Oldbury-on-Severn Housing needs Assessment (HNA)

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Quality information

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List of acronyms used in the text

AH	Affordable Housing (NPPF definition)
AMH	Affordable Market Housing
DMSH	Discounted Market Sale Homes
DPD	Development Plan Document
DWP	Department for Work and Pensions
HMA	Housing Market Area
HNA	Housing needs Assessment
HPA	Housing and Planning Act 2016
HRP	Household Reference Person
JSP	West of England Joint Spatial Plan
UA	Local Authority
UA	Local Planning Authority
MHCLG	Ministry for Housing, Communities and Local Government (formerly DCLG)
NA	Neighbourhood Plan Area
NDP	Neighbourhood Development Plan
NP	Neighbourhood Plan
NPPF	National Planning Policy Framework
OAN	Objectively Assessed Need
ONS	Office for National Statistics
OSPC	Oldbury-on-Severn Parish Council
PPG	Planning Practice Guidance
PRS	Private Rented Sector
PSPP	South Gloucestershire Local Plan: Policies, Sites and Places Plan (2017)
SGUA	South Gloucestershire Authority UA
SGLP	New South Gloucestershire Local Plan 2018 – 2036
SHUAA	Strategic Housing Land Availability Assessment
SHMA	Strategic Housing Market Assessment
SMAHN	Standard Methodology for Assessing Housing needs
UA	Unitary Authority
UAA	Unitary Authority Area
WoE	West of England sub-region

Table of Contents

1. Executive summary 7
   - 1.1 Headlines 7
   - 1.2 Introduction 7
   - 1.3 Summary of methodology 8
   - 1.4 Quantity of housing needed 8
   - 1.5 Type of housing needed 10
2. Context 13
   - 2.1 Local context 13
   - 2.2 Planning policy context 13
3. Approach 18
   - 3.1 Research questions 18
   - 3.2 Study objectives 19
   - 3.3 Relevant data 19
4. Quantity 21
   - 4.1 South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013) 21
   - 4.2 New South Gloucestershire Local Plan (2018 – 2036) (2018) 22
   - 4.3 Wider Bristol SHMA 2015 22
   - 4.4 MHCLG Household Projections 22
   - 4.5 Dwelling growth 2001 – 2011 23
   - 4.6 Dwelling growth since 2011 23
   - 4.7 Dwelling growth 2001-2017 23
   - 4.8 The Standard Methodology 23
   - 4.9 Interim housing needs figure 24
5. Tenure and Affordable Housing 27
   - 5.1 Definitional issues 27
   - 5.2 Current tenure profile 28
   - 5.3 Indicators of affordable housing needs 30
   - 5.4 Bringing the evidence together: Housing mix of tenure and Affordable Housing required 39
6. Type and size 41
   - 6.1 Background and definitions 41
   - 6.2 Existing types and sizes 41
   - 6.3 Demographic factors affecting size and type of housing: household composition 44
   - 6.4 Demographic factors affecting size and type of housing: age structure 48
   - 6.5 Bringing the evidence together: housing mix of type and size required 50
7. Market signals 54
   - 7.1 Employment and commuting 54
   - 7.2 Housing market (prices) 57
   - 7.3 Housing market (transactions) 58
   - 7.4 Rate of development 59
8. Conclusions 60
   - 8.1 Overview ..... **Error! Bookmark not defined.**
   - 8.2 Recommendations for next steps 65

Appendix A :Market Segmentation 66

Appendix B : Housing tenure 69
   - B.1 Social rented housing 69
   - B.2 Other Affordable Housing tenures 69
   - i) Discounted market housing (starter homes) 70
   - ii) Shared ownership 70
   - iii) Affordable rent 70
   - B.3 Market housing 71

B.4 Build to rent 71
Appendix C : Rent calculations 72

1. Executive summary

1.1 Headlines

1. Oldbury and the wider Parish are mostly covered by flood risk areas and flood defences. For this reason, it is restricted from growth, in line with the NPPF Paragraph 100: *"Inappropriate development in areas at risk of flooding should be avoided by directing development away from areas at highest risk*". Although supply and planning constraints are not part of the HNA exercise, it is crucial to acknowledge its impact on the likely amount of housing to be built in the Parish. Flooding events occur frequently within the boundaries of the Neighbourhood Area, and as a result a Proportionate Strategic Flood Risk was produced to understand flood risks locally. This assessment was heavily relied upon by the AECOM Site Assessment work.

2. Despite the aforementioned constraints, the village is now being considered for some development. Although the Core Strategy did not expect or encourage any contribution from the rural areas other than windfalls[1] and agricultural conversions[2], the emerging Local Plan suggests that a contribution for non-strategic growth in the rural areas[3] is possible.

3. Following the presentation and comparison of various quantitative projections**,** an unconstrained and objectively assessed[4] housing needs figure (HNF) of 74 dwellings in the Oldbury NA and 31 dwellings in the Oldbury settlement (this is within the 74 figure) by 2036 was identified. **However, this HNF does not take into account policies relevant to housing delivery that may constrain supply. Given the constraints mentioned earlier, the separate projection for the Oldbury settlement alone, which produced an HNF of 31 dwellings up to 2036, is seen as a more realistic HNF than the one for the whole NA.**

4. Shared ownership and other affordable forms of home ownership and affordable renting, including social renting, have a significant role to play in meeting locally expressed needs, while more private rented dwellings should be made available to meet a growing demand.

5. There is likely to be a significant need for **small and medium sized housing of 2-3 bedrooms in the future**, with these most appropriately provided via the provision of terraced houses, semi-detached houses or bungalows, although any development will need to comply with the Village Character Assessment Guidelines (currently being developed).

1.2 Introduction

6. Oldbury-on-Severn Parish Council (OPC) is designated as a Qualifying Body (QB) and has decided to prepare a Neighbourhood Plan for the Parish area, referred to here as the Neighbourhood Area (NA). 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. We have been asked to prepare a Housing Needs Assessment by the Parish Council, based on a robust methodology, local data, and focused on a number of research questions agreed with the Parish Council.

7. As more and more towns and Parish Councils and forums seek to address housing growth, including tenure and type of new housing, it has become evident that housing policies need to be underpinned by robust, objectively assessed housing data.

8. 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.[5] The process involves making balanced judgements based on the qualitative and statistical evidence gathered as well as having regard to relevant national and local planning policies and guidance.

9. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority 'average' in terms of housing needs, reflecting the fact that a single town, village, or neighbourhood almost never constitutes a housing market area on its own and must therefore be assessed in its wider context.

[1] Sites which have not been specifically identified as available in the Local Plan process.
[2] Conversation of agricultural buildings for other uses.
[3] Small-scale development in rural areas. The New Local Plan considers strategic development, as a minimum, to be approximately 500 homes, or a 25 hectare site. This is the 'upper limit' of non-strategic growth in any rural place.
[4] Other considerations, such as supply and viability, are not taken into account.
[5] PPG Paragraph: 014 Reference ID: 2a-014-20140306 Revision date: 06 03 2014

10. 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 needs at a local authority and/or housing market area 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 localised level should be proportionate.

11. Our brief was to advise on data at this more local level to help Oldbury understand the quantity, tenure, type, and size of housing needed to inform neighbourhood plan policies.

PPG-based assessment

12. This objective and independent housing needs advice note follows the PPG approach where relevant. This ensures 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.

1.3 Summary of methodology

13. Housing Needs Assessment (HNA) at neighbourhood plan level can be focused 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 area is unclear, for example where the local authority has not set a specific target for the area, or where there is no Local Plan in place.

14. In the case of Oldbury, the emerging Local Plan for South Gloucestershire does not identify Oldbury as a place for investigation in Rural Growth, preferring the Neighbourhood Plan to investigate and propose allocations for Non-Strategic Growth. In this context, the task of this HNA is to consider the overall quantity of housing required, together with the types, tenures and sizes of housing that are needed by the local population living in Oldbury.

15. The rationale for this approach is that neighbourhood plans need to meet basic conditions, the fulfilment of which is tested through an independent examination. One of these, Basic Condition E, requires the Neighbourhood Plan to be in 'general conformity with the strategic policies' of the Local Plan. The Government's Planning Practice Guidance indicates that the level of housing development is likely to count as a strategic policy.[6] As such, this HNA investigates specific local needs that are relevant to the neighbourhood whilst supporting the strategic development needs set out in the emerging Local Plan. This means a neighbourhood plan can propose more housing where there is demonstrable need, but not less than in the Local Plan.

16. 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 Oldbury, we have gathered a wide range of local evidence[7] and distilled this into policy recommendations designed to inform decisions on housing characteristics.

17. Our approach is based on best practice and is to advise on housing required based on need and/or demand rather than supply. 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.[8] In this case, however, we took into account a Proportionate Strategic Flood Risk that was produced to understand flood risks locally, as requested by the Neighbourhood Planning Working Group.

1.4 Quantity of housing needed

18. We have estimated the quantity of housing needed in the NA according to four different sources; these are:

    1. South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013)
    2. New South Gloucestershire Local Plan – 2018-2036 (2018)
    3. MHCLG household projections
    4. Dwelling growth between 2001 and 2017

[6] PPG Paragraph: 006 Reference ID: 2a-006-20140306
[7] The sources of information are detailed throughout the document. Some of the sources include: SHMA, ONS Census data, Land Registry. No up-to-date local Housing Survey was undertaken but we have considered the questionnaire analysis from the Spring 2017 Questionnaire.
[8] Such an approach, clearly separating housing needs assessment from dwelling capacity assessment, was endorsed by the Government for calculating housing needs at local authority level in the ministerial statement and press release 'UAs must protect our precious green belt land' (DHCLG, 4 October 2014, available at https://www.gov.uk/government/news/UAs-must-protect-our-precious-green-belt-land)

19. To arrive at an overall projection for the quantity of housing to be delivered in the NA over the Plan Period, we have averaged projections from the New Local Plan and from the MHCLG household projections. We chose these two projections over the Core Strategy projection and the Dwelling growth projection because the Core Strategy is out-of-date and because dwelling growth relates to supply, which we are not considering in this study.

20. The projections produced an interim housing needs figure (interim because it will be adjusted to reflect the impact of market indicators called market signals) of 74 dwellings for the whole Neighbourhood Area and 31 dwellings in the Oldbury settlement only by 2036.

21. Following the derivation of an interim housing needs figure, the next step is to assess the interim housing needs figure against a series of so called 'market signals' which may serve to raise or lower the interim housing needs figure or range as appropriate[9]. Our assessment of these market signals is summarised in Table 1-1 below. As these market signals are not significant enough, we have decided to not apply any market signals to increase or lower the interim housing needs figure. This produces a final housing needs figure of **74 dwellings in the whole Neighbourhood Area and 31 dwellings in the Oldbury settlement only by 2036.**

22. This HNF is not supposed to take into account policies relevant to housing delivery that may constrain supply. Yet, Oldbury and the wider Parish are mostly covered by flood risk areas and flood defences. For this reason, it is restricted from growth, in line with the NPPF Paragraph 100: *"Inappropriate development in areas at risk of flooding should be avoided by directing development away from areas at highest risk*". Although supply and planning constraints are not part of the HNA exercise, it is crucial to acknowledge the impact flood risk regulations on the likely amount of housing to be built in the Parish.

23. Therefore, given the constraints mentioned above, the separate projection for the Oldbury settlement alone which produced an HNF of **31 dwelling up to 2036**, is seen as a more realistic HNF than the one for the whole NA.

24. In the table below, 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 set out in the table below in alphabetical order.

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

Factor	Source(s)	Possible impact on future housing needs	Rationale for judgement
Employment and commuting	*ONS 2011, WE LEP SEP, South Gloucestershire Local Plan 2018 – 2036 Consultation Document, southglos.gov.uk, bristolpost.co.uk, guardian.co.uk*	↑↑	The evidence suggests that employment prospects will have an impact on housing needs. As the UA has proposed 1,300 new homes in the rural areas of South Gloucestershire and a potential contingency of 500 homes, we recommend that Oldbury accommodate some of this non-strategic growth. This may help some of the key workforce associated with the Oldbury nuclear site to live in the area. Given growth prospects within a 20 mile radius (for example, at Filton and Thornbury), it is likely that Oldbury will accommodate some commuters who wish to work in these locations. This recommendation is in line with the opinion of Parishioners. 60% of the 206 Parishioners surveyed in spring 2017 expressed a view that it is very important that young people and key

[9] *"The housing needs 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."*

			workers can afford to live in the Parish. 80% also agreed that 'Oldbury will need more homes by 2036'. Finally, given the high number of self-employed residents and Parishioners working from home, further investigation should be made into their specific needs.
Housing sales (prices)	*Land Registry Price Paid Data for 2008-2017*		Looking at prices of different housing types, larger properties such as detached and semi-detached are more expensive in the NA than in the UAA. Terraced houses and flats were even more significantly expensive in the NA than in the UAA which shows a strong demand for these smaller building types. Most housing types have recovered their pre-recession price levels and prices have grown by about 30% over a 9 year period. However, terraced dwelling prices have increased significantly (46.6%), again confirming the strong demand for smaller dwellings types (although flats have not increased as much).
Housing sales (volume)	*Land Registry Price Paid Data for 2008-2017, Census 2001/2011 data,*		Bringing the evidence together, the housing market in Oldbury is relatively stable and there is no recommendation to alter dwelling targets in the light of market signals relating to quantity data.
Rate of development	*Land Registry data/AECOM calculations*		There is evidence to demonstrate significant under delivery since 2011 and this market signal indicates the need for additional planned supply.

1.5 Type of housing needed

Table 1-2: Summary of local factors specific to Oldbury with a potential impact on neighbourhood plan housing characteristics

Factor	Sources	Possible impact on housing needed	Conclusion
Affordable Housing[10]	ONS, Wider Bristol SHMA, Land Registry, www.home.co.uk, DWP, Housing Register	We have shown the relative scarcity of smaller properties, those which are more likely to be considered 'entry-level': 16.5% of properties have one to two bedrooms; Only one two-bedroom dwelling was advertised for sale in March 2018.This lack of smaller dwellings is driving affordability pressures up. We have estimated the entry-level property price to be around £307,000, which creates a Lower Quartile Affordability Ratio[11] (LQAR) of 8.2, higher than the average for the UA.	Only a very small number of households are in urgent need of affordable housing, and overcrowding and household concealment are not pressing issues within the NA. Households in the private rented sector who are housing benefits recipients would not necessarily be in need of social housing, but cannot afford market prices; hence why they are housing benefits beneficiaries. Furthermore, some individuals within the households with non-

[10] The term 'Affordable Housing' denotes the planning definition set out on page 50 of the National Planning Policy Framework, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf
[11] The LQ house price is the price below which the cheapest 25% of houses may be bought and is a measure of 'entry-level' property in the area (cheaper, more affordable housing).

Factor	Sources	Possible impact on housing needed	Conclusion
		Oldbury is a relatively expensive area (average house price estimated at £459,583), compared to not only the national average (average house price is £149,000) but also to the mean for South Gloucestershire (average house price is £210,000). Moreover, affordability pressures (determined by the LQAR) have increased in the NA by 16% between 2008 and 2016, while they have remained stable across the UA and increased by 4% nationally. We have also examined affordability for market sale homes and private rented homes. The purchase and income thresholds were respectively £78,943 and £31,818. Two residents were identified as being in urgent need of affordable housing, to which we can add 10 households in the PRS who are receiving housing benefits. Three households were considered to be overcrowded and two to be concealed. However, some of the 42 households with non-dependent children identified have the potential to be concealed on top of the two identified above.	dependent children could potentially form their own households but are unable to, probably due not only to a lack of affordable tenures but also to a lack of appropriate types and sizes. Therefore, a mix of social housing and affordable rents would satisfy the needs of those households.
Demand/need for smaller dwellings	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Houses of one to three habitable rooms are less frequent and only represent 4% of accommodation against 9% in the UAA, which also has a higher proportion of entry-level properties and medium-sized family dwellings. One-person households are forecast to increase by 32% in the UAA by the end of the Plan Period. Households aged over 65 are estimated to form around 40% of all households towards the end of the Plan Period. These households are the most likely to occupy smaller dwellings. Furthermore, it has been shown across the UAA that households tend to downsize after reaching the age of 60.	There is a need for one to three-bedroom properties in the light of the increase in two people and one person households aged over 65. The need for one to three-bedroom properties is not only for older, downsizing households but also to allow non-dependent children living with their parents to form their own households and remain in Oldbury.
Demographic change	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Oldbury had 310 households in 2011, representing 0.29% of the UA's total. 84 additional households are expected to form between 2011 and 2036, producing a total of 394 households. Changes in household composition during the inter-censual period indicate a reduction in the size of households, and an increase in one-person households and childless families. Considering household projections for the whole UA, trends in the	See 'Demand/need for smaller dwellings', 'Dwelling type', and 'Family-sized housing'.

Factor	Sources	Possible impact on housing needed	Conclusion
		NA mentioned above are likely to continue as a reduction in the size of households and an increase in one person households has been forecasted. The data also points towards a substantial gain in households over the age of 65. Indeed, these households are already proportionally more substantial in the NA (31.9%), and are likely to form close to 40% of the population in 2036.	
Dwelling type	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Most of the stock in the NA is made up of detached properties, which is reflected in the bigger size of houses in Oldbury. Current patterns of occupation (age of the head of household to size) are detailed the main body of the report. One of the findings is that , in the UAA in 2011, more than 30% of households where the HRP is aged between 50 and 54 were living in a detached home.	Based on current patterns of occupation, we recommend the following in terms of size of housing needed: • Semi-detached whole house or bungalow:43% • Terraced whole house or bungalow:46% • Flat, maisonette or apartment: 11%
Family-sized housing	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Family-sized housing is largely available in the NA and 96% of the stock can be considered family dwellings (4 rooms or more). By comparison, in South Gloucestershire, 90% of the stock can be considered family. Cross-referencing this data with 'number of bedrooms' shows that family-sized dwellings are 10% more substantial in the NA than in the UAA.	Although larger properties will still be needed and families with dependent children will continue to increase, building smaller dwellings will allow older households to downsize, freeing up the larger properties they occupied for younger families with children.
Tenure of housing	ONS, Wider Bristol SHMA, Land Registry, www.home.co.uk, DWP	The current tenure distribution in the NA is: high level of home ownership (80.6%), relatively high level of PRS (15.5%), lower levels of social rented (2.6%) and shared ownership housing (0.6%). The social rented tenure is close to being insignificant, with only eight households falling into this tenure in 2011. Between 2001 and 2011 the proportion of PRS has increased by 71.4%. Cohabiting couple, lone parents and one person households below 65 are disproportionately likely fall into the PRS, while households above 65 (single or multi-people) generally own their property outright.	Home ownership is currently prevalent although there will be a drop in the proportion of the population that owns their own home as there has been a significant increase of households housed in the PRS. The PRS has provided accommodation to those individuals unable to buy a property and should be a key tenure moving forward. Based on the evidence gathered earlier, a distribution of housing tenures is recommended as follows: • Intermediate housing: 17% • Social housing: 14% • Market housing: 69%

2. Context

2.1 Local context

26. Oldbury-on-Severn is a small village and Parish in a rural area near the mouth of the River Severn in the Unitary Authority (UA) of South Gloucestershire in South-West England. The Parish includes hamlets such as Oldbury Naite, Cowhill and Shepperdine and is bounded by the River Severn to the West.

27. The village is home to the nearby Oldbury nuclear power station, which opened in 1967 and ceased operation on 29 February 2012. It is also part of 'A Forgotten Landscape', a large-scale project to encourage conservation, engagement and learning about the cultural and natural history of the Lower Severn Vales Levels. It is noteworthy that Oldbury and the wider Parish are mostly covered by flood risk areas on the national database, and that flooding events are a frequent occurrence.

28. Oldbury is located in between Bristol (20 miles south) and Gloucester (30 miles north). In terms of access, it is served by a limited bus route (623), although there is community transport available on demand[12]. Economic activities are centred around farming and the power station (even if it no longer operates), and there are a number of small businesses covering mechanical and electrical engineering, tyres, garden machinery and builders merchants; although most of the residents work outside, within 30 miles of Oldbury.

29. In October 2016, Oldbury-on-Severn Parish Council (OSPC) resolved to produce a Neighbourhood Development Plan (henceforward NDP). In accordance with Regulation 7 of the Neighbourhood Planning (General) Regulations 2012, the Oldbury-on-Severn civil Parish was designated by South Gloucestershire Authority UA (SGUA) as the 'Oldbury-on-Severn Neighbourhood Area' for the purposes of neighbourhood planning under Section 61G(1) of the Town and Country Planning Act 1990. The Neighbourhood Area (NA) covers the whole of the Parish and is depicted in Figure 2-1 below.

Figure 2-1: Oldbury Parish map

Source: Oldbury-on-Severn Parish Plan 2012

2.2 Planning policy context

30. In line with the basic conditions of Neighbourhood Planning, NDPs are required to be in general conformity with adopted strategic local policies. Consequently, there is a requirement for the relevant Local Plan documents to be reviewed as part of this HNA.

[12] http://4tvl.org.uk/faqs/

31. The following policy documents have been reviewed:

- South Gloucestershire Local Plan: Core Strategy – 2006-2027 (adopted in 2013) (henceforward Core Strategy)
- South Gloucestershire Local Plan: Policies, Sites and Places Plan (adopted in 2017)
- New South Gloucestershire Local Plan – 2018-2036 (in preparation)
- West of England Joint Spatial Plan (henceforward JSP)

32. The current statutory strategic policies for South Gloucestershire comprise the Core Strategy and the Policies, Sites and Places Plan (henceforward PSPP).

33. SGUA is in the process of preparing a new Local Plan, the New South Gloucestershire Local Plan (henceforward SGLP). The SGLP will cover the whole administrative area of South Gloucestershire and the Plan Period will be 2018-2036. When adopted, the SGLP will replace the UA's adopted Core Strategy and the PSPP and provide a single Local Plan document.

34. The SGLP is currently being prepared and a consultation document was published for consultation from 5 February 2018 to 30 April 2018.[13] While the NDP needs to be in conformity with the adopted Core Strategy and the strategic policies in it, it makes sense for it to pay close attention to the development of policy in the SGLP so as to ensure its policies are not superseded by the new Local Plan on its adoption.

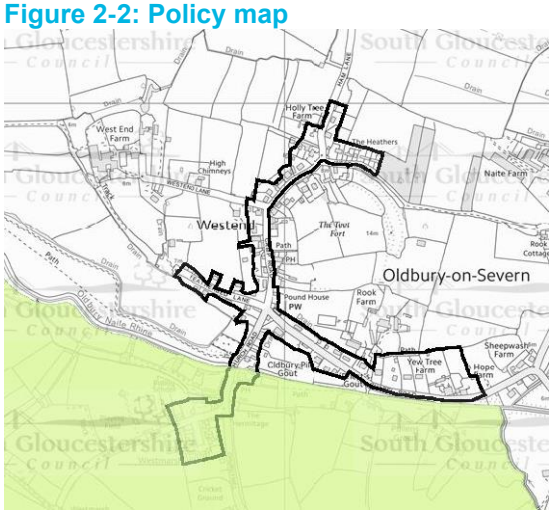
35. It should be noted that, on completion, the SGLP will also reflect many of the decisions made in the JSP currently being prepared by the four West of England (WoE) Unitary Authorities (UAs), Bristol City UA, Bath and North East Somerset UA, North Somerset UA and South Gloucestershire Unitary Authority. The JSP will be a statutory document that will provide the strategic overarching development framework for the area until 2036.

2.2.1 South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013)

36. The current adopted Core Strategy provides the following seven policies that are relevant to this HNA:

Policy CS5 – Location of development: which sets out the strategy for development and specifies the location and scale of development across the UA. Oldbury-on-Severn falls within the rural area of South Gloucestershire Unitary Authority, an area defined as all those parts of the Authority outside the urban areas of the North and East fringes of Bristol and the towns of Yate/Chipping Sodbury and Thornbury.[14] The policy states that in the open countryside new development will be strictly limited, but also invites the rural areas to 'shape their own local area' via neighbourhood plans. The policy also distinguishes between development occurring outside of the Green Belt and within the Green Belt, with some parts of Oldbury falling within the Greenbelt and some parts outside of it. Figure 2-2 below shows the settlement boundary of Oldbury in black and areas designated as Green Belt is in green.

Figure 2-2: Policy map



Source: http://map.n-somerset.gov.uk/southglos.html

37. **Policy CS15 – Distribution of housing**: which sets a housing target of a minimum of 28,355 new homes between 2006 and 2027, covering a period up to 14 years from adoption of the Plan. As 5,810 have already been completed, the residual housing target between 2013 and 2027 is for 22,545 dwellings.

[13] Regulation 18 of the Town and Country Regulations 2012
[14] Core Strategy, page 12

38. **Policy CS17 – Housing diversity**: which states that new housing development must deliver a wide variety of housing types and sizes to accommodate a different range of households, as evidenced by local needs assessment and strategic housing market assessments. On sites outside the strategic sites, the mix of housing should contribute to providing choice in tenure and type, having regard to the existing mix of dwellings in the locality. Housing developments will also need to provide for the needs of older people, persons with disabilities and those with other special needs.[15]

39. **Policy CS18 – Affordable Housing (AH)**: which states that AH provision will be achieved through:

    i. Developers being required to achieve 35% on-site affordable housing on all new housing developments (without public subsidy) on sites of 5 or more dwellings or 0.20 hectares in rural areas. In cases where developers demonstrate that the economic viability of a particular site is affected by specific factors, off-site provision or equivalent financial contribution can be made but it will have to be robustly justified.
    ii. Delivery of direct provision on sites by registered providers.
    iii. Delivery of Rural Housing Exception sites in accordance with Policy CS19 below.
    iv. Providing AH in suitable mixed use schemes as part of commercial development and also when existing properties in need of investment are renovated and converted into permanent AH by registered providers.
    v. Empowering local communities through opportunities presented by Neighbourhood Planning.

40. The UA will also ensure that developments contribute to a range of housing provision in local areas and refer to findings of the West of England (WoE) Strategic Housing Market Assessment (May 2009).[16]

41. **Policy CS19 – Rural Housing Exception Sites**: This policy allows for affordable housing to be developed - provided there is an identified local need - in locations where market housing would not normally be acceptable. Proposals will have to be supported by a housing needs survey or the relevant Parish Council.

42. **Policy CS37 – Nuclear Related Development**: which states that the requirements of temporary workers should be met in a way that minimises impact on the local housing market to an acceptable level.

2.2.2 New South Gloucestershire Local Plan (2018 – 2036) (SGLP)

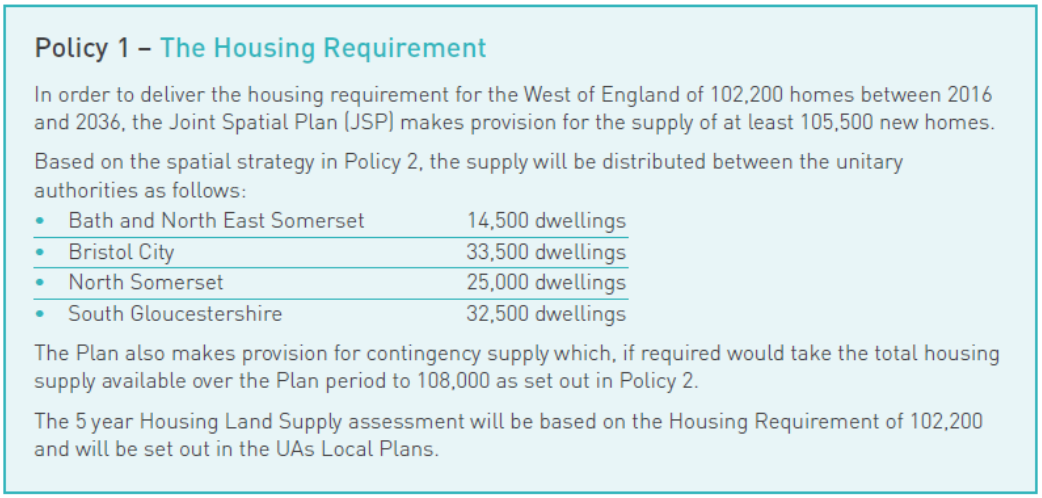
43. The SGLP will provide new policies that are likely to update policies or replace policies in the adopted development plan. However, at present this Plan can only be of limited relevance to the Oldbury NP as the Basic Conditions do not include it. This HNA has considered the developing proposals within it, but it should notes that they may change. The draft policies are explained below.

44. The number of homes for the West of England in the JSP Publication Plan (November 2017) is 105,500 and the South Gloucestershire component of this is 32,500 (see Figure 2-3 below).

[15] *"On non-strategic sites, the UA will be looking for housing sizes which improve the housing choice in an area. Very small developments generally tend to provide a disproportionate number of 3 and 4 bedroom houses. The demand for 4+ bedroom house sizes is also provided though extensions to existing properties. Therefore the UA will expect smaller family housing to be included in the mix of housing on other sites*."(Core Strategy, 2013)

[16] "*There is an estimated average annual need for 903 new affordable housing units over the period 2009 to 2021 compared to a potential average annual housing supply (both market and affordable) of around 1,550 units. The proportion of younger households able to buy or rent in the market had fallen from 52.3% in 2002 to 45.3% in 2007. Other key features are the large backlog of need for affordable housing, the projected annual increase of newly forming households continuing to need social rented accommodation, and the relatively small existing stock of affordable housing limiting the ability to meet needs through re-lets."* (Core Strategy, 2013)

Figure 2-3: The housing requirement in the West of England JSP



Policy 1 – The Housing Requirement

In order to deliver the housing requirement for the West of England of 102,200 homes between 2016 and 2036, the Joint Spatial Plan (JSP) makes provision for the supply of at least 105,500 new homes.

Based on the spatial strategy in Policy 2, the supply will be distributed between the unitary authorities as follows:

• Bath and North East Somerset	14,500 dwellings
• Bristol City	33,500 dwellings
• North Somerset	25,000 dwellings
• South Gloucestershire	32,500 dwellings

The Plan also makes provision for contingency supply which, if required would take the total housing supply available over the Plan period to 108,000 as set out in Policy 2.

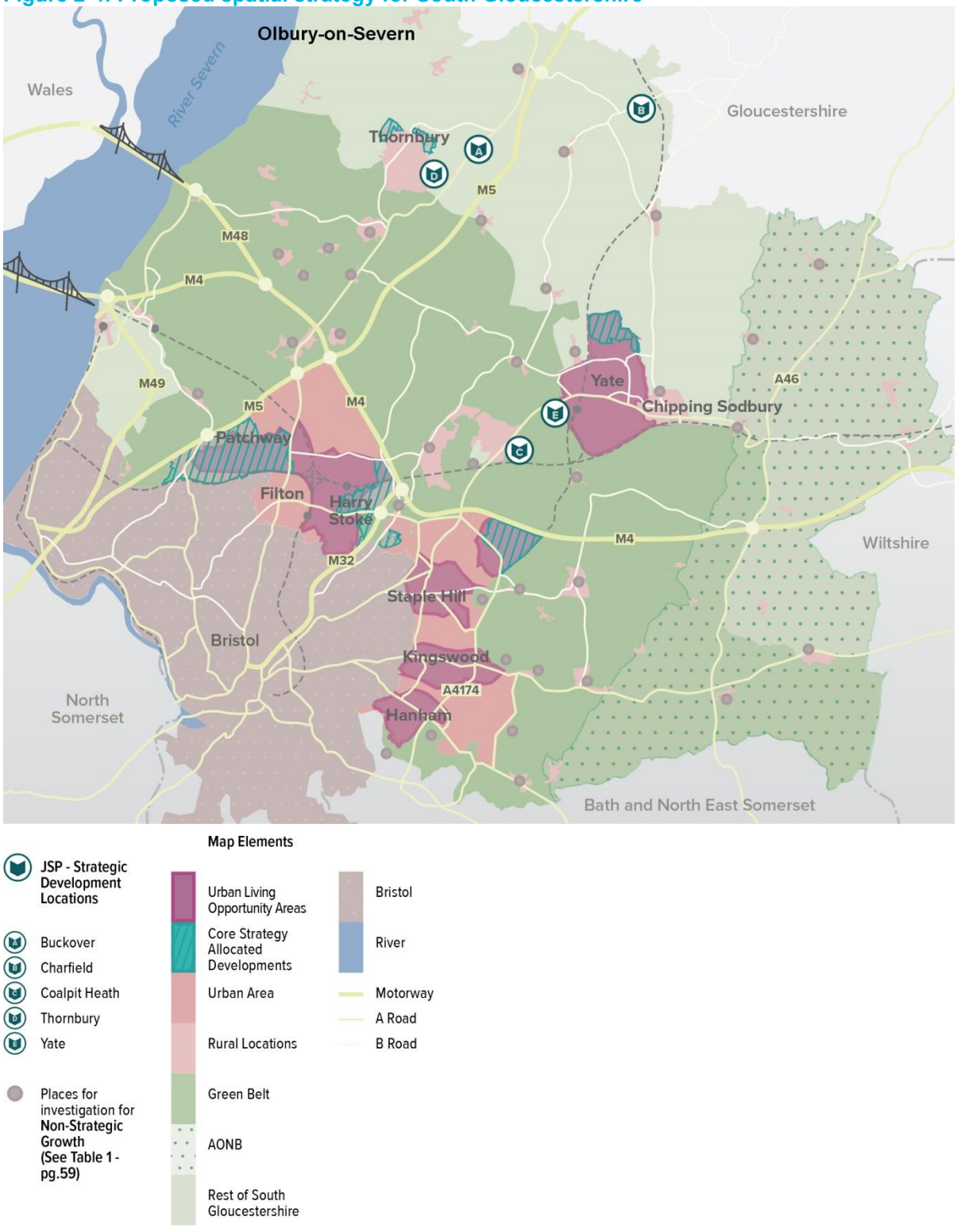
The 5 year Housing Land Supply assessment will be based on the Housing Requirement of 102,200 and will be set out in the UAs Local Plans.

Source: West of England Joint Spatial Plan Publication Document 2017

45. The JSP approach to new development in South Gloucestershire is made up of four elements: (1) 'completion of the developments planned in the Core Strategy', (2) 'new approach to urban living', (3) 'Strategic Development Locations' and (4) 'Non-Strategic development'[17], which refers to smaller scale development in rural areas. The proposed spatial strategy for South Gloucestershire is depicted in Figure 2-4 below.

[17] The JSP considers strategic development, as a minimum, to be approximately 500 homes, or a 25 hectare site. Non-strategic growth is defined as a growth that would not lead to a strategic change of a rural place, for example, changing small villages into very large villages.

Figure 2-4: Proposed spatial strategy for South Gloucestershire



Source: SGLP, (2018), Map 2, p.19

46. Oldbury is located in a rural area and will therefore be influenced by the aforementioned fourth element of the new SGLP strategy. Furthermore, the JSP has identified a need for 1,300 new homes in the rural areas of South Gloucestershire. It also proposes a potential additional contingency of 500 new homes in those rural areas. An initial list of villages, settlements and urban edge places within the rural areas will be investigated for non-strategic growth. However, the document specifies that Oldbury-on-Severn is excluded from the list of places proposed for investigation for Non-Strategic growth because the Neighbourhood Planning Group is leading the work itself.

47. The series of strategic policies that will set the approach to deliver the new spatial strategy set by the JSP will replace strategic policies CS5 and CS15 under a new strategic policy called ‘Residential Development’.

48. Furthermore, the SGLP will introduce new policies or new approaches to existing policies in the areas described below (although there is no policy text available yet):

    - Private Rented Sector (Build to Rent): this is a new policy area and no adopted policies will be superseded;
    - Extra Care Housing: CS20 likely to be updated;
    - Affordable Housing: proposes to replace CS18.

3. Approach

3.1 Research questions

49. Housing Needs Assessment (HNA) at neighbourhood plan level can be focused either on quantity of housing needed, type of housing needs, 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. In this case, we considered both.

50. To answer this dilemma, Research Questions, abbreviated to 'RQ'; were arrived at the start of the project through discussion with OSPC. They serve to direct our research and provide the structure for the HNA. Below we set out the RQs relevant to this study, as discussed and agreed with the Parish.

3.1.1 Quantity

51. As we have seen above, SGUA is in the process of preparing a new Local Plan, which suggests a new direction of travel with respect to housing in rural areas, and a potential shift away from Policy CS5.

52. Indeed, the SGLP is likely to Plan for "*1,300 new homes…to meet requirements for non-strategic growth"* and an additional contingency of 500 new homes within selected rural communities which may be considered for release over the Plan Period.[18] We note however that priority may be given to areas 'adjacent to the urban edges', a provision that may remove the NA from consideration for substantial allocations.

53. This is now a good opportunity to enter into discussion with SGUA as to a suitable housing needs figure for the NA, but this can only be done from a starting point that is robust and defendable. It is therefore appropriate for this HNA to arrive at a housing needs figure calculate on the basis of a number of sources, including one that provides for a 'fair share' of the 32,500 dwelling numbers described above.

RQ1: What quantity of housing in the Neighbourhood Plan Area (NA) is appropriate over the Plan Period?

3.1.2 Tenure and Affordable Housing

54. OSPC have said that there is a need for dwellings that are affordable to newly forming households in the NA, including both market housing and Affordable Housing[19] (as defined by the NPPF) on account of the popularity of the area and the resulting high house prices. They are also interested in the tenure split of Affordable Housing, taking into account, for example, the potential for shared equity dwellings.

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

3.1.3 Type and size

55. Given the emerging requirement for new housing in the NA, OSPC are interested to know what the housing mix in terms of type and size of new dwellings should be so as to enable older residents to access dwellings of a suitable size as well as helping to maintain a balanced community in the future.

RQ3: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate?

[18] South Gloucestershire Local Plan Consultation Document February 2018, page 22
[19] Affordable housing is social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. From April 2012 affordable housing is defined in the National Planning Policy Framework (prior to this the definitions in Planning Policy Statement 3 apply). https://www.gov.uk/guidance/definitions-of-general-housing-terms#social-and-affordable-housing

3.2 Study objectives

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

- Collation of a range of data with relevance to housing needs in Oldbury;
- Analysis of that data to determine patterns of housing needs and demand, including quantity; and
- Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

3.3 Relevant data

3.3.1 SHMA

57. The PPG states that neighbourhood planners can refer to existing needs assessment prepared by the UA as a starting point. As Oldbury is located within South Gloucestershire, we therefore turned to the Strategic Housing Market Assessment (SHMA) which covers the relevant housing market area and informs emerging housing policies at the local authority level, including affordable housing policy.

58. The Wider Bristol SHMA 2015 prepared by Opinion Research Services covers the unitary authorities (UAs) of Bristol City, South Gloucestershire and North Somerset. Together these comprise the Wider Bristol Housing Market Area (Wider Bristol HMA), shown in Figure 3-1 below. The SHMA provides the evidence required to inform planning and housing policy over a 20 year Plan Period of 2016 to 2036 in accordance with Government planning policy and guidance (NPPF and PPG). Volume 1 of the SHMA, published in June 2015, reported on the full objectively assessed need (OAN). Volume 2 of the SHMA, published in November 2015, sets out technical information such as the need for all types of housing including the breakdown of affordable housing needs by tenure and type.

59. While these are obviously credible sources, and their statistical robustness can be assumed, their usefulness also depends on whether the Housing Market Area (HMA) in the SHMA can be used as a proxy for the NA.

60. This requires an assessment of the extent to which the demographic characteristics and economic trends that it identifies for the HMA are common to the NA.

61. PPG defines a HMA 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."*[20] It goes on to remark that *"establishing the assessment area may identify smaller sub-markets with specific features, and it may be appropriate to investigate these specifically in order to create a detailed picture of local need. It is important also to recognise that there are 'market segments', i.e. not all housing types or economic development have the same appeal to different occupants."*[21]

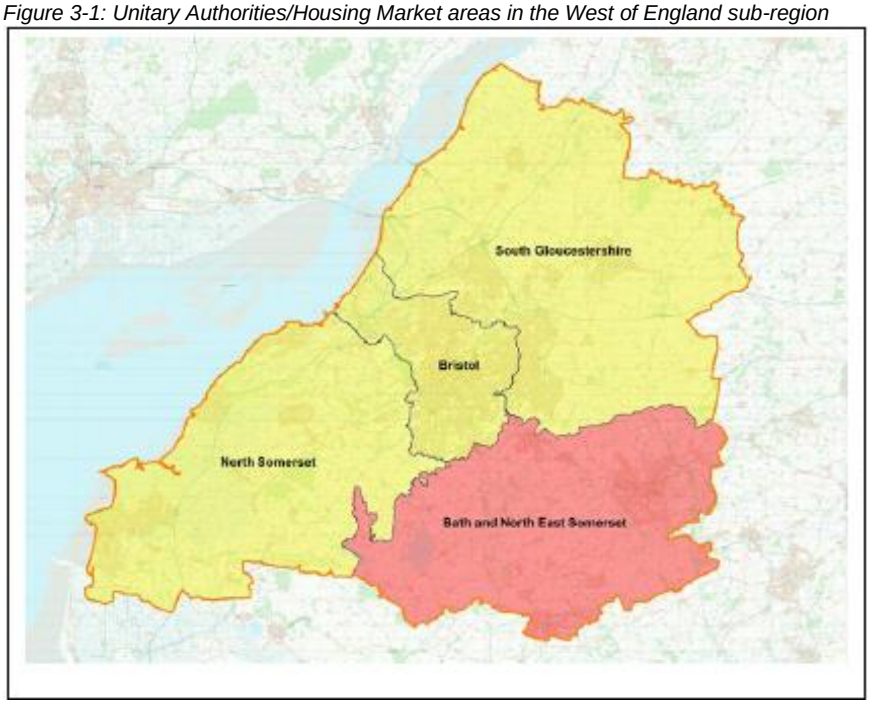
62. PPG therefore sets two principle tests for identifying a functional HMA: patterns of demand for housing and commuting relationships. The first can be denoted by the concept of 'self-containment,' the degree to which household moves are 'contained' within a certain geographical area, and the second by 'travel to work areas.' It is generally assumed that a strong HMA will show at least 70% of household moves and commuting journeys taking place within its area.

63. Analysis from the Wider Bristol SHMA 2015 (Volume 1) has demonstrated that the Wider Bristol HMA satisfies the appropriate requirements in terms of travel to work and migration flows. In terms of workers, 85.2% of the workplace population live in the area, 89% of the resident population work in the area: both exceed the PPG threshold of 66.7%. In terms of movers, 74.9% previously lived in the area and 73.5% of movers stayed in the area: both exceed the 70% proportion that PPG considers typical.

64. Regarding Oldbury, about 83% of the resident population aged 16 and over in employment (excluding those 'working from home' and 'other') work in the Wider Bristol HMA while only 46% of the workplace population live in the HMA (as a substantial proportion of them live in Stroud). In terms of movers, there is no data on migration flows available at the Parish level. It is therefore not possible to establish whether the housing moves of Oldbury residents occur within the HMA. However, we believe that the fact that 83% of NA resident population works in the HMA represents sufficient evidence to assert that Oldbury is sufficiently integrated into the HMA.

[20] PPG Paragraph: 010 Reference ID: 2a-010-20140306 Revision date: 06 03 2014
[21] PPG Paragraph: 008 Reference ID: 2a-008-20140306 Revision date: 06 03 2014

Figure 3-1: Unitary Authorities/Housing Market areas in the West of England sub-region



Source: Wider Bristol HMA Strategic Housing Market Assessment: Volume 1 July 2015. Diagram 3b

65. The SHMA studies draw upon a range of data including population and demographic projections, housing market transactions and employment scenarios to derive the objectively-assessed housing needs for the UAA. As such, it contains a number of points of relevance when determining housing needs within the NA.

66. This provides a strong starting point for policy development that aims to build on and add local specificity to those of the UA by enabling a comparison to be made with Parish-level data (gathered as part of the preparation of this study), given that such an exercise reveals contrasts as well as similarities.

3.3.2 Other relevant data

67. In addition to the SHMA studies, we have gathered a range of other data sources to ensure our study is robust for the purposes of developing policy at the neighbourhood plan level. These include data drawn from Census 2001 and 2011 and the affordable housing waiting list for South Gloucestershire, provided by SGUA. We also looked at data on housing benefits claimants provided by the Department for Work and Pensions (DWP) to inform our tenure and affordability section.

68. Furthermore, to assess the housing market in Oldbury, data from the Land Registry was analysed. This data provides price paid, housing types and date of transaction information which allows housing market trends to be identified. This data was collected for the all of the 75 postcode sub-areas within the BS35 sector that are contained within the NA boundary to create a database including all housing transactions registered with the Land Registry between January 1st 2007 and December 31st 2016. This was also done for the wider BS35 postcode area and for the whole of South Gloucestershire. These areas are used within the Market Signals section and also to inform our response to RQ1.

69. Finally, we also reviewed documents provided by the OSPC such as the Parish Plan 2012 and material used for the community engagement event held on the 27th January 2018 in Oldbury, which also presented the results from the spring 2017 questionnaire.

4. Quantity

RQ1: What quantity of housing in the NA is appropriate over the Plan Period?

70. We have estimated the quantity of housing needed in the NA according to four different sources; these are:

    5. South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013)
    6. New South Gloucestershire Local Plan – 2018-2036 (2018)
    7. MHCLG household projections
    8. Dwelling growth between 2001 and 2017

71. We have produced two separate projections: one which reflects the whole Neighbourhood Area and the other Oldbury-on-Severn only. The settlement boundary for Oldbury-on-Severn was shown in Figure 2-2. However, as it is not possible to retrieve ONS Census data at this scale, we have used the output area E00075593 (see Figure 4-1 below) as a proxy. It should be noted that the QB estimated the number of dwellings within the settlement boundary to be 132, whilst there were 152 dwellings in the output area E00075593 in 2011. As a consequence, the Housing Needs Figure might be slightly higher and it is reasonable to suggest a lower figure.

Figure 4-1: Output area E00075593, proxy for the Oldbury-on-Severn settlement

Source: ONS

72. The calculations for the whole Neighbourhood Area are presented below (does not include calculations for the Oldbury settlement, the logic of the calculations remains the same).

4.1 South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013)

73. SGUA puts forward a housing requirement of 22,545 additional dwellings for the UA over the Plan Period between 2013 and 2027. Although Policy CS5 does not really apply to Oldbury, it is an interesting exercise to see what sort of allocation Oldbury could have received if the flood risk had not been perceived as an obstacle. The proportional share for Oldbury can be calculated based on the proportion of dwellings in the NA compared to the UA. At the time of the last Census (2011) there were 109,984 dwellings across the UA, and 319 dwellings in the NA, or 0.29% of all dwellings in the UAA. Therefore, 65 dwellings (0.29% of 22,545*)* should be allocated as the 'fair share' of the unitary authority target, equating to approximately 5 dwellings (rounded) per annum between 2013 and 2027.

74. In arriving at a final total for Oldbury, it is important to take into consideration that 9 dwellings were built between 2013 and 2017 in the NA.[22] Allowing for these completed dwellings, a housing target for Oldbury would be 56 dwellings (65 - 9) between 2018 and 2036 (NP Plan Period) or 3 dwellings (rounded) per annum.

[22] Oldbury Parish Completions April 2011 – March 2017, South Gloucestershire UA

4.2 New South Gloucestershire Local Plan (2018 – 2036) (2018)

75. We have decided to include the housing target set in the emerging local plan as part of our calculation as it is currently under Regulation 18 and is getting closer to adoption. The WoE UAs put forward a housing requirement of 32,500 additional dwellings for SGUA over the Plan Period between 2018 and 2036. The proportional share for Oldbury can be calculated based on the proportion of dwellings in the NA compared to the UA. At the time of the last Census (2011) there were 109,984 dwellings across the UA, and 319 dwellings in the NA, or 0.29% of all dwellings in the UAA. Therefore, 94 dwellings (0.29% of 32,500*)* should be allocated as the 'fair share' of the UA target, equating to approximately 5 dwellings (rounded) per annum between 2018 and 2036. A housing target for Oldbury would be 94 dwellings between 2018 and 2036 (NP Plan-period) or 5 dwellings (rounded) per annum.

4.3 Wider Bristol SHMA 2015

76. 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 OAN[23]), 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.

77. The SHMA presents an appropriate starting point for deriving need at the NA level because it is an authoritative source of evidence and, importantly, because it takes into account the latest population and household projections, as set out in the 2014 Sub-National Population Projections on which the Household Projections are based, which the PPG guidance suggests should be taken as a 'starting point' in determining need at the local authority level.

78. In the case of Oldbury, the most up-to-date OAN for housing is provided in the Wider Bristol SHMA published in 2015. The SHMA identified the OAN for housing in the Wider Bristol HMA to be 85,000 dwellings over the 20-year Plan Period 2016-36, equivalent to an average of 4,250 dwellings per year.

79. To calculate the NA's 'fair share' of this target, it is again possible to use the NA's proportion of dwellings in the UAA. However, there is no OAN available at the UA level. Using a 'fair share' of the target based on the NA's proportion of dwellings in the Wider Bristol HMA (0.08%) would produce a figure of dwellings over the Plan Period, which is too low to be incorporated into our calculation.

4.4 MHCLG Household Projections

80. The Ministry for Housing, Communities and Local Government (MHCLG) periodically publishes household projections. The PPG recommends that these household projections should form the starting point for the assessment of housing needs.

81. The most recent (2014-based) household projections were published in July 2016[24], and extend to 2039. Although population projections are only available at a local authority level, a calculation of the share for the NA is nevertheless possible for the household projections based on the NA's household numbers in the 2011 Census.

82. At the 2011 Census, South Gloucestershire had 107,538 households and the NA 310 households, or 0.29% of the total (rounded).

83. In the 2014-based household projections, the projection for 2036 is 136,396 households in South Gloucestershire or an additional 28,858 households. Assuming it continues to form 0.29% of the UA total, the NA's total number of households in 2036 would be 393 (rounded); therefore 83 new households will form in the NA between 2011 and 2036 (or a rate of growth of 3 households per year).

84. The number of households does not, however, equate precisely to the number of dwellings, with the latter slightly higher in most places. The NA is no exception; in the 2011 Census, there were 310 households but 319 dwellings. This gives a ratio of 0.97 households per dwelling. In the case of NA, then, a projection of 83 new households (between 2011 and 2036) translates into a need for 86 dwellings (83/0.97, rounded to the nearest whole number).

85. These figures are based on the assumption that the 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,

[23] 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 needs (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.

[24] See 2014-based MHCLG Household Projections live tables at https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections

the 2014-based household projections may need to be 'rebased' for accuracy. The mid-2016 population estimates give the actual number of people in the UAA at that point, meaning the difference between the estimated and the previously projected number of households can to be taken into account in future projections.

86. The 2014-based household projections were based on the 2014-based Sub-National Population Projections, which estimated that by 2016 there would be 276,890 people in South Gloucestershire. The mid-2016 estimates show that based on the latest information there were estimated to be 277,623 people, which is higher than the projections by 733 people. Assuming average household sizes remain constant (in 2011 there were an average of 2.44 people per household, obtained by dividing population by number of households) this equates to 300 additional households across South Gloucestershire.

87. Taking 136,696 (136,396 + 300) as our revised household number in 2036 and, assuming it continues to form 0.29%, of the UA total, the NA's total number of households in 2036 would be 394 (rounded), producing a revised growth in the number of households between 2011 and 2036 of 84.

88. Taking into account the disparity between household numbers and dwelling numbers, a projection of 84 new households between 2011 and 2036 translates into a need for 86 dwellings. Netting off the 14 dwellings completed between 2011 and 2017, we arrive at a re-based household projections-derived dwellings figure of 72 dwellings (rounded) until 2036 or 4 dpa (rounded).

89. 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 UA and hence any difference between this figure and a future Local Plan-derived figure.

4.5 Dwelling growth 2001 – 2011

90. 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 45 dwellings in the NA between these two dates, or an average annual rate of increase of 5 homes. Multiplying this annual figure by the number of years from 2018 until the end of the Plan Period would generate a figure of 81 homes.

4.6 Dwelling growth since 2011

91. 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 UA. As we have seen, between 2011 and 2017, 14 new dwellings were completed. This equates to an annual rate of delivery of 2 homes. If this rate of delivery was continued to 2036, this would equate to a projection of 42 homes from 2018 to the end of the Plan Period.

4.7 Dwelling growth 2001-2017

92. 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 2017; this comes to 59 (45 + 14) dwellings. Expressed as an annual average rate, this is 4 dpa. This produces a projection derived from homes growth between 2001 and 2017 of 66 homes over the Plan Period of 2018-2036.

4.8 The Standard Methodology

93. On September 14th 2017, the MHCLG published 'Planning for the right homes in the right places: consultation proposals' (the consultation proposals), a consultation on a new proposed Standard Methodology for Assessing Housing needs (SMAHN) for arriving at an OAN for housing for individual local authorities, thus avoiding both the expense of producing complex SHMAs and the disagreements surrounding their methodologies. MHCLG has stated that *"this consultation sets out a number of proposals to reform the planning system"* including *"how neighbourhood planning groups can have greater certainty on the level of housing needs to plan for*".[25]

94. It is important to consider the implications of this emerging policy guidance for potential housing needs calculations in the NA. Therefore, what follows is an assessment of the NA's housing needs based on the new proposed methodology. This projection is included for information only and has not been used in this assessment, bearing in

[25] https://www.gov.uk/government/consultations/planning-for-the-right-homes-in-the-right-places-consultation-proposals

mind that the consultation makes clear that UAs will have the option of using alternative methods of calculating their OAN, so long as the number they arrive at exceeds that produced by the new Standard Methodology.

95. Proposed updates to the PPG include a requirement that UAs provide a housing needs figure to neighbourhood planning groups, and that they may do this by making a reasoned judgement based on the settlement strategy and housing allocations in their plan, so long as the Local Plan provides a sufficiently up-to-date basis to do so.[26] The starting point for using the SMAHN for the neighbourhood level is therefore whether the current Local Plan was adopted before or after the introduction of the NPPF.

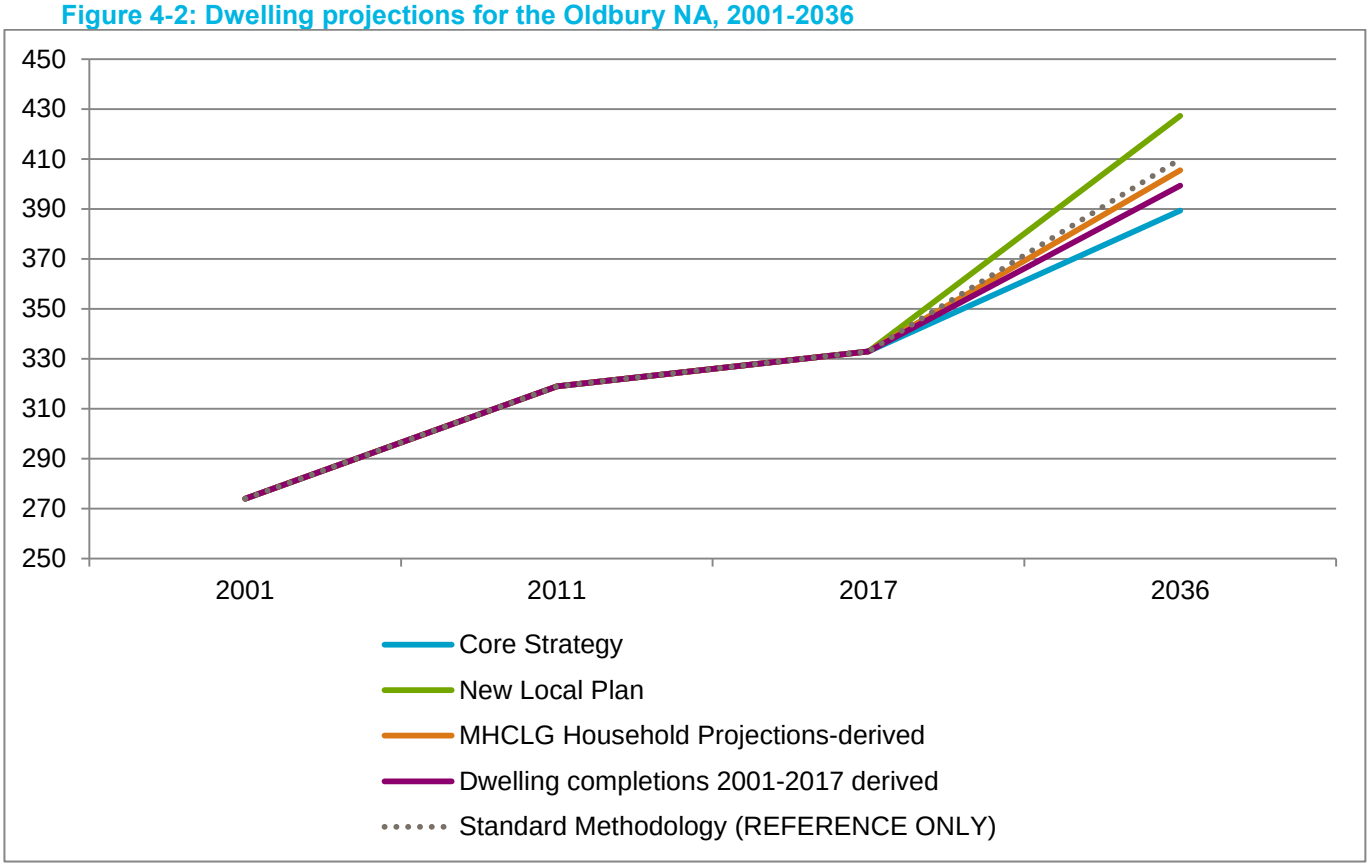
96. In the case of South Gloucestershire, the South Gloucestershire Local Plan Core Strategy was adopted in 2013, and therefore provides an up-to-date basis for arriving at a housing needs figure for the NA. The indicative assessment using the Standard Methodology for Assessing Housing needs (SMAHN formula is 1,474 dwellings per annum for SGUA. This is a fall on the current number of 1,610 set out in the Core Strategy of around 9%, and suggests there would be a reduction of 136 dwellings over the Plan Period from 2018 to 2036.

97. A new OAN for housing of 1,474 dwellings would produce a revised projection for the NA of 77 or 4 dwellings per annum.

4.9 Interim housing needs figure

98. Figure 4-2 and Figure 4-3 below and on the next page respectively compare the total number of homes under each of the projections we have identified for Oldbury NA and the Oldbury settlement starting from 2001 and ending at the end of the Plan Period, in 2036.

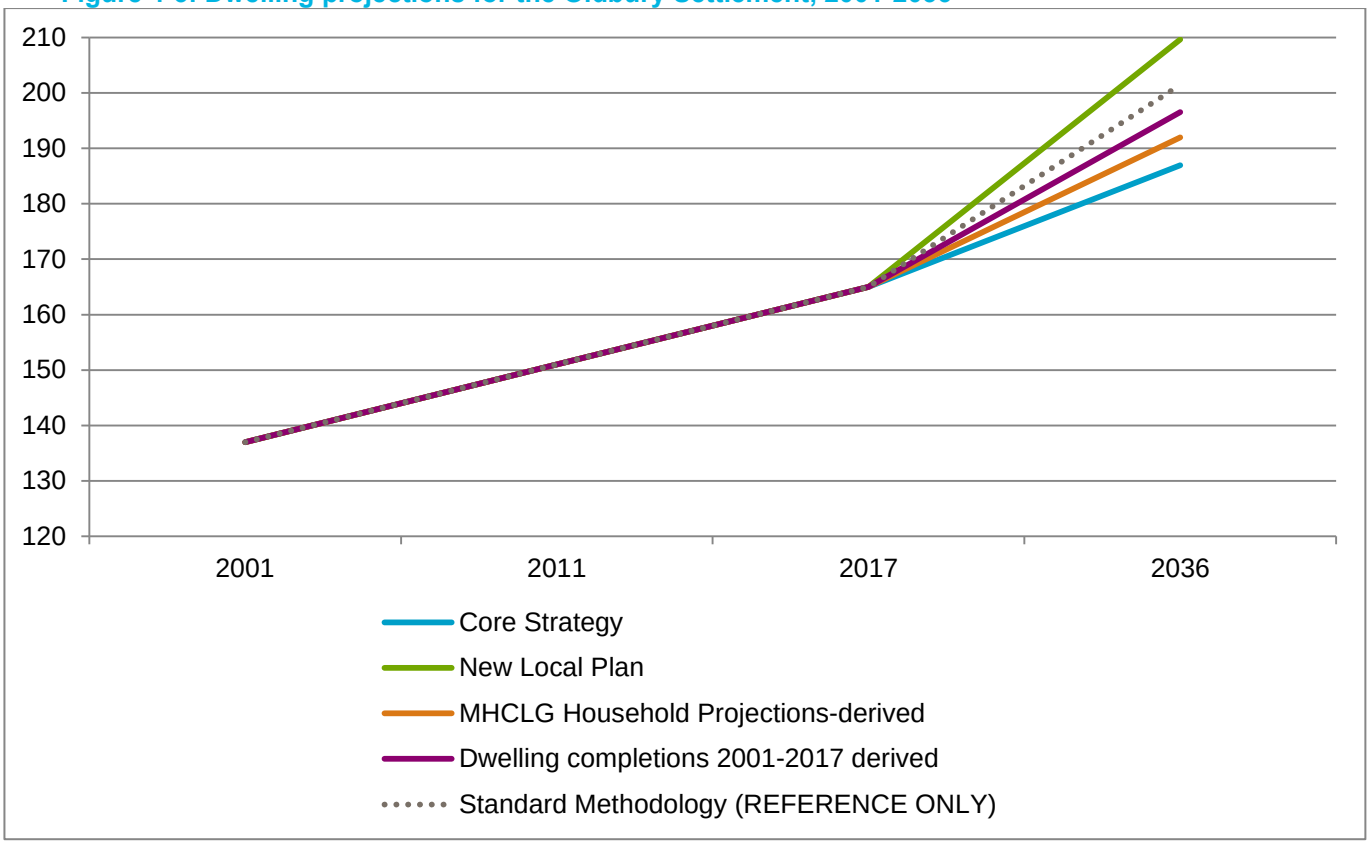
Figure 4-2: Dwelling projections for the Oldbury NA, 2001-2036



Source: AECOM Calculations

[26] MHCLG, planning for the right homes in the right places: consultation proposals, page 31

Figure 4-3: Dwelling projections for the Oldbury Settlement, 2001-2036



Source: AECOM Calculations

99. To arrive at an overall projection for the quantity of housing to be delivered in the NA over the Plan Period, we have averaged some of the projections set out above. However, the following should be noted:

100. The dwelling completions 2001-2017-derived projection is based to a significant extent on the supply side. To reflect the fact that HNAs should not be constrained by supply-side considerations, this projection has not been used for the purpose of arriving at an overall projection.

101. The standard methodology-derived projection is presented for reference only and is also not included in the overall calculation.

102. Although the Local Plan-derived projection represents a balance between demand and supply, it has been included in the overall calculation to reflect its importance with regard to Basic Condition E. 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. For example, if the Local Plan was out-of-date in planning terms, or another projection was a clear outlier. In this case, although Policy CS5 does not really apply to Oldbury, and the emerging Local Plan has not yet been adopted, it is an interesting exercise to see what sort of allocation Oldbury could have received if the flood risk or other development constraints were not obstacles to growth.

103. Table 4-1 below shows these projections and the average of the projections used to arrive at an interim housing needs figure for both the NA and the settlement.

Table 4-1: Arriving at the interim housing needs figure

	Projection	Total housing needs in the Oldbury NA	Total housing needs in the Oldbury settlement
1	Core Strategy	56	22
2	New Local Plan	94	45
3	MHCLG household projections fair share	72	27
4	Home growth	66	32
5	Standard methodology fair share	77	36
	Average of 1, 2 and 3	**74**	**31**

104. Therefore, the projections outlined above produce an interim housing needs figure of **74 dwellings in the Oldbury NA and 31 dwellings in the Oldbury settlement by 2036.** This HNF does not take into account policies relevant to housing delivery that may constrain supply.

105. Yet, Oldbury and the wider Parish are mostly covered by flood risk areas on the national database. For this reason, it is excluded from growth, in line with the NPPF Paragraph 100: *"Inappropriate development in areas at risk of flooding should be avoided by directing development away from areas at highest risk*". Although supply and planning constraints are not part of the HNA exercise, it is crucial to acknowledge its impact on the likely amount of housing to be built in the Parish. Flooding events occur frequently within the boundaries of the NA, and as a result a Proportionate Strategic Flood Risk was produced to understand flood risks locally. This assessment was heavily relied upon by the AECOM Site Assessment work. Despite the aforementioned constraints, the village has now been accepted for some development. Although the Core Strategy did not expect or encourage any contribution from the rural areas other than windfalls and agricultural conversions, the emerging Local Plan suggests that a contribution for non-strategic growth in the rural areas is possible.

106. Therefore, **given the constraints mentioned above the separate projection for the Oldbury settlement alone, which produced an HNF of 31 dwelling up to 2036, is seen as a more realistic HNF than the one for the whole NA.**

107. Following the presentation and comparison of the quantitative projections and the derivation of an interim housing needs figure, the next step, in line with the PPG approach is to assess the interim housing needs figure (or range) against market signals which may raise or lower the housing needs figure as appropriate[27]. This is done in Section 7 'Market Signals'.

[27] *"The housing needs 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."*

5. Tenure and Affordable Housing

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

108. The provision of affordable housing is a critical issue for most communities, and needs to be understood in relation to other tenures of housing. 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, 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 NA's housing stock.[28]

5.1 Definitional issues

109. It is necessary at this stage of the study to make clear the distinction between affordable homes as 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 current National Planning Policy Framework (NPPF): social, affordable rented and various forms of intermediate housing.[29] To distinguish this from the colloquial definition, we refer to the latter as Affordable Market Housing (AMH).

110. In this paragraph we review the tenures that appear under the new definition of Affordable Housing set out in the consultation draft of the NPPF published in March 2018 (henceforward, NPPF18). These revisions make clear the Government's commitment to home ownership but recognise the important role of affordable rent for those not currently seeking home ownership. The changes remove references to 'social rented,' although its definition remains, those dwellings where 'rent is set in accordance with the Government's rent policy'. The revisions seek to broaden the definition of affordable housing to include a range of low cost housing opportunities for those aspiring to own a home, including starter homes. **For the purposes of this HNA we assume this new definition will be introduced following the consultation process broadly unchanged.**

111. The NPPF18 puts in place the revised definition of Affordable Housing envisaged in the Housing White Paper[30] 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/or is for essential local workers; and which complies with one or more of the following definitions':

a) ***Affordable housing for rent:*** *meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).*

b) ***Starter homes:*** *is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute at the time of plan preparation or decision-making. Income restrictions should be used to limit a household's eligibility to purchase a starter home to those who have maximum household incomes of £80,000 a year or less (or £90,000 a year or less in Greater London)*

c) ***Discounted market sales housing:*** *is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.*

d) ***Other affordable routes to home ownership:*** *is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale and rent to buy (which includes a period of intermediate rent). Where public*

[28] PPG Paragraph: 021 Reference ID: 2a-021-20160401
[29] At the time of writing the 2018 version of the NPPF is out for consultation and includes the following tenures, Affordable housing for rent, Starter homes, Discounted market sales housing, and other affordable routes to home ownership.
[30] MHCLG (2017) Fixing our Broken Housing Market (para A.120)

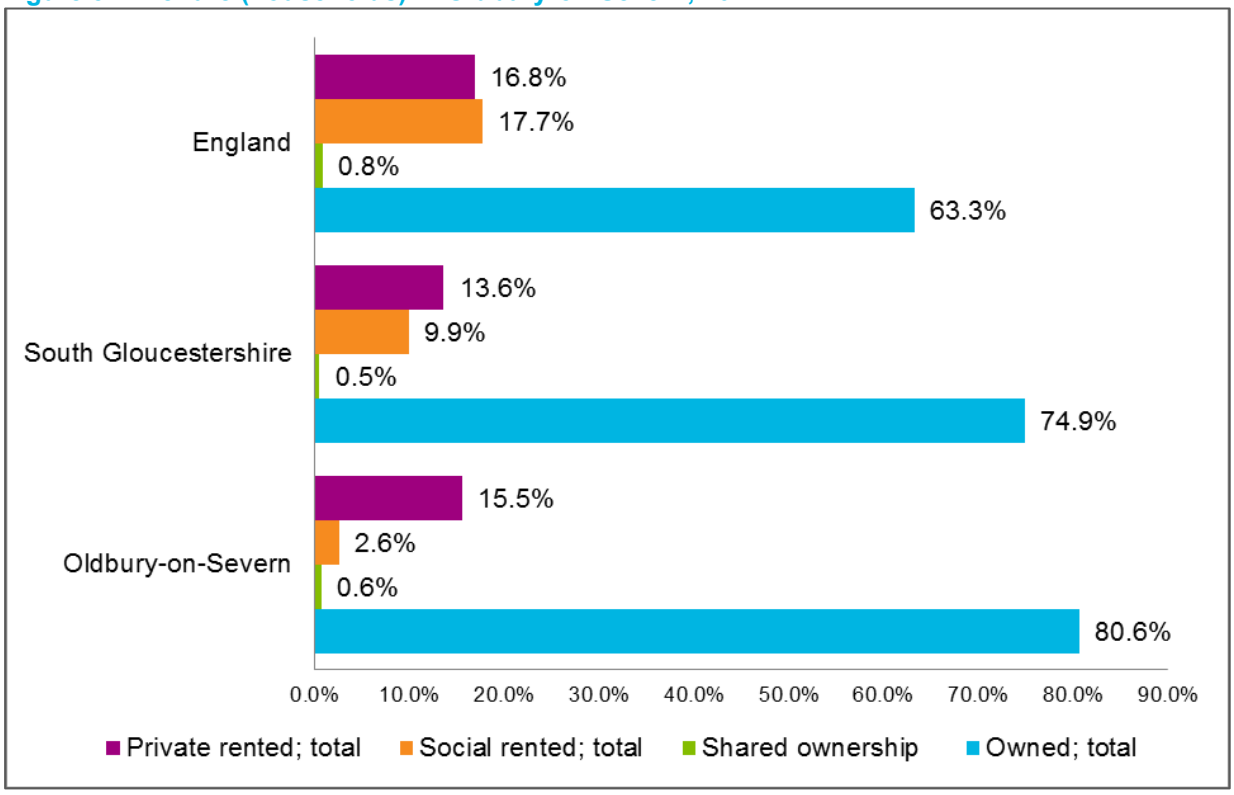
grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.[31]

112. In paragraph 65 of the NPPF18, Government introduces a recommendation that 'where major housing development is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership'. In line with PPG[32], the assumption should be that 'major housing development' can be defined as sites of more than 10 units, and that affordable home ownership includes Starter Homes, shared ownership homes and homes available for discount market sale.

5.2 Current tenure profile

113. It is necessary to present a picture of tenure in the NA based on the most recent reliable data. Figure 5-1 below presents Census data from 2011 that shows a higher level of home ownership in the NA than observed in the UAA and England. The data also suggests the importance of the private rented sector (PRS). Despite being lower than the 16.8% found in England, its proportion is higher than in the UAA. This is unusual as rural Parishes tend to have low levels of PRS. Finally, the balance of social rented sector is very low compared to the UA (2.6% against 9.9%).

Figure 5-1: Tenure (households) in Oldbury-on-Severn, 2011



Source: ONS 2011, AECOM Calculations

114.

115. Table 5-1 on the following page allows us to take a longitudinal perspective, identifying how the tenure profile of the NA has changed between the last two censuses. From this, it is possible to detect a definite trend towards more private rented tenures; this tenure has increased by 71.4% over the inter-censual period. In South Gloucestershire, the PRS has grown by 163.6% which is even more significant. While this suggests demand for PRS housing may be weaker in the NA than the UA, this may be the result of a lack of suitable supply.

116. Home ownership has continued to grow, illustrating a stable and continuous demand for this tenure in the NA, while it has declined in the UAA, probably in favour of the PRS. Finally, it is worth noting that the level of social rented tenures has dropped, further eroding the limited provision of Affordable Housing in the NA (8 households were socially renting in 2011).

[31] NPPF18, page 62
[32] PPG 031 Reference ID: 23b-031-20161116

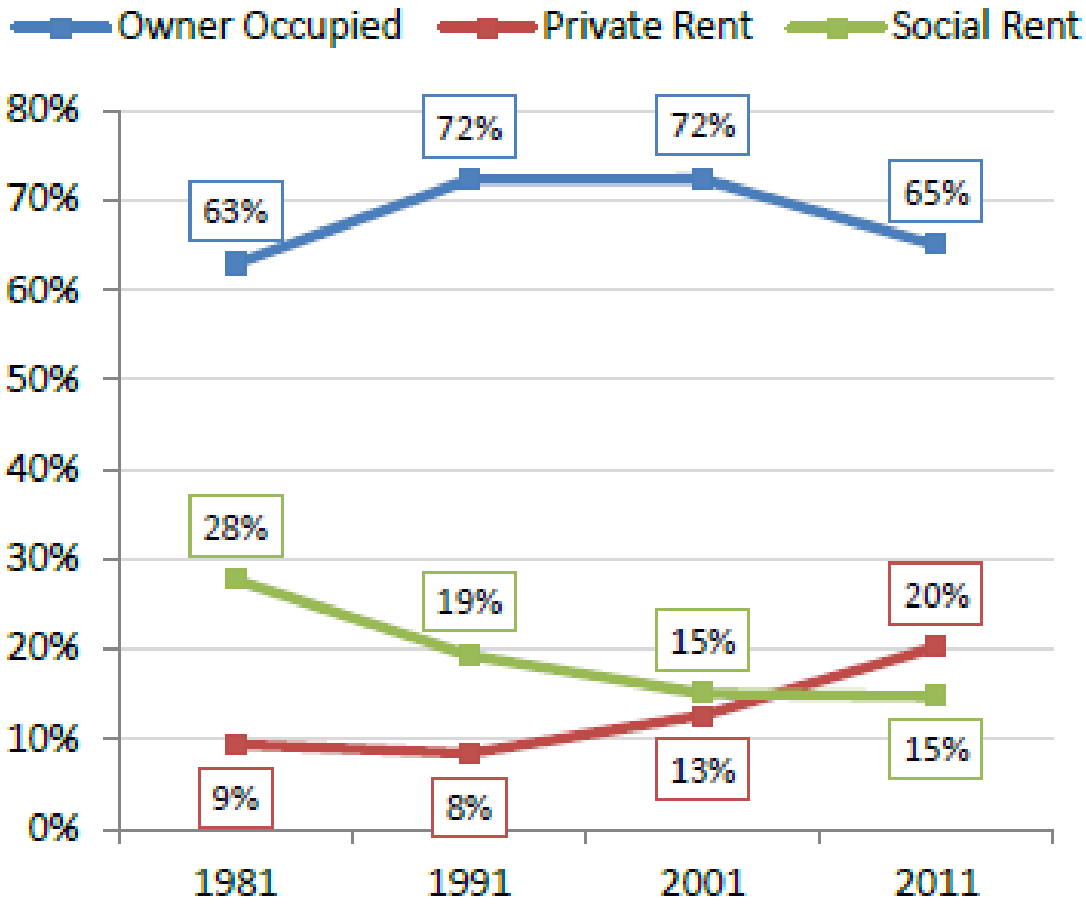
Table 5-1: Rates of tenure change in Oldbury-on-Severn, 2001-2011

Tenure	Oldbury-on-Severn	South Gloucestershire	England
Owned; total	16.8%	-0.2%	-0.6%
Shared ownership	-33.3%	-1.4%	30.0%
Social rented; total	-27.3%	9.3%	-0.9%
Private rented; total	71.4%	163.6%	82.4%

Source: ONS 2001-2011, AECOM Calculations

117. Furthermore, the SHMA (Volume 2) has analysed the trends of tenure mix for Wider Bristol over the last thirty years and identified a substantial increase in the number of private tenants (at the expense of the Social Rented Sector) as shown in Figure 5-2 below.

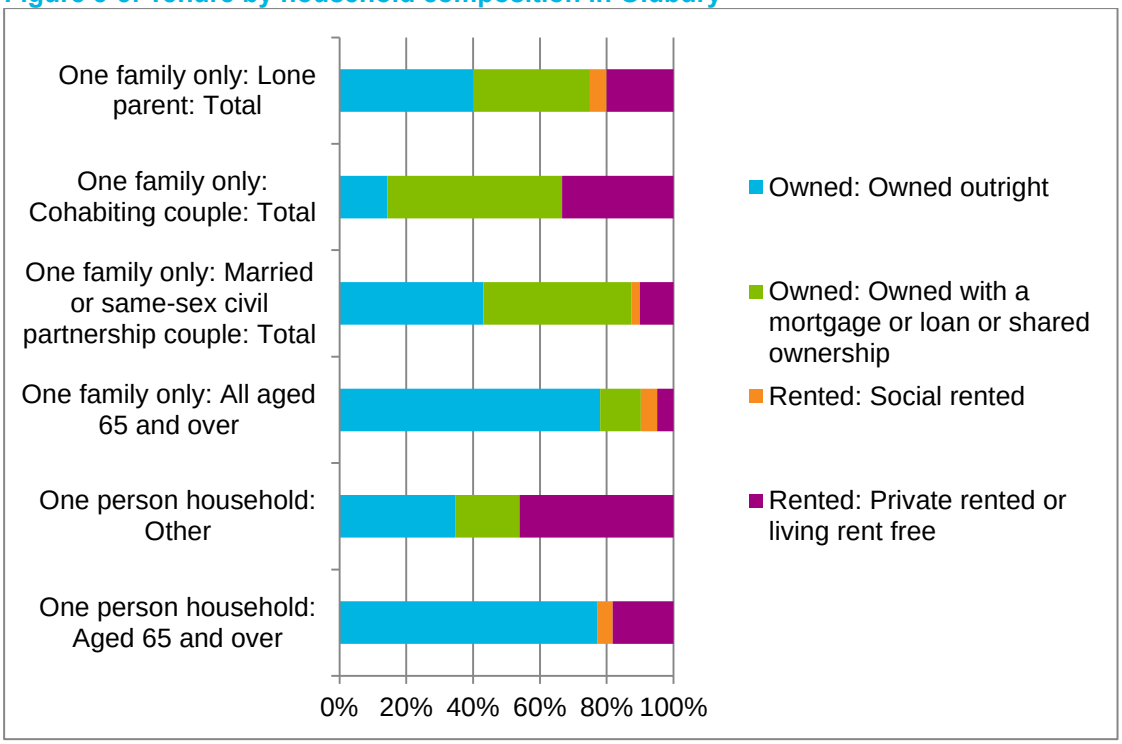
Figure 5-2: Percentage of households by tenure 1981-2011



Source: Wider Bristol SHMA: Volume 2 November 2015

118. In Figure 5-3 on the following page, we present tenures occupied by household types in the NA in 2011. The data reveals that a higher proportion of cohabiting couples, lone parents and one person households below 65 fall into the PRS. The data provided a breakdown of home ownership between owned outright and owned with a mortgage or loan or shared ownership. Older households (over 65 years-old) are the most likely to possess a property outright. However, a substantial number of other household types, including lone parents, own their homes without a mortgage. This could suggest a certain affluence of households in Oldbury.

Figure 5-3: Tenure by household composition in Oldbury



Source: ONS 2011 (LC4101EW)

Conclusion

119. Home ownership is the dominant tenure in the NA, which is generally to be expected in rural villages. Despite high levels of home ownership, there are proportionally more households in the PRS than in the UAA. This tenure has indeed experienced the most significant increase in recent years, not only in the NA but also across the whole South Gloucestershire. Additional evidence shows that household types falling into the PRS are disproportionately likely to be one person households aged below 65 and young couples. Finally, the social rented sector is close to being insignificant, as only 8 tenants occupied that tenure in 2008.

5.3 Indicators of affordable housing needs

120. In order to understand whether the tenure profile of the current stock reflects the needs of the population over the Plan Period, it is necessary to consider whether this profile enables different target groups to access dwellings of a suitable tenure given their composition or whether there is a significant misalignment between need and the mix of tenures available within the current housing stock. This is considered more closely through an examination of affordability.

5.3.1 Affordability

121. Affordability considers the relationship between the price of a good and the money to which the individual has access to purchase it. It is the most significant factor affecting the overall need for Affordable Housing (AH).

122. To determine levels of affordability, we consider three primary indicators, firstly affordability of housing expressed as a multiple of household income, known as the 'Affordability Ratio'. Secondly 'Income Thresholds', which denotes the maximum share of a family's income that should be spent on accommodation costs, and thirdly 'Purchase Thresholds', which denotes the standard household income requirement to access mortgage products.

Affordability Ratio

123. In line with the PPG, we have considered evidence of affordability by looking specifically at the relationship between lower quartile house prices and incomes, as expressed in the Lower Quartile Affordability Ratio (LQAR). While this is a relatively crude measure of affordability, as it does not take account of the cost of servicing mortgage debt, it is a useful primary measure for benchmarking affordability changes over time. This indicator is also helpful both as a way of understanding the extent to which those on lower incomes can access entry-level houses for sale and the relative affordability of housing in the NA compared to other places.

124. Entry-level dwellings may be understood as suitable for a household comprising two or three individuals. In order to conform with Government guidance on overcrowding[33], such a home would require three habitable rooms (a flat or house with two bedrooms).

125. To ascertain the value of an entry-level property in Oldbury, data has been drawn from the website home.co.uk. Only one two-bedroom dwelling was advertised for sale in March 2018. It offers modest family accommodation and therefore conforms with the working definition of an 'entry-level' dwelling set out above. The value of this property was £225,000.

126. To sense-check this data we referred to house price data from other sources and used other assumptions of what entry-level means. Here our understanding of 'entry-level' refers to the lower quartile[34] (LQ) price paid for residential properties.[35] We have used Land Registry data to calculate the lower quartile house prices in Oldbury, the postcode BS35 (map shown in Figure 5-4 below) and South Gloucestershire.

Figure 5-4: BS35 Postcode area

Source: Google Maps

127. The lower quartile price paid for residential properties in Oldbury in 2017 was £390,000. The results for other geographies are presented in the following page in Table 5-2. That LQ house price for Oldbury is significantly higher than the ones for different geographies. Indeed, sales in Oldbury are dominated by detached and semi-detached properties, driving the average prices up. However, mid-sized dwellings corresponding to entry-level properties are sometimes available.

128. The cost for the single two-bedroom house advertised in Oldbury on home.co.uk compares to the LQ house price for the wider postcode code area (£225,000). £225,000 is, therefore, a good proxy for the price of entry-level properties.

129. However, to take into account the relative scarcity of these types of dwellings in the NA, we have averaged the value of LQ price paid in 2017 for Oldbury with that figure of £225,000, giving an estimate for an entry-level property in the NA of £307,000.

130. Houses are expensive in the NA compared to the UA and surrounding areas, mainly because of the scarcity of smaller dwellings. Detached and semi-detached homes, the most available types in the NA, are also more expensive in general.

[33] This is based in the notion of the 'room standard'. This indicates a dwelling is legally overcrowded if two people of the opposite sex have to share a room to sleep in (this does not apply when couples share a room). http://england.shelter.org.uk/housing_advice/repairs/overcrowding

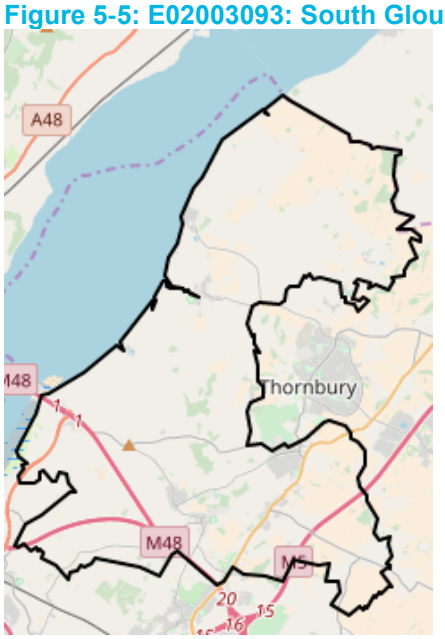
[34] The LQ house price is the price below which the cheapest 25% of houses may be bought and is a measure of 'entry-level' property in the area (cheaper, more affordable housing).

[35] If all properties sold in a year were ranked from highest to lowest, this would be the value halfway between the bottom and the middle.

131. As we have established entry level house prices, we are in a position to calculate the LQAR for Oldbury which is arrived at by dividing the estimated entry level house-prices by the mean net household income.[36]

132. As household income data at the Parish level is not available, we have used estimates of average household incomes for 2013/14, published by the ONS at the Middle-layer Super Output Area. One must be aware that the selected area used to obtain estimates of household average income is larger than the NA. This geography is shown in Figure 5-5 below.

Figure 5-5: E02003093: South Gloucestershire 004



Source: OpenStreetMap, NOMIS

133. We believe this data is a robust proxy, giving a more accurate picture than given by estimates of incomes at the UA level. The results of our calculations are presented in Table 5-2 below. It shows affordability pressures in the NA despite higher average income. If smaller dwellings were more widely available in Oldbury, affordability pressures would drop below the UA level.

Table 5-2: Ratio of lower quartile house prices to average net household incomes (LQAR) in Oldbury, 2017

Area	Mean Net Household Income (2014)	Lower Quartile House Price 2017	LQAR
Oldbury	**37,542.89**	307,000.00	8.2
Oldbury[37]	**Ibid.**	225,000.00	6.0
South Gloucestershire	33,061.86	210,000.00	6.4
England	31,704.00	149,000.00	4.7

Source: Land Registry, ONS, AECOM Calculations

Evolution of affordability

134. We have also considered the evolution of affordability to understand whether it is worsening or improving. To do so, we have mainly relied on 'Ratio of house price to residence-based earnings (lower quartile and median), 2002 to 2016' a dataset published by the ONS in March 2017.

135. The earnings data used to calculate the LQAR is based on individual income rather than household incomes; therefore, it cannot be directly compared to the LQAR calculations presented above in Table 5-5.

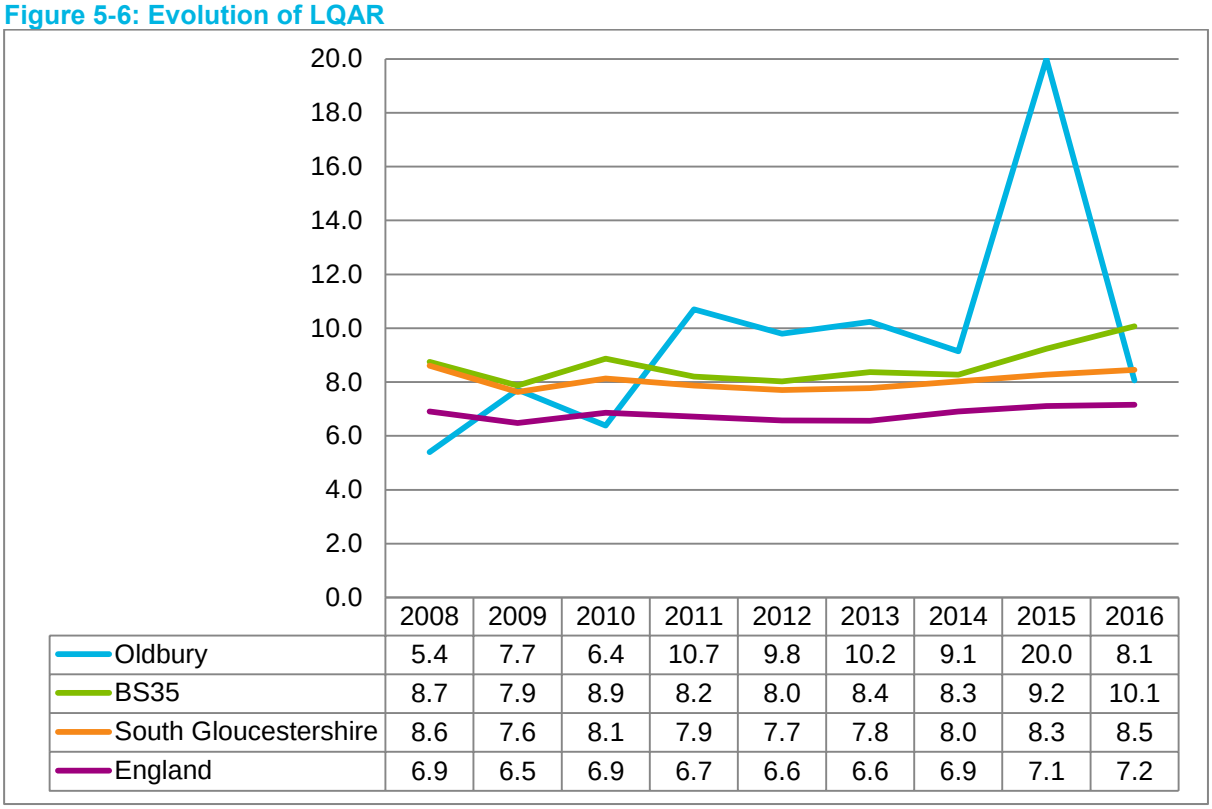
136. It is necessary to use income data for the whole of South Gloucestershire as a proxy to calculate the LQAR for Oldbury and for the postcode area BS35 (which we use as a proxy for Oldbury). Land Registry data has also been employed to calculate LQ house prices, as was done in Table 5-5. As seen in Figure 5-6 on the following page, the LQAR for Oldbury shows considerable fluctuations. This is due to the small sample size; in order to overcome this

[36] Although the LQAR is generally arrived at by dividing lower quartile house price by lower quartile income, we are using mean household income for the purpose of this exercise, as this is the only household income data is available. The affordability ratio calculated using our estimation of entry-level house price and mean household income is a useful proxy to understand affordability pressures in the area.
[37] Here we look at LQ house price, if smaller property types more widely available

difficulty, we have used house price data for the larger postcode area (BS35) as a proxy to calculate the LQAR for Oldbury.

137. The data shows that affordability in South Gloucestershire is higher than the national average but has remained stable. By comparison, there are more affordability pressures in BS35 than in the UAA. In 2016 LQ house price was 10.1 times the LQ income, while it was 8.5 times the LQ income in the rest of the UA. Moreover, affordability pressures have been worsening in the BS35 area since 2014.

Figure 5-6: Evolution of LQAR



	2008	2009	2010	2011	2012	2013	2014	2015	2016
Oldbury	5.4	7.7	6.4	10.7	9.8	10.2	9.1	20.0	8.1
BS35	8.7	7.9	8.9	8.2	8.0	8.4	8.3	9.2	10.1
South Gloucestershire	8.6	7.6	8.1	7.9	7.7	7.8	8.0	8.3	8.5
England	6.9	6.5	6.9	6.7	6.6	6.6	6.9	7.1	7.2

Source: ONS 2017, AECOM calculations

Income and purchase threshold

138. Additional ways to understand affordability are the notions of 'income' and 'purchase' thresholds. This suggests that only a certain proportion of a household's income should be spent on accommodation to retain enough money for other essential items as well as discretionary spending. Also, it allows comparing house sales and rental sectors.

- 'Purchase threshold' is calculated by netting 10% off the entry house price to reflect purchase deposit. The resulting cost is divided by 3.5 to reflect the standard household income requirement to access mortgage products.
- 'Income thresholds' are derived through the annualisation of the monthly rental cost. The approach taken is based on the work undertaken by the Resolution Foundation[38] – and cited by both Shelter and Joseph Rowntree Foundation – which suggests that a household should spend no more than **one third** of their disposable income on ongoing housing costs. Thus, this cost should not exceed 33% of annual household income.

139. The calculations are as follows:

Market sale homes

140. The annual cost of homeownership can be estimated. The purchase threshold for lower quartile property as of 2017 is £307,000 X 10% = 30,700; £307,000 – 30,700 = £276,300; Dividing this figure by 3.5 produces a threshold of **£78,943**

Private rented homes

An assessment of rental values was done for the Wider Bristol SHMA – Volume 2 which presented median private rent values for different local authority areas based on data from the Valuation Office Agency. The result of this

[38] Housing Pinched, Resolution Foundation, 2014

analysis is presented in Figure 5-7 on the following page. From the data, it appears that rents in South Gloucestershire are higher than in North Somerset but lower than in Bristol.

Figure 5-7: Weekly rent thresholds

Weekly Rent £	Median Private Rent	Maximum Local Housing Allowance	Affordable Rent (80% of median)	Target Social Rent
BRISTOL				
1 bedroom	128.80	115.20	103.00	67.20
2 bedrooms	161.00	144.20	128.80	78.80
3 bedrooms	195.50	167.30	156.40	87.80
4+ bedrooms	356.50	219.20	285.20	98.10
NORTH SOMERSET				
1 bedroom	105.80	96.90	84.60	64.80
2 bedrooms	132.20	121.20	105.80	74.50
3 bedrooms	159.80	150.00	127.90	85.10
4+ bedrooms	228.80	183.50	183.10	94.20
SOUTH GLOUCESTERSHIRE				
1 bedroom	120.70	115.20	96.60	66.00
2 bedrooms	149.50	144.20	119.60	75.60
3 bedrooms	178.20	167.30	142.60	84.20
4+ bedrooms	230.00	219.20	184.00	98.40

Source: Wider Bristol HMA Strategic Housing Market Assessment: Volume 2 November 2015

141. We have then attempted to conduct an analysis of rental values which is as up-to-date and as geographically accurate as possible.

142. Average and median private rents in four different areas were compared with each other: the NA, the wider post-code area, Thornbury and the UA. The results of our analysis is presented in the summary table below (For transparency, we have also attached in Appendix C the data we used to calculate average and median private rent in different locations).The table presents monthly rent.

Table 5-3: Private rent summary

Areas	Mean	Median	Source
South Gloucestershire	955	825	(VOA)
Thornbury	900	875	Home.co.uk
BS35	932	875	Home.co.uk
Oldbury	1058	850	Home.co.uk, AECOM calculations

143. As was the case for the sales market, rents are more expensive in the area covered by the postcode BS35 compared to the rest of the UA. It is likely that rents are more expensive in Oldbury than Thornbury, due to the relative scarcity of rented properties. Given similarities between Oldbury and its wider postcode area, we have used median rent for BS35 as a proxy for Oldbury as the data for Oldbury is not reliable due to a small sample size.

144. Thus, the estimated median rent for Oldbury is £875. The annualisation of this figure is £10,500. **The income threshold is therefore £31,818**. Despite a high income threshold, renting remains much more affordable than home ownership. This explains why households who typically have lower incomes (lone parents, one person households, young couples) are choosing the PRS as was evidenced in Figure 5-3.

Conclusion

145. Housing needs were considered via looking at different affordability indicators. To bring the evidence together, we have shown the relative scarcity of smaller properties, those which are more likely to be considered ‘entry-level’. This lack of smaller dwellings is driving affordability pressures up. We have estimated the entry-level property price to be around £307,000, which creates an LQAR of 8.2, higher than in the average for the UA.

146. Looking at different property types, it can be said that Oldbury is a relatively expensive area, compared to not only the national average but also to the mean for South Gloucestershire. Moreover, affordability pressures have been increasing in the NA, while they have remained stable across the UA. We have also examined affordability for sale market homes and rent market homes. The purchase and income thresholds were respectively £78,943and £31,818. As income data is not available, we cannot calculate the proportion of household unable to afford the different tenures.

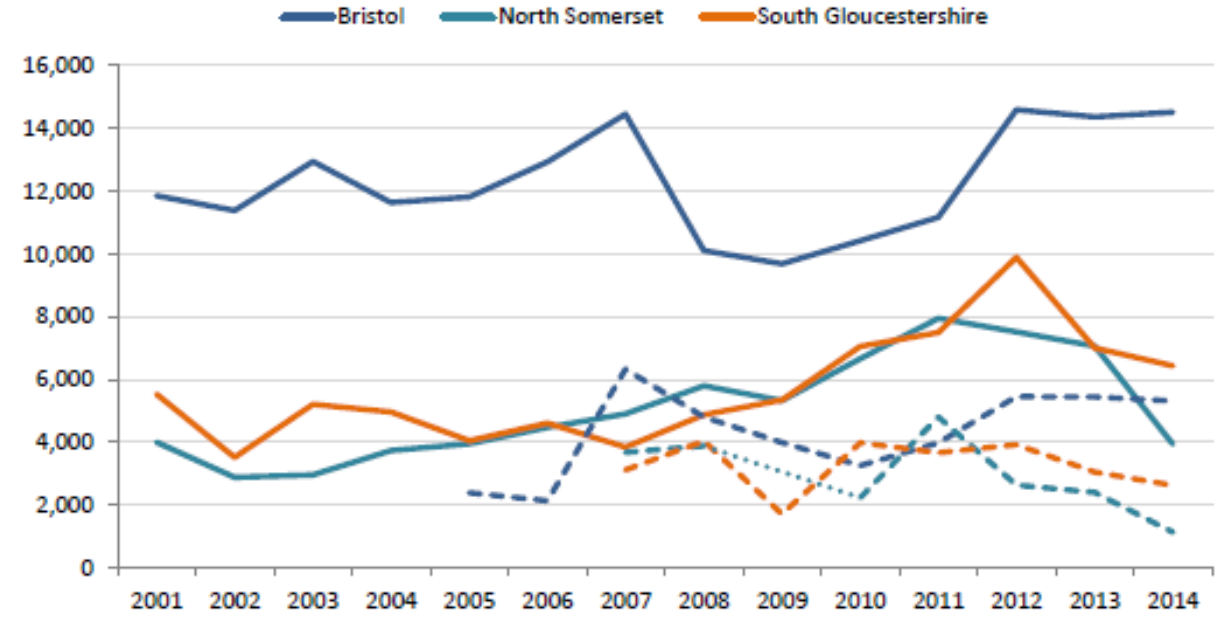
5.3.2 Housing waiting list and housing benefits data

Housing waiting list

147. So far, we have considered housing needs based on a statistical understanding of affordability derived from household income and house prices. A necessary additional component to quantify need for AH in the NA is identifiable through demand expressed in entries on a housing needs register. This number would express an existing unmet need for AH.

148. Figure 5-8 below shows the trends in households on the housing register over the period since 2001. The overall number of households on the housing register remained at similar levels over the period in South Gloucestershire. In 2014, households were at the same level as in 2001 (6,400). More recent data shared with us by the UA suggests that this number has dropped to 4,051 in 2017.

Figure 5-8: Number of household on the UA housing register 2001-14



Source: Wider Bristol HMA Strategic Housing Market Assessment: Volume 1 July 2015

149. The waiting list is divided into priority bandings according to urgency of needs. According to the SHMA, the waiting list shows the total numbers of households on the local authority housing register but also the number recorded in a 'reasonable preference category'.[39] There were 4051 households on the housing register from 1st March 2018, of those, 4 state that Oldbury-on-Severn is their first choice area. We have discounted 2 of those from calculations of immediate housing needs, as they didn't fall within a reasonable preference category. Indeed, households in these categories tend to be on the waiting list more as an insurance policy against future need, rather than in immediate or urgent need.

150. As we have seen in para. 29, the current adopted Core Strategy sets out policy as regards affordable housing. Policy CS18 states that the UA will seek a target of 35% of all housing to be affordable.

[39] Reasonable preference categories are defined in the Housing Act 1996, which requires "reasonable preference" for housing to be given to people who are:
- Legally homeless;
- Living in unsatisfactory housing (as defined by the Housing Act 2004);
- Need to move on medical/welfare grounds; or
- Need to move to a particular area to avoid hardship.

151. For the purposes of this exercise, we assume that all 78 dwellings (the quantity of housing to be built in the NA we have deemed appropriate) are delivered on sites where the target of 35% applies. This will produce a total of 26 AH over the Plan Period.

152. Although the waiting list is only a snapshot in time, assuming the Parish is successful in achieving the dwelling numbers put forward in this HNA, there does not appear to be a requirement for the Neighbourhood Plan to set its own affordable housing target on the basis of this data. Nevertheless, it may reference the waiting list and mention the need to work closely with South Gloucestershire to ensure the needs of those on the housing waiting list continue to be met.

153. It is important to note that even after the Neighbourhood Plan is adopted, the UA's affordable housing policy will continue to apply, and it will still be the UA that will manage the housing waiting list and negotiate affordable housing commitments with developers as part of the development management process.

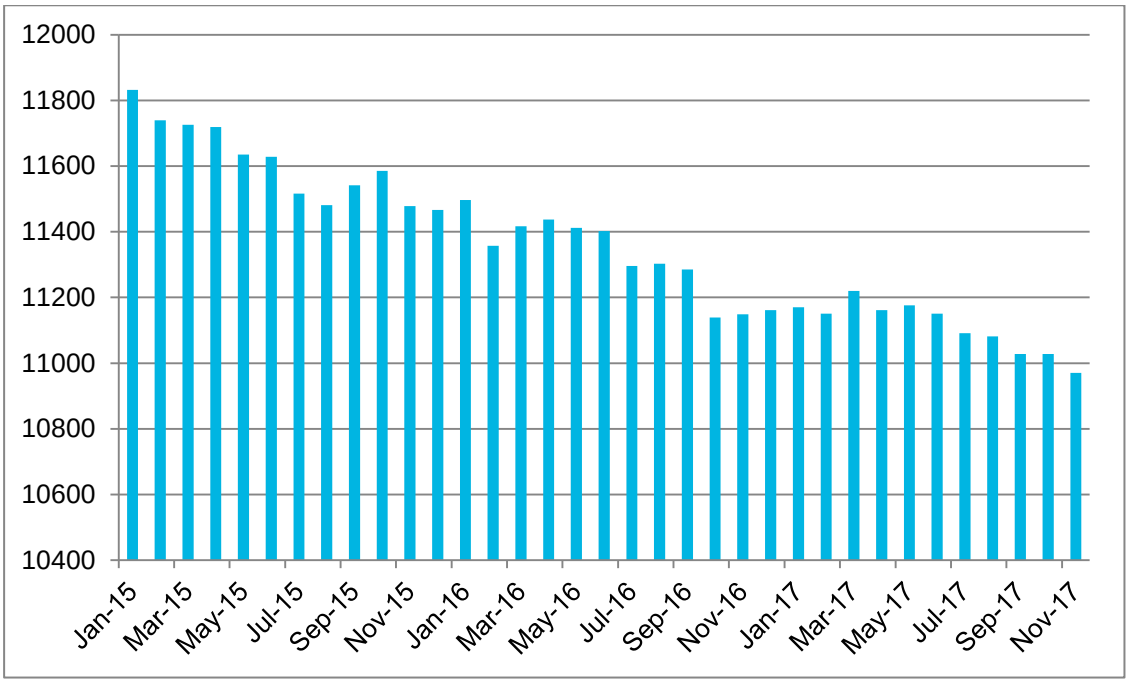
Housing benefit[40]

154. Housing benefit data from the Department of Work and Pensions (DWP) provides detailed information about the number of families that are unable to afford their housing costs. According to the SHMA, "*the DWP data provides the most reliable basis for establishing the number of households unable to afford their housing costs and estimating affordable housing*".[41]

155. We have downloaded data regarding the number of claimants in receipt of housing benefit in South Gloucestershire and in the Parish area specifically. This data is presented below in Figure 5-9, Figure 5-10, Figure 5-11, and Figure 5-12.

156. The number of housing benefit claimants in South Gloucestershire has been decreasing from 11,832 in early 2015 to 11,355 in late 2017, a decrease of 477 in total. Over that period an average of 11,355 households were receiving housing benefits. That number represents 45% of all households privately or socially renting.

Figure 5-9: Trend in the number of housing benefit claimants in South Gloucestershire between 2015 and 2017

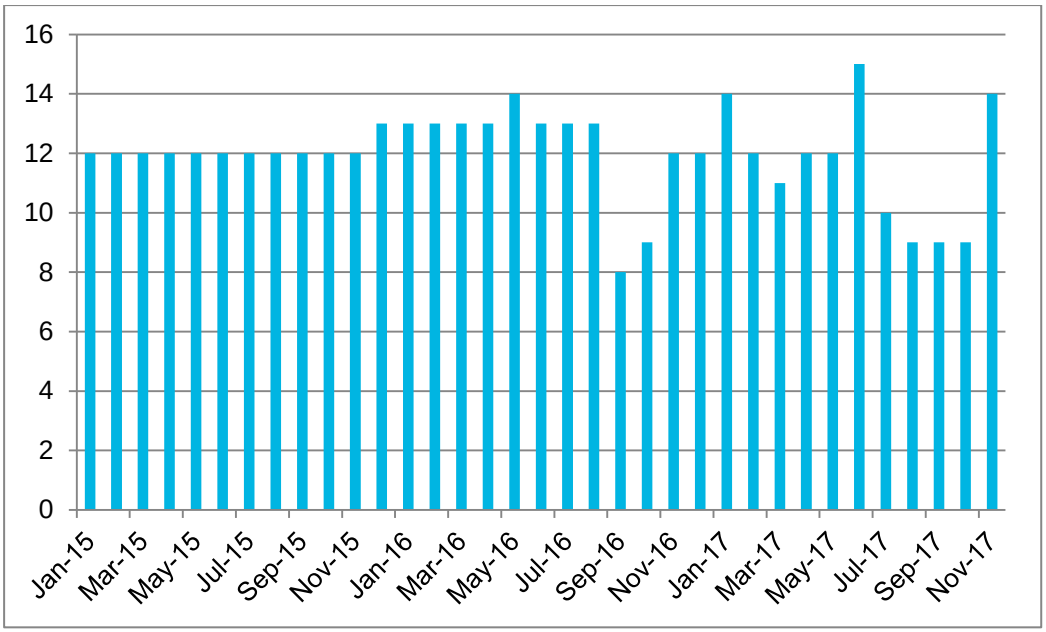


Source: Department for Work and Pensions

157. In Oldbury, however, the number of housing benefit claimants has remained relatively stable, with an average of 12 households claiming housing benefits. This represents 21% of the 56 households privately renting.

[40] "Housing Benefit (HB) was introduced on 1st April 1983 and is an income-related benefit designed to help people on low incomes pay for rented accommodation whether in or out-of-work. It can be claimed by a household as well as an individual."
[41] SHMA

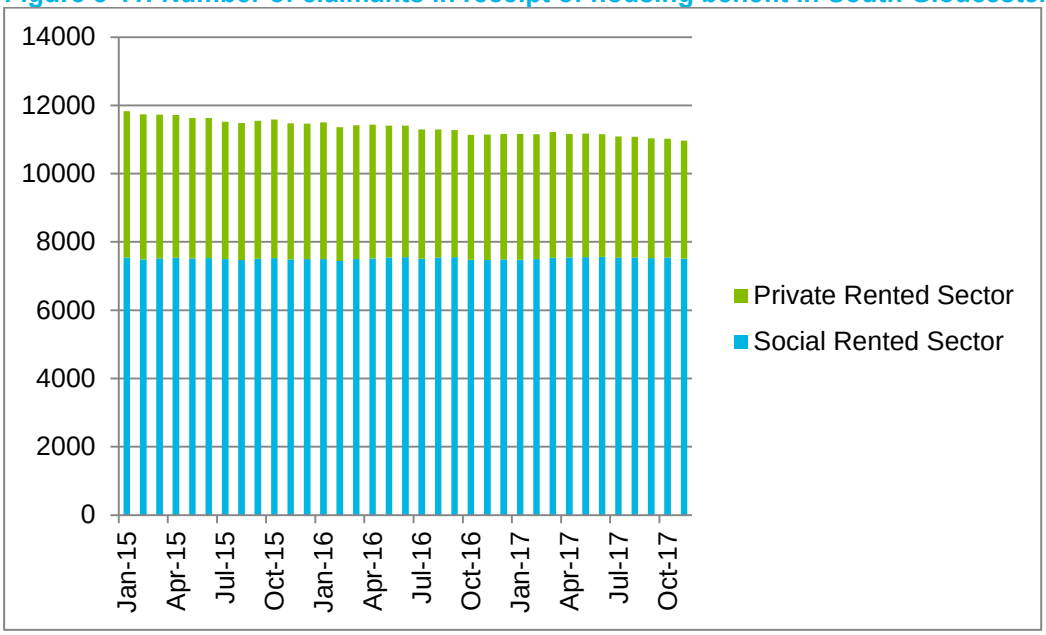
Figure 5-10: Trend in the number of housing benefit claimants in Oldbury NA between 2015 and 2017



Source: Department for Work and Pensions

158. We now consider more detailed information on tenure. In South Gloucestershire, while the number of housing benefits claimants in the social rented sector has remained stable, it has decreased 11.6% in the PRS. On average, 71% of households in the social rented sector receive housing benefits against 26% in the PRS.

Figure 5-11: Number of claimants in receipt of housing benefit in South Gloucestershire by tenure

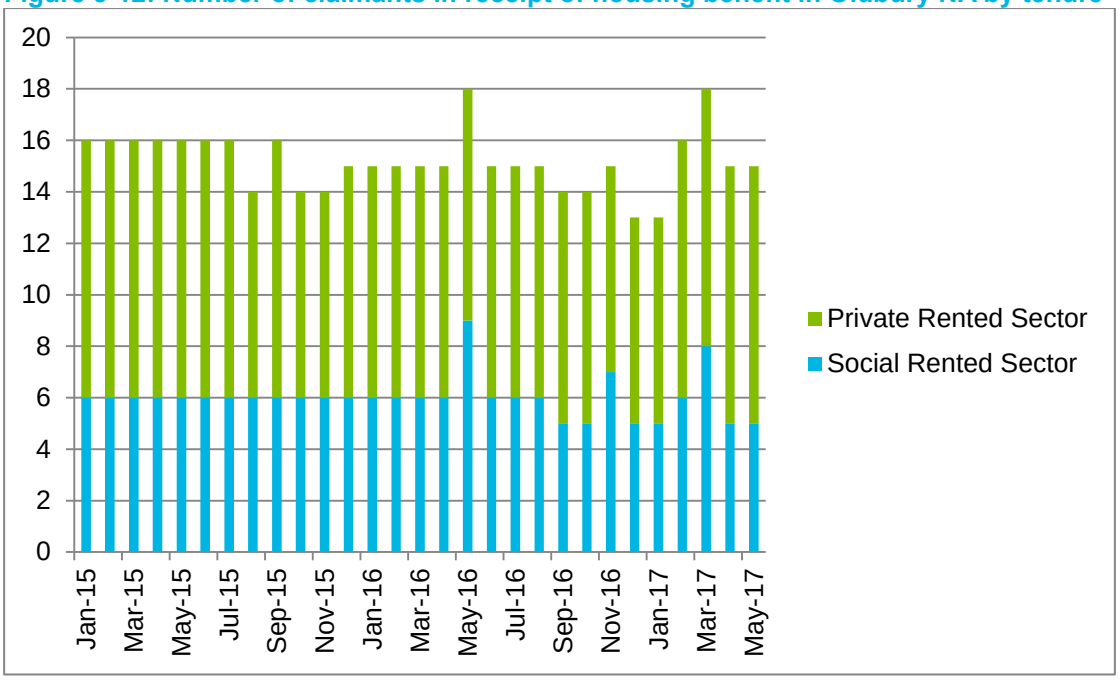


Source: Department for Work and Pensions

159. As opposed to South Gloucester, Oldbury has not experienced a decline in the number of housing benefit claimants and the number has remained stable for both tenures.

160. Although the chart suggests most of the households receiving housing benefits are privately renting, this is because the number of households in social housing in very low as we have seen in 1.2. In reality, 75% of social renters receive housing benefits against 19% in the PRS. That proportion does not vary much from the UA.

Figure 5-12: Number of claimants in receipt of housing benefit in Oldbury NA by tenure



Source: Department for Work and Pensions

161. 10 households (19% of households in the PRS) are claiming housing benefits, indicating these households are unable to afford market prices and could potentially benefit from social housing. However, given the small number of households on the housing register requesting Oldbury, it more likely that intermediate forms of Affordable Housing such as shared equity or discounted market sales housing would be more appropriate.

162. Finally, it must be said that using the number of households receiving housing benefits to establish the number of households unable to afford their housing costs may under-estimate true need given that it does not take into account those households that are not claiming housing benefit support as they have stayed living with parents or other family or friends and have not formed independent households.[42]

Conclusion

163. Data from the housing register and about households receiving housing benefits provides an indication of existing unmet need for AH. Two residents were identified as being in urgent need for affordable housing, to which we can add 10 households in the PRS who are receiving housing benefits. These households would not necessarily be in need of social housing, but cannot afford market prices; hence why they are housing benefits beneficiaries. A mix of social housing and intermediate AH tenures would satisfy the needs of those households.

5.3.3 Households in unsuitable housing

164. Other indicators are also helpful in gaining a clear understanding of AH needs in the NA. These include overcrowded households, those households experiencing a mismatch between the housing needed and the actual dwelling they occupy, and concealed households, that is those households who do not have sole use of basic facilities such as kitchen or bathroom, either living with a host household, often made up of family members, or living with other households, who would prefer to occupy their own home, but cannot do so for reasons of affordability.[43]

Overcrowding

165. The Census provides detailed information about occupancy which gives a measure of whether a household's accommodation is overcrowded or under occupied.

[42] One household's housing benefits may be reduced by a certain amount if a non-dependent live with that household but non-dependants can't get housing benefit for their contributions to household costshttps://england.shelter.org.uk/housing_advice/housing_benefit/housing_benefit_deductions_when_living_with_non-dependants

[43] http://webarchive.nationalarchives.gov.uk/20160105222237/http://www.ons.gov.uk/ons/rel/census/2011-census-analysis/what-does-the-2011-census-tell-us-about-concealed-families-living-in-multi-family-households-in-england-and-wales-/summary.html

166. In Table 5-4 below, we present occupancy rating data in the NA. The data shows that most households' dwellings are under occupied (they have one more room/bedroom than the standard requirement), however we do note the existence of 3 households considered to be overcrowded.

Table 5-4: Occupancy rating in Oldbury

Occupancy Rating (rooms) 2011	N	%
Occupancy rating (rooms) of +2 or more	254	82%
Occupancy rating (rooms) of +1	33	11%
Occupancy rating (rooms) of 0	20	6%
Occupancy rating (rooms) of -1	3	1%
Occupancy rating (rooms) of -2 or less	0	0%

Source: ONS 2011

Concealed families

167. The 2011 Census identified two households considered to be concealed, defined by the Census as *"a multi-family household...such as young couple living with parents"*. Whilst overall these make up a smaller proportion of all households in Oldbury than in the UAA, it is important to note that these households represent a growing generation of young people reaching maturity and seeking to leave the family home. If they are unable to access suitable housing within Oldbury, they are likely to move elsewhere, most moving within one year, a phenomenon called 'displacement'. The two households can therefore be seen as the most obvious indicator of households who would perhaps prefer to form their own households, and are likely to be the ones registered on the social housing waiting list.

168. A truer picture of 'concealed households' can be seen in data for households with non-dependent children, i.e. those with children living in the household over the age of 18, and some aged 16-18. For Oldbury, at the time of the last Census, 13.5% of all households (42 households) fell into this category against 9.9% in the UAA, suggesting the phenomenon of adult children living with their parents is not uncommon in the NA.

169. Moreover, these findings should be considered together with an increase of a 100% of that group over the inter-censual period. Whilst not all of these children are considered 'concealed', clearly the vast majority have the potential to form their own household, and thus represent a significant source of local housing needs in Oldbury. In the context of an ageing population, it is important planning policy makes every effort to stem the leakage of younger households so as to maintain balanced communities in future years.

Conclusion

170. Data on overcrowding and concealment does not suggest this is a pressing issue within the NA, with 3 households considered to be overcrowded and 2 to be concealed. However, data for households with non-dependent children, another indicator of concealed households, suggests that 42 households could potentially form their own households but have not done so; this may in part be to do with affordability and the lack of suitable housing in the NA.

5.4 Bringing the evidence together: Housing mix of tenure and Affordable Housing required

171. In Table 5-5 below, we have estimated the affordability thresholds for each tenure. The income required for entry-level rented properties and entry-level sales were calculated in Table 5-2 and Table 5-3, while the income needed for other affordable tenures is calculated in Appendix B.

Table 5-5: Affordability of different types of tenures

Types of tenures	Income required/threshold
Entry-level rented properties	£31,818
Entry-level sales	£78,943
Starter Homes	£63,153
Affordable Rent	£25,455
Social Housing	NA

Source: AECOM Calculations

172. The evidence presented throughout that section relies mainly on indicators of affordability. To consider all types of tenures, we have analysed additional data on age and household projections in 5.3 and 5.4, another indicator of needs for tenures. This has allowed us to identify different market segments presented in Appendix A, and gave further evidence on the type of tenures needed. Furthermore, each tenure type was examined in detail in Appendix B which allowed us to identify the following recommendations:

173. Based on the evidence gathered earlier, a distribution of the below housing tenures is recommended:

- Intermediate housing (shared equity, low cost homes for sale, intermediate rent): 17%
- Social housing: 14%
- Market housing: 69%, including a large proportion of PRS homes.

6. Type and size

174. Given the emerging requirement for new housing in the NA, OSPC are interested to know what the housing mix in terms of type and size of new dwellings should be so as to enable older residents to access dwellings of a suitable size as well as helping maintain a balanced community in future years.

RQ3: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate?

6.1 Background and definitions

175. Before beginning our consideration of type and size, it is important to understand how different types of households occupy their homes. Crucially, household 'consumption' of housing (in terms of housing size) tends to increase alongside wages, with the highest earning households consuming relatively more (i.e. larger) housing than those on lower incomes. Similarly, housing consumption tends to increase, alongside wealth and income, with age, such that older households tend to have larger homes than younger households, often as a result of cost and affordability.[44]

176. In this context, even smaller households (those with smaller numbers of inhabitants, including just one or two people) may be able to choose to live in larger homes than their needs would suggest, and thus would be defined in census terms as under occupying their homes. This is a natural feature of the housing market, although it can make considerations of future housing needs as much a matter of market dynamics and signals, as of demographics and household type and size projections in future years.

177. In order to understand the terminology surrounding size of dwellings, it is important to note the number of rooms recorded in Census data excludes some rooms such as bathrooms, toilets and halls; and to be clear that data on dwelling size is collected on the number of rooms being occupied by each household. In the section that follows, 'dwelling sizes' should be translated as follows[45]:

- 1 room = bedsit
- 2 rooms = flat/house with one bedroom and a reception room/kitchen
- 3 rooms = flat/house 1-2 bedrooms and one reception room and/or kitchen
- 4 rooms = flat/house with 2 bedroom, one reception room and one kitchen
- 5 rooms = flat/house with 3 bedrooms, one reception room and one kitchen
- 6 rooms = house with 2 bedrooms and 2 reception rooms and a kitchen, or 3 bedrooms and one reception room and a kitchen
- 7+ rooms = house with 3, 4 or more bedrooms

178. It is also useful to clarify somewhat the census terminology around dwellings and households spaces, which can be confusing in the context of flats, apartments, shared and communal dwellings, and houses in multiple occupation, types which may typically fall into the private rented sector. Dwellings are counted in the census by combining address information with census returns on whether people's accommodation is self-contained,[46] and as such all dwellings are classified into either shared or unshared dwellings. Household spaces make up the individual accommodation units forming part of a shared dwelling.

179. The key measure of whether a dwelling is shared or unshared relates to the Census' definition of a household. A household is defined as "One person living alone or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area."[47] On this basis, where unrelated residents of a dwelling share rooms other than a kitchen, this would be considered a single household in an unshared dwelling, whilst where only a kitchen is shared, each resident would be considered their own household, and the dwelling would be considered shared.

6.2 Existing types and sizes

180. The PPG recommends a consideration of the existing housing provision and its suitability, having regard for demographic shifts in age and household composition, to address future as well as current community need. For this reason, we start with a consideration of type and size within the existing housing stock in Oldbury.

[44] SHMA15, pp.130, para 8.5
[45] https://www.nomisweb.co.uk/census/2011/qs407ew
[46] https://www.gov.uk/guidance/dwelling-stock-data-notes-and-definitions-includes-hfr-full-guidance-notes-and-returns-form
[47] Ibid.

181. Table 6-1 below describes the distribution of households classified by dwelling type in 2011 in Oldbury, South Gloucestershire and England. Oldbury, in line with many other rural areas, is dominated by detached and semi-detached properties, respectively 68% and 20% - well above the national average for detached properties. In contrast, less than 7% live in terraced properties and 5% in flats. Terraced properties and flats are more common across the UA, with 27.4% of terraces and 11.40% (9.30% + 1.40% + 0.70%) of flats.

Table 6-1: Accommodation type (households) in Oldbury-on-Severn, 2011

Dwelling type		Oldbury-on-Severn	South Gloucestershire	England
Whole house or bungalow	Detached	68%	26.40%	22.40%
	Semi-detached	20.10%	34.10%	31.20%
	Terraced	6.30%	27.40%	24.50%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	1.60%	9.30%	16.40%
	Parts of a converted or shared house	3.40%	1.40%	3.80%
	In commercial building	0%	0.70%	1%

Source: ONS 2011, AECOM Calculations

182. Table 6-2 below sets out the distribution of the number of rooms by household's accommodation (household space). From this data, it is apparent that there is a predominance of large dwellings. Almost half of the houses have 8 rooms or more, 96% of the stock can be considered family dwellings (4 rooms or more) and more than three-quarters of them are large properties (with 6 rooms or more). There are also a substantial proportion of medium-sized family homes of 4 or 5 habitable rooms, representing 20% of the stock. By comparison, in South Gloucestershire, 16% of dwellings have 8 rooms or more, 90% of the stock can be considered family dwellings and 50% of them are large properties.

183. Finally, houses of 1-3 habitable rooms [48] are less common and only represent 4% of accommodation against 9% in the UAA which also has a higher proportion of medium-sized family dwellings.

Table 6-2: Number of rooms per household in Oldbury-on-Severn, 2011

	2011 Oldbury-on-Severn		2011 South Gloucestershire	
	Number of households	%	Number of households	%
1 Room	0	0%	275	0.3%
2 Rooms	1	0.3%	1890	1.8%
3 Rooms	11	3.5%	7346	6.8%
4 Rooms	18	5.8%	16244	15.1%
5 Rooms	42	13.5%	26466	24.6%
6 Rooms	57	18.4%	24417	22.7%
7 Rooms	41	13.2%	13869	12.9%
8 Rooms or more	48	15.5%	9077	8.4%
9 Rooms or more	92	29.7%	7954	7.4%

Source: ONS 2011, AECOM calculations

184. It is particularly useful then to cross-reference this data with census estimates of the number of bedrooms for each household in Oldbury and South Gloucestershire. The table on the following page summarises the proportion of households occupying each size of home in terms of the number of bedrooms. This data suggests that there are more four and five- bedroom homes and significantly fewer one to two-bedroom homes than across the UA.

[48] A three room dwelling may be considered an 'entry level dwelling'

Table 6-3: Number of bedrooms in household spaces, 2011

Number of bedrooms	Oldbury-on-Severn	South Gloucestershire
1 bedroom	3.9%	7.7%
2 bedrooms	12.6%	21.0%
3 bedrooms	32.9%	47.1%
4 bedrooms	33.2%	19.8%
5 or more bedrooms	17.4%	4.3%

Source: Census 2011

185. Regarding housing needs, it is relevant to consider whether it is the number of rooms overall that is the most important measure of housing size, or the number of bedrooms. On the one hand, additional rooms may be converted for use as extra bedrooms where necessary. However, this is more likely to be true in larger homes where there is more overall flexibility in terms of space, and the data above suggests that the vast majority of one to three-room homes have only one bedroom, with relatively greater constraints on potential conversion to accommodate a second bedroom in a purpose-built living room for example.

186. It is also relevant to consider how the number of rooms occupied by households changed between the 2001 and 2011 censuses. This data is presented below and shows quite clearly that there has been a reduction in the number of households occupying two rooms and four rooms and an increase in those occupying properties with more rooms, except for seven rooms. Indeed, the total increase in the seven and more room (usually a four to five-bedroom house) segment was 32 homes, in spite of there being just 35 net additions to the dwelling stock. This suggests that smaller homes may have been replaced with larger homes, and that some mid-sized homes may have been extended to become larger with additions and conservatories, both of which are counted in the Census as rooms if they create a separate living space. This picture differed slightly from that across South Gloucestershire, which saw a more significant increase in the number of smallest homes of two and three rooms.

Table 6-4: Rates of change in number of rooms per household in Oldbury-on-Severn, 2001-2011

Number of Rooms	Oldbury-on-Severn	South Gloucestershire	England
1 Room	0.00%	-3.50%	-5.20%
2 Rooms	-83.30%	45.50%	24.20%
3 Rooms	83.30%	32.40%	20.40%
4 Rooms	-25.00%	5.00%	3.50%
5 Rooms	20.00%	-5.10%	-1.80%
6 Rooms	7.50%	1.00%	2.10%
7 Rooms	-4.70%	18.00%	17.90%
8 Rooms or more	29.60%	35.00%	29.80%

Source: ONS 2001-2011, AECOM calculations

Conclusion

187. In summary, homes in Oldbury are larger than the average for South Gloucestershire, although in recent years the number of larger homes of seven to eight rooms has increased markedly across the UA (rising from 25% of the total housing stock in 2001 to 31% in 2011). Noteworthy is the small increase in three-room properties in the NA (rising from 2.18% to 3.55% of the total housing stock), which could indicate a growing demand for smaller property types. Regarding the type of houses, most of the stock in the NA is made up of detached properties, which also partly explains why houses are bigger on average.

188. The evidence assembled below seeks to populate a series of ‘key indicators’; these are the household composition and age structure of the population both now and how they are likely to change in future years. Through a consideration of these trends and how they interrelate to each other, it is possible to consider how size and type of housing in Oldbury should be influenced through planning policy.

6.3 Demographic factors affecting size and type of housing: household composition

189. Household composition is a fundamental factor driving the size of housing that will be needed in Oldbury in the future. As of 2011, Oldbury had 310 households, representing 0.29% of the UA's total.

Current household composition

190. In Table 6-5 below, we present data relating to household composition drawn from Census 2011 in the NA. Families seem to prevail in Oldbury, whilst one person households are less common and represent 15.5% of the population compared to 26.6% in the UAA. Moreover, although families with children (both dependent and non-dependent) form a substantial group, they are not the most common family type; indeed they form 22.9% of all households, whilst families with no children represent 27.7% of all households. The NA differs from the UA, where families with dependent children are more common than those with no children. This would explain the slightly smaller average household size in the Parish (2.4 against 2.5 for the UA). Finally, Oldbury also has a substantial proportion of families aged 65 and over and of families living with non-dependent children, as was observed in the tenure and affordability section.

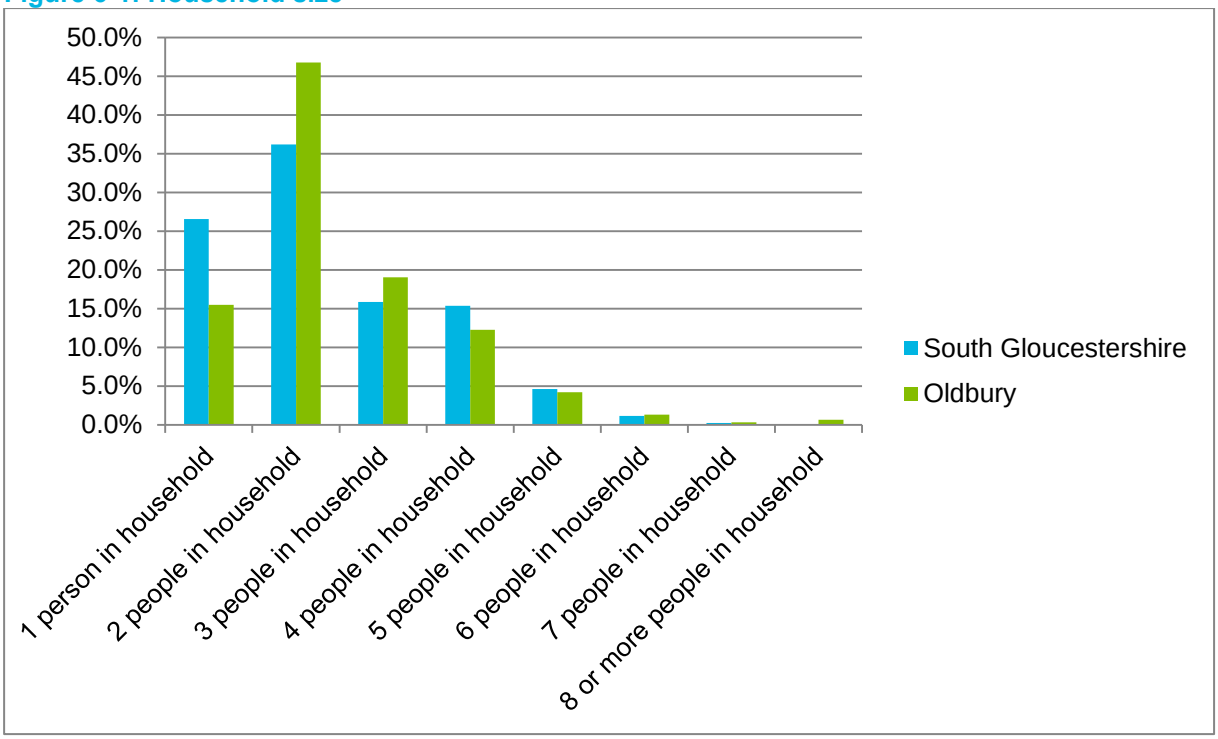
Table 6-5: Household composition (by household) in Oldbury-on-Severn, 2011

		Oldbury-on-Severn	South Gloucestershire	England
One person household	Total	15.50%	26.60%	30.20%
	Aged 65 and over	7.10%	11.40%	12.40%
	Other	8.40%	15.10%	17.90%
One family only[1]	Total	77.40%	67.80%	61.80%
	All aged 65 and over	13.20%	9.80%	8.10%
	With no children	27.70%	19.40%	17.60%
	With dependent children	22.90%	28.80%	26.50%
	All children Non-Dependent	13.50%	9.90%	9.60%
Other household types	Total	7.10%	5.60%	8.00%

Source: ONS 2011, AECOM calculations

191. It is particularly useful then to sense-check this data with Census estimates of the number of usual residents in households. This data is presented on the following page in Figure 6-1 and corroborates the findings above. Indeed the prevalence of couples without children is reflected in the larger proportion of two-person households. Three-person households are slightly more represented in the NA, which might be explained by the relatively large proportion of families living with non-dependent children. Finally as evidenced above, there are more single person households in the UAA.

Figure 6-1: Household size[49]



Source: ONS – 2011Census (QS118EW), AECOM calculations

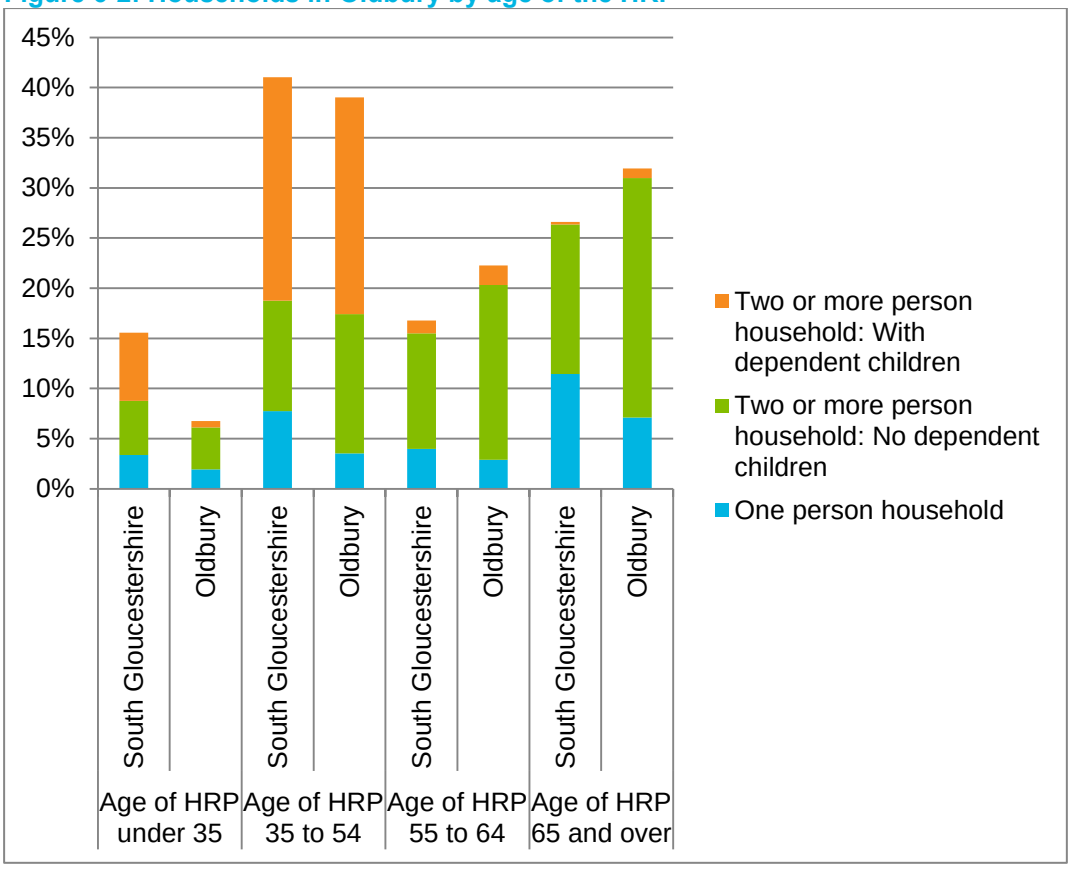
Consideration of age

192. The data presented on the following page classifies households in Oldbury and South Gloucestershire according to the age of the Household Reference Person (HRP). Size and type of housing is not only influenced by household composition, but also by the age of the HRP. This data provides further insight into the household structure. The influence of age will be further investigated in 6.3. The following observations can be highlighted from the data presented in Figure 6-2:

- In both the NA and the UA, about 40% of households have a HRP aged between 35 and 54. These households are the most likely to have dependent children.
- Young households are clearly a minority in Oldbury, whilst they form a substantial part of the population in South Gloucestershire. There are also proportionally more households where the HRP is aged over 55 in Oldbury.

[49] The size of a household is equal to the number of usual residents in the household. Visitors staying at an address do not contribute to that household's size because they are counted in the household of their place of usual residence.

Figure 6-2: Households in Oldbury by age of the HRP



Source: ONS – 2011Census (QS111EW), AECOM calculations

Future household composition

193. We will now consider how household composition has shifted over the intercensal period, before examining how it is expected to evolve towards the end of the Plan Period.

194. Table 6-6 below points towards the reduction of household size, evidenced by the increase of 14.3% of one-person households and the reduction of households with dependent children (unlike what is observed in the UAA). The 28.10% increase of couples aged 65 and over also suggests a relative ageing of households. Finally, the 100% uplift in the number of non-dependent children exhibits the phenomenon of adult children living with their parents.

Table 6-6: Rates of change in household composition in Oldbury-on-Severn, 2001-2011

Household type		Percentage change, 2001-2011		
		Oldbury-on-Severn	South Gloucestershire	England
One person household	Total	14.30%	17.10%	8.40%
	Aged 65 and over	0%	8.70%	-7.30%
	Other	30%	24.40%	22.70%
One family only	Total	12.10%	4%	5.40%
	All aged 65 and over	28.10%	9.30%	-2.00%
	With no children	4.90%	-2.80%	7.10%
	With dependent children	-10.10%	5.60%	5.00%
	All children non-dependent	100%	9%	10.60%
Other household types	Total	46.70%	33.30%	28.90%

Source: ONS 2001-2011, AECOM calculations

195. It would be helpful to consider how the households of Oldbury are projected to change in the future and whether the trends observed in the inter-censual period will continue. Unfortunately, detailed projections of future populations are not available for individual towns or Parishes, so it is necessary to turn to projections for South Gloucestershire as a whole and to refine them based on other local data.

196. MHCLG publishes bi-annual household projections for all local authorities in England and Wales, broken down by household type, and also provides projections of the average household size and age. It is notable that by 2039, the closest year to the end of the Plan Period for the Neighbourhood Plan (2032) for which projections are available, the average household size across the UA will have dropped to 2.33 people (2.44 in 2011).[50] Based on these and current trends, it is likely that the average household size in Oldbury will decline even further. This decrease of 4.5% applied to Oldbury (2.52 – 4.5% = 2.41) gives a household size of 2.41, which is closer to the current average for the UA.

197. The projections for South Gloucestershire also consider increases in each type of household up to 2039. The greatest increases projected for the UA are of one-person households and households with dependent children.

Table 6-7: MHCLG Household Projections for South Gloucestershire by household type

	One person	Couple and no other adult	Couple and one or more other adult	Households with dependent children	Other
2014	30,581	32,808	9,249	33,143	6,347
2039	40,400	36,802	10,355	42,551	9,078
Changes	9,819	3,994	1,106	9,408	2,731
Changes (%)	32.11%	12.17%	11.96%	28.39%	43.03%

Source: MHCLG 2014-based household projections

198. The projections for South Gloucestershire also consider increases in each household age up to 2039. The greatest increases projected for the UA are of older households aged over 55, and in particular those aged over 75.

Table 6-8: MHCLG Household Projections for South Gloucestershire by household age

	Under 25	25-34	35-44	45-54	55-64	65-74	75-84	85+
2014	2,839	14,457	19,499	24,241	17,889	16,939	11,701	4,563
2039	3,014	14,186	21,557	27,763	21,231	20,441	18,789	12,205
Changes	175	-272	2,058	3,521	3,342	3,502	7,088	7,642
Changes (%)	6.18%	-1.88%	10.56%	14.53%	18.68%	20.67%	60.58%	167.45%

Source: MHCLG 2014-based household projections

Conclusion

199. This section allowed us to understand the current household composition, and how it is expected to change towards the end of the Plan Period.

200. One-person households are proportionally less substantial in Oldbury (16%) than in the UAA (27%), although they are forecast to increase substantially across the UA (32% uplift is forecast between 2014 and 2039).

201. The NA is dominated by two-person households (47%), but also households living with non-dependent children (14%). In light of their current importance (24%) and the rapid ageing of the population, we believe that two person households aged over 65 are likely to form the most substantial part of the NA's population towards the end of the Plan Period.

202. Furthermore, families with children (where the HRP is generally aged between 35 and 54) form a substantial part of the population both in the NA and the UA. That household type is expected to increase towards 2039, although to a lesser extent in the NA, as households with dependent children experienced a decline during the inter-censual period.

203. In conclusion, households are expected to become smaller and older. This will surely have an implication on the types and sizes of housing required, which we will consider in the following sections.

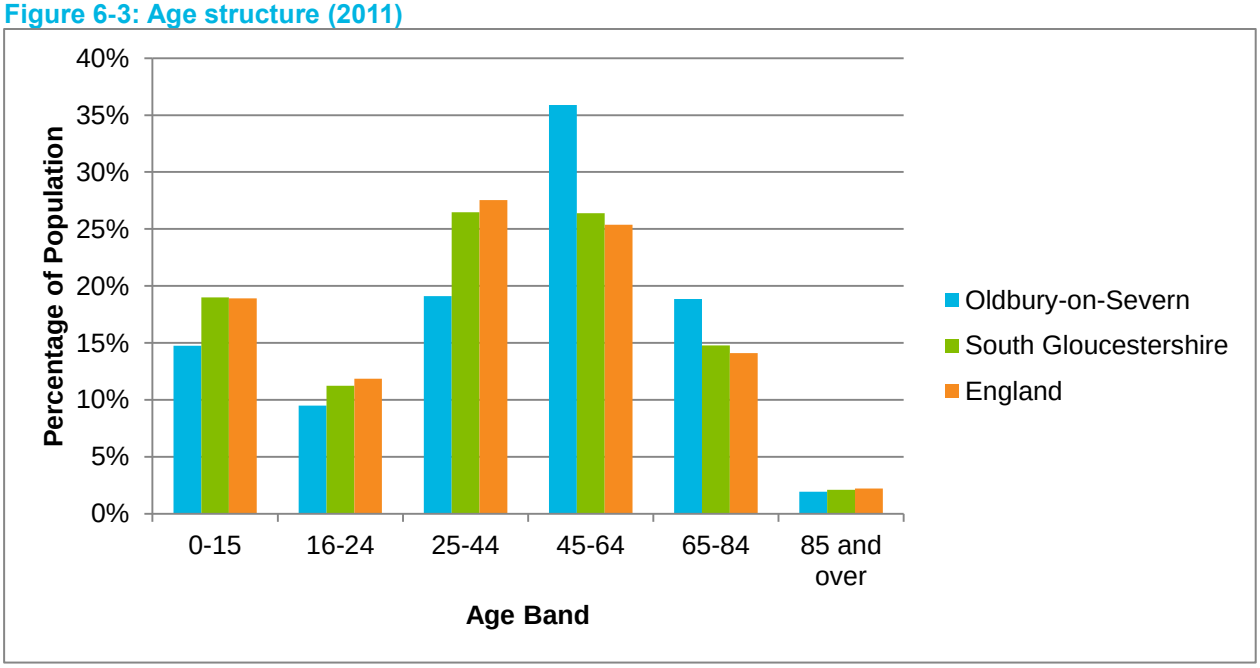
[50] MHCLG 2014-based household projections

6.4 Demographic factors affecting size and type of housing: age structure

204. Figure 6-3 below presents the age structure of Oldbury at the time of the last Census. Oldbury has a large proportion of its population aged between 45 and 64 (36% against 26% in the UAA), and a large population aged 65 and over (21%), exhibiting a weighting towards a more elderly population.

205. The combined population of those aged 25-64, the working age population, is around 55% in Oldbury against 52% across South Gloucestershire. As heads of household falling into these age categories are most likely to have children, this suggests that one of the largest household types will be families with children. The fact that around 15% of the population are aged between 0 and 15 supports this finding, although the number of resident aged between 0 and 15 is higher in South Gloucestershire.

Figure 6-3: Age structure (2011)



206. Source: Census 2011, AECOM Calculations

207. Table 6-10 below provides further evidence pointing towards an older population in the NA. This suggests that heads of households belong to older age brackets in Oldbury, and may explain why there are proportionally fewer children.

Table 6-9: Household lifestage

Household Lifestage	South Gloucestershire	Oldbury
Age of HRP under 35: Total	15.56%	6.77%
Age of HRP 35 to 54: Total	41.03%	39.03%
Age of HRP 55 to 64: Total	16.79%	22.26%
Age of HRP 65 and over: Total	26.61%	31.94%

Source: ONS – 2011Census (QS111EW), AECOM calculations

208. It is also worth considering the way age structure has shifted during the inter-censual period. This is set out in Table 6-10 on the following page. The key trends over this period has been the growth of those aged 65-84 by 63.30%, an up-lift over the period of 57 individuals making it the most significant increase among all age groups.

209. The reduction in the number of those aged 0-15 (13.50%) corresponds with the reduction in adults of parental age. Simultaneously, the increase in the numbers of those belonging to the 16-24 is explained by individuals belonging to the 0-15 brackets in 2001 who have moved to the 16-24 age group in 2011 (this is confirmed by more detailed data on age composition, the 8 to 14 age groups have lost 17 individuals between 2001 and 2011). This uplift of 16 individuals can be also considered together with the uplift of 21 households living with non-dependent children.

Table 6-10: Rate of change in the age structure of the population of Oldbury, 2001-2011

Age group	Oldbury-on-Severn	South Gloucestershire	England
0-15	-13.50%	-2.20%	1.20%
16-24	27.60%	25.00%	17.20%
25-44	-4.50%	-7.40%	1.40%
45-64	8.50%	14.60%	15.20%
65-84	63.30%	23.50%	9.10%
85 and over	-6.30%	43.90%	23.70%

Source: Census 2001/2011, AECOM calculations

210. In Table 6-11 below we present the 2014-based subnational population projections (October 2015) for South Gloucestershire. This data clearly shows the increase in numbers of the population in the older age brackets.

Table 6-11: Percentaged age band change in South Gloucestershire, 2011-2036

Age band	2011		2036		Rate of Change
	Population	Percentage of total population	Population	Percentage of total population	19.44%
0-15	49,930	19%	59,638	18%	17.52%
16-24	29,518	11%	34,689	11%	12.70%
25-44	69,580	26%	78,414	24%	8.38%
45-64	69,330	26%	75,137	23%	57.66%
65-84	38,875	15%	61,290	19%	182.24%
85 and over	5,534	2%	15,619	5%	19.44%

Source: Census 2011, ONS Sub-National Population Projections 2014, AECOM Calculations

211. To estimate the age structure for Oldbury in 2036, we have first calculated the rate of change in age profile in South Gloucestershire (Table 6-11). We have then applied the same rate of change onto the population of Oldbury, after averaging it to the rate of change in age profile in Oldbury between 2001 and 2011. For example, the population aged 85 and over in South Gloucestershire is forecasted to increase by 19.4% between 2011 and 2036; in the NA, that group has decreased by 6.3% between 2001 and 2011. An average of these two percentages applied onto the current population aged 85 and over in the NA in 2011 (15) gives a number of 28 by 2036, or an increase of 13 people.

212. The results are presented in Table 6-11 below. From now until the end of the Plan Period, the population is forecast to age and the elderly population is expected to form a larger part of the population. The working-age population will continue to form a substantial part of the NA but will experience a decline. This means there will be fewer families and newly forming households.

Table 6-12: Percentaged age band change in Oldbury, 2011-2036

Age band	2011		2036	
	Population	Percentage of total population	Population	Percentage of total population
0-15	115	15%	118	13%
16-24	74	9%	91	10%
25-44	149	19%	155	17%
45-64	280	36%	304	33%
65-84	147	19%	236	25%
85 and over	15	2%	28	3%

Source: Census 2011, ONS Sub-National Population Projections 2014, AECOM Calculations

Conclusion

213. The evidence gathered in this section has allowed us to identify how Oldbury differs with the UA in terms of age structure. Both geographies are dominated by the 45-65 age groups; however, while the NA has a larger proportion of

its population in the older age brackets than the UA, the latter has a larger proportion of its population in the younger age brackets.

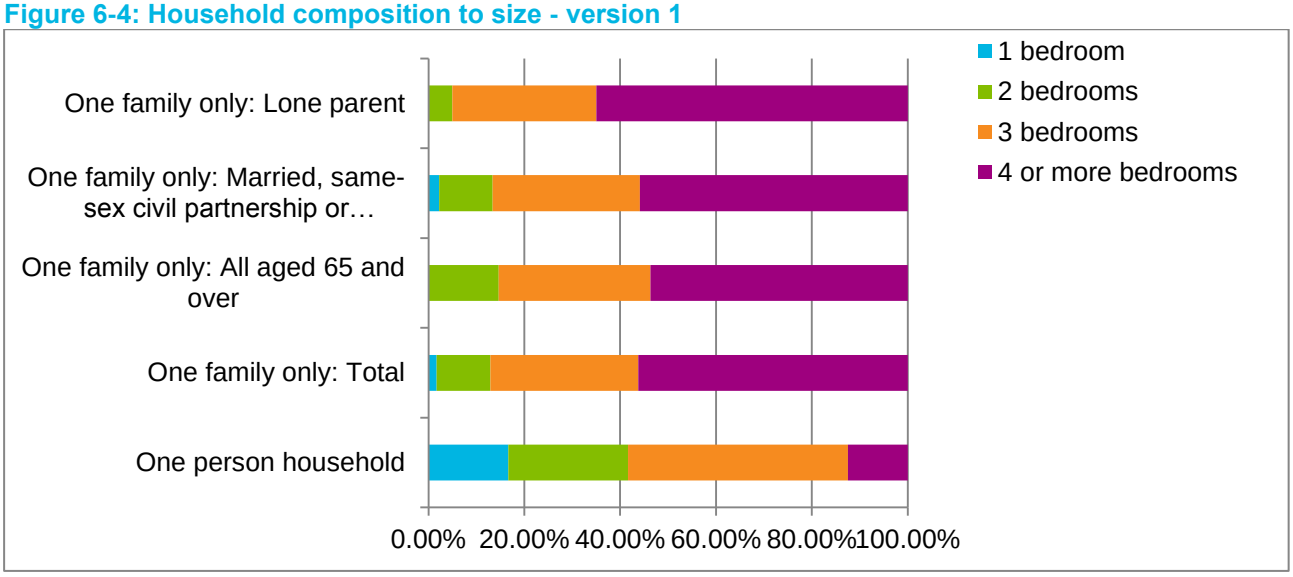
214. Furthermore, the age groups that have grown the most in the NA during the inter-censual period are mainly those over 45, and overwhelmingly those in the 65-84 age groups. We have then calculated the rate of change in the age profile in South Gloucestershire between 2011 and 2036 based on sub-national population projections and applied them onto Oldbury after averaging it to the rate of change between 2001 and 2011. Although the 45-64 age group will continue to form a substantial part of the population, the population over 65 will form a greater proportion (30% against 20% today), so much so that the population aged over 45 will form more than 60% of the whole population against 57% today.

6.5 Bringing the evidence together: housing mix of type and size required

215. To estimate the housing mix needed by the end of the Plan Period we refer to the model used in the SHMA.[51] This model assumes that the housing mix needed by households of each household type and age will reflect current patterns. For example a growth in single person households aged 65-74 will lead to an increase in the need for the type of housing currently occupied by single person households of this age.

216. Data is available at the Parish level on the distribution of dwellings size among different household types. This data is presented in Figure 6-4 below. All households tend to occupy larger dwellings regardless of their composition, with the exception of one-person households. Indeed, 70% of them occupy either two to three-bedroom dwellings. Considering this group is expected to increase (32.11% across South Gloucestershire), this provides a prima facie case for an increase in the provision of two to three bedroom-properties, despite the fact they currently form 45% of the stock against almost 70% in the UAA.

Figure 6-4: Household composition to size - version 1

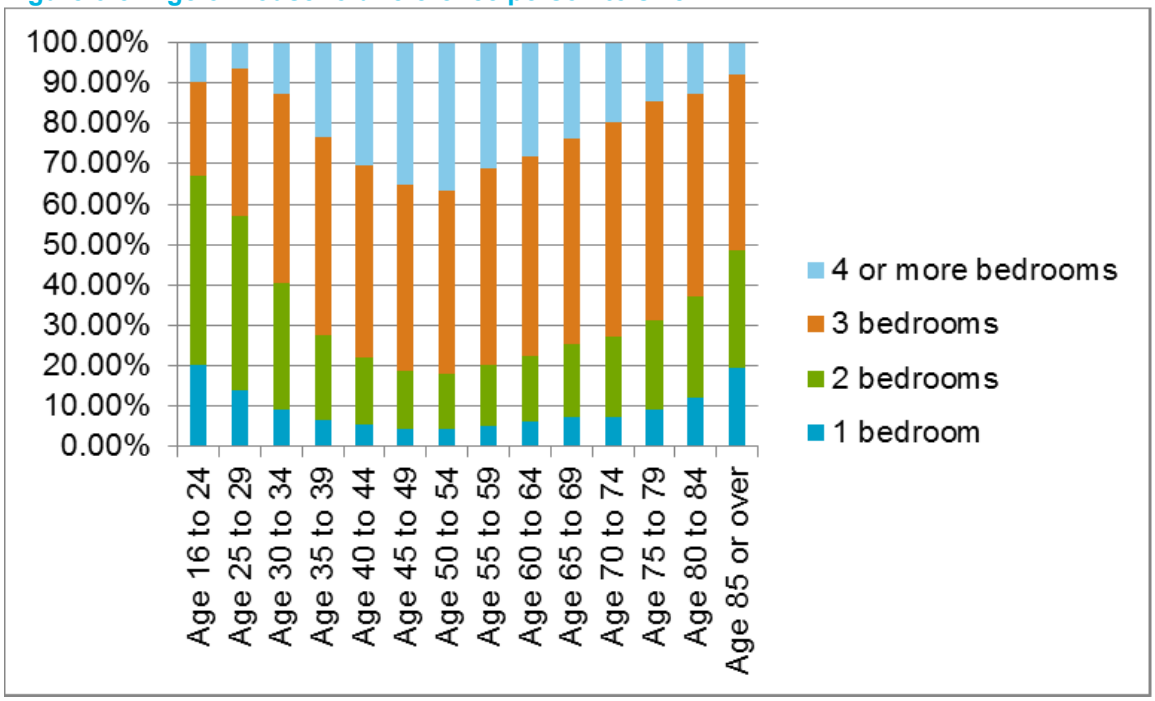


Source: ONS 2011, AECOM Calculations

217. The Housing mix is also influenced by the age of the household. However, no data available at the Parish level provides housing size occupation by household age. Nonetheless, this data is available at the UA level and can be used as a proxy for Oldbury. That data is presented in Figure 6-5 on the following page. The data clearly shows a pattern of downsizing to smaller properties after reaching the age of 60.

[51] Wider Bristol SHMA – Volume 2, p. 12

Figure 6-5: Age of household reference person to size



Source: ONS 2011, AECOM calculations

218. In line with the SHMA, it is possible to estimate the housing mix needed by the end of the Plan Period by matching future household composition to current patterns of occupation by age.

219. To do so, we have used Household Projections to estimate the future distribution of households by the age of the household reference person. The percentage of increase expected for each in South Gloucestershire, detailed above in Table 6-12, was applied onto the population of Oldbury. This calculation and the results are detailed in Table 6-13 below:

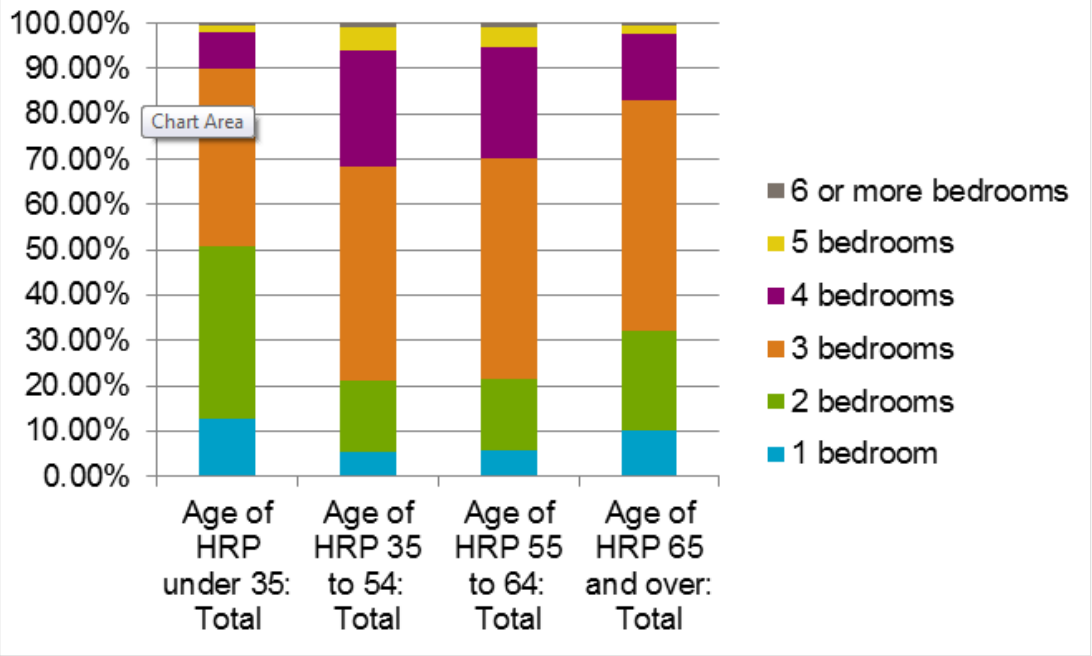
Table 6-13: Estimated future household lifestage distribution in Oldbury

	Household lifestage distribution 2011		Household lifestage distribution 2036	
Household lifestage categories	Number	%	Number	%
All categories: Household lifestage	310		393	
Age of HRP under 35: Total	21	6.77%	21	5.32%
Age of HRP 35 to 54: Total	121	39.03%	136	34.75%
Age of HRP 55 to 64: Total	69	22.26%	82	20.86%
Age of HRP 65 and over: Total	99	31.94%	153	39.07%

Source: AECOM Calculations

220. Figure 6-5 above was adapted to reflect the age brackets used in the Household Projections and is shown in Figure 6-6 on the following page.

Figure 6-6: Age of household reference person to size – version 2



Source: ONS 2011, AECOM calculations

221. Therefore, in line with current patterns of occupation according to household lifestage for South Gloucestershire, the housing mix should be as detailed below to satisfy the need of the future household composition in Oldbury. The current number of bedrooms is presented alongside for reference

Table 6-14: Required number of bedrooms in Oldbury by 2036

Number of bedrooms	2011		2036	
1 bedroom	12	3.9%	30	8%
2 bedrooms	39	12.6%	77	19%
3 bedrooms	102	32.9%	190	48%
4 bedrooms	103	33.2%	79	20%
5 bedrooms	54	17.4%	14	4%

222. We have then calculated the number of dwellings of each size that would need to be built to get as close as possible to that required housing mix. The calculations are detailed below in Table 6-15.

Table 6-15: Sizes of dwellings required to be built

Number of bedrooms	2011	2036	Number required to be built	%
1 bedroom	12	30	18	13%
2 bedrooms	39	77	38	26%
3 bedrooms	102	190	88	61%
4 bedrooms	103	79	79	0%
5 bedrooms	54	14	14	0%

223. The current housing mix is not appropriate to meet the needs of ageing and smaller households. Therefore, future developments must achieve the following size distribution:

- 1 bedroom: 13%
- 2 bedrooms: 26%
- 3 bedrooms: 61%

224. Finally, the same approach was applied to housing types and we give the following recommendation:

- Semi-detached whole house or bungalow: 43%
- Terraced whole house or bungalow: 46%
- Flat, maisonette or apartment: 11%

Conclusion

225. Bringing the evidence together, there is a need for one to three-bedroom properties in the light of the increase of two-person and one-person households aged over 65. Although larger properties will still be needed and that families with dependent children will continue to increase, building smaller dwellings will allow older households to downsize, freeing up the larger properties they occupied for families with children aged between 35 and 55. The need for 1 to 3 bedroom properties is not only for older, downsizing households but also to allow the concealed households currently living with their parents to form their own households, and remain in Oldbury.

7. Market signals

226. The PPG highlights the importance of taking market signals into account when assessing housing needs, given 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.

227. The PPG states:

> *"The housing needs 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."*[52]

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

229. 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."*[53]

230. In discussions with OSPC and SGUA as to the appropriate levels of market dwellings in the Plan Area it will necessary to consider factors that suggest either an uplift or reduction. This study considers the following market signals:

- Employment and commuting trends;
- Migration;
- Housing market (prices);
- Housing market (volume);
- Overcrowding and concealment; and
- Rate of development.

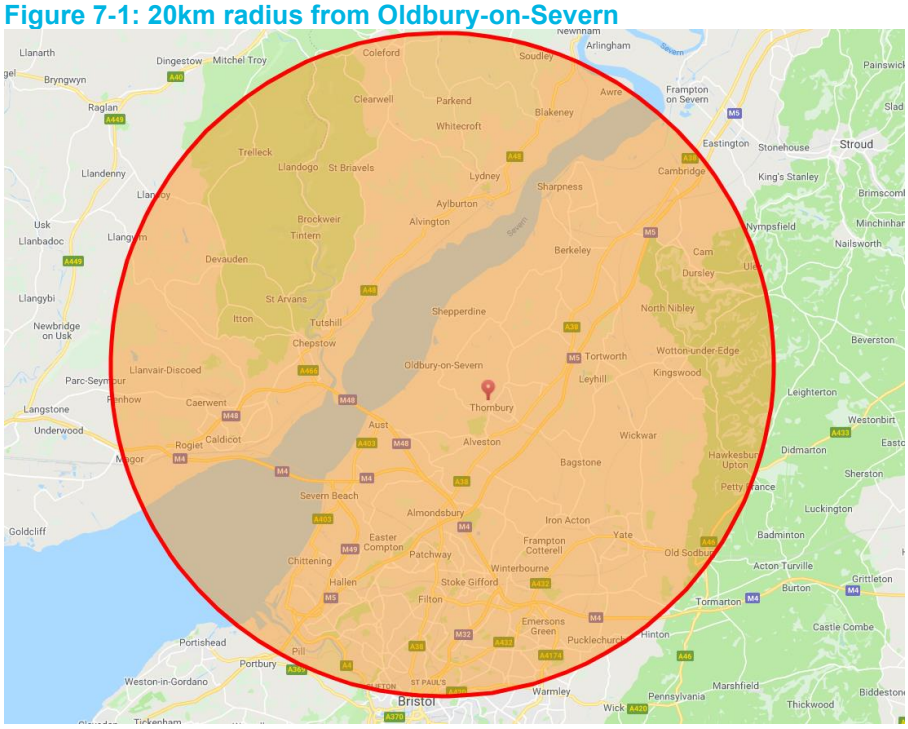
7.1 Employment and commuting

231. Local employment trends can greatly influence housing needs as employment opportunities can stimulate demand in the NA. The PPG notes that likely change in employment and the local economy should be taken into account when assessing the need for housing. It is therefore important to establish the employment sphere of influence experienced by the residents of Oldbury.

[52] PPG Paragraph: 019 Reference ID: 2a-019-20140306
[53] PPG Paragraph: 020 Reference ID: 2a-020-20140306

232. With this end in view, we first examined commuting patterns in the NA. Oldbury is likely to be influenced by growth in Bristol, due to its relative proximity to the conurbation (30km away from centre). This is reflected in the Census data which suggests that a significant proportion of the population work between 10km to less than 30km away from home, which is higher than the UA's average. Besides, the average distance travelled to work of 20.6km. Therefore, housings needs in Oldbury might be influenced by economic prospects within a 20km radius depicted in Figure 7-1 below.

Figure 7-1: 20km radius from Oldbury-on-Severn



Source: Google Maps

233. Census data on commuting is presented in Table 7-1 below and shows a substantial proportion of residents working from home (25%) compared to 9.4% in the UAA. The second most significant category is those residents who work less than 10km away from home (27.3%); although that proportion is lower than in the UAA.

Table 7-1: Distance to work, 2011

Location of work	Oldbury-on-Severn	South Gloucestershire	England
Less than 10km	27.3%	57.2%	52.3%
10km to less than 30km	32.2%	18.8%	21.0%
30km and over	7.5%	6.5%	8.0%
Work mainly at or from home	25.0%	9.4%	10.3%
Other	7.9%	8.1%	8.5%
Average distance travelled to work	20.6km	14.6km	14.9km

Source: ONS 2011, AECOM calculations

234. Below we consider in more detail the employment sphere of influence experienced by residents of the Parish. Oldbury-on-Severn is a small rural village with a population of 780 as of 2011. Of these 780, 207 are full-time employees, 91 work part-time and 113 are self-employed. That number of 113 represents 18.8% of the population, a substantial proportion compared to the 8.1% in the UAA. This is reflected in the 25% of residents working from home, and it can be assumed that these residents either work in agriculture, or in the accommodation and food service industry. In 2011, Census data shows that 30 residents worked in the agricultural sector and 18 in the accommodation and food service industry.

235. Moving on to full-time and part-time employees, given the distances to work analysed above, it can be assumed that the majority of them either work in the Bristol conurbation, while the rest work within the Parish itself or in the nearby town of Thornbury. Looking at Location of usual residence and place of work data,[54] it was found that 68 residents

[54] WF01BEW - Location of usual residence and place of work (OA level), ONS 2011

worked in Bristol, 45 worked in Thornbury (approximately ten minutes drive away) and 23 worked in the Parish. Therefore, Bristol and Thornbury appear to be the main employment sphere of influence experienced by the residents of Oldbury.

236. Furthermore, we have found evidence that both areas are expected to grow economically. In Bristol, 4,000 new jobs are expected to be created in the Filton Enterprise Area alone, which is located 20km away from the NA and easily accessible via the A38.[55] Regarding Thornbury, it is one of the five new large-scale developments identified by the JSP which will deliver 6,000 new homes as well as employment opportunities.[56]

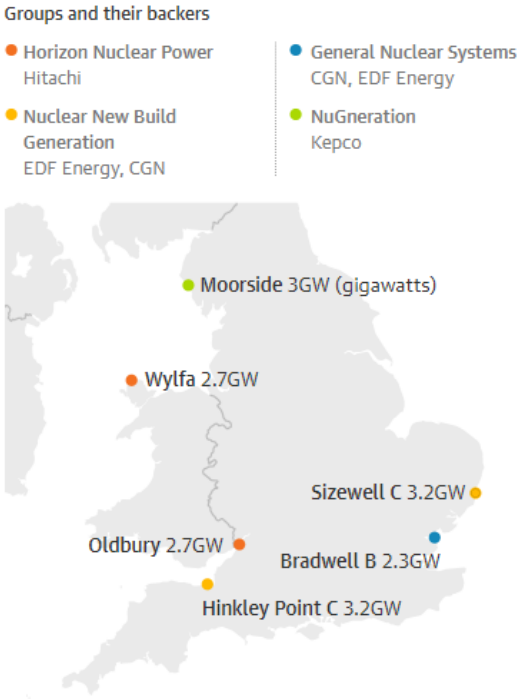
237. It could be assumed that there is a lack of employment opportunities within the Parish itself, pushing residents to work elsewhere. It could also reflect a trend for people to move out of the cities (in this case Bristol) into the surrounding Green Belt. The dominance of large family dwellings in the Parish would suggest that Oldbury is a "dormitory village".

238. However, it was found out that a total of 297 people from South Gloucestershire (excluding NA residents) and Bristol combined worked in the Parish (among them, 73 people from Bristol and 94 from Thornbury). Thus, most of the people working in the Parish do not actually live there. This suggests there are employment opportunities Oldbury, but the housing offer is not suitable to host the workers. It is therefore recommended to diversify the housing offer and make it more affordable to accommodate some of the professionals.

The influence of the Oldbury nuclear plant

239. The Oldbury nuclear plant, a significant employment site in Oldbury, accounts for the number of people from outside the Parish working there. Although the site was shut down in February 2012 and is currently being de-fuelled,[57] the loss of local employment opportunities arising from the decommissioning of the existing power station will be offset by plans by Horizon to build a second new nuclear power station at Oldbury (see Figure 7-2 below). According to the WE LEP SEP, this is part of a strategy to establish the West of England as a major centre for energy skills.

Figure 7-2: The UK's planned new nuclear plants



Source: https://www.theguardian.com/environment/2017/dec/14/plans-for-major-nuclear-power-station-in-wales-win-green-light-wylfa-anglesey

240. The Oldbury New Nuclear Build (NNB) is likely to have an impact on housing needs, so much so that the new local plan lists among its key issues, the "need to provide for housing needs arising from the construction phase of the Oldbury New Nuclear Build". Matthew Riddle, the leader of the South Gloucestershire UA, has also commented that the NNB will provide training opportunities and quality jobs for local people[58].

[55] West of England Strategic Economic Plan and South Gloucestershire Local Plan 2018 – 2036 (WE LEP SEP)
[56] South Gloucestershire Local Plan 2018 – 2036 Consultation Document
[57] http://www.southglos.gov.uk/environment-and-planning/planning/nuclear-legacy/
[58] https://www.bristolpost.co.uk/news/technology-approved-new-nuclear-power-959334

Conclusion

241. The evidence suggests that employment prospects will have an impact on housing needs. As the UA has proposed 1,300 new homes in the rural areas of South Gloucestershire and a potential contingency of 500 homes, we recommend that Oldbury accommodate some of this non-strategic growth.

242. This will allow some of the key workforce associated with the Oldbury nuclear site to live in the area. Given growth prospects within a 20 miles radius (for example Filton and Thornbury), this will also accommodate out-commuters.

243. This recommendation is in line with the opinion of the Parishioners. 60% of the 206 Parishioners surveyed in spring 2017 expressed that it is very important that young people and key workers can afford to live in the Parish. 80% also agreed that 'Oldbury will need more homes by 2036'.

244. Finally, given the high number of self-employed residents and Parishioners working from home, further investigation should be made into their specific needs.

7.2 Housing market (prices)

245. 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[59]. It makes clear that house prices can be used to provide a 'market-base' enabling: "*the identification of areas which have clearly different price levels 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*." This is then used as a signal to increase demographically based housing projections in response to the actual housing market.

246. In Table 7-2 below we have analysed house prices achieved in 2017 in Oldbury to gain an understanding of the latest prices for different property types and how they compare to the wider postcode area, the UA and England.

247. The mean house price for Oldbury is higher than the UA's and the postcode area average, however as the sample size is small, the data is easily skewed and therefore we believe house price for the larger postcode area is more representative of local house prices. Prices are generally more expensive in Oldbury than across the UA and much more expensive than the national average.

248. Looking at prices of different types, larger properties such as detached and semi-detached (using BS35 prices as a proxy for the NA) are more expensive in the NA than in the UAA. However the price difference is stronger for terraced and flats. Terraces and flats are 9% more expensive which shows a strong demand for these smaller house types.

Table 7-2: Mean house prices (2017)

Mean	Detached	Semi-detached	Terraced	Flats and maisonettes	All
Oldbury	£458,750	NA	£375,000	£545,000	£459,583
BS35 postcode area	£434,859	£287,808	£264,315	£191,623	£294,651
South Gloucestershire	£412,652	£280,935	£239,969	£175,011	£277,142
England	£334,848	£207,998	£178,874	£201,364	£221,790

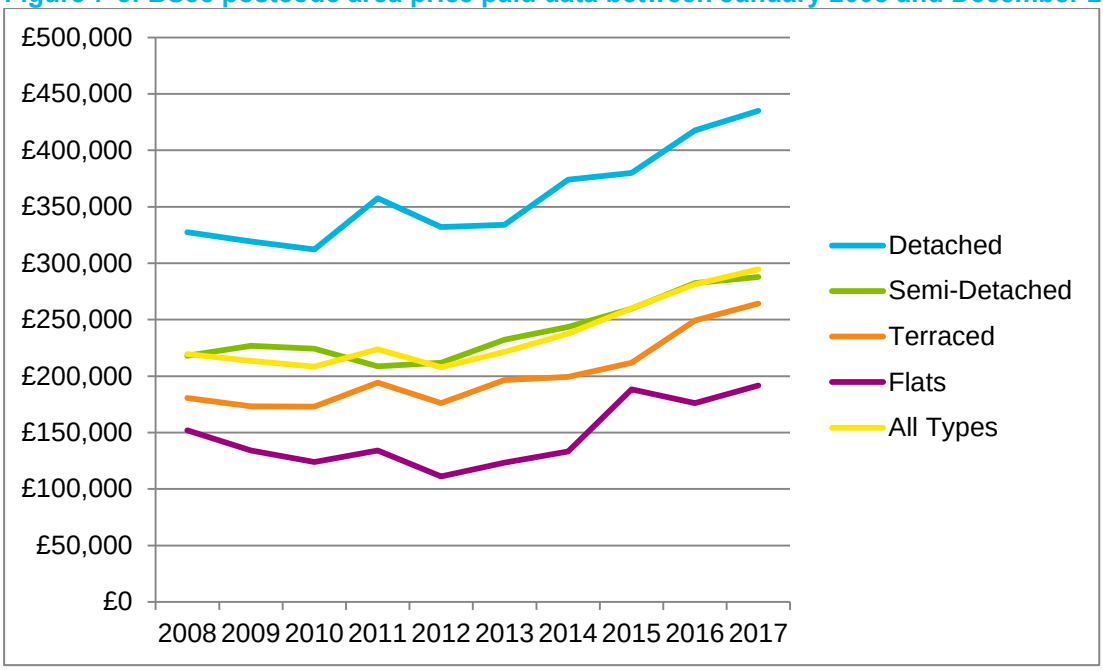
Source: Land Registry, AECOM Calculations

249. To assess recent movements in the housing market in Oldbury we have analysed data from the Land Registry. Data was then downloaded for the larger postcode area for the period of January 2008 to December 2017 and is presented in the figure below in Figure 7-3, divided by type of home and showing average price for each year. The graph shows little fluctuation across price paid data for the different types.

250. Most types have recovered their pre-recession levels and have grown by about 30% over the 9 year period. However, terraced dwelling prices have increased significantly (46.6%) again confirming the strong demand for smaller dwellings types (although flats have not increased as much).

[59] PPG Paragraph: 010 Reference ID: 2a-010-20140306

Figure 7-3: BS35 postcode area price paid data between January 2008 and December 2017



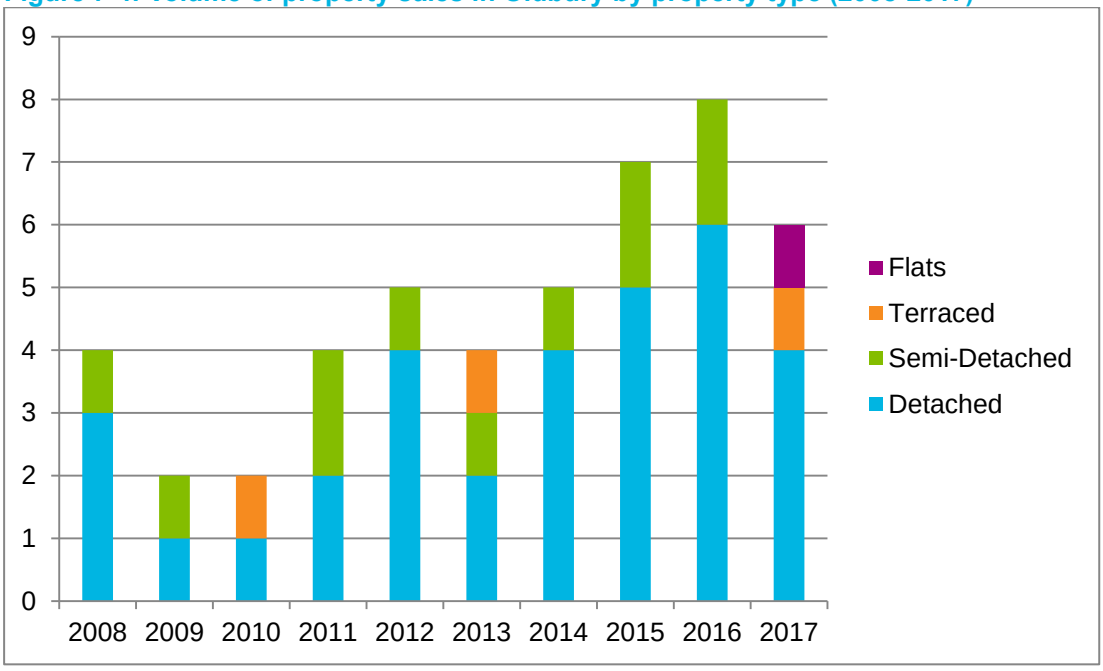
Source: Land Registry

7.3 Housing market (transactions)

251. Assessing housing sales over time is an important indicator in assessing demand for different types of housing. Figure 7-4 below presents Land Registry data for housing sales for different dwelling types in the Oldbury NA. The data suggests that despite fluctuations in the volume of property sales between 2008 and 2017, number of sales are lower now than they were before the economic downturn.

252. The data also shows that semi-detached and terraced dwellings formed the majority of total sales with 1165 and 1027 sales respectively between 2008 and 2017. Detached dwellings come in third position, with 703 dwellings sold over that period, whilst there have only been a small number of flats sold (381). The low quantity of flats sold, together with low sale prices for that same type, suggests a deflated demand for flats.

Figure 7-4: Volume of property sales in Oldbury by property type (2008-2017)



Source: Land Registry PPD, ONS

253. 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 whether there is unmet demand.

254. This comparison is presented in Table 7-3 below, with figures for the housing stock in South Gloucestershire as a whole added alongside for reference. The table shows a little discrepancy between sales and stock and a relative equilibrium.

Table 7-3: Sales volumes versus stock of different housing types in Oldbury and South Gloucestershire

	SALES (PPD)	STOCK (ONS)	STOCK(ONS)
	Oldbury	Oldbury	South Gloucestershire
Detached	68%	68%	26%
Semi-Detached	23%	20%	34%
Terraced	6%	6%	27%
Flats	2%	5%	11%

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

255. Bringing the evidence together, evidence shows that the housing market in Oldbury is relatively stable and there is no recommendation to alter the dwelling targets in the light of market signals relating to transaction data.

7.4 Rate of development

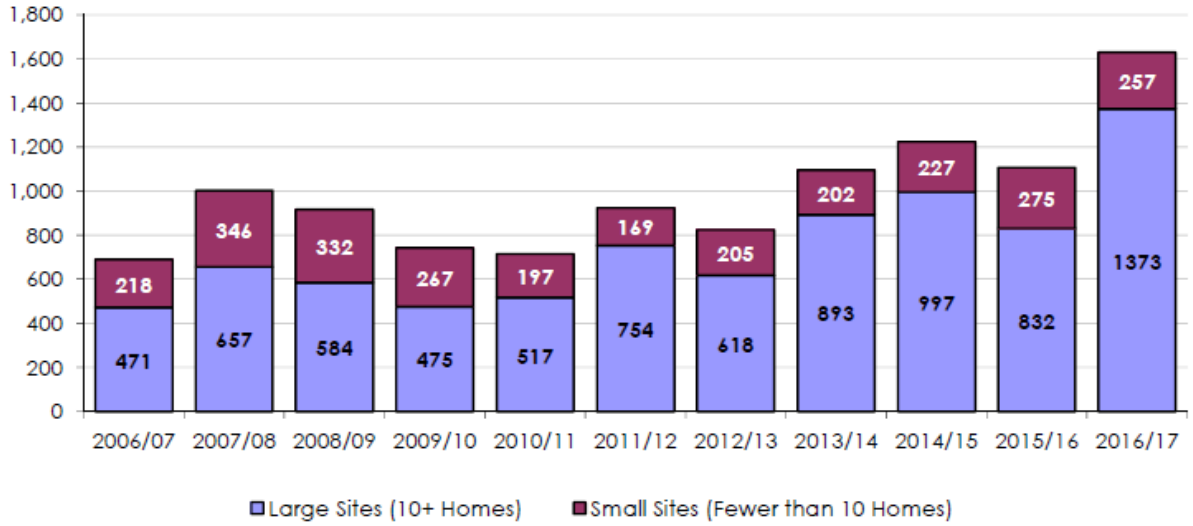
256. PPG suggests that *"If the historic rate of development shows that actual supply falls below planned supply, future supply should be increased to reflect the likelihood of under-delivery of a plan"*.[60]

257. For that, we 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 UA. Between the 1st April 2011 and the 31st March 2017, 14 new dwellings were completed. That number equates to an annual rate of delivery of 2 homes.

258. The Core Strategy (Policy CS15) sets a target of 28,355 homes between 2006 and 2027, or an annual target of 1,350 dwellings. A 'fair share' of that target for the NA produces 4 dwellings per annum (rounded). Based on that, 23 dwellings should have been completed between 2011 and 2017 (4 multiplied by the number of years elapsed between 2011 and 2017). Yet, only 14 dwellings were completed, creating a shortfall of 9. Therefore, recent completions rates are below the planned targets. Consequently, there is evidence to demonstrate significant under delivery since 2011 and this market signal indicates the need for additional planned supply. Figure 7-5 below shows the UA has consistently delivered below targets since 2006, with the exception of 2016/17. This gives further evidence of under delivery.

[60] PPG Paragraph: 019 Reference ID: 2a-019-20140306

Figure 7-5: Net additional dwellings delivered in South Gloucestershire



Source: South Gloucestershire UA - Annual Monitoring Report 2017, p.30

8. Conclusions

259. We have estimated the quantity of housing needed in the NA according to four different sources; these are:

    9. South Gloucestershire Local Plan: Core Strategy – 2006-2027 (2013)
    10. New South Gloucestershire Local Plan – 2018-2036 (2018)
    11. MHCLG household projections
    12. Dwelling growth between 2001 and 2017

260. To arrive at an overall projection for the quantity of housing to be delivered in the NA over the Plan Period, we have averaged projections from the New Local Plan and from the MHCLG household projections. We chose these two projections over the Core Strategy projection and the Dwelling growth projection because the Core Strategy is out-of-date and because dwelling growth relates to supply, which we are not considering in this study.

261. The projections produced an interim housing needs figure (interim because it will be adjusted to reflect the impact of market indicators called market signals) of 74 dwellings for the whole Neighbourhood Area and 31 dwellings in the Oldbury settlement only by 2036.

262. Following the derivation of an interim housing needs figure, the next step is to assess the interim housing needs figure against a series of so called 'market signals' which may serve to raise or lower the interim housing needs figure or range as appropriate[61]. Our assessment of these market signals is summarised in Table 1-1 below. As these market signals are not significant enough, we have decided to not apply any market signals to increase or lower the interim housing needs figure. This produces a final housing needs figure of **74 dwellings in the whole Neighbourhood Area and 31 dwellings in the Oldbury settlement only by 2036.**

263. This HNF is not supposed to take into account policies relevant to housing delivery that may constrain supply. Yet, Oldbury and the wider Parish are mostly covered by flood risk areas and flood defences. For this reason, it is restricted from growth, in line with the NPPF Paragraph 100: *"Inappropriate development in areas at risk of flooding should be avoided by directing development away from areas at highest risk*". Although supply and planning constraints are not part of the HNA exercise, it is crucial to acknowledge the impact flood risk regulations on the likely amount of housing to be built in the Parish.

264. Therefore, **given the constraints mentioned above, the separate projection for the Oldbury settlement alone which produced an HNF of 31 dwelling up to 2036, is seen as a more realistic HNF than the one for the whole NA.**

[61] *"The housing needs 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."*

265. In the table below, 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 set out in the table below in alphabetical order.

Table 8-1: Summary of factors specific to Oldbury with a potential impact on neighbourhood plan housing quantity

Factor	Source(s)	Possible impact on future housing needs	Rationale for judgement
Employment and commuting	*ONS 2011, WE LEP SEP, South Gloucestershire Local Plan 2018 – 2036 Consultation Document, southglos.gov.uk, bristolpost.co.uk, guardian.co.uk*	↑↑	The evidence suggests that employment prospects will have an impact on housing needs. As the UA has proposed 1,300 new homes in the rural areas of South Gloucestershire and a potential contingency of 500 homes, we recommend that Oldbury accommodate some of this non-strategic growth. This may help some of the key workforce associated with the Oldbury nuclear site to live in the area. Given growth prospects within a 20 mile radius (for example, at Filton and Thornbury), it is likely that Oldbury will accommodate some commuters who wish to work in these locations. This recommendation is in line with the opinion of Parishioners. 60% of the 206 Parishioners surveyed in spring 2017 expressed a view that it is very important that young people and key workers can afford to live in the Parish. 80% also agreed that 'Oldbury will need more homes by 2036'. Finally, given the high number of self-employed residents and Parishioners working from home, further investigation should be made into their specific needs.
Housing sales (prices)	*Land Registry Price Paid Data for 2008-2017*	↑↑	Looking at prices of different housing types, larger properties such as detached and semi-detached are more expensive in the NA than in the UAA. Terraced houses and flats were even more significantly expensive in the NA than in the UAA which shows a strong demand for these smaller building types. Most housing types have recovered their pre-recession price levels and prices have grown by about 30% over a 9 year period. However, terraced dwelling prices have increased significantly (46.6%), again confirming the strong demand for smaller dwellings types (although flats have not increased as much).
Housing sales (volume)	*Land Registry Price Paid Data for 2008-2017, Census 2001/2011 data,*	↔	Bringing the evidence together, the housing market in Oldbury is relatively stable and there is no recommendation to alter dwelling targets in the light of market signals relating to quantity data.

Rate of development	*Land Registry data/AECOM calculations*		There is evidence to demonstrate significant under delivery since 2011 and this market signal indicates the need for additional planned supply.

8.1 Type of housing needed

Table 8-2: Summary of local factors specific to Oldbury with a potential impact on neighbourhood plan housing characteristics

Factor	Sources	Possible impact on housing needed	Conclusion
Affordable Housing[62]	ONS, Wider Bristol SHMA, Land Registry, www.home.co.uk, DWP, Housing Register	We have shown the relative scarcity of smaller properties, those which are more likely to be considered 'entry-level': 16.5% of properties have one to two bedrooms; Only one two-bedroom dwelling was advertised for sale in March 2018.This lack of smaller dwellings is driving affordability pressures up. We have estimated the entry-level property price to be around £307,000, which creates a Lower Quartile Affordability Ratio[63] (LQAR) of 8.2, higher than the average for the UA. Oldbury is a relatively expensive area (average house price estimated at £459,583), compared to not only the national average (average house price is £149,000) but also to the mean for South Gloucestershire (average house price is £210,000). Moreover, affordability pressures (determined by the LQAR) have increased in the NA by 16% between 2008 and 2016, while they have remained stable across the UA and increased by 4% nationally. We have also examined affordability for market sale homes and private rented homes. The purchase and income thresholds were respectively £78,943 and £31,818. Two residents were identified as being in urgent need of affordable housing, to which we can add 10 households in the PRS who are receiving housing benefits. Three households were considered to be overcrowded and two to be concealed. However, some of the 42 households with non-dependent children identified have the potential to be concealed on top of the two identified above.	Only a very small number of households are in urgent need of affordable housing, and overcrowding and household concealment are not pressing issues within the NA. Households in the private rented sector who are housing benefits recipients would not necessarily be in need of social housing, but cannot afford market prices; hence why they are housing benefits beneficiaries. Furthermore, some individuals within the households with non-dependent children could potentially form their own households but are unable to, probably due not only to a lack of affordable tenures but also to a lack of appropriate types and sizes. Therefore, a mix of social housing and affordable rents would satisfy the needs of those households.

[62] The term 'Affordable Housing' denotes the planning definition set out on page 50 of the National Planning Policy Framework, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf
[63] The LQ house price is the price below which the cheapest 25% of houses may be bought and is a measure of 'entry-level' property in the area (cheaper, more affordable housing).

Factor	Sources	Possible impact on housing needed	Conclusion
Demand/need for smaller dwellings	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Houses of one to three habitable rooms are less frequent and only represent 4% of accommodation against 9% in the UAA, which also has a higher proportion of entry-level properties and medium-sized family dwellings. One-person households are forecast to increase by 32% in the UAA by the end of the Plan Period. Households aged over 65 are estimated to form around 40% of all households towards the end of the Plan Period. These households are the most likely to occupy smaller dwellings. Furthermore, it has been shown across the UAA that households tend to downsize after reaching the age of 60.	There is a need for one to three-bedroom properties in the light of the increase in two people and one person households aged over 65. The need for one to three-bedroom properties is not only for older, downsizing households but also to allow non-dependent children living with their parents to form their own households and remain in Oldbury.
Demographic change	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Oldbury had 310 households in 2011, representing 0.29% of the UA's total. 84 additional households are expected to form between 2011 and 2036, producing a total of 394 households. Changes in household composition during the inter-censual period indicate a reduction in the size of households, and an increase in one-person households and childless families. Considering household projections for the whole UA, trends in the NA mentioned above are likely to continue as a reduction in the size of households and an increase in one person households has been forecasted. The data also points towards a substantial gain in households over the age of 65. Indeed, these households are already proportionally more substantial in the NA (31.9%), and are likely to form close to 40% of the population in 2036.	• See 'Demand/need for smaller dwellings', 'Dwelling type', and 'Family-sized housing'.
Dwelling type	ONS, MHCLG 2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	Most of the stock in the NA is made up of detached properties, which is reflected in the bigger size of houses in Oldbury. Current patterns of occupation (age of the head of household to size) are detailed the main body of the report. One of the findings is that , in the UAA in 2011, more than 30% of households where the HRP is aged between 50 and 54 were living in a detached home.	Based on current patterns of occupation, we recommend the following in terms of size of housing needed: • Semi-detached whole house or bungalow:43% • Terraced whole house or bungalow:46% • Flat, maisonette or apartment: 11%
Family-sized	ONS, MHCLG	Family-sized housing is largely	Although larger properties will still

Factor	Sources	Possible impact on housing needed	Conclusion
housing	2014-based household projections, ONS Sub-National Population Projections 2014, SHMA	available in the NA and 96% of the stock can be considered family dwellings (4 rooms or more). By comparison, in South Gloucestershire, 90% of the stock can be considered family. Cross-referencing this data with 'number of bedrooms' shows that family-sized dwellings are 10% more substantial in the NA than in the UAA.	be needed and families with dependent children will continue to increase, building smaller dwellings will allow older households to downsize, freeing up the larger properties they occupied for younger families with children.

8.2 Recommendations for next steps

266. This neighbourhood plan housing needs advice has aimed to provide Oldbury 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 SGUA 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 NP area, bearing the following in mind:

    - Neighbourhood Planning Basic Condition A, that it has regard to national policies and advice contained in guidance issued by the Secretary of State; Condition D, that the making of the neighbourhood plan contributes to the achievement of sustainable development; and Condition E, which is the need for the neighbourhood plan to be in general conformity with the adopted strategic development plan and its policies;
    - the views of SGUA – in particular in relation to the housing needs 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 SGUA, including but not limited to the SHUAA;
    - the recommendations and findings of this study; and
    - The impact of the new Government proposed standard methodology on calculating housing needs on the Authority and its neighbourhoods.

267. 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. Therefore we recommend the Neighbourhood Plan Working Group to monitor for chances.

268. 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).

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

270. At the same time, monitoring on-going demographic or other trends over the period in which the neighbourhood plan is being developed (factors summarised in Table 1-2 above) would help ensure relevance and credibility of its policies.

Appendix A :Market Segmentation

271. The evidence assembled 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.

272. In Table 8-3 on the following page we reproduce research by Nathaniel Litchfield and Partners, setting out recommended dwelling sizes for different household types. The table 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 in the NA; two 'up' arrows indicates strong growth, three 'up' arrows suggests very rapid growth in years to come. Where segments are falling in numbers, or not growing, neutral or down arrows are shown.

273. 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.

274. 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). This table has been defined on the basis of the following assumptions,

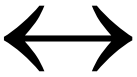
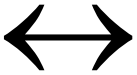
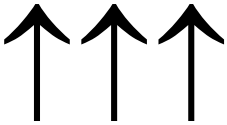
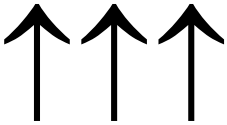
- Smaller apartments/flats or houses will be more suitable for meeting the initial requirements of married couples until the age they have a family. Those households without children could occupy either houses or flats of the appropriate size;
- Cohabiting couples and lone parents will want and require similar sizes of housing to married couples. Those households without children could occupy either houses or flats of the appropriate size;
- Smaller apartments/flats or houses will be more suitable to meeting the requirements of single person households;
- According to their composition, institutional accommodation such as a residential care home, hostel or purpose-built student accommodation may provide a suitable form of specialist housing for groups such as elderly people and students;
- Further qualitative allowances will need to be made of households at retirement age who are likely to continue living in their previous home unless more manageable two bed flats, houses and bungalows are available; and,
- The requirement for housing with care, including supported housing and extra care provision, is likely to increase at 85 and above.

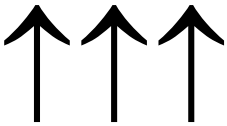
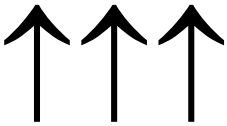
Table 8-3: Estimated housing size required by household type, by age of head of household

Age Range 2013	One Person	Married Couple / With 1/2 Children	Married Couple / With 3+ Children	Cohabiting Couple / With 1/2 Children	Cohabiting Couple / With 3+ Children	Lone Parent / With 1/2 Children	Lone Parent / With 3+ Children	Other Multi-Person
0-14	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
15-24	1 bed flat/house	2 bed flat/house	3 bed house	2 bed flat/house	3 bed flat/house	2 bed flat/house	3 bed house	1 bed flat
25-34	1 bed flat/house	3 bed house	3 bed house	3 bed house	3 bed house	3 bed house	3 bed house	1 bed flat
35-44	2 bed flat/house	3 bed house	4 bed house	3 bed house	4 bed house	3 bed house	4 bed house	2 bed flat
45-59	2 bed flat/house	3 bed house	4 bed house	3 bed house	4 bed house	3 bed house	4 bed house	2 bed flat
60-84	2 bed flat/bungalow [30]	2 bed flat/bungalow	3 bed bungalow	2 bed flat/bungalow	3 bed bungalow	2 bed flat/bungalow	3 bed bungalow	2 bed flat
85+	Housing with care	Housing with care	Housing with care	Housing with care	Housing with care	Housing with care	Housing with care	Housing with care

Source: NLP

Table 8-4: Market Segments

Market segments	Income range	Tenure	Presence in Plan Area	Rationale	Size of home
Young family where parents are aged 24-44 with 1+ children aged 0-15	Median	PRS, Social housing, shared equity, AMH		Those of parental age form a substantial part of the population (19%), supporting a school age population that accounts for roughly 15% of all residents. However family with dependent children (23%) is not the largest household type. Over the inter-censual period there has been a fall in the 0-15 population by 13.50%, together with a fall of 4.50% of those of parental age.	5 rooms
Professional Head of Household Young family where parents are aged 24-44 with 1+ children aged 0-15	Mean	AMH, Market Housing (MH)		Those of parental age form a substantial part of the population (19%), supporting a school age population that accounts for roughly 15% of all residents. However family with dependent children (23%) is not the largest household type. Over the inter-censual period there has been a fall in the 0-15 population by 13.50%, together with a fall of 4.50% of those of parental age.	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		There are a high proportion of families with non-dependent children (13.50%) The number of non-dependent children has increased. The group 44-64 is projected to increase and has increased. Ideally enough entry-level affordable dwellings should be built to avoid concealment in the future.	6+ rooms
One person household aged under 65	Median (equity poor)	PRS, DMH		One person households (15.50%) are split equally between those over 65 and those under. There are fewer one-person households in Oldbury. Growth of 14.30% during the inter-censual period. Decline of household size.	2 rooms
One person household aged 65+ with wealth	Median (equity rich)	Market Housing		Oldbury exhibits a higher proportion of people falling into the 65-84 age bracket than England. There has been a substantial uplift in older cohorts (aged 65-84 and 85+). Although it has not increased during the inter-censual period, given that older age groups are projected to increase, together with a decreasing household size, this group is expected to grow. In South Gloucestershire, one-person households as a proportion of all households, will experience a 32,11% increase.	2-3 rooms

Market segments	Income range	Tenure	Presence in Plan Area	Rationale	Size of home
				The housing stock should give these people the ability to right-size.	
One person household aged 65+ without wealth	Lower Quartile (equity poor)	Social Housing		Oldbury exhibits a higher proportion of people falling into the 65-84 age bracket than England. There has been a substantial uplift in older cohorts (aged 65-84 and 85+). Although it has not increased during the inter-censual period, given that older age groups are projected to increase, together with a decreasing household size, this group is expected to grow. In South Gloucestershire, one-person households as a proportion of all households, will experience a 32,11% increase. The housing stock should give these people the ability to right-size.	2 rooms
Young couple no children	>Mean (equity poor)	Market Housing, Shared Equity, DMH		Over the inter-censual period there has been an increase of 27.60% in younger adults; Key constituency: couples with no children (27.70%).	4+ rooms
Concealed households	Lower Quartile (equity poor)	Social Housing		Over the inter-censual period there has been a small increase in younger adults (11.4%); Over the inter-censual period there has been an increase of 100% of households with non-dependent children.	1-3 rooms

Source: AECOM

Appendix B : Housing tenure

Earlier in this study, we identified the various different tenures that constitute the new definition of Affordable Housing (AH) within the NPPF18: *Affordable housing for rent, Starter homes, Discounted market sales housing, and other affordable routes to home ownership.*

This variety of AH tenures reflects an ambition by the Government to provide a pathway to home ownership to those who seek it, as well as introducing market principles into the provision of subsidised housing for rent. The aim is to divide AH into a series of products designed to appeal to different sectors of the market and, by changing eligibility criteria, bring rents closer in line with people's ability to pay.

A good example is, in 2012, the introduction of affordable rented dwellings, rent for this tenure is set at up to 80% of market rent, with the additional income being used to help fund the development of new homes. Labelled an 'intermediate' product, this would be suitable for people with an income that precludes them from eligibility for the social rented dwellings (those dwellings where the rent is set in accordance with the Government's rent policy), but who cannot afford to access the private market.

The overall aim is to reduce the group who are eligible for social rented dwellings to those who have, relatively speaking, very low household incomes. However, within this segment, market principles also apply given the link between rents and size of dwelling, with a strong financial incentive for households to only occupy a dwelling deemed suited to their composition, based on an 'occupancy rating' formula set by the Government.

We consider each of the AH tenures in turn, before arriving at a recommendation for how the quota of AH yielded by development should be divided between these tenure types.

B.1 Social rented housing

Rents in socially rented properties reflect a 'formula rent' based on a combination of individual property values and average earnings in each area, maintaining substantial discounts to market rents. As such, it is suitable for the needs of those on low incomes, and is subject to strict eligibility criteria.

As we have seen, the majority of households in Oldbury are able to afford market dwellings (for sale or rent) as they are only 8 households in social housing, representing 2.6% of the NA. However, the evidence we have gathered suggests there is a minority who experience great difficulty in accessing housing suited to their needs. The following were identified:

- 2 households currently on the housing waiting list;
- 3 considered to be overcrowded;
- 2 considered to be concealed.

Although there might be an overlap between these households (the 2 households considered to be concealed could be the same households on the housing waiting list), this gives a total number of 7 households currently in need for social-rented Affordable Housing.

This corresponds to the current backlog of needs. In order to estimate future needs, we can assume that the current proportion of households who can only afford social housing will be similar among the households expected to form (although that proportion will grow due to the reported increase in house prices in the area in recent years). There are currently 15 households who can only afford social housing (8 households currently living in social housing or 2.6% of all 310 households + 7 households in need), representing 5% of all 310 households.

Assuming that 78 dwellings get built, 4 (5% of 78) + 7 (current backlog) = 11 should be social-rented, or 14% of all new dwellings.

B.2 Other Affordable Housing tenures

As we have seen, 10 households (19% of households in the PRS) are claiming housing benefits, and would benefit from Affordable Housing tenures other than social housing.

We have also identified 42 households where adult children who could form their own households are living with their parents. They represent a source of local housing needs in Oldbury. While some of them cannot form their own households because of affordability issues, others cannot because of supply.

To estimate future needs, we can assume that the current proportion of households who would benefit from Affordable Housing tenures other than social housing will be similar among the households expected to form. There are currently 10 households in that situation, representing 3.23% of all 310 households.

Assuming that 78 dwellings get built, 3 (3.23% of 78) + 10 (current households in need) = 12 dwellings or 17% of all new dwellings should be Intermediate housing tenures or AH tenures other than social housing. We further discuss the different types of Affordable Housing tenures below.

i) Discounted market housing (starter homes)

As we have seen, Housing and Planning Act 2016 (HPA) includes provisions to introduce a general duty on planning authorities in England to promote the supply of 'starter homes,' and a specific duty to require a minimum number or proportion of 'starter homes' on certain residential development sites. As we have seen, in paragraph 65 of the NPPF18 Government introduces a recommendation that *'where major housing development is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership'.*

This is a fulfilment of the direction of travel set in the Housing White Paper. It states that, *"in keeping with our approach to deliver a range of affordable homes to buy, rather than a mandatory requirement for 'starter homes,' we intend to amend the NPPF to introduce a clear policy expectation that housing sites deliver a minimum of 10% affordable home ownership units. It will be for local areas to work with developers to agree an appropriate level of delivery of 'starter homes', alongside other affordable home ownership and rented tenure".*

This is a substantial watering-down of the 'starter home' requirement as envisaged when policy contained in the Housing and Planning Act was first conceived. In effect, it leaves it to local groups, including neighbourhood plans, to decide an appropriate level of affordable home ownership products, while taking note of the 10% policy expectation.

The decision whether to treat Discounted Market Sale Homes (DMSH) as affordable housing should be determined by whether lowering the asking price of new build homes of a size and type suitable to first time buyers by 20% would bring them within reach of people currently unable to access AMH for purchase.

So as to provide a conservative assessment of suitability of DMSH, we propose to use the LQ house price for Oldbury in 2017; this set a value of £307,000 on an entry level dwelling. As we have seen, allowing for a 10% deposit, reducing the value of a LQ property priced at £307,000 for mortgage purposes to £276,300, and applying a further discount of 20% to arrive at the approximate selling price of a DMSH of £221,040, a household on the mean income for Oldbury of £37,542.89 would not be able to afford a dwelling at this price-point, the income threshold at a multiple of 3.5 being £63,153.

On the basis of the evidence we have gathered, we would therefore recommend that DMSH form part of the AH quota within the NA.

ii) Shared ownership

As we have seen, there are very few shared ownership dwellings in Oldbury (2 at the time of the last Census). Nevertheless, it is worth considering its future role in the NA. Shared ownership involves the purchaser buying an initial share in a property typically of between 25% and 75% and paying rent on the share retained by the provider. Shared ownership is flexible in two respects, in the share which can be purchased and in the rental payable on the share retained by the provider. Both of these are variable.

The share owned by the leaseholder can be varied by 'stair-casing'. Generally, stair-casing will be upward, thereby increasing the share owned. In exceptional circumstances (as a result of financial difficulties, and where the alternative is repossession), and at the discretion of the provider, shared owners may staircase down, thereby reducing the share they own.

Shared equity is available to both first-time buyers, people who have owned a home previously and UA and housing association tenants with a good credit rating whose household income does not exceed £60,000. Given these conditions, on the basis of the affordability analysis discussed above, it should form part of the AH mix in the Parish.

iii) Affordable rent

Commentators have repeatedly raised concerns about affordable rent not constituting a realistic form of AH given that in many areas this reduces rent to levels that are still beyond the means of the target group: those on incomes substantially below the mean.

Affordable rent is controlled at no more than 80% of the local market rent. As we have seen the annual rent for a two bedroom dwelling in Oldbury is £10,500. This remains beyond the reach of those households in the PRS on housing benefits, and of some of the identified concealed households. In the event of a 20% reduction in rent, the income threshold would come down to £25,455, bringing rents largely within reach of some of those households as the mean income for Oldbury of £37,542.89.

We therefore recommend that the affordable rented tenure form a component within AH.

B.3 Market housing

Given the limited quantity of AH in the NA, the needs of the great majority of the people will be served by the market. 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.

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 needs; to do so will not only frustrate the delivery of new housing but also may deprive the community of resources for infrastructure improvements.

B.4 Build to rent

As we have seen, there is strong evidence of growing demand for private rent accommodation in the NA. On-going changes to the benefit system, in particular 'Universal Credit,'[64] and the way Affordable Housing is allocated, for example restrictions imposed by eligibility criteria, are likely to increase demand on the private rented sector, especially at the lower-cost end of the market. Given the very substantial increases in PRS revealed by Census data, this trend is one shared by Oldbury.

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. Given the trends identified in this HNA, Oldbury should seek build to rent (BTR) development, a percentage of which may be 'intermediate rented housing' so as to address the need to affordable market housing for younger age groups.

[64] Reforms to the benefits system are likely to see payments made directly into recipients' bank accounts rather than housing benefit paid to landlords thus granting the individual greater choice in the nature of their housing arrangements.

Appendix C : Rent calculations

Table 8-5: Summary of monthly rents recorded between 1 October 2016 to 30 September 2017 by administrative area for England

Area	Count of rents	Mean	Lower quartile	Median	Upper quartile
ENGLAND	487680	831	500	675	950
SOUTH WEST	64510	765	560	695	850
South Gloucestershire UA	960	955	695	825	995

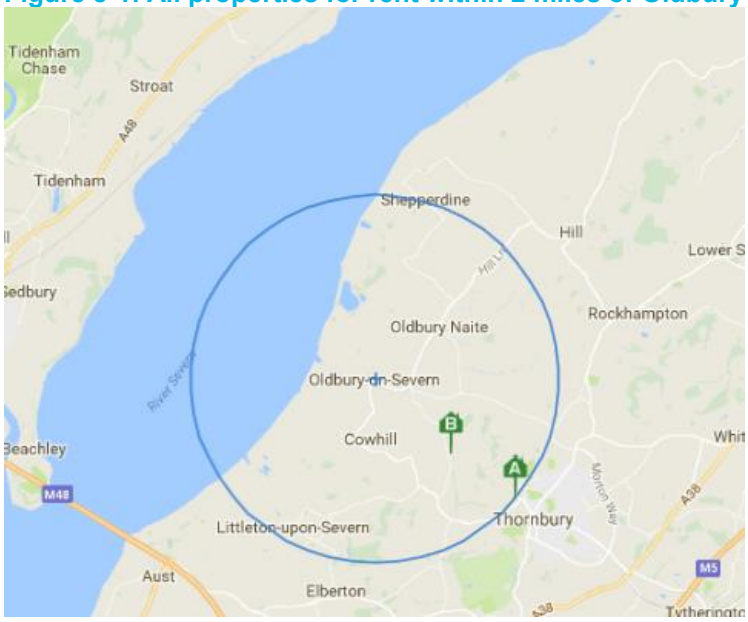
Source: Valuation Office Agency, 2017, https://www.gov.uk/government/statistics/private-rental-market-summary-statistics-october-2016-to-september-2017

Table 8-6: Properties for rent within 2 miles of Oldbury-on-Severn, Mars 2018

Size	Property	Price	Within the NA
3-Bed House	Oldbury-On-Severn, South Gloucestershire	1,500	Yes
3 Beds Detached	Warwick Place, Thornbury	850	No
1 Bed House	NR Thornbury, South Gloucestershire	825	Yes

Source: Home.co.uk

Figure 8-1: All properties for rent within 2 miles of Oldbury-on-Severn, March 2018



Source: Home.co.uk

Figure 8-2: BS35 Market Rent Summary

Our rental price analysis for BS35 summarises the advertised rents for homes to let, calculated daily from the rental properties found by the Home.co.uk Property Search Engine

Summary of Properties for Rent in BS35

Total properties for rent in BS35:	23
Properties for rent in BS35 listed in the last 14 days:	11
Average* property rents in BS35:	£900 pcm
Median* rent:	£875 pcm
Average Time on Market (ToM) in BS35*:	125 days

Source: Home.co.uk