particularly those suited to newly formed households. This study will therefore explore tenure mix with a particular focus on affordable housing including the role of discounted market housing.

*RQ2: What **affordable housing tenures** (social housing, affordable rented, shared ownership, intermediate rented) should be included in the housing mix?*

*RQ3: What **market housing tenures** should be included in the housing mix?*

3.4 Type and size

45. In addition to the quantity of housing and its tenure mix, TPC seeks to understand what type and size of dwellings are required to meet community need.

*RQ4: What **type** (terrace, semi, bungalows, flats and detached) **and size** (number of habitable rooms) of housing is appropriate?*

3.5 Housing for specialist groups

46. TPC is conscious of the need to plan for those groups that have particularly needs, such as the elderly.

*RQ5: Given recent and forecast demographic changes and affordability issues, which are the **key groups in the community** and which of these is in particular need?*

3.6 Study objectives

47. The objectives of this report can be summarised as:

- Collation of a range of data with relevance to housing need in the Tollerton NPA relative to Rushcliffe Borough Council;
- Analysis of that data to determine patterns of housing need and demand; and
- Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

48. The remainder of this report is structured around the research questions set out above.

3.7 Relevant data

SHMA

49. The PPG states that neighbourhood planners can refer to existing needs assessment prepared by the local planning authority as a starting point. As the Tollerton Neighbourhood Plan area is located within Rushcliffe Borough Council, we therefore turned to the relevant Strategic Housing Market Assessment (SHMA), which covers the Nottingham Core Housing Market Area. This was first published in 2007, however this study has considered the subsequent 2009 and 2012 updates (2009, April 2012, henceforth 'SHMA') which covers the housing market area and informs emerging housing policies at a local authority level, including affordable housing policy.

50. The SHMA draws upon a range of data including population projections, housing market transactions and employment scenarios to derive the objectively-assessed housing need. As such, it contains a number of points of relevance when determining the degree to which the housing needs context of Tollerton itself differs from the authority-wide picture.

3.8 RQ1: Given the Local Authority's housing targets, what is an appropriate housing target for TNDP?

51. We have estimated the quantity of housing needed in NPA according to four different sources; these are,

1. Adopted Local Plan (LP)
2. SHMA - proportional share drawn from OAN
3. DCLG household projections
4. An aggregate of net dwelling completion rates 2001-2011 and net dwelling completion rates 2011-2015.

These calculations are set out below.

Local Plan

52. The RBC Core strategy puts forward a housing requirement for a minimum of 13,150 dwellings for the district over the Plan Period between 2011 and 2031. The proportional share may be calculated for TNPA based on the proportion of homes in the NPA. At the time of the last Census there were 667 dwellings in the NPA, compared to 47,439 in the RBC area, so 1.41% of all homes in the district. Therefore, 185 homes (1.41% of 13,150) homes should be allocated as the 'fair share' of the borough target. This figure is in addition to the strategic allocation of 4,000 homes in the Core Strategy.
53. In arriving at a final total for TPC, it is important to take into consideration that only 14 dwellings were built between 2011 and 2016 in the NPA. Allowing for these completed dwellings, a housing target for TPC that is in conformity with RBC district policy is the delivery of **171 dwellings (185 - 14) between 2017 and 2028 or 14 homes per year (rounded)**.

SHMA

54. It is important to remember that the SHMA presents a demand-side only, or 'unconstrained' assessment of need (often identified as Objectively Assessed Need, or OAN⁶), as opposed to a final housing target. The final housing target will take into account a number of other factors, including for example the availability of land, viability, infrastructure and environmental constraints and the results of consultation.
55. The SHMA presents an appropriate starting point for deriving need at the NP level because it is the most up-to-date evidence available. In the case of Rushcliffe however, the situation is a little more complex. The Core Strategy's starting point was the 2007 SHMA, however this was updated in both 2009 and 2012, and also reviewed as part of a number of documents that were prepared as part of the Core Strategy examination. The 'Updated Housing Background Paper' (2014) sets out the evidence with regards to Rushcliffe and the wider Nottingham Core Housing Market Area (NCHMA).
56. This identified an OAN of 49,950 homes across the NCHMA between 2011 and 2028. The 'aligned' Core Strategies of Broxtowe, Gedling and Nottingham City proposed a combined 30,500 homes between 2011 and 2028; whilst the Erewash Core Strategy allocated a housing requirement of 6,250 homes. As the 2014 background paper states, given the figures for the other LPAs are predicated on the OAN for the NCHMA being 49,950 homes, with Rushcliffe making up the residual amount there could be no other outcome other than to conclude that Rushcliffe had to provide a minimum of 13,150 homes to be found 'sound'.
57. Therefore it is considered that the OAN for Rushcliffe is 13,150 homes between 2011 and 2028.
58. To calculate the NPA's 'fair share' of this target, it is again possible to use TPC's proportion of all housing in the borough (1.41%). Given the Core Strategy reflects the OAN of 13,150 homes, this again provides a figure of 185 new homes (gross) between 2011 and 2028, which once the completions between 2011 and 2016 have been accounted for, reduces to **171 homes (rounded) over the plan period, or 14 homes per year (rounded)**.

⁶ The OAN includes the baseline demographic need, plus any adjustments made to official forecasts to account for projected rates of household formation post 2021, past suppression of the formation of new households, the effect of past under-supply, employment forecasts, market signals and affordable housing need (as set out in paragraph ID2a-004 of the NPPG). This is sometimes described as 'policy off' because it does not take account of final policy responses as a result of taking into account capacity, environmental and infrastructure constraints.

DCLG household projections

59. The Department for Communities and Local Government (DCLG) periodically publishes household projections. The NPPG recommends that these household projections should form the starting point for the assessment of housing need.
60. The most recent (2014-based) household projections were published in July 2016, and extend to 2039. Although population projections are only available at a local authority level, a calculation of the share for the NPA is nevertheless possible for the household projections based on the NPA's household numbers in the 2011 Census.
61. At the 2011 Census, Rushcliffe had 45,835 households and the NPA 647 households, or 1.41% of the total.
62. In the 2014-based household projections, the projection for 2028 is for 53,586 households in Rushcliffe. Assuming it continues to form 1.41% of the borough total, the NPA's new total number of households would be 756 (rounded); therefore 109 new households would be set to form in the NPA between 2011 and 2028 (or a rate of growth of nine households per year).
63. Number of households does not, however, equate precisely to number of homes, with the latter slightly higher in most places. The NPA is no exception; in the 2011 Census, there were 647 households but 667 homes. This gives a ratio of 0.97 households per home. In the case of NPA, then, a projection of 109 new households translates into a need for 112 homes (109/0.97 rounded to the nearest whole number).
64. These figures are based on the assumption that 2014-based government projections as to household growth at the local authority level are accurate. As the annual mid-year population estimates have now been released for 2016, the 2014-based household projections may need to be 'rebased' for accuracy. The mid-2016 population estimates give the actual number of people in Rushcliffe at that point, meaning the difference between the estimated and the previously projected number of households can be taken into account in future projections.
65. The 2014-based household projections were based on the 2014-based Sub-National Population Projections, which estimated that by 2015 there would be 114,100 people in Rushcliffe. The mid-2016 estimates show that, based on the latest information, there were estimated to be 115,200 (rounded) people, which is higher than the projections by 1,100 people. Assuming average household sizes remain constant (in 2011 there were an average of 2.42 people per household, obtained by dividing population by number of households) this equates to 454 more households across Rushcliffe.
66. Taking 54,040 (53,586 + 454) as our revised household number at 2028, this equates to 762 households in the NPA (rounded), producing a revised growth in the number of households between 2011 and 2028 of 115. Taking into account the disparity between household numbers and dwelling numbers (115/.97), this produces figure of 118 homes. Net off the 14 dwellings completed since 2011, we arrive at a **re-based household projections-derived dwellings requirement of 104, or nine dwellings (rounded) per year over the plan period.**
67. This projection is an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase, and thus does not take into account political, economic, demographic or any other drivers that might have influenced, or may in future influence, the Local Plan distribution across the borough.

Home growth 2001 – 2011

68. Consideration of home growth 2001-2011 provides a projection based on the rate of delivery of net new homes between the two Censuses. There was an increase of 32 homes in the NPA between these two dates, or an average annual rate of increase of three homes per annum (rounded). Multiplying this annual figure by the number of years remaining of the plan period from 2017 to 2028 **produces a gross need for 36 homes.**

Home growth since 2011

69. It is also helpful to consider a projection based on the rate of delivery of net new homes since the last Census (2011), using data gathered and monitored by the LPA. As we have seen, between 1st April 2011 and the 31st March 2016, 14 new dwellings were completed⁷. This equates to an annual rate of delivery of three (rounded) homes (14 divided by 5, the number of years elapsed). If this rate of delivery was continued to 2028, **this would equate to a projection of 36 homes over the plan period of 2017-2028 (rounded to the nearest whole number)**.
70. It is important to note the disparity between the two 'home growth' figures; this reflects the susceptibility of the development industry to fluctuations in demand and costs of development, among other factors. To allow for these peaks and troughs, and provide a more realistic picture of the quantum of development that could be delivered over the plan period, we have taken the aggregate of the homes growth between 2001 and 2016; this comes to 46 (32 + 14) dwellings. Expressed as an annual average rate, this is 3.07 dwellings /year. This produces a projected growth between 2001 and 2016 **of 37 homes over the plan period of 2017-2028 (3.07 x 12)**.

3.9 Summary

71. Reviewing the range of projections provides a potential range of need from 171 dwellings (14 per annum) to 36 dwellings (3 per annum). Taking the average of the range provides **a housing requirement of 91 dwellings, or 8 dwelling per annum (rounded)**.

3.10 RQ2: What affordable housing tenures (social housing, affordable rented, shared ownership, intermediate rented) should be included in the housing mix?

72. The PPG states that HNAs should investigate household tenure in the current stock and recent supply, and make an assessment, based on a reasonable interpretation of the evidence gathered, as to whether continuation of these trends would meet future needs or whether, on account of significant misalignments between supply of housing falling into different tenure types and local need/demand, policies should support a change to the profile of tenure within the NPA's housing stock.⁸

3.10.1 Definitional issues

73. It is necessary at this stage of the study to make clear the distinction between affordable homes as a piece of planning terminology and the colloquial meaning of the phrase. In the course of this study, we refer to Affordable Housing, abbreviated to 'AH'. We mean by this those forms of housing tenure that fall within the definition of Affordable Housing set out in the National Planning Policy Framework (NPPF): social, affordable rented and various forms of intermediate housing. To distinguish this from the colloquial definition, we refer to the latter as Affordable Market Housing (AMH).
74. In this paragraph we briefly review the proposed reforms to the definition of AH set out in the Government's Housing White Paper published in February 2017. These reforms make clear the Government's commitment to home ownership but recognised the important role of affordable rent for those not currently seeking home ownership. The changes proposed would broaden the definition of affordable housing, supporting 'present and future innovation by housing providers in meeting the needs of a wide range of households who are unable to access market housing'. This would include 'products that are analogous to low cost market housing or intermediate rent, such as discount market sales or innovative rent to buy housing. Some of these products may not be subject to 'in perpetuity' restrictions or have recycled subsidy'.
75. The Housing and Planning Act 2016 made provision for a new simplified definition of affordable housing as 'new dwellings... to be made available for people whose needs are not adequately served by the

⁷ Local Plan Annual Monitoring Report Appendix 1 – Housing Land Availability Report 2015/16, Rushcliffe Borough Council, April 2016.

⁸ PPG Paragraph: 021 Reference ID: 2a-021-20160401

commercial housing market'.⁹ Secondary legislation is required to implement this definition, necessitating further parliamentary debate.¹⁰

76. The Housing White Paper¹¹ confirms that a revised definition of AH will be brought forward through changes to the NPPF later this year, proposing a definition as 'housing that is provided for sale or rent to those whose needs are not met by the market (this can include housing that provides a subsidised route to home ownership' and which 'meets the criteria' for one of the following models:¹²
- **Social rented housing**, defined as owned by local authorities and private registered providers with guideline target rents determined through the national rent regime. It may be owned by other persons and provided under equivalent rental arrangements, as agreed with the local authority or the Homes and Communities Agency;
 - **Affordable rented housing**, defined as let by local authorities or private registered providers of social housing to households eligible for social rented housing. Affordable rent is controlled at no more than 80% of the local market rent including service charges where applicable;
 - **Starter Homes**, as defined in the Housing and Planning Act 2016 and subsequent secondary legislation with an income restriction of £80,000 outside London. These homes are expected to provide a new low cost market housing product for first time buyers between the ages of 23 and 40 with a mortgage, sold for no more than 80% of open market value and capped at £250,000 outside London;
 - **Discounted market sales housing**, sold at a discount of at least 20% below market value with provision to remain at a discount for future eligible households. Eligibility is to be determined with regard to local incomes and house prices;
 - **Affordable private rent housing**, made available for rent at a level which is at least 20% below local market rent with provision to ensure that rent remains at a discounted level or alternative affordable housing provision is made if the discount is withdrawn. This is viewed as particularly suited to the provision of affordable housing in Build to Rent schemes; and
 - **Intermediate housing**, defined to include discounted market sales and affordable private rent housing – as outlined above – and other housing that is 'provided for sale and rent at a cost above social rent, but below market levels'.
77. A transition period is proposed to enable a review of local policies, with the revised definitions intended to apply from April 2018. The Government also intends to introduce a requirement for sites of 10 units or more to ensure that at least 10% of all homes are affordable home ownership products, including Starter Homes, shared ownership homes and homes available for discount market sale.
78. The evidence assembled to answer RQ2 seeks to populate a series of 'key indicators'; these are the age structure of the population, household composition and income both now and how they are forecast to change in future years. Through a consideration of these trends and how they interrelate to each other, it is possible to arrive at recommendations as to how not only the tenure of housing in the plan area, but also type and size should be modified through planning policy.

3.10.2 Current tenure profile

79. Before we present the data relating to the key indicators, it is necessary to present a picture of tenure in the NPA at the moment. Table 3 below presents Census data from 2011 that shows the profile of the NPA is one of almost exclusively owner occupation (92.7%), with the only other tenure of note being private rented (5.1%).

⁹ Housing and Planning Act 2016, part 6, section 159 (4)

¹⁰ Section 159(2) of the Act inserts '(3ZB) No regulations may be made under section 106ZB [which contains the updated definition of affordable housing] unless a draft of the instrument containing the regulations has been laid before, and approved by a resolution of, each House of Parliament'

¹¹ DCLG (2017) Fixing our Broken Housing Market (para A.120)

¹² Ibid (p100)

Table 3: Tenure (households) in Tollerton, 2011

| Tenure | Tollerton | Rushcliffe | England |
|-----------------------|-----------|------------|---------|
| Owned; total | 92.7% | 76.7% | 63.3% |
| Shared ownership | 0.5% | 0.7% | 0.8% |
| Social rented; total | 1.1% | 8.4% | 17.7% |
| Private rented; total | 5.1% | 13.3% | 16.8% |

Source: Census 2011, AECOM Calculations

80. Table 4 below provides a longitudinal assessment of tenure in the NPA recorded in Census data from 2001 and 2011; this allows consideration of any changes that have taken place. This shows that in the context of the NPA there has been a substantial uplift in privately rented dwellings (increasing from 22 homes in 2001 to 33 homes in 2011).

Table 4: Rates of tenure change in Tollerton, 2001-2011

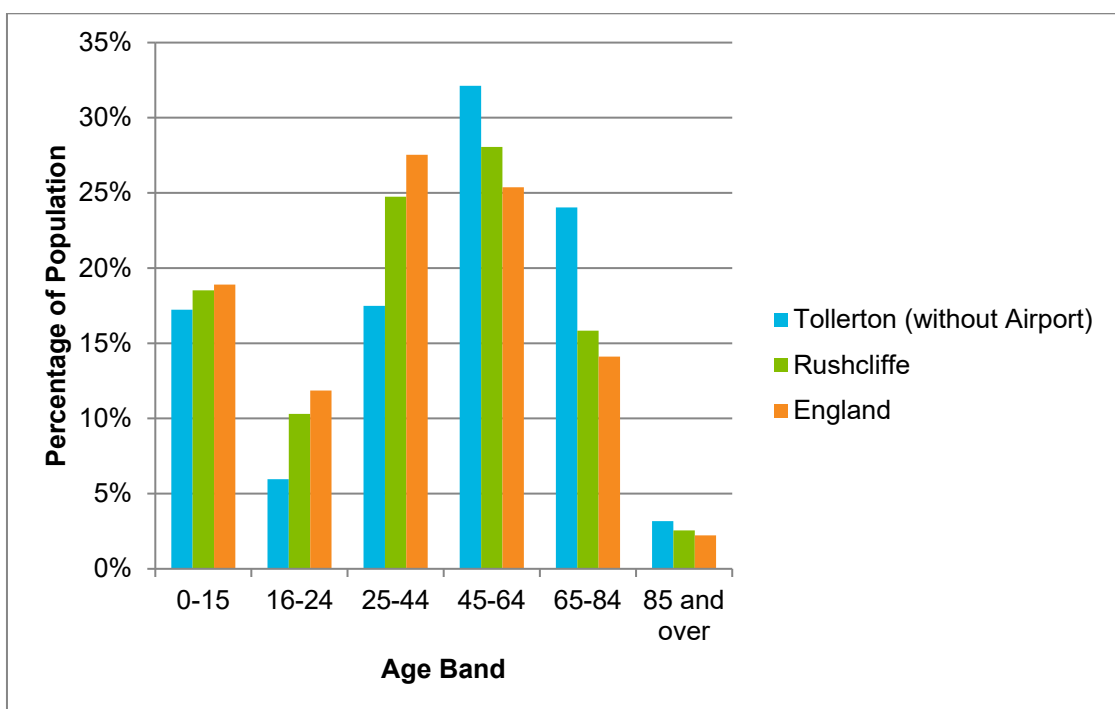
| Tenure | Tollerton | Rushcliffe | England |
|-----------------------|-----------|------------|---------|
| Owned; total | 2.0% | 3.2% | -0.6% |
| Shared ownership | 0.0% | -16.1% | 30.0% |
| Social rented; total | 16.7% | -10.6% | -0.9% |
| Private rented; total | 50.0% | 50.0% | 82.4% |

Source: Census 2011, AECOM Calculations

3.10.3 Age Structure

81. Having established the tenure profile of the NPA, we now review the age structure, household composition, and income indicators in turn.
82. With regards to the age structure profile of the NPA, the following chart presents the 2011 Census data which shows that the NPA has a significantly higher percentage of people in the 65 to 84 years age group than both Rushcliffe and England, overall the NPA has a higher percentage of people aged 45 and over compared to either Rushcliffe and England, and a lower percentage of those aged 44 or less when compared to both. Overall, of those that responded to the Tollerton Neighbourhood Plan Survey (TPNS) 71% were aged 45 or over.

Figure 4: Age bands in Tollerton, Rushcliffe, England 2011



Source: Census 2011

83. Feedback from the household survey carried out by TPC suggests that 64% of existing residents consider that ‘smaller retirement housing’ would be suitable for other resident’s needs, and that 73% of respondents either agreed or strongly agreed with Tollerton retaining a supply of smaller bungalows for downsizing, reflecting the age structure set out in Figure 4. This age profile is supported further by Table 5 which shows the rates of age changes in Tollerton between the 2001 and 2011 Censuses. The number of those aged between 45 and 84 has increased at a higher rate than those below the age of 44.

Table 5: Rates of age change in Tollerton, 2001-2011

| Age group | Tollerton | Rushcliffe | England |
|-------------|-----------|------------|---------|
| 0-15 | 17% | 19% | 19% |
| 16-24 | 6% | 10% | 12% |
| 25-44 | 17% | 25% | 28% |
| 45-64 | 32% | 28% | 25% |
| 65-84 | 24% | 16% | 14% |
| 85 and over | 3% | 3% | 2% |

Source: Census 2011, AECOM Calculations

84. Taking the demographic data into account, it is clear that the NPA has an ageing population, with a significant percentage of the resident population aged 45 or over, with a significant difference compared to the rest of the borough in terms of those aged between 65 and 84.

3.10.4 Household composition

85. With regards to household composition, Table 6 presents the analysis of the NPA when compared to Rushcliffe and the national picture. In terms of one person households, the NPA has a lower percentage (21%) than either Rushcliffe as a whole (27.2%) or the national percentage (30.2%). The NP area also has a significantly lower percentage (7%) of ‘other’ one person households than Rushcliffe (14.4%) and England (17.9%).

86. When compared to Rushcliffe, the NPA has a higher percentage of one family households, (74.7% vs. 67.4%), and a much higher percentage (19.6%) of all one family households aged 65 or over than both

Rushcliffe (10.5%) and the national figure (8.1%). The NPA has a slightly lower number of families with dependent children than the local authority area (25% vs. 28%).

Table 6: Household Composition, Tollerton 2011

| Household Composition | | Tollerton | Rushcliffe | England |
|-----------------------|----------------------------|-----------|------------|---------|
| One person Household | Total | 21% | 27.2% | 30.2% |
| | Aged 65 and over | 14.1% | 12.8% | 12.4% |
| | Other | 7% | 14.4% | 17.9% |
| One family only | Total | 74.7% | 67.4% | 61.8% |
| | All aged 65 and over | 19.6% | 10.5% | 8.1% |
| | With no children | 21.3% | 20.3% | 17.6% |
| | With dependent children | 25.0% | 28.0% | 26.5% |
| | All children non dependent | 8.7% | 8.6% | 9.6% |
| Other household types | Total | 4.3% | 5.4% | 8.0% |

Source: Census 2011, AECOM Calculations

87. Further information on household composition was provided by the TNPS. This supported the Census data as the most common type of households were either a couple with dependent children (30%) or a couple without dependent children (49%).
88. The rate of change in household composition is set out in Table 7; there have been a number of increases of note during the period between the 2001 and 2011 Censuses. One person households have increased by 10.6%, whilst there has been a slight fall overall in the number of households with one family (-1.2%). There was an increase in one family households with dependent children (11%), but a more significant decrease in the number of households with non-dependent children (15.2%).

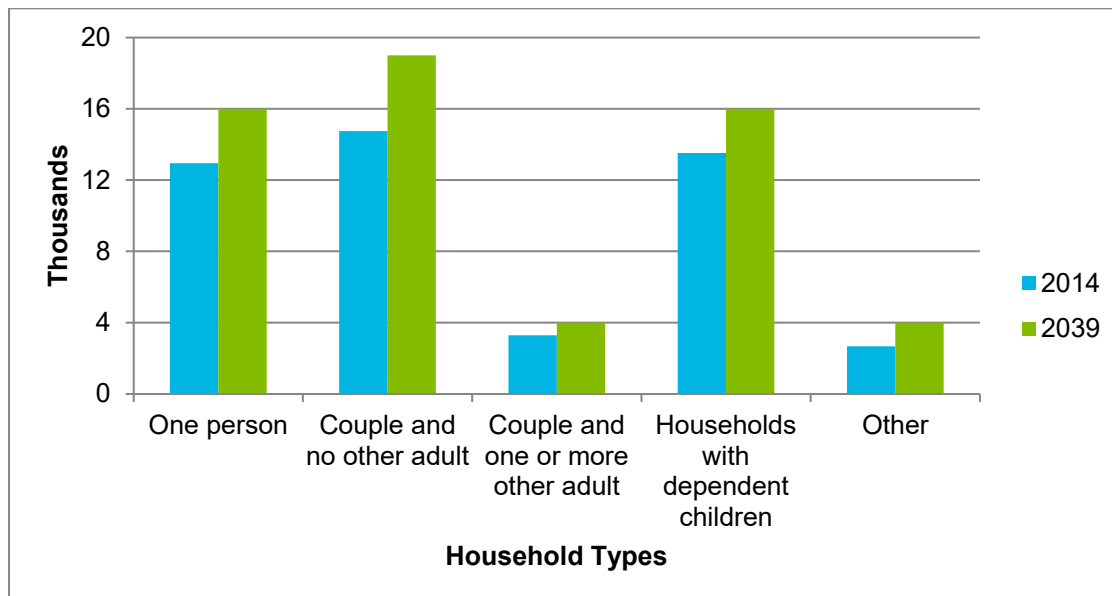
Table 7: Household Composition, Rate of Change 2001 - 2011

| Household Composition | | Tollerton | Rushcliffe | England |
|-----------------------|----------------------------|-----------|------------|---------|
| One person Household | Total | 10.6% | 4.5% | 8.4% |
| | Aged 65 and over | 3.4% | 1.7% | -7.3% |
| | Other | 28.6% | 7.2% | 22.7% |
| One family only | Total | -1.2% | 4.7% | 5.4% |
| | All aged 65 and over | -3.8% | 9.2% | -2.0% |
| | With no children | -4.8% | 0.4% | 7.1% |
| | With dependent children | 11.0% | 5.5% | 5.0% |
| | All children non dependent | -15.2% | 7.6% | 10.6% |
| Other household types | Total | 27.3% | 10.5% | 28.9% |

Source: Census 2011, AECOM Calculations

89. Further information on household composition and change is presented in Figure 5. This shows that all household types are projected to increase across the whole of the borough between 2014 and 2039. However the rate of change is projected to be greatest in either one person households which would typically require smaller dwellings, whilst there is a continued increase in households with dependent children as well, households that will require larger family size housing.

Figure 5: Household projections 2014 to 2039, Rushcliffe



Source: DCLG / ONS Table 420: Household projections by type & district, England, 2014-2039

- 90. Bringing the evidence related to household composition together, at 25%, families with children form the largest household type in the NPA. Their numbers increased in Tollerton Parish by 16 households in the decade between the Censuses, however there was a significant decrease in percentage terms (-15.2%) of families with non-dependent children. In addition, there was a 10.6% increase in one person households between 2001 and 2011.
- 91. With regards to future population and household projections, data from the ONS suggests strongly that both smaller households and families with dependent children will become the household types that increase in the borough, and therefore, this is likely to occur in Tollerton. Given the existing age structure of the NPA, it is not unreasonable to assume that such a situation will have an impact on the types of housing required in the lifetime of the NPA, that is smaller housing and family housing.

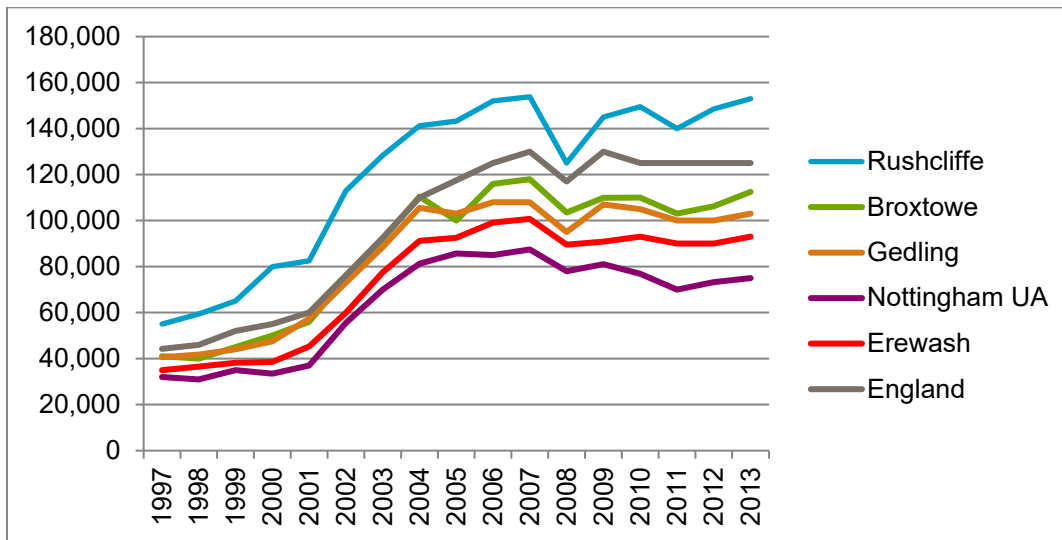
3.11 Affordability

- 92. To understand need for AH in the NPA it is necessary to identify the proportion of the population who are unable to access AMH without subsidy. To do this, we consider two primary indicators, firstly affordability of housing expressed as a multiple of household income, known as the 'Affordability Ratio'; secondly 'Income Thresholds.' The latter denotes the maximum share of a family's income that should be spent on accommodation costs if enough resources are to remain to cover other needs, as well as discretionary spending.

3.11.1 Affordability ratio

- 93. Affordability considers the relationship between price of a good, and the resources available to purchase it. In the context of housing, a useful though crude indicator that provides an understanding of this relationship is the Lower Quartile Affordability Ratio (LQAR); this produces a number that expresses lower quartile house-prices as multiple of lower quartile household income. This is helpful both as a way of understanding the extent to which those on lower incomes can access AHM for sale and the relative affordability of housing in the NPA compared to other places.
- 94. The affordability ratio assesses specifically the degree to which people on modest incomes (lower quartile earnings) are able to access AMH. Figure 6 shows fluctuations at the HMA level in the Lower Quartile House Price Trend between 1997 and 2013. For consistency, the comparative areas are made up of the local authorities within the Nottingham HMA. The chart shows that Rushcliffe has consistently experienced the highest 'lower quartile' house prices based on land registry data from 1997 to 2013, which indicates that affordability in Rushcliffe as a whole is a greater constraint than elsewhere in the HMA.

Figure 6 : Lower Quartile House Price trend (1997-2013)



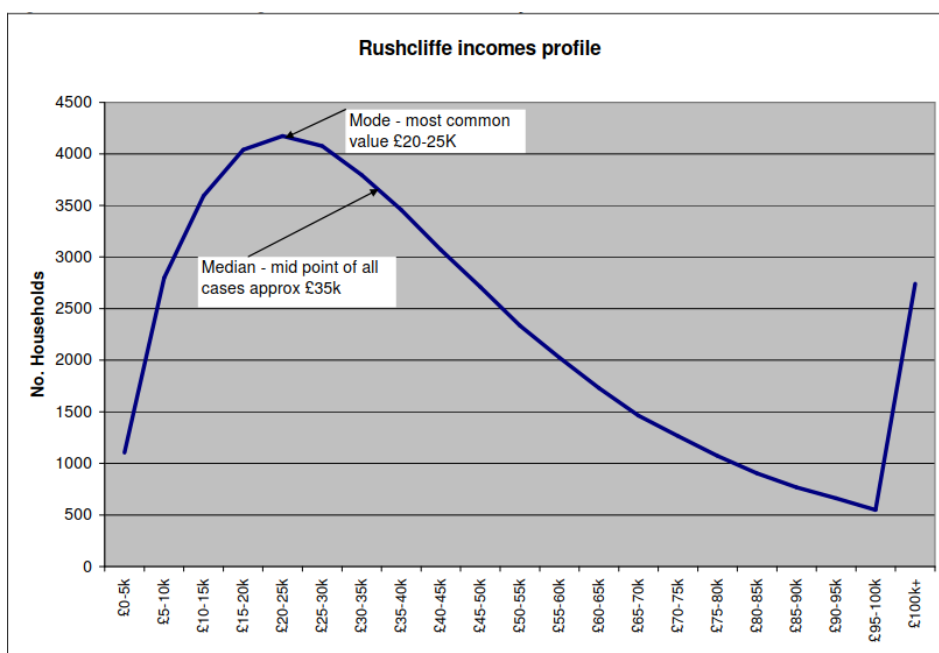
Source: CLG, Live House Price Tables, Table 583. AECOM Calculations

95. The SHMAU 2012 estimated that 45% of emerging households were unable to afford market housing in 2009, and in terms of the Private Rented Sector (PRS) in 2009, 14% could not afford a Lower Quartile Rental property (£412 pcm)¹³.
96. In 2012, the lower quartile entry price was around £148,500. The SHMAU estimated that approximately 56% of emerging households would be unable to afford entry level housing at this price each year (estimated over 2012-2022).
97. The median household income in 2011 was estimated to be around £35,000.¹⁴ Figure 14 from the SHMAU is reproduced on the following page and shows that the vast majority of incomes in the borough, or the 'mode' (most common) income stood at around the £20-25,000 mark. When compared against the lower quartile house price in 2011, (£139,975), this represents an affordability ratio in 2011 of 5.6 times the higher of the mode incomes, and 3.9 times the median income.

¹³ Rushcliffe Borough Council SHMA Update 2009, B.Line Housing Information Ltd

¹⁴ Rushcliffe Borough Council Housing Market Assessment Update 2012, B.Line Housing Information Ltd.

Figure 7: Rushcliffe Borough Incomes Profile 2011



Source: Rushcliffe Borough Council SHMAU 2012, CACI Paycheck 2011.

98. Figure 8 is reproduced from the SHMAU (2012) and emphasises the level of income required in order to purchase a property based on either a 10% or 25% deposit. This shows that in order to buy an average flat or terraced property in the borough, a household would need to raise £15-16,000 in order to buy with a 10% deposit. Comparing this to the mode income puts into perspective the difficulty of saving such a deposit.

Figure 8: Income and deposit requirements in order to buy property using average price / type

| Mortgage requirements | Detached | Flat | Semi-detached | Terraced |
|--------------------------------|----------|---------|---------------|----------|
| 10% deposit income requirement | £81,138 | £38,168 | £49,566 | £42,357 |
| 10% deposit amount | £31,554 | £14,843 | £19,276 | £16,472 |
| 25% deposit income requirement | £67,615 | £31,806 | £41,305 | £35,298 |
| 25% deposit amount | £78,884 | £37,107 | £48,189 | £41,181 |

Source: Rushcliffe Borough Council SHMAU 2012, CACI Paycheck 2011.

99. Table 8 compares the LQAR with an Affordability Ratio based on median incomes. This indicates that those at the lower end of the income scale are less able to access relatively affordable market homes than those on higher incomes are able to access more expensive dwellings, leading to the conclusion that, while there is a crisis of affordability across the market, this is particularly acute at the low end of the income spectrum.

Table 8: Ratio of house price to earnings 2015:

| Local Authority | Lower Quartile | |
|-----------------|---------------------|--------------|
| | Affordability Ratio | Median Ratio |
| Rushcliffe | 8.58 | 7.87 |
| Broxtowe | 5.96 | 5.47 |
| Gedling | 5.43 | 4.46 |
| Nottingham UA | 4.07 | 3.99 |
| Erewash | 5.29 | 4.93 |
| England | 6.45 | 6.72 |

Source: CLG Live Tables: Ratio of house price to earnings (Lower Quartile and Median) Tables 576 -578 AECOM Calculations

100. The latest SHMA update (2012) states that the median household income for Rushcliffe in 2011 was £35,000. The median house price in Rushcliffe according to Land Registry data in 2011 was £190,000.

This means that in order to buy a median valued house in Rushcliffe a single person household would need 5.5 times the median household income.

101. More recent data from the LPA states that, compared to neighbouring areas, prices are relatively high, with an average house price of £235,125 compared with the Nottinghamshire average of £161,155 (Land Registry, April-June 2013). Housing affordability is therefore a significant issue within the borough, and by extension, within the NPA, with average house prices around eight times average incomes.

Affordable housing waiting list data

102. Current waiting list data, together with the backlog of affordable housing provision, provides an indication of whether current provision satisfies need for affordable housing.

Local housing waiting list (RBC, October 2017)

103. We requested data from RBC's Housing Strategy team, for an assessment of the number of households currently on the waiting list that have expressed a preference for being located in the NPA. This provides a useful indication of whether the Local Plan's affordable housing target of 3,100 homes across the local authority area is sufficient to meet present affordable need within the plan period.
104. The waiting list is divided into three bands according to urgency of need. Council officers advised that bands 1 & 2 were categorised as 'urgent need' and 'high need' respectively, whilst band 3 is categorised as 'moderate need'. Band 3 includes households where a move is not considered 'essential'. Therefore we have taken the approach that band 3 should be discounted from calculations of immediate housing need. **Following this discount there is at present only 1 household across the remaining 2 categories in the NP area.** Even when taking account of Band 3, this only increases the figure to 6 households overall.
105. Although the waiting list is only a snapshot in time, it does seem apparent that, with only 1 household in immediate need of affordable housing within the NPA (and 5 others with moderate need), the Core Strategy policy framework for delivery of affordable housing does seem sufficient. The policy seeks the provision of a proportion of affordable housing on sites of five dwellings or more or 0.2ha or more, and in terms of the strategic sites, as much as 30% affordable housing provision is required. In terms of rural areas, rural exception sites or sites allocated purely for affordable housing will be permitted where there is robust evidence of local need. The policy framework, in alignment with this HNA study, should therefore be adequate to meet affordable need over the remainder of the plan period, even allowing for any future increase in affordable need. As such, on the basis of this evidence, there does not appear to be a requirement for the Neighbourhood Plan to set its own affordable housing target, although it may reference the waiting list and mention the need to work closely with RBC to ensure the needs of those on the housing waiting list continue to be met.
106. It is important to note that even after the Neighbourhood Plan is made, RBC's affordable housing policy will continue to apply until such time as a new Local Plan is prepared, and it will still be the Council that will control the housing waiting list and negotiate affordable housing commitments with developers as part of the development management process.
107. The number of households on RBC's housing register¹⁵ which, as at 1st November 2015 stood at 480 households, had an average of just 290 lettings in each of the past 3 years, waiting times for social housing are therefore still very long.
108. Bringing together the affordability section, it is clear that from a borough-wide perspective, affordability is an acute issue for the borough as a whole; and, given that the majority of the stock within Tollerton is either detached or semi-detached properties, which generally assume a higher value than terraced or flats, it is reasonable to assume that affordability is also an acute issue for existing residents within the NPA.

3.11.2 Market segmentation

109. Bringing together the evidence from our consideration of affordability, age structure and household composition, in line with the PPG, we have sought to identify the different market segments in the

¹⁵ Rushcliffe Borough Council, Cabinet Report on the Rushcliffe Housing Delivery Plan 2016-2021, 8th December 2015

population of Tollerton. We then use this understanding to put forward recommendations for policy relating to affordable housing as well as and size and tenure of dwelling.

110. In order to understand the terminology surrounding dwelling size, it is important to note the number of rooms recorded in the Census exclude kitchen, bathrooms and toilets. In the market segments table that follows, 'dwelling size' should be translated as follows:
- 1 room = Bedsit
 - 2 rooms = flat/house with one bedroom
 - 3 rooms = flat/house with 2 bedrooms
 - 4 rooms = flat/house with 2 bedrooms and 2 reception rooms, or 3 bedrooms and 1 reception room
 - 5 rooms = flat/house with 3 bedrooms and 2 reception rooms
 - 6 rooms = house with 3 bedrooms and 3 reception rooms or 4 bedrooms and 2 reception rooms
 - 7+ rooms = house with 4, 5 or more bedrooms
111. The table on the following page indicates the different market segments, and the degree to which they are a growing, stable or declining group within the local population. One 'up' arrow indicates this grouping is growing modestly within the NPA; two 'up' arrows indicates strong growth; and three 'up' arrows suggests very rapid growth in years to come. Where segments are falling in numbers, or not growing or neutral, down arrows are shown.
112. It is important to note that, the private sector is good at picking up market trends that result from, among other factors, changes in social behaviours and demographic shifts. For this reason, policy intervention is only justified in the case of market failure (where the market is unable, for reasons of viability, or there are incentives, deliberate or otherwise, that drive the market not to respond to trends). Examples include the failure of the market to provide homes to those on low incomes and the under-supply of dwellings for the elderly.
113. Similarly, because, generally speaking, the market is able to deliver the homes required for the majority of residents (either through for-sale dwellings or for-rent), policy intervention is only required where the evidence is both compelling and the circumstances it describes serious. This is because policies carry both costs and risks; this can distort the market, preventing it from providing homes (and encouraging a position of market equilibrium in which homes are accessible to target markets).
114. To answer the RQ2 specifically, the housing needs of older people will be driven, as far as market housing is concerned, primarily by wealth and life-style choice. The three 'up' arrows indicate there is sufficient justification to plan specifically for the needs of older people to ensure there is enough suitable housing to cater to their needs in the future.
115. The table also reflects the increased number of single person households under 65, and the increased number of households that have dependent children. The NPA does not, according to the Census, have a significant issue with concealed households. The types of housing tenures are discussed in the next section.
116. As we have seen, the projections are that a greater number of young people will need to be housed in future years than the unadjusted 2014 household projections suggest. With this in mind, we foresee a requirement of dwellings of five rooms to address their needs.
117. Taking into consideration the forecast of strong growth in solo households, as well as the presence of a small but persistent number of concealed households, is it appropriate for planning to support dwellings of 1-3 rooms in size. Aligned to this increase in solo households, is the significant forecast growth in the elderly population.
118. In terms of tenure, there is a substantial number of people in need of subsidy to access housing of a suitable type for their needs. Back in 2011, the median house price was £190,000 in Rushcliffe, and the median household income was £35,000, which meant that the median affordability was 5.5 times average income, and therefore affordability would be likely to be more acute at lower quartile prices and incomes, as demonstrated by the 2015 data which is 7.87 for the median and 8.38 for the lower quartile price and income indicator. Affordable housing should therefore form an important consideration, with the mix of tenures including social rented housing and intermediate products.

Table 9: Market Segments Analysis.

| Market segments | Income range | Tenure | Presence in Plan Area | Size of home |
|--|------------------------------|--|-----------------------|--------------|
| Young family where parents are aged 24-44 with two children aged 0-15 | Median | PRS, Social housing, Intermediate | ↑ | 5 rooms |
| Professional Head of Household Young family where parents are aged 24-44 with two children aged 0-15 | Mean | PRS, Intermediate (shared equity and discounted market housing for sale or rent) | ↔ | 5 rooms |
| Professional Head of Household family where parent are aged 44-64 with non-dependent children living at home | >Mean (equity rich) | Market Housing | ↔ | 6+ rooms |
| Lone parent with two children | Lower Quartile (equity poor) | Social Housing | ↔ | 3 rooms |
| Solo household aged under 65 | Median (equity poor) | PRS, Intermediate (shared equity and discounted market housing for sale or rent) | ↑↑ | 2 rooms |
| Solo household aged over 65 with wealth | Median (equity rich) | Market Housing | ↑↑↑ | 2-3 rooms |
| Solo household aged over 65 with little wealth | Lower Quartile (equity poor) | Social Housing | ↑↑↑ | 2 rooms |
| Young couple w/o Children aged under 34 | >Mean (equity poor) | Market Housing, PRS, Intermediate (shared equity and discounted market housing for sale or rent) | ↑ | 4+ rooms |
| Concealed households | Lower Quartile (equity poor) | Social Housing | ↔ | 1-3 rooms |

3.12 RQ3: What market housing tenures should be included in the housing mix?

119. Given the limited quantity of AH in the NPA, the great majority of people will look to the private sector to obtain a home. People on higher incomes will be able to access a variety of market dwellings; their

choices will be driven principally by how much they can afford to spend, the extent to which old age is driving their choice of home as well as personal taste.

120. The operation of the market is the best means of addressing the demand for different types of housing for sale. It is important planning policy does not place unnecessary burdens on the market preventing its ability to respond to demand; this is after all the principal way equilibrium is achieved in the housing market and house price growth kept in check. In this way the notion of viability is essential. It is important not to deter development in the context of clear housing need; to do so will not only frustrate the delivery of new housing but also may deprive the community of resources for infrastructure improvements.

3.12.1 Build to rent

121. There is evidence of growing demand for private rent accommodation in the context of the NPA. Given the increases in PRS revealed by Census data, this trend is one shared by Tollerton. The reason for the strength of this demand is that, for those households unable to access market housing to buy, and who do not qualify for affordable housing, private rented housing is the only remaining option.
122. Given the trends identified in this HNA, Tollerton should seek build to rent (BTR) development, which may include an element of affordable housing and is likely to be brought forward by specialist developers funded by institutional investors. This will provide accommodation of consistently higher quality than is available through the traditional small private landlord.
123. As we have seen, the Housing White Paper proposed a number of modifications to the definition of affordable housing for planning purposes. One of these is Affordable Private Rent Housing (APRH) – which is housing made available for rent at a level which is at least 20 per cent below local market rent. It is envisaged such housing would be delivered as part of BTR schemes.
124. Bringing the evidence together on housing tenure, as we have seen, affordability is a significant issue in Tollerton, and the wider borough, where average prices are eight times the average income. The most common level of income was between £20 -25,000, and for this reason, Discounted Market Sale Housing (DMSH) does not offer a realistic means of those on incomes below the mean to access the property market. We would therefore recommend that DMSH does not form part of the AH quota within the NPA, due to the large disparity between lower quartile house prices in the NPA and latest available data on incomes within the borough.
125. For Affordable Rented Dwellings to expand the choice of housing available to residents in the NPA, rent levels should be set substantially below the maximum of 80% so as to avoid competition with intermediate products; this will encourage ‘true affordability,’ providing a route to housing for households on lower quartile incomes. We note, however, that policy of this kind can only be devised where it does not threaten viability.
126. The operation of the market is the best means of addressing the demand for different types of housing for sale. PRS will continue to provide a growing role in satisfying housing need in the NPA, given the shortage of shared equity stock and overall affordability of for-sale homes. As a result, Tollerton should seek build to rent (BTR) development, which may include an element of affordable housing in the form of Affordable Private Rent Housing (APRH).

3.13 RQ4: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate?

127. As identified earlier in this study, PPG recommends a consideration of the existing housing provision and its suitability, having regard to demographic shifts in age and household composition as well as affordability, to address future as well as current community need. For this reason, we start with a consideration of the existing housing stock.
128. In Table 10 we present the range of dwelling types in the NPA; the overwhelming majority of dwellings are houses of the two principal types, with little in the way of terraced houses or flats, therefore little in the way of smaller properties that would suit smaller households, including elderly households downsizing.

Table 10: Accommodation type (households) in Tollerton, 2011

| Dwelling type | | Tollerton | Rushcliffe | England |
|-------------------------------|--|-----------|------------|---------|
| Whole house or bungalow | Detached | 77.8% | 46.3% | 22.4% |
| | Semi-detached | 20.7% | 31.0% | 31.2% |
| | Terraced | 0.6% | 11.4% | 24.5% |
| Flat, maisonette or apartment | Purpose-built block of flats or tenement | 0.3% | 7.7% | 16.4% |
| | Parts of a converted or shared house | 0.0% | 2.3% | 3.8% |
| | In commercial building | 0.6% | 0.7% | 1.0% |

Source: Census 2011, AECOM Calculations

129. Turning to size of dwellings, Tables 11 and 12 show the range of dwelling sizes in Tollerton and how the overall housing stock has changed in the decade between the 2001 and 2011 Censuses. Firstly we note that 91% of all dwellings have five rooms or more in 2011. Bearing in mind the market segments analysis earlier, this suggests the housing stock is not aligned with future need, given the increased size of dwellings over the reporting period.

Table 11: size of dwellings in Tollerton

| Number of Rooms | 2001 | | 2011 | |
|-----------------|-----------|------------|-----------|------------|
| | Tollerton | Rushcliffe | Tollerton | Rushcliffe |
| 1 Room | 0 | 194 | 0 | 123 |
| 2 Rooms | 3 | 544 | 3 | 446 |
| 3 Rooms | 3 | 2287 | 2 | 2371 |
| 4 Rooms | 53 | 6792 | 52 | 6450 |
| 5 Rooms | 138 | 10,084 | 118 | 9351 |
| 6 Rooms | 199 | 9252 | 165 | 9225 |
| 7 Rooms | 125 | 5832 | 133 | 6724 |
| 8 Rooms or more | 105 | 8685 | 93 | 5203 |
| 9 Rooms or more | | | 81 | 5942 |

Source: Census 2011, AECOM Calculations

130. Table 12 expresses Table 11 as percentages and brings out the changes that have taken place in dwelling size between the Censuses. From this we can see there has been a sharp increase in the number of larger family homes of 6, 7 and 8 rooms, and a significant fall in homes of 3 rooms, alongside a modest fall in the number of homes of 4 and 5 rooms.

Table 12: Rates of change in number of rooms per household in Tollerton, 2001-2011

| Number of Rooms | Tollerton | Rushcliffe | England |
|-----------------|-----------|------------|---------|
| 1 Room | 0% | -36.6% | -5.2% |
| 2 Rooms | 0% | -18% | 24.2% |
| 3 Rooms | -33.3% | 3.7% | 20.4% |
| 4 Rooms | -1.9% | -5.0% | 3.5% |
| 5 Rooms | -14.5% | -7.3% | -1.8% |
| 6 Rooms | 17.1% | -0.3% | 2.1% |
| 7 Rooms | 6.4% | 15.3% | 17.9% |
| 8 Rooms or more | 65.7% | 28.3% | 29.8% |

Source: Census 2011, AECOM Calculations

131. This information, aligned with the market segment information, suggests that in Tollerton there is a potential mismatch between the existing housing stock and future housing needs, that is, housing stock is getting larger, but there is a projected increase in the elderly population, typically smaller households, and mid-sized family housing.

3.14 RQ 5: Given recent and forecast demographic changes and affordability issues, which are the key groups in the community and which of these is in particular need?

3.14.1 Sheltered and extra-care housing

132. As we have seen, given the significant forecast increases in people aged 75+, it is appropriate for policy to provide support for a significant quantum of sheltered¹⁶ and extra care¹⁷ housing as part of the delivery of new housing. Table 13 identifies the growth in the population of over 75s between 2011 and 2031.

Table 11: Change in the population of over 75s between 2011 and 2031

| Age band | 2011 | | | 2031 | | |
|----------|------------------------|-------------------------|--------------------------|-------------------------|------------------------|---------------------------------------|
| | Population (Tollerton) | Population (Rushcliffe) | Percentage of population | Population (Rushcliffe) | Population (Tollerton) | Projected 75+ population (Rushcliffe) |
| All ages | 1,544 | 111,129 | 1.4% | 128,300 | 1,796 | |
| 75+ | 203 | 9796 | 13.1% | 17,800 | 13.9% | 250 |

Source: 2014-based Sub-national population projections, DCLG and Census 2011 (ONS) AECOM calculations

133. In arriving at an appropriate level of housing for older people of different types, we have applied the Housing Learning and Improvement Network's suggested numbers per 1,000 of the 75+ population.¹⁸ The table above shows an estimate of the increase in the numbers of older people aged 75+ of 47(250-203). This will result, over the plan period, in a need for:

- additional conventional sheltered housing units = 60 x 4.7% = 3 (rounded)
- additional leasehold sheltered housing units = 120 x 4.7% = 6 (rounded)

¹⁶ Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They usually contain between 15 and 40 properties, and range in size from studio flats (or 'bedsits') through to 2 and 3 bedroomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden. Source: <http://www.housingcare.org/jargon-sheltered-housing.aspx> (accessed 11/04/17)

¹⁷ New forms of sheltered housing and retirement housing have been pioneered in recent years, to cater for older people who are becoming more frail and less able to do everything for themselves. Extra Care Housing is housing designed with the needs of frailer older people in mind and with varying levels of care and support available on site. People who live in Extra Care Housing have their own self-contained homes, their own front doors and a legal right to occupy the property. Extra Care Housing is also known as very or enhanced sheltered housing, assisted living, or simply as 'housing with care'. It comes in many built forms, including blocks of flats, bungalow estates and retirement villages. It is a popular choice among older people because it can sometimes provide an alternative to a care home. In addition to the communal facilities often found in sheltered housing (residents' lounge, guest suite, laundry), Extra Care often includes a restaurant or dining room, health & fitness facilities, hobby rooms and even computer rooms. Domestic support and personal care are available, usually provided by on-site staff. Properties can be rented, owned or part owned/part rented. There is a limited (though increasing) amount of Extra Care Housing in most areas and most providers set eligibility criteria which prospective residents have to meet. <http://www.housingcare.org/jargon-extra-care-housing.aspx> (accessed 11/04/17)

¹⁸ Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: http://www.housinglin.org.uk/_library/Resources/Housing/SHOP/SHOPResourcePack.pdf

- additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale = $20 \times 4.7\% = 1$ (rounded)
- additional extra care housing units for rent = $15 \times 4.7\% = 1$ (rounded)
- additional extra care housing units for sale = $30 \times 4.7\% = 1$ (rounded)
- additional specialist dementia care home = $6 \times 4.7\% = 1$ (rounded)

134. It is important to note that there is no obligation for these all to be provided within the parish itself and clearly in some cases, such as providing a single specialist dementia care dwelling, it would not be economically feasible to do so. As such, these 13 specialist dwellings need not be thought of as all needing to be provided within the neighbourhood plan housing target - rather, there will be some overlap between these dwellings and the target, depending on the number that could be provided within the parish itself.

135. This specialist dwelling need is likely therefore to be split between the parish and the rest of the borough, which will enable the elderly to live either within or as close to the parish as possible, taking account of the fact that Tollerton is unlikely to be able to provide many of the specialist housing types needed within its own boundaries - although there could be the potential for these to be provided in other larger neighbouring settlements, taking account of their higher levels of accessibility to services and facilities, which will help in the recruitment and retention of specialist care staff and enable economies of scale (e.g. a centralised dementia care unit or enhanced sheltered development serving a widely dispersed rural population from a single location).

4. Market Signals

136. The PPG highlights the importance of taking market signals into account when assessing housing need, given that they provide an indication of the balance between demand and supply. This is particularly important to consider given the significant and well-documented changes in the housing market over recent years, which were exacerbated by the economic downturn and subsequent issues in obtaining mortgage finance.

137. The PPG states:

The housing need number suggested by household projections (the starting point) should be adjusted to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings. Prices rising faster than the national/local average may well indicate particular market undersupply relative to demand.¹⁹

138. These market signals relate to trends discernable within the housing market, and broader economic trends that have an impact on the housing market.

139. The PPG goes on to assert that where there is evidence of an imbalance in supply and demand, an uplift in planned housing numbers – compared to those derived solely from household projections – is required in order to increase the supply of housing to meet demand and tackle affordability issues:

This includes comparison with longer term trends (both in absolute levels and rates of change) in the: housing market area; similar demographic and economic areas; and nationally. A worsening trend in any of these indicators will require upward adjustment to planned housing numbers compared to ones based solely on household projections.

In areas where an upward adjustment is required, plan makers should set this adjustment at a level that is reasonable. The more significant the affordability constraints (as reflected in rising prices and rents, and worsening affordability ratio) and the stronger other indicators of high demand (e.g. the differential between land prices), the larger the improvement in affordability needed and, therefore, the larger the additional supply response should be.²⁰

¹⁹ http://planningguidance.communities.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/methodology-assessing-housing-need/#paragraph_019

²⁰ http://planningguidance.communities.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/methodology-assessing-housing-need/#paragraph_020

140. In discussions with Tollerton PC and RBC as to the appropriate levels of market dwellings in the NPA it will necessary to consider factors that suggest either an uplift or reduction. This study considers the following market signals:

- Employment trends;
- Housing Market (Prices);
- Housing Market (Volume);
- Overcrowding; and
- Rate of Development (changes in housing stock).

4.1 Employment Trends

141. Local employment trends can greatly influence housing need as employment opportunities can stimulate demand in the NPA. On the other hand, a relative lack of growth can negatively affect house prices as dwellings located far from employment opportunities may be less attractive to those in full time work. It is therefore important to establish the employment sphere of influence experienced by the residents of Tollerton Parish.

142. The table below shows that Tollerton is quite similar to Rushcliffe as a whole in terms of employment activity, although it has slightly fewer economically active people (67.2% of the NPA population compared to 71.9% of the population of Rushcliffe).

Table 12: Economic activity in Tollerton, 2011

| Economic category | | Tollerton | Rushcliffe | England |
|-----------------------|------------------------------|-----------|------------|---------|
| Economically active | Total | 67.2% | 71.9% | 69.9% |
| | Employee: Full-time | 37.4% | 40.5% | 38.6% |
| | Employee: Part-time | 15.0% | 14.6% | 13.7% |
| | Self-employed | 10.5% | 10.8% | 9.8% |
| | Unemployed | 2.2% | 2.8% | 4.4% |
| | Full-time student | 2.0% | 3.3% | 3.4% |
| Economically inactive | Total | 32.8% | 28.1% | 30.1% |
| | Retired | 26.2% | 15.9% | 13.7% |
| | Student | 3.3% | 5.5% | 5.8% |
| | Looking after home or family | 2.2% | 3.0% | 4.4% |
| | Long-term sick or disabled | 0.3% | 2.2% | 4.1% |
| | Other | 0.7% | 1.5% | 2.2% |

Source: ONS Census 2011, AECOM Calculations

Greater Nottingham Employment Background Paper (June 2012)

143. This paper reviews and rolls forward aspects of the Nottingham City Region Employment Land Study (NCRELS), which ensured that the evidence base supporting the Employment Policy of the RBC Core Strategy was up to date. Table 15 is reproduced from the June 2012 update, which suggests that as a minimum, 25% of the industry and warehousing land supply should come from within Rushcliffe, which is the largest proportion of all the HMA authorities. The Core Strategy aims to create 4,400 new jobs within Rushcliffe, and proposes around 20 hectares of employment land within the NPA; therefore it is reasonable to assume that this level of development will offer potential future employment opportunities to the residents within the NPA.

Table 15: Industry and Warehousing Land 2011 to 2028, Minimum Supply

| Council | Supply at 2011 | Percentage of total supply | Provision on basis of distribution of supply | Proposed Policy |
|-------------------|-----------------------|-----------------------------------|---|------------------------|
| | | | (%* 80.6ha) | |
| Broxtowe | 39.7 | 18% | 14.9 | 15 |
| Erewash | 24.7 | 12% | 9.3 | 10 |
| Gedling | 27.1 | 13% | 10.2 | 10 |
| Hucknall | 37.3 | 17% | 14.0 | n/a |
| Nottingham | 31.7 | 15% | 11.9 | 12 |
| Rushcliffe | 54.2 | 25% | 20.3 | 20 |
| Total | 214.7 | | | |

Source: Greater Nottingham Employment Background Paper, 2012

144. Table 16, which reproduces Table D:1 from the SHMAU2012 update suggests a possible distribution of office jobs within RBC of 16% of the share of Greater Nottingham as a whole. This proportion is the second highest of the NCHMA authorities; as expected, Nottingham City Urban Area is proportioned the highest number.

145. The RBC Core Strategy places an emphasis on office development to provide for a science and knowledge based economy and, to ensure the availability of sufficient land to 2028, includes a policy that requires the borough to identify 67,900m³ of new office floorspace.

Table 16: Approaches to the distribution of future office jobs around Greater Nottingham

| | Based on current share of office jobs²⁸ | Based on share of future housing growth²⁹ | Based on share of future housing growth plus reflecting travel to work³⁰ | Suggested distribution of office jobs |
|------------|---|---|--|--|
| Broxtowe | 9% | 12% | 8% | 8% |
| Erewash | 6% | 12% | 11% | 10% |
| Gedling | 8% | 15% | 9% | 7% |
| Nottingham | 61% | 34% | 55% | 55% |
| Rushcliffe | 16% | 20% | 14% | 16% |
| Hucknall | 2% | 6% | 5% | 5% |

Source: Source: Greater Nottingham Employment Background Paper, 2012

146. Census data as shown in Table 17 on the following page indicates that 64% of those who are economically active in Tollerton tend either to commute less than 10km (47.6%) or work mainly at or from home (17.2%). The significant difference when compared to either Rushcliffe or England, is that a smaller proportion of economically active residents travel between 10 and 30km to work, whilst a higher percentage of residents work mainly at or from home. However, conversely, the average distance to work is higher at 20.4km than either Rushcliffe (18km) or England (14.9km).

147. Around 31% of respondents to the Tollerton NPS who indicated their main place of work chose Greater Nottingham, with 17% choosing the option of 'other – less than 10 miles from Tollerton'. This would appear to support the Census statistics.

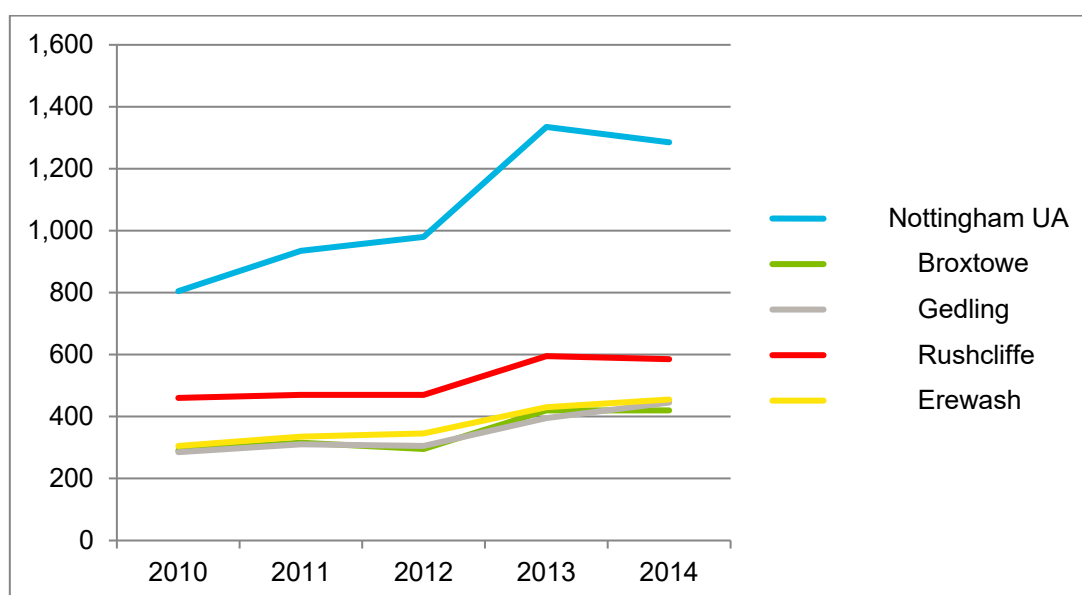
Table 17: Distance to work, 2011

| Location | Tollerton | Rushcliffe | England |
|------------------------------------|-----------|------------|---------|
| Less than 10km | 47.6% | 46.3% | 52.3% |
| 10km to less than 30km | 19.2% | 24.3% | 21.0% |
| 30km or more | 10.2% | 9.4% | 8.0% |
| Work mainly at or from home | 17.2% | 13.4% | 10.3% |
| Other | 5.9% | 6.7% | 8.5% |
| Average distance travelled to work | 20.4km | 18km | 14.9km |

Source: ONS, Census 2001 and 2011. AECOM calculations

148. Apart from a subtle increase in demand for space required for home work, Rushcliffe out performs the other HMA authorities when it comes to newly registered businesses, as shown in the figure below, which could also drive demand for housing in Tollerton.

Figure 10 – Count of Births of New Enterprises for 2010 to 2014



Source: ONS Business Demography tables

149. Looking at employment and commuting trends, the Greater Nottingham Employment Land Forecasting Study²¹ considers that future growth in Rushcliffe is projected to be higher than past trends both in terms of job and labour supply growth. In addition, the City of Nottingham’s role as a focus for growth within the LEP Strategic Plan would also continue to offer residents within the NPA with access to a wide variety of job opportunities. Given the local plan is proposing significant levels of new mixed employment development within the NPA, and there are already a significant proportion of economically active residents in the NPA that either travel a relatively short distance to work or are mainly home based; aligned with the second highest rate of new enterprise registrations in the HMA, this could potentially drive up demand for housing in Tollerton.

4.2 Housing Transactions: Prices

150. The PPG advises that house prices should be used as an indication of the strength of demand for housing, and adequacy of supply to meet demand. The PPG states house prices can be used to provide a ‘market-base’ enabling: “the identification of areas which have clearly different price levels

²¹ Employment Land Forecasting Study , Nottingham Core HMA and Outer HMA , Final Report 2015, NLP

compared to surrounding areas. The findings provide information about differences across the area in terms of the price people pay for similar housing, market 'hotspots', low demand areas and volatility.²²

151. To assess the housing market in the Tollerton NPA, data from the Land Registry was analysed. This data provides price paid, housing type and date of transaction information which allows housing market trends to be identified. Data was downloaded for the period January 2007 to December 2016, as this was considered a sufficiently long time frame to establish trends and is presented annually in the figure below. To replicate the NPA area, relevant post code data was filtered down to the parish level, such that only post-codes within the parish were included in the selection of Land Registry data used for the analysis.

152. The table and associated chart illustrate that the stock, and resulting sales in the NPA were almost exclusively either detached or semi-detached properties. Review of the sales data is therefore focused on the two main types of properties. Detached properties have increased over the reporting period as a whole; however there have been fluctuations in prices, with a sharp decrease in prices between 2012 and 2013, although there was an equivalent sharp increase between 2013 and 2014. These significant differences in the average prices are due primarily to the relatively small levels of sales transactions within the NPA. The situation is similar with semi-detached properties, which have increased over the reporting period despite significant reductions in average values, most recently between 2010 and 2011, and 2014 and 2015.

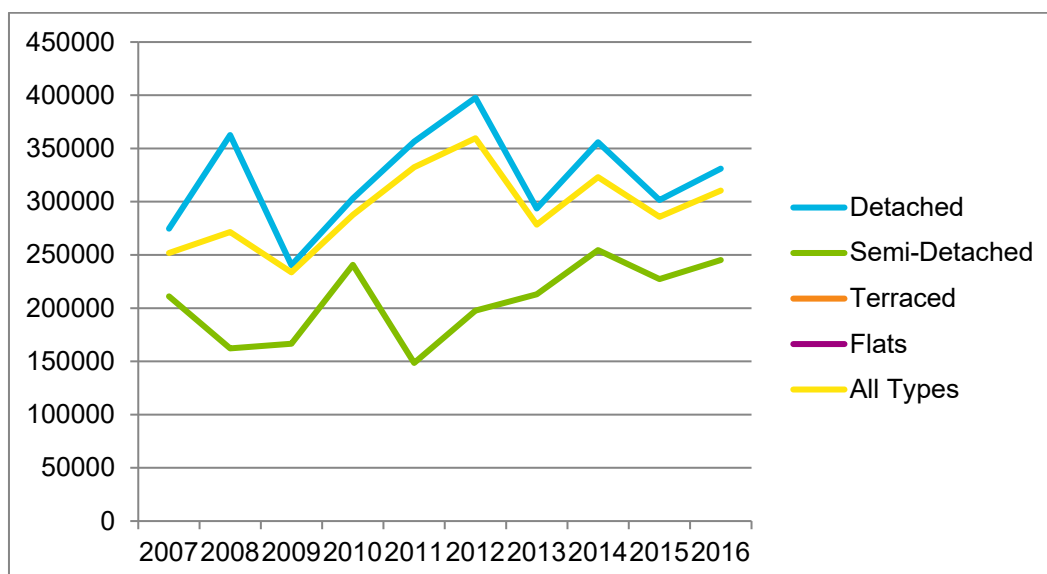
153. Overall the average price of all types of properties has increased by 23%, when including the terraced property data from 2016, without this the increase is 18%.

Table 18: Average house prices by type, 2007 to 2016, Tollerton

| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Detached | 274,687 | 362,583 | 240,385 | 303,139 | 356,385 | 397,779 | 293,577 | 355,800 | 301,558 | 331,107 |
| Semi-Detached | 211,028 | 162,200 | 166,500 | 240,667 | 148,583 | 197,750 | 213,080 | 254,545 | 227,357 | 245,119 |
| Terraced | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 380,000 |
| Flats | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| All Types | 251770 | 271500 | 233668 | 287521 | 332408 | 359678 | 278348 | 323041 | 285818 | 310494 |

Source: Land Registry PPD, AECOM calculations

Figure 11: Average House Prices by Type, 2007 to 2016, Tollerton.



Source: Land Registry PPD, AECOM calculations

²²Housing and economic development needs assessment PPG, Paragraph: 011 Reference ID: 2a-011-20140306

154. Further analysis is presented in Table 19 that sets out a comparison of prices in 2007 and 2016, alongside the percentage difference between the NP area and Rushcliffe as a whole. This shows that in terms of detached properties, these are now slightly more expensive in Rushcliffe as a whole, whilst the NPA area has more expensive semi-detached properties on average.

155. The values associated with the terraced category of property are to be treated with caution, due the nature of the property and the very low stock in the NPA compared with Rushcliffe overall.

Table 19 – Comparison of House Prices 2007 and 2016

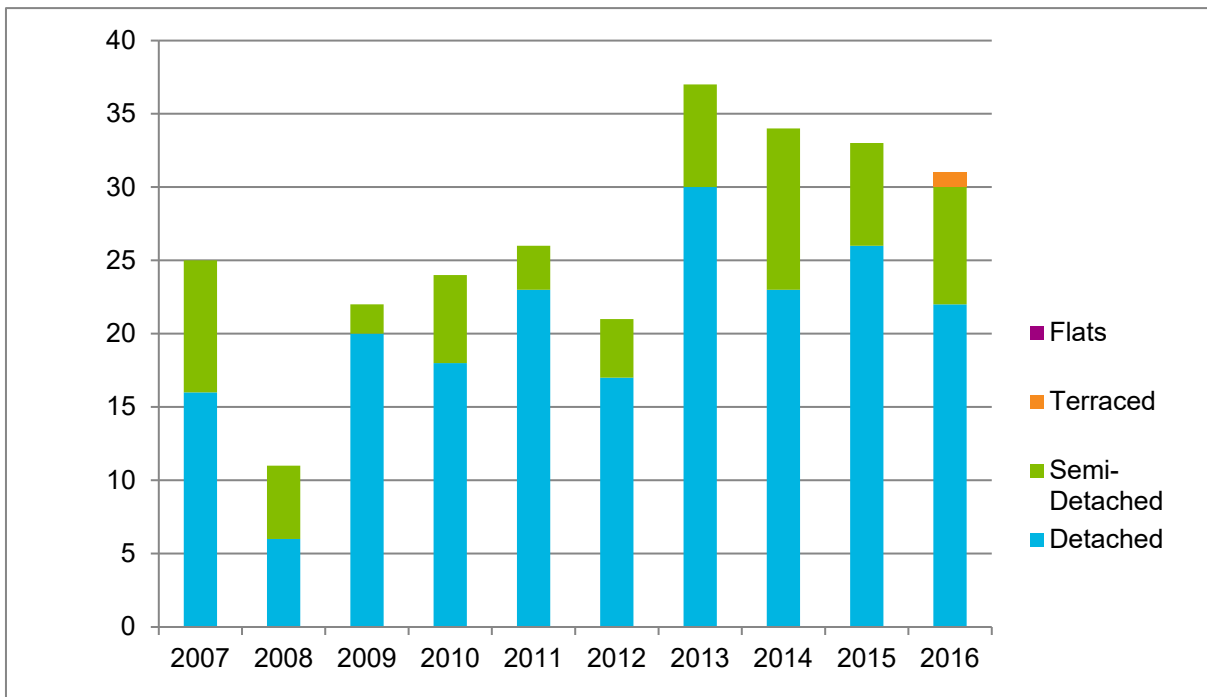
| | Prices in January 2007 | | | Prices in December 2016 | | |
|---------------|------------------------|------------|-------------------|-------------------------|------------|-------------------|
| | Tollerton | Rushcliffe | % difference 2007 | Tollerton | Rushcliffe | % difference 2016 |
| Detached | £274,687 | £268,271 | 2% | £331,107 | £350,861 | -6% |
| Semi-Detached | £211,028 | £181,209 | 14% | £245,119 | £229,615 | 6% |
| Terraced | N/A | £144,542 | N/A | £380,000 | £181,403 | 52% |
| Flats | N/A | £121,404 | N/A | N/A | £137,905 | N/A |
| All Types | £251,770 | £201,713 | 20% | £310,494 | £256,406 | 17% |

Source: Land Registry PPD, AECOM calculations

4.3 Housing Market (Volume)

156. Figure 12 depicts the relative proportions of different housing typologies sold in Tollerton between 2007 and 2016. This graph represents the same Land Registry data discussed in the previous section separated out by housing type. This graph shows the effects of the national recession, however housing transactions in Tollerton have recovered past pre-recession levels, although since 2013 there has been a continual small decrease in sales, although volumes of sales are small scale across the period due to the relatively low housing stock in the NPA, and development of one site will skew the figures somewhat.

Figure 12: Different house types and sales 2007-2016



Source: Land Registry PPD, AECOM calculations

157. Another approach to benchmarking whether sales volumes represent a clear market signal indicating inflated or depressed demand across different housing types is to compare the proportion of sales of each type of housing (excluding any new builds, which would introduce supply side factors) with the proportion of the existing housing stock that falls into each category. This allows conclusions to be drawn about whether the sale of homes of each type is occurring proportional to their availability, or there whether there is unmet demand.

158. This comparison is presented in Table 20, with figures for the housing stock in Rushcliffe Borough as a whole presented alongside for reference. The table reinforces the predominance of detached and semi-detached properties in the NPA, and to a lesser extent the borough as a whole. Given the relatively small housing stock numbers, any interpretation of the data should be treated with caution; however, given the nature of the stock, there is little if any choice at all with regards to terraced houses or flats within the NPA.

Table 20 – Proportion of sales and stock by house type

| | SALES Tollerton | STOCK Tollerton | STOCK Rushcliffe |
|---------------|--------------------|--------------------|---------------------|
| Detached | 75% | 78% | 46% |
| Semi-Detached | 24% | 21% | 31% |
| Terraced | <1% | 1% | 11% |
| Flats | <1% | 1% | 11% |

Source: Census 2001/2011, Land Registry PPD, AECOM Calculations

4.4 Migration

159. Tollerton has experienced a slight population increase (4.68%) during the period 2001-2011 according to Census data, whilst Rushcliffe Borough has also experienced a slight increase (5.24%).

160. Relatively small population growth in the NPA is set against a backdrop of low levels of migration into both the NPA and the wider borough; Table 22 shows the percentage of people born outside of the UK is very low in Tollerton (3.8%) which is less than the figure for Rushcliffe (6.5%). Therefore, migration is not seen as a significant driver of increased housing demand in Tollerton.

Table 21: Population by Age Group, 2001, 2011

| Age group | 2001 | 2001 | 2011 | 2011 |
|-------------------|-----------|------------|-----------|------------|
| | Tollerton | Rushcliffe | Tollerton | Rushcliffe |
| 0-15 | 233 | 20533 | 266 | 20578 |
| 16-24 | 102 | 10246 | 92 | 11452 |
| 25-44 | 303 | 30609 | 270 | 27498 |
| 45-64 | 483 | 27091 | 496 | 31178 |
| 65-84 | 320 | 14911 | 371 | 17593 |
| 85 and over | 34 | 2209 | 49 | 2830 |
| All | 1475 | 105599 | 1544 | 111129 |
| Percentage Growth | | | 4.68% | 5.24% |

Source: Census 2001/2011, AECOM Calculations

Table 22: Country of birth and length of residence, 2011

| Place of birth | Population breakdown | Tollerton | Rushcliffe | England |
|---------------------|-------------------------|-----------|------------|---------|
| Born in the UK | Total | 96.2% | 93.5% | 86.2% |
| Born outside the UK | Total | 3.8% | 6.5% | 13.8% |
| | EU | 1.6% | 2.3% | 3.7% |
| | Other | 2.3% | 4.2% | 9.4% |

Source: Census 2001/2011, AECOM Calculations

Table 23: Length of residence of those born outside of the United Kingdom

| Length of residence in the UK | Tollerton | Rushcliffe |
|-------------------------------|-----------|------------|
| Less than 2 years | 0.2% | 0.5% |
| 2-5 years | 0.2% | 0.7% |
| 5-10 years | 0.3% | 1.0% |
| 10 years or more | 3.2% | 4.3% |

Source: Census 2001/2011, AECOM Calculations

4.5 Overcrowding and concealed families

161. Another indicator of demand in the housing market is shown by the prevalence (or lack) of overcrowding in the NPA. This is because demand for housing in the area can manifest itself in the over-occupation of housing stock as increased demand does not always result in an increase in supply as this is relatively inelastic.
162. One of the most reliable indicators of overcrowding is the 'persons per room' data collected at the household level during the Census. The relative proportion of households occupying different amounts of space in the NPA and the borough is shown in the table below, which demonstrates that Tollerton has seen a slight decrease of 3.9% in the number of households with more than 0.5 and up to 1.0 persons per room, although there has been no change in those households with over 1.0 persons per room, which contrasts with the borough-wide data which recorded decreases of 11% against more than 1.0 and up to 1.5 persons per room, and a decrease of 17.7% against those properties with over 1.5 persons per room. The NPA has experienced a slight increase (4.4%) of properties with up to 0.5 persons per room.

Table 24: Trends in number of persons per room in Tollerton, 2001-2011

| Persons per room | Tollerton | Rushcliffe | England |
|---|-----------|------------|---------|
| Up to 0.5 persons per room | 4.4% | 6.8% | 7.9% |
| Over 0.5 and up to 1.0 persons per room | -3.9% | -1.3% | 7.0% |
| Over 1.0 and up to 1.5 persons per room | 0.0% | -11.0% | 27.3% |
| Over 1.5 persons per room | 0.0% | -17.7% | 2.5% |

Source: Census 2001/2011, AECOM Calculations

163. A second indicator of overcrowding is the prevalence of concealed families within the NPA. ONS data shows that there are four concealed families in Tollerton, or 0.8% of families; this is slightly less than the figure for Rushcliffe (1.0%), and lower than the average for England as a whole (1.9%). This indicator does not indicate that concealed families (and therefore unmet additional demand for housing in the area from those already living there) is a significant issue for Tollerton.

Table 25: Concealed families in Tollerton, 2011

| Concealed families | Tollerton | Rushcliffe | England |
|----------------------------------|-----------|------------|------------|
| All families: total | 504 | 32,462 | 14,885,145 |
| Concealed families: total | 4 | 336 | 275,954 |
| Concealed families as % of total | 0.8% | 1.0% | 1.9% |

Source: Census 2011, AECOM Calculations

4.6 Rate of development

Table 26 shows the net number of dwellings completed in each of the past five years, as well as the cumulative of these. The data shows clearly that the rate of development in Tollerton is very low, for instance in 2015/16, only one dwelling was completed. The low rate of development reflects the rural nature of the NPA.

Table 26: Completions in Tollerton, 2011-2016

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 |
|------------------------------------|---------|---------|---------|---------|---------|
| Net completed dwellings | 9 | 2 | 3 | -1 | 1 |
| Cumulative net completed dwellings | 9 | 11 | 14 | 13 | 14 |

Source: Rushcliffe Borough Council

164. Having reviewed the market signal data, the following points are considered to summarise the main issues:

- the local plan is proposing significant levels of new mixed employment development within the NPA, and there are already a significant proportion of economically active residents in the NPA that either travel a relatively short distance to work or are mainly home based; aligned with the second highest rate of new enterprise registrations in the HMA, this could potentially drive up demand for housing in Tollerton.
- Employment growth is forecast to increase in Rushcliffe compared to previous levels, and there is a continued focus on the City of Nottingham as a focus for economic growth.
- Analysis of house prices for the NPA is to be treated with caution due to the low levels of stock. Only 302 transactions were recorded between 2007 and 2016. The average property price according to Land Registry data as at December 2016 was £310, 494, although this is skewed somewhat by the sale of a terrace property for £380,000. The stock is dominated by larger detached homes and semi-detached properties, with hardly any terraced or flat/ maisonette properties.
- Relatively small population growth in the NPA is set against a backdrop of low levels of migration into both the NPA and the wider borough;
- Analysis does not indicate that concealed families (and therefore unmet additional demand for housing in the area from those already living there) is a significant issue for Tollerton.
- The data shows the rate of development in Tollerton is very low, for instance in 2015/16, only one new dwelling was completed, and over 2011-2016 only 14 dwellings were completed. The low rate of development reflects the rural nature of the NPA.

5. Conclusions

5.1 Overview

Table 27: Summary of factors specific to Client NP with a potential impact on neighbourhood plan housing quantity

| Factor | Source(s) (detailed in Chapter 5) | Possible impact on future housing need | Rationale for judgement |
|--------------------------------------|---|--|--|
| Employment trends | Local Plan, Greater Nottingham Employment Background Paper (2012), Employment Land Forecasting Study (ELFS, 2015, NLP) Census 2001/11 | ↑ ↑ ↑ | <p>The Local Plan is proposing significant levels of new mixed employment development within the NPA, and there are already a significant proportion of economically active residents in the NPA that either travel a relatively short distance to work or are mainly home based; aligned with the second highest rate of new enterprise registrations in the HMA, this could potentially drive up demand for housing in Tollerton. The ELFS also identified potential for greater economic growth in Rushcliffe and repeated the LEP’s aim to focus on the City of Nottingham for future economic growth.</p> <p>As a result, an assessment of three up arrows has been deemed appropriate because of the current strength and predicted future growth of employment opportunities in the local area.</p> |
| Housing transactions (Prices) | Land Registry Price Paid Data for 2006-2016, | ↑ ↑ | <p>Analysis of house prices for the NPA is to be treated with caution due to the low levels of stock. Only 302 transactions were recorded between 2007 and 2016. The average property price according to Land Registry data as at December 2016 was £310, 494, although this is skewed somewhat by the sale of a terrace property for £380,000.</p> <p>In terms of specific increases in house prices, Overall the average price of all types of properties has increased by 23% or 18% when you discount the single Terrace property.</p> <p>As a result an assessment of two up arrows has been deemed appropriate due to the relatively high increases in house prices experienced in the NPA when assessed against the District.</p> |
| Housing Transactions (Volume) | Land Registry Price Paid Data for 2006-2016, Census 2001/2011 data, SHMA09 | ↑ ↑ ↑ | <p>Analysis of house prices and transactions for the NPA is to be treated with caution due to the low levels of stock. Only 302 transactions were recorded between 2007 and 2016.</p> <p>The stock is dominated by larger detached homes and semi-detached properties, with hardly any terraced or flat/ maisonette properties.</p> <p>As a result three up arrows have been considered appropriate due to the narrow choice</p> |

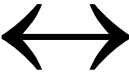
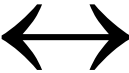
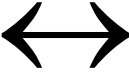
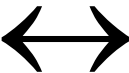
| Factor | Source(s) (detailed in Chapter 5) | Possible impact on future housing need | Rationale for judgement |
|---------------------|--|---|--|
| Migration | Census data 2001, 2011 |  | <p>of house types within the NPA, however this is dependent on new dwellings being suitable for those households forecast to grow (elderly, and those in the 25-44 age bracket).</p> <p>Migration is not seen as significant factor in determining housing need given that just 20% of the 3.8% of Tollerton residents born outside of the UK arrived in the last 10 years.</p> |
| Overcrowding | Census data 2001, 2011 |  | <p>Tollerton has seen a decrease of 3.9% in the number of households with more than 0.5 and up to 1.0 persons per room, although there has been no change in those households with over 1.0 persons per room, which contrasts with the borough wide data which recorded decreases of 11% against more than 1.0 and up to 1.5 persons per room, and a decrease of 17.7% against those properties with over 1.5 persons per room. The NPA has experienced a slight increase (4.4%) of properties with up to 0.5 persons per room, although this increase is not sufficient to warrant any 'up' arrows given the relatively stable persons per room in the other categories in the NPA.</p> |
| Concealment | Census data 2001, 2011 |  | <p>ONS data shows that there are 4 concealed families in Tollerton, or 0.8% of families; this is slightly less than the figure for Rushcliffe (1.0%), and lower than the average for England as a whole (1.9%). This indicator does not indicate that concealed families (and therefore unmet additional demand for housing in the area from those already living there) is a significant issue for Tollerton.</p> |
| Rate of development | RBC, Land Registry Data/AECOM Calculations |  | <p>The data shows clearly that the rate of development in Tollerton is very low, for instance in 2015/16, only 1 dwelling was completed. The low rate of development reflects the rural nature of the NPA.</p> |

Table 28: Summary of local factors specific to Client with a potential impact on neighbourhood plan housing characteristics

| Factor | Source(s) (see Chapter 4) | Possible impact on housing needed | Conclusion |
|---|---|--|--|
| Affordable Housing (AH) | Census, Housing Waiting List Data, SHMA studies | The current tenure profile of the area (dominated by owner occupation) leaves little suitable accommodation for those on low incomes | Those households ineligible for affordable housing, but who cannot afford market housing, may struggle to access housing suitable for their needs, meaning they may need to move out of the area. |
| | | At the level of the NPA, a crisis of affordability is identified, with households on lower and median incomes unable to access affordable market housing (AMH). | The growth of shared ownership could be a plausible route to home ownership for those on low incomes, for example first time buyers, leading to the recommendation that a substantial share of AH quotas that come from housing development should be allocated to this tenure type. |
| | | Households on mean and median incomes within Rushcliffe are unable to afford entry-level properties in the NPA | Household income levels generate a compelling argument for affordable private rent housing. These tenure types are particularly suitable for first time buyers. |
| Demand/ need for smaller dwellings | Census, Land Registry Price Paid Data | The current housing stock exhibits an exceptionally strong bias towards larger dwellings, and very few flats (6 properties) or terraced (4) properties, therefore the effect on housing need could be acute on those smaller properties. | Demand for smaller properties is difficult ascertain due to the very specific nature of stock. The lack of smaller dwellings is likely to lead to the displacement of households on lower incomes from the area. Findings from the housing transactions data should be treated with caution given the specific nature of the existing stock in the NPA. |
| Demographic Change | Census, SHMA studies | An increase in the projected numbers of older people (65-84) is recorded, and this is forecast to continue. In addition, increases in ages between 25-44, and 45-64 are recorded. | The increase in the proportion of the population accounted for by older people creates an imperative for housing policy to address their needs, for example dwellings of a manageable size designed to be 'age-friendly.' In arriving at an appropriate level of housing for older people of different types, we have applied the Housing Learning and Improvement Network's suggested numbers per 1,000 of the 75+ population ²³ . The data shows an estimate of the increase in the numbers of older people aged 75+ of 47(250-203). This will result, over the plan |

²³ Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: http://www.housinglin.org.uk/_library/Resources/Housing/SHOP/SHOPResourcePack.pdf

period, in a need for:

- additional conventional sheltered housing units = $60 \times 4.7\% = 3$ (rounded)
- additional leasehold sheltered housing units = $120 \times 4.7\% = 6$ (rounded)
- additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale = $20 \times 4.7\% = 1$ (rounded)
- additional extra care housing units for rent = $15 \times 4.7\% = 1$ (rounded)
- additional extra care housing units for sale = $30 \times 4.7\% = 1$ (rounded)
- additional specialist dementia care home = $6 \times 4.7\% = 1$ (rounded)

Family-sized housing

Other changes in age structure reinforce the impression of a family orientated community, as well as a place of retirement.

Smaller and to lesser extent mid-sized dwellings should form an important part of the mix of types and sizes of homes provided over the plan period.

5.2 Recommendations for next steps

165. This neighbourhood plan housing needs advice has aimed to provide Tollerton Parish Council with evidence on housing trends from a range of sources. We recommend that the Parish Council should, as a next step, discuss the contents and conclusions with Rushcliffe Borough Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:

- the contents of this report, including but not limited to Tables 27 and 28;
- Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the emerging development plan (here, the Rushcliffe Core Strategy);
- the views of Rushcliffe Borough Council;
- the views of local residents;
- the views of other relevant local stakeholders, including housing developers; and
- the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the Council, including but not limited to the SHLAA.

166. As noted previously, recent changes to the planning system, as well as forthcoming changes to the National Planning Policy Framework as well as the implementation of the Housing and Planning Act 2016, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.

167. This advice note has been provided in good faith by AECOM consultants on the basis of housing data current at the time of writing (alongside other relevant and available information).

168. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by Rushcliffe Borough Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.

169. Most obviously, this includes monitoring the status of the emerging Part 2 Local Plan.

170. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 27 and 28 would be particularly valuable.

