

Local Authorities of Gloucestershire

SHMA Update Paper:

Impact of new Objectively Assessed
Need figures

December 2014

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Issued 5th December 2014

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Chapter Listing

1. Introduction	3
Purpose.....	3
Objectively Assessed Need.....	3
The LTBHM model.....	5
2. LTBHM Model Results for Cheltenham	9
Introduction.....	9
Demographic projections.....	9
Tenure of housing required.....	11
Size of housing required within each tenure.....	13
Older persons accommodation required.....	15
Alternative LTBHM scenarios outputs for Cheltenham.....	17
3. LTBHM Model Results for Cotswold	19
Introduction.....	19
Demographic projections.....	19
Tenure of housing required.....	20
Size of housing required within each tenure.....	22
Older persons' accommodation required.....	25
Alternative LTBHM scenarios outputs for Cotswold.....	27
4. LTBHM Model Results for Forest of Dean	29
Introduction.....	29
Demographic projections.....	29
Tenure of housing required.....	30
Size of housing required within each tenure.....	32
Older persons' accommodation required.....	35
Alternative LTBHM scenarios outputs for Forest of Dean.....	37
5. LTBHM Model Results for Gloucester	39
Introduction.....	39
Demographic projections.....	39
Tenure of housing required.....	40
Size of housing required within each tenure.....	42
Older persons' accommodation required.....	45
Alternative LTBHM scenarios outputs for Gloucester.....	47
6. LTBHM Model Results for Stroud	49
Introduction.....	49
Demographic projections.....	49

Tenure of housing required.....	50
Size of housing required within each tenure	52
Older persons' accommodation required	55
Alternative LTBHM scenarios outputs for Stroud	57
7. LTBHM Model Results for Tewkesbury	59
Introduction	59
Demographic projections.....	59
Tenure of housing required.....	60
Size of housing required within each tenure	62
Older persons' accommodation required	65
Alternative LTBHM scenarios outputs for Tewkesbury.....	67
8. Revised policy implications	69
Introduction	69
Gloucestershire-wide outputs	72
Older persons' accommodation required	73
Results for the 3 JCS authorities combined.....	75

1. Introduction

Purpose

- 1.1 In 2013 a Strategic Housing Market Assessment (SHMA) was published for Gloucestershire in accordance with the National Planning Policy framework (NPPF). That report contained a detailed discussion of the housing market and set out the most appropriate mix of new housing to meet the population growth identified within the externally set out Objectively Assessed Need¹ (OAN). This output was derived from the Long Term Balancing Housing Markets (LTBHM) model as detailed in Chapter 8 of the 2013 SHMA report.
- 1.2 Since the publication of the SHMA the constituent authorities of Gloucestershire have commissioned a report to produce consistent OAN figures for each authority (previously different approaches were used to calculate the OAN in different parts of the County). The LTBHM model has consequently been updated in light of the new OAN figures (which are a key input component of the model). This report presents the updated housing mix requirements for each authority resulting from the updated model. The following chapters of this report set out the updated outputs of the LTBHM for the each individual authority and detail the nature of housing required between 2013 and 2031. The final chapter presents the LTBHM results for the County as a whole as well as the three Joint Core Strategy (JCS) authorities (Cheltenham, Gloucester and Tewkesbury Joint Core Strategy). It also reviews the policy recommendations of the 2013 SHMA report and sets out updated equivalents. The remainder of this chapter is used to briefly summarise the new work on the OAN and sets out the methodology of the LTBHM model.

Objectively Assessed Need

- 1.3 Cotswold, Forest of Dean and Stroud have commissioned Neil McDonald with Christine Whitehead to assess the scale of the Objectively Assessed Need across Gloucestershire using a single methodology. The report² uses the latest demographic projections available to examine the number of new homes required in each of the constituent authorities, and to derive the Objectively Assessed Need arising from both future demographic and economic growth. The Objectively Assessed Need constitutes the figure that the Councils should seek to plan towards in accordance with the NPPF. It is therefore an important input to the LTBHM model.
- 1.4 The report provides three scenarios for the level of OAN in each authority, one based on the most recent (2012-based) sub-national population projection alongside the most recent (2011-based) sub-

¹ The Objectively Assessed Need is the total future requirement for housing in an area (usually set out over the Local Plan period).

² Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014).

national household projections³, one based on these projections but modified to adjust for the lower household formation rate of 25-34 year olds that was recorded by the Census, and one that was based on the need to provide sufficient homes for the projected economic growth to take place. The second of these was considered to be the most appropriate to be the Objectively Assessed Need.

- 1.5 The LTBHM model will initially identify the nature of housing required to address the demographic OAN, but will also produce equivalent results for the unadjusted trend based OAN⁴ (labelled the lower scenario for the purposes of this report) and the OAN with extra homes for jobs (labelled the higher scenario for the purposes of this report). It should be noted that there is not a separate OAN with extra homes for jobs figure for each of Cheltenham, Gloucester and Tewkesbury as the demographic OAN contained sufficient population change to meet the projected economic growth. Results are therefore not presented for this scenario for these three JCS authorities. In Tewkesbury the lower scenario has a higher figure than the main scenario because a greater requirement is identified in the unadjusted trend based OAN than in the demographic OAN.
- 1.6 The model will assess the tenure and size of housing required to meet the housing requirements of the households that comprise the OAN between 2013 and 2031. The results in Neil McDonald with Christine Whitehead's report are based on housing requirements between 2011 and 2031. These totals have therefore been reduced based on the actual net housing delivery achieved between 2011-2013 in each authority (the amount of the OAN already delivered). Table 1.1 sets out the number of additional dwellings required in each authority in each of the scenarios being examined.

Authority	<i>Main</i>	Lower	<i>Higher</i>
Cheltenham	9,699	8,099	-
Cotswold	5,371	4,371	6,571
Forest of Dean	5,705	4,605	6,705
Gloucester	11,615	9,415	-
Stroud	7,815	7,315	8,615
Tewkesbury	6,922	7,122	-

Source: The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

³ The 2012-based household projections equivalent to the 2012-based population projections are not published.

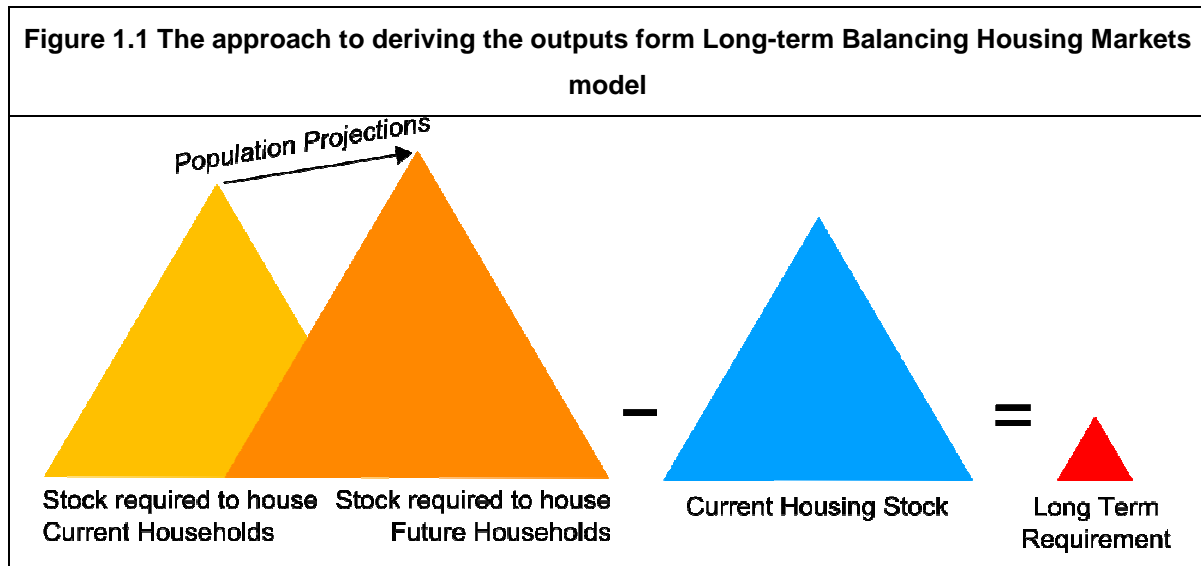
⁴ Titled Baseline: 2012 SNPP + DCLG 2011 in Neil McDonald and Christine Whitehead's report.

⁵ The figures used differ from the ones set out in Neil McDonald and Christine Whitehead's report due to accounting for housing delivery that has occurred in 2011 and 2013

The LTBHM model

- 1.7 The purpose of the model is to identify the new accommodation required to adequately house the future population and ensure that the housing market is balanced over the plan-period (the results are presented through to 2031 to correlate with the Objectively Assessed Need calculations). The model uses primary and secondary data (set out in detail in the original SHMA report) alongside the independent work on the objectively assessed need of each local authority area (including the projected change to the population and household composition).
- 1.8 The Long-term Balancing Housing Markets model is not a household flow model, but an assessment of the accommodation required to house the future household population. Figure 1.1 demonstrates how the model works:
- Firstly a suitable accommodation profile is identified. The model considers current occupation patterns of households and makes adjustments to ensure the occupation patterns moving forward are sustainable for all households, (but in the majority of cases it is presumed that the occupation patterns exhibited today are satisfactory). The adjustments made are not to the particular household now, but so the future household is most efficiently accommodated. Therefore it assumes for example that whilst there are some households now in social rented sector that can afford shared ownership accommodation, equivalent future households would be resident in this tenure.
 - Secondly, the projected change to the population and household composition alongside the employment growth indicated in the OAN, produced separately from this SHMA report, are applied to the primary dataset⁶ to provide an estimated household profile for 18 years' time. The model can then identify the profile of accommodation required to adequately house the profile of future households within the OAN.
 - Lastly, the difference between this and the current stock profile indicates the additional dwellings required.

⁶ Chapter 2 of the 2013 SHMA details how the primary data was collected and updated.



1.9 The LTBHM model generates two key outputs to inform future planning policies on housing mix and affordability:

- Data relating to the scale and mix of housing that would exist if an ideal tenure profile was achieved by 2031; and
- The level of change required to achieve this tenure profile, therefore balancing the housing market over an 18 year period from 2013-2031.

Adequacy of the housing stock

1.10 For the purpose of this model, the housing market is considered balanced if the local population is adequately accommodated. It is therefore initially appropriate to assess the adequacy of the current accommodation to house the residents of Gloucestershire. This is determined through response to the household survey.

1.11 A household is considered currently adequately housed unless the household has indicated that they need to move home now because the accommodation is inadequate for the household. This is ascertained from the reason cited for the household moving. Households whose moves are caused by the accommodation size, cost, form and services available within it being currently unsuitable for the resident, are considered to be inadequately housed and to require alternative accommodation. The tenure and size of dwelling these households expect to achieve when they move are presumed to represent the nature of the accommodation that they require.

1.12 Further adjustments are also made to remove the long-term any undesirable elements of market imbalance that exist currently:

- Households that are overcrowded are assumed to require a property large enough for overcrowding not to take place.
- Non-pensioner households in the social rented stock in receipt of Housing Benefit that under-occupy their home are assumed to require a dwelling with no spare bedrooms (to reflect the changes being introduced in April 2013 as discussed in para 7.81).
- Households resident in the private rented sector without Local Housing Allowance who identified that the cost of their current housing was a severe problem are assigned to a tenure that they can afford according to the Practice Guidance affordability test.

1.13 Table 1.2 shows the proportion of each household type in Gloucestershire currently requiring alternative accommodation in order to be adequately housed. The table shows that some 7.1% of households are classified as inadequately housed currently. Lone parent households are least likely to reside in adequate accommodation, whilst households with two or more pensioners are least likely to be inadequately housed.

Table 1.2 Types of households inadequately housed currently			
<i>Household type</i>	<i>Number inadequately housed</i>	<i>All households</i>	<i>Proportion inadequately housed</i>
Single pensioners	3,028	33,432	9.1%
2 or more pensioners	1,572	26,116	6.0%
Single non-pensioners	2,719	44,264	6.1%
More than one adult, no children	5,163	92,563	5.6%
Lone parent	1,648	9,930	16.6%
2+ adults, 1 child	1,874	24,614	7.6%
2+ adults, 2+ children	2,569	28,852	8.9%
Total	18,573	259,770	7.1%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

1.14 Several further adjustments are also made to use the affordable stock and any housing subsidy paid most economically:

- Households resident in the private rented sector on Local Housing Allowance (LHA) that can afford market, shared ownership or Affordable Rented accommodation are assumed to require this, to ensure that the stock is being most appropriately and efficiently used. The cost of Affordable Rented accommodation is based at 80% Affordable Rent. Shared ownership is

deemed suitable for those able to afford a home with a 25% share and with 10% of the value of this equity share in capital.⁷

- Households in social rented accommodation that can afford market, shared ownership or Affordable Rented accommodation are assumed to require this to ensure that the stock is being most appropriately and efficiently used.

1.15 Rather than prescribing the accommodation required to address the current mismatch between the household population and the current stock, the profile of suitable accommodation for each household type is applied to the household population in 18 years' time. The model therefore assumes that the pattern of accommodation required by each household type remains constant. It assumes that the LHA supported private rented sector will be available at the same level as today.

⁷ The cost of these products is set out in chapter 5 of the 2013 SHMA.

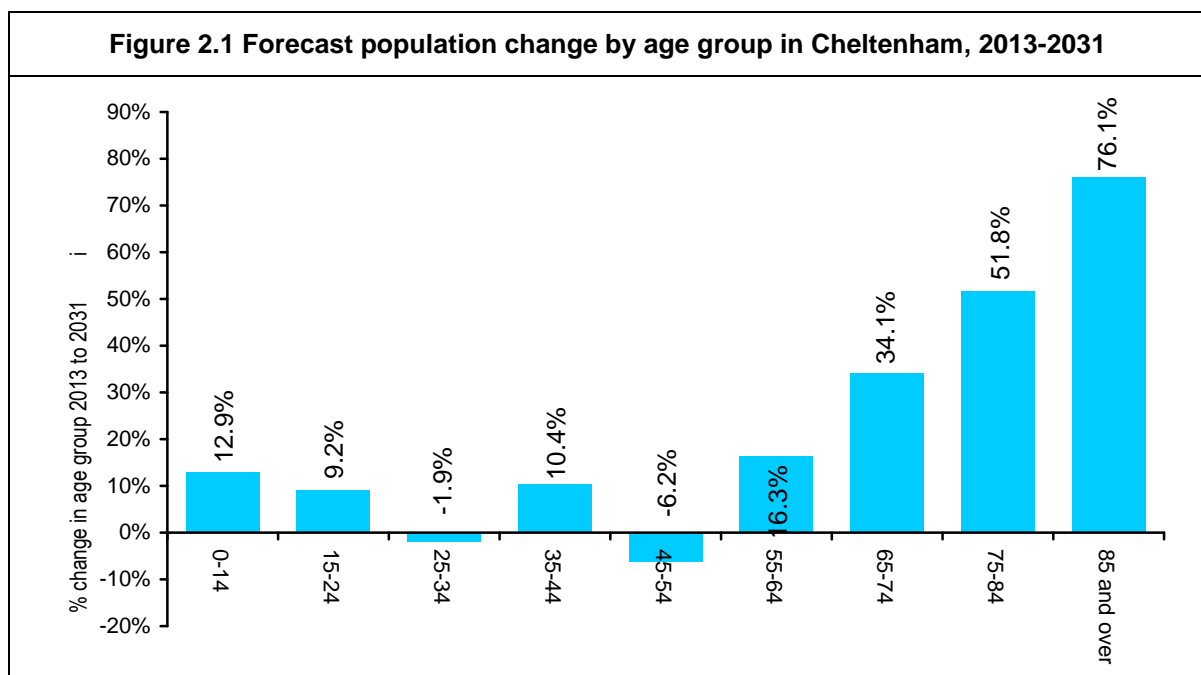
2. LTBHM Model Results for Cheltenham

Introduction

2.1 Chapter 1 establishes the OAN in Cheltenham between 2013 and 2031. This chapter sets out the nature of new housing required in Cheltenham to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in Chapter 1. Initially the projected change in population of the authority as determined as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves on to present the outputs of the model, setting out the tenure and size of new accommodation required in Cheltenham over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenarios included at the end of the chapter.

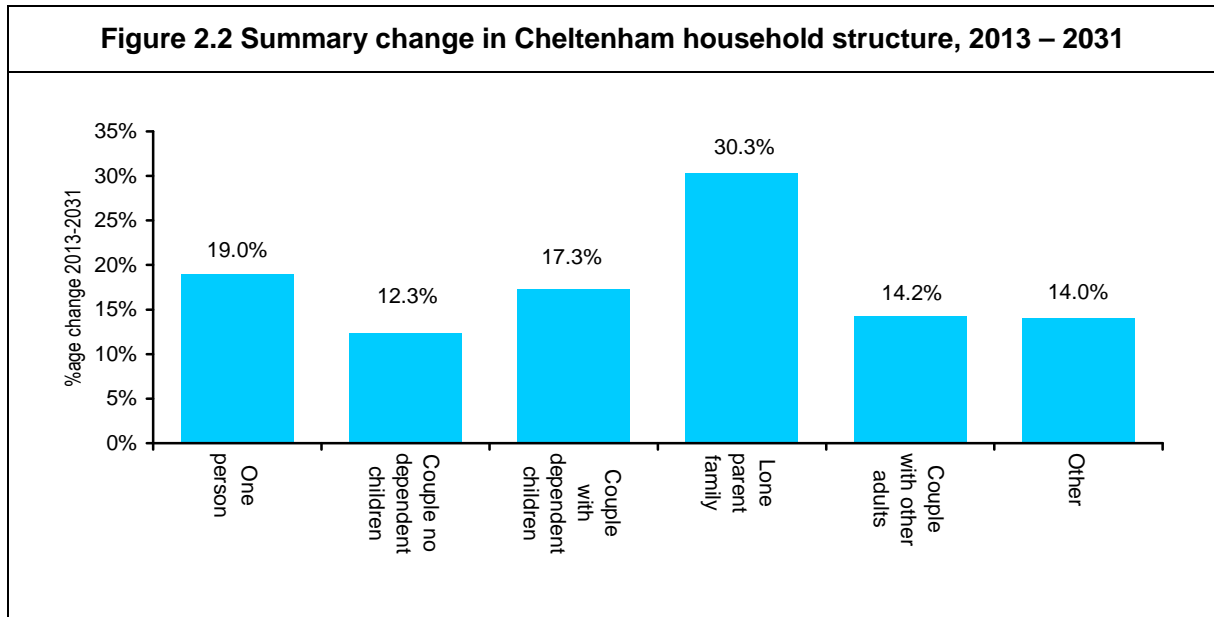
Demographic projections

2.2 Neil McDonald and Christine Whitehead provided detail of the change in the composition of the population in Cheltenham derived as part of their OAN calculations. Figure 2.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 years olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by over 75% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

2.3 The projections also suggest that the structure of households in Cheltenham is likely to change over time as set out in Figure 2.2. The data indicates that the number of ‘couple with no dependent children’ households is expected to increase by 12.3%, whilst in contrast lone parent households are anticipated to increase by 30.3%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

2.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years’ time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However, rather than simply prescribing current occupation patterns into the future, the model looks to ensure future households are adequately housed, and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years’ time, the new accommodation suggested by the model is still useful in the interim as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

- 2.5 Table 2.1 shows the tenure profile of households resident in Cheltenham currently. The table indicates that over 80% of households are resident in market accommodation (without the aid of LHA), 0.9% live in a shared ownership home, 4.4% live in a social rented property (without the aid of HB) and 13.1% live in rented accommodation with the aid of benefit (HB or LHA).

Table 2.1 Current tenure profile in Cheltenham		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	42,421	81.6%
Shared ownership	461	0.9%
Social rented	2,310	4.4%
Benefit supported (both private and social rented)	6,788	13.1%
Total	51,980	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 2.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or Housing Benefit (HB) to live in the rented sector). Taking this into account, Table 2.2 shows the ideal tenure profile for Cheltenham in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 80.3% market dwellings, 1.7% shared ownership properties, 1.6% Affordable Rented homes and 16.4% dwellings occupied with the support of benefit.

Table 2.2 Ideal tenure profile in 2031 in Cheltenham		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	49,521	80.3%
Shared Ownership	1,053	1.7%
Affordable Rent	980	1.6%
Benefit supported (both private and social rented)	10,126	16.4%
Total	61,679	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 2.7 Table 2.3 shows the tenure profile required by households resident in Cheltenham in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 73.2% of new housing should be in the market sector, 6.1% should be shared ownership properties and 10.1% Affordable Rent.
- 2.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 1,028 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 10.6% of the total new homes required in Cheltenham. The model therefore assumes that the LHA supported private rented sector remains the same size as now, and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

Table 2.3 Tenure of new accommodation required in Cheltenham over the next 18 years				
<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	42,421	49,521	7,100	73.2%
Shared ownership	461	1,053	592	6.1%
Affordable Rent*	0	980	980	10.1%
Social rented	2,310	10,126	1,028	10.6%
Benefit supported	6,788			
Total	51,980	61,679	9,699	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Cheltenham, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 2.9 The total requirement for market housing is 7,100 dwellings with the total requirement for affordable housing 2,599 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

2.10 Table 2.4 presents the size of market accommodation required in Cheltenham in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 40.2% of new market dwellings should be three bedroom properties, with 32.2% having two bedrooms, 19.7% containing four or more bedrooms and 7.9% having one bedroom.

<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	4,620	5,180	560	7.9%
Two bedrooms	11,498	13,783	2,285	32.2%
Three bedrooms	15,876	18,730	2,854	40.2%
Four or more bedrooms	10,427	11,828	1,401	19.7%
Total	42,421	49,521	7,100	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

2.11 This analysis can be repeated for shared ownership housing and is presented in Table 2.5. The data indicates that of the 592 shared ownership dwellings required within Cheltenham, 38.0% should be two bedroom properties with a further 24.7% three bedroom accommodation. Some 23.5% should have one bedroom and 13.9% should have four or more bedrooms.

<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	28	167	139	23.5%
Two bedrooms	210	435	225	38.0%
Three bedrooms	169	315	146	24.7%
Four or more bedrooms	54	136	82	13.9%
Total	461	1,053	592	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

2.12 Table 2.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 980 additional Affordable Rented units required within Cheltenham over the next 18 years, the majority should be two and three bedroom properties.

<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	274	28.0%
Two bedrooms	339	34.6%
Three bedrooms	295	30.1%
Four or more bedrooms	72	7.3%
Total	980	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

2.13 Table 2.7 presents the size of social rented/LHA supported private rented accommodation required in Cheltenham in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size as is now and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 36.2% of the new social rented housing required should comprise three bedrooms, 40.2% should have four or more bedrooms, 15.8% should have two bedrooms and 7.9% should contain a single bedroom.

<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	3,015	3,096	81	7.9%
Two bedrooms	3,535	3,697	162	15.8%
Three bedrooms	2,305	2,677	372	36.2%
Four or more bedrooms	243	656	413	40.2%
Total	9,098	10,126	1,028	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

2.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in chapter 5 of the 2013 SHMA), it is possible that households unable to afford will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 2.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 2.8 Size of new Affordable Rented homes required in Cheltenham over the next 18 years – to house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	3,015	3,370	355	17.7%
Two bedrooms	3,535	4,036	501	25.0%
Three bedrooms	2,305	2,972	667	33.2%
Four or more bedrooms	243	728	485	24.2%
Total	9,098	11,106	2,008	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

2.15 It should be noted that, if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons accommodation required

2.16 Table 2.9 sets out the nature of older persons accommodation required in Cheltenham over the next 18 years. The table sets out the requirement arising from within the general household population, whom would require a one or two bedroom home with additional services or adaptations, and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. institutional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.

- 2.17 For the purposes of this analysis, the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 2.9 Tenure and size of new older persons accommodation required in Cheltenham over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	403	455	858
One bedroom	160	272	432
Two bedrooms	129	23	152
Total	692	750	1,442

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 2.18 This requirement for (non-bedspace) older persons accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Table 2.10 and 2.11 therefore show the overall requirement split between older persons and ordinary accommodation in Cheltenham between 2013 and 2031.

Table 2.10 Size of all new market homes required in Cheltenham over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	403	0	403
One bedroom	160	400	560
Two bedrooms	129	2,156	2,285
Three bedrooms	0	2,854	2,854
Four or more bedrooms	0	1,401	1,401
Total	289	6,811	7,100

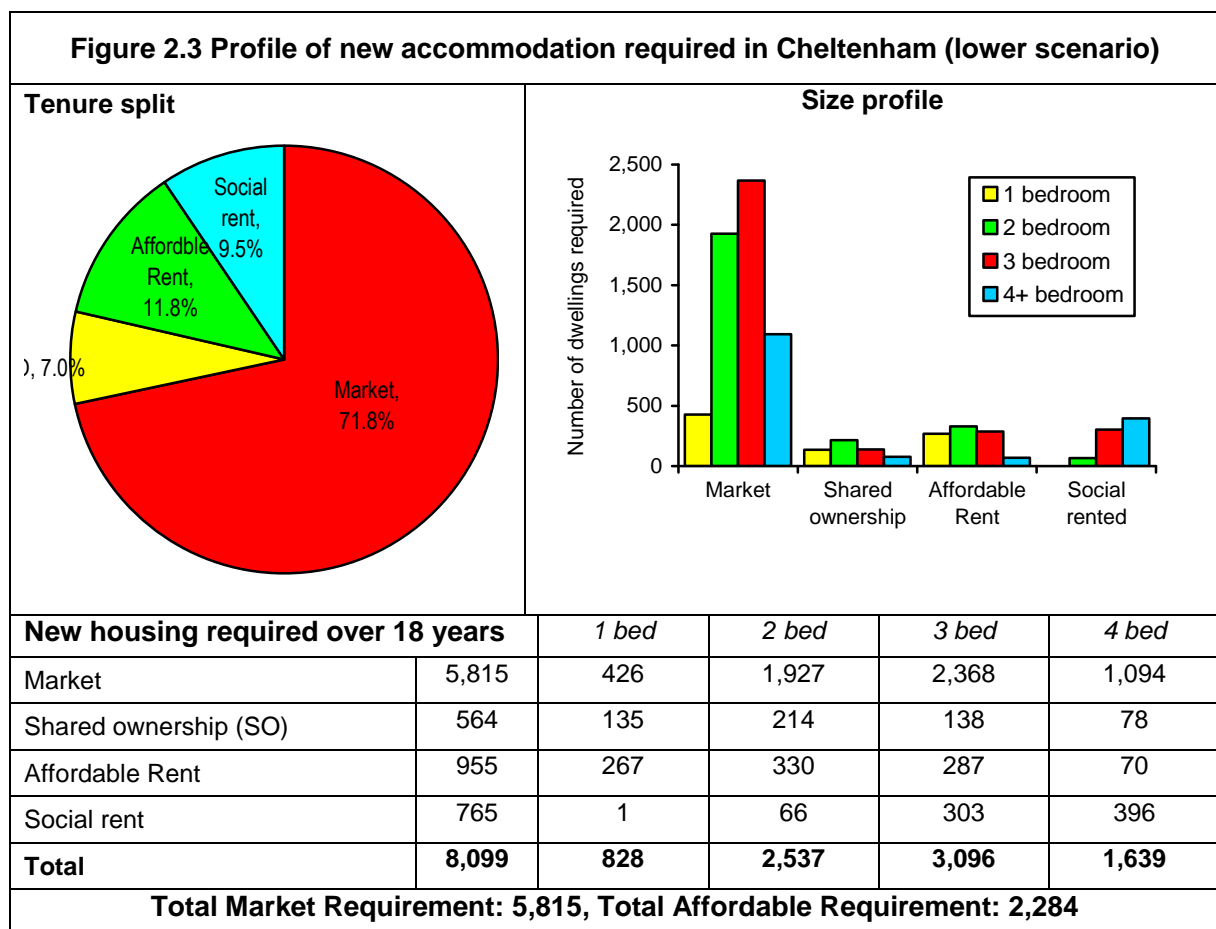
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	455	0	455
One bedroom	272	222	494
Two bedrooms	23	703	726
Three bedrooms	0	813	813
Four or more bedrooms	0	567	567
Total	295	2,305	2,600

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Alternative LTBHM scenarios outputs for Cheltenham

2.19 The model has been run to provide equivalent detail for the different potential levels of Objectively Assessed Need set out in the published reports (set out in Table 1.1). Figure 2.3 sets out summary results for the size and tenure of new homes required within the lower estimate of Objectively Assessed Need in Cheltenham.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

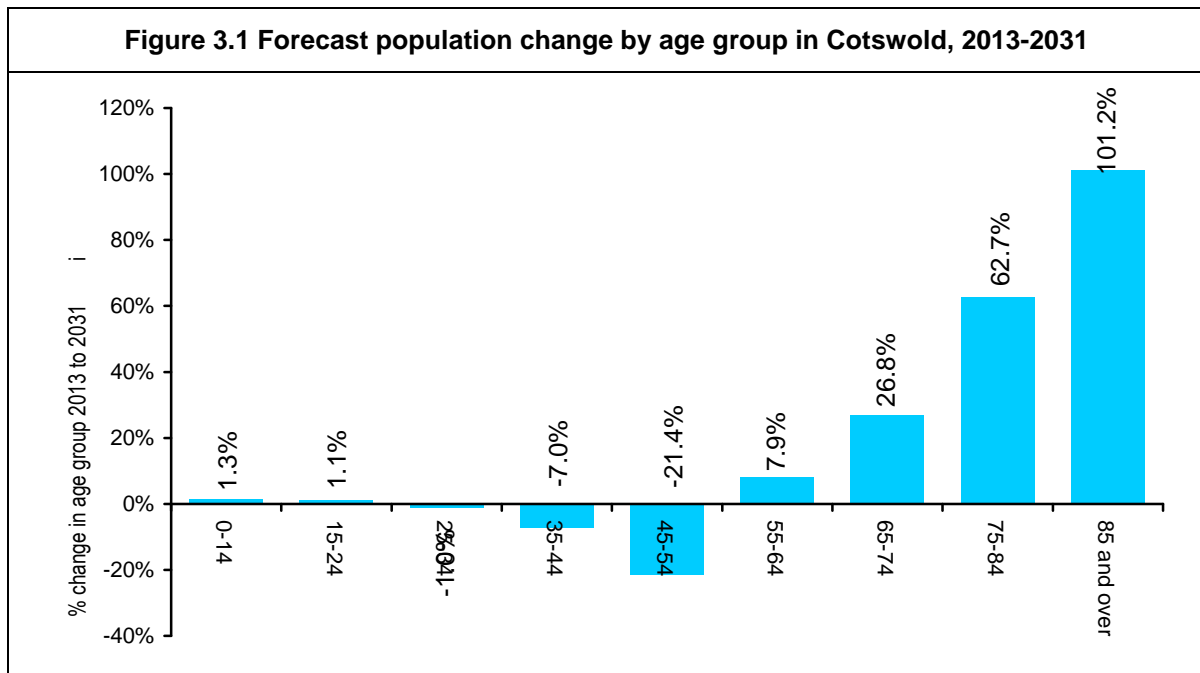
3. LTBHM Model Results for Cotswold

Introduction

3.1 Chapter 1 establishes the OAN in Cotswold between 2013 and 2031. This chapter sets out the nature of new housing required in Cotswold to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in detail in Chapter 1. Initially the projected change in population of the authority, as determined, as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves on to present the outputs of the model, setting out the tenure and size of new accommodation required in Cotswold over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenarios included at the end of the chapter.

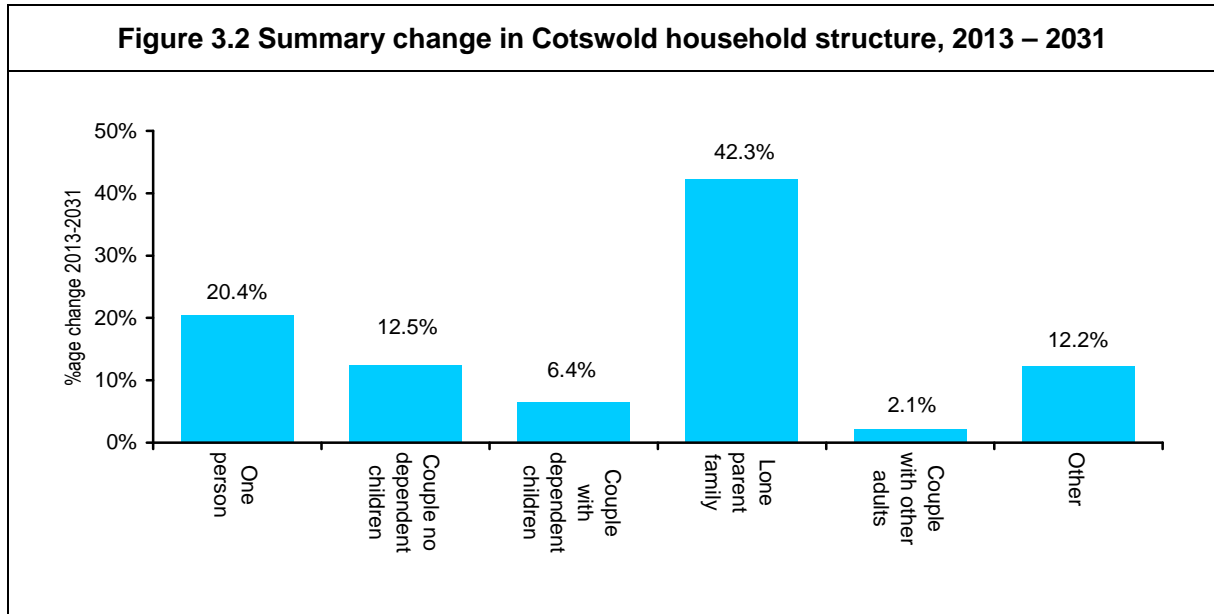
Demographic projections

3.2 Neil McDonald and Christine Whitehead provided detail of the change in the composition of the population in Cotswold derived as part of their OAN calculations. Figure 3.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 year olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by over 100% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

3.3 The projections also suggest that the structure of households in Cotswold is likely to change over time as set out in Figure 3.2. The data indicates that the number of ‘couple with other adult’ households is expected to increase by 2.1%, whilst in contrast lone parent households are anticipated to increase by 42.3%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

3.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years’ time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However rather than simply prescribing current occupation patterns into the future, the model looks to ensure future households are adequately housed, and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years’ time, the new accommodation suggested by the model is still useful in the interim, as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

3.5 Table 3.1 shows the tenure profile of households resident in Cotswold currently. The table indicates that over 80% of households are resident in market accommodation (without the aid of LHA), 1.1%

live in a shared ownership home, 6.9% live in a social rented property (without the aid of HB) and 9.7% live in rented accommodation with the aid of benefit (HB or LHA).

Table 3.1 Current tenure profile in Cotswold		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	30,383	82.2%
Shared ownership	422	1.1%
Social rented	2,563	6.9%
Benefit supported (both private and social rented)	3,572	9.7%
Total	36,940	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or HB to live in the rented sector). Taking this into account, Table 3.2 shows the ideal tenure profile for Cotswold in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 80.8% market dwellings, 1.8% shared ownership properties, 1.9% Affordable Rented homes and 15.5% dwellings occupied with the support of benefit.

Table 3.2 Ideal tenure profile in 2031 in Cotswold		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	34,180	80.8%
Shared Ownership	750	1.8%
Affordable Rent	811	1.9%
Benefit supported (both private and social rented)	6,570	15.5%
Total	42,311	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.7 Table 3.3 shows the tenure profile required by households resident in Cotswold in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 70.7% of new housing should be in the market sector, 6.1% should be shared ownership properties and 15.1% Affordable Rent.

- 3.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable

Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 435 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 8.1% of the total new homes required in Cotswold. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	30,383	34,180	3,797	70.7%
Shared ownership	422	750	328	6.1%
Affordable Rent*	0	811	811	15.1%
Social rented	2,563	6,570	435	8.1%
Benefit supported	3,572			
Total	36,940	42,311	5,371	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Cotswold, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

3.9 The total requirement for market housing is 3,797 dwellings with the total requirement for affordable housing 1,574 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

3.10 Table 3.4 presents the size of market accommodation required in Cotswold in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 47.5% of new market dwellings should be three bedroom properties, with 27.0% having two bedrooms, 22.8% containing four or more bedrooms and 2.7% having one bedroom.

Table 3.4 Size of new market accommodation required in Cotswold over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	1,399	1,502	103	2.7%
Two bedrooms	6,199	7,226	1,027	27.0%
Three bedrooms	12,458	14,260	1,802	47.5%
Four or more bedrooms	10,327	11,192	865	22.8%
Total	30,383	34,180	3,797	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.11 This analysis can be repeated for shared ownership housing and is presented in Table 3.5. The data indicates that of the 382 shared ownership dwellings required within Cotswold, 39.6% should be two bedroom properties with a further 23.8% three bedroom accommodation. Some 25.0% should have one bedroom and 11.6% should have four or more bedrooms.

Table 3.5 Size of new shared ownership accommodation required in Cotswold over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	0	82	82	25.0%
Two bedrooms	224	354	130	39.6%
Three bedrooms	171	249	78	23.8%
Four or more bedrooms	27	65	38	11.6%
Total	422	750	328	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.12 Table 3.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 811 additional Affordable Rented units required within Cotswold over the next 18 years, the majority (81.1%) should be two and three bedroom properties.

<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	102	12.6%
Two bedrooms	205	25.3%
Three bedrooms	453	55.9%
Four or more bedrooms	51	6.3%
Total	811	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

3.13 Table 3.7 presents the size of social rented/LHA supported private rented accommodation required in Cotswold in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 32.2% of the new social rented housing required should comprise three bedrooms, 28.0% should have four or more bedrooms, 17.2% should have two bedrooms and 22.5% should contain a single bedroom.

<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	1,625	1,723	98	22.5%
Two bedrooms	2,164	2,239	75	17.2%
Three bedrooms	2,147	2,287	140	32.2%
Four or more bedrooms	199	321	122	28.0%
Total	6,135	6,570	435	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

3.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in Chapter 5 of the 2013

SHMA) it is possible that households unable to afford it will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 3.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 3.8 Size of new Affordable Rented homes required in Cotswold over the next 18 years – if house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	1,625	1,825	200	16.1%
Two bedrooms	2,164	2,444	280	22.5%
Three bedrooms	2,147	2,740	593	47.6%
Four or more bedrooms	199	372	173	13.9%
Total	6,135	7,381	1,246	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.15 It should be noted that if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons' accommodation required

- 3.16 Table 3.9 sets out the nature of older persons' accommodation required in Cotswold over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. institutional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.
- 3.17 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons accommodation will contain no more than two bedrooms.

Table 3.9 Tenure and size of new older persons accommodation required in Cotswold over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	229	304	533
One bedroom	79	195	274
Two bedrooms	227	122	349
Total	535	620	1,156

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 3.18 This requirement for (non-bedroom) older persons accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 3.10 and 3.11 therefore show the overall requirement split between older persons and ordinary accommodation in Cotswold between 2013 and 2031.

Table 3.10 Size of all new market homes required in Cotswold over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	229	0	229
One bedroom	79	24	103
Two bedrooms	227	800	1,027
Three bedrooms	0	1,802	1,802
Four or more bedrooms	0	865	865
Total	306	3,491	3,797

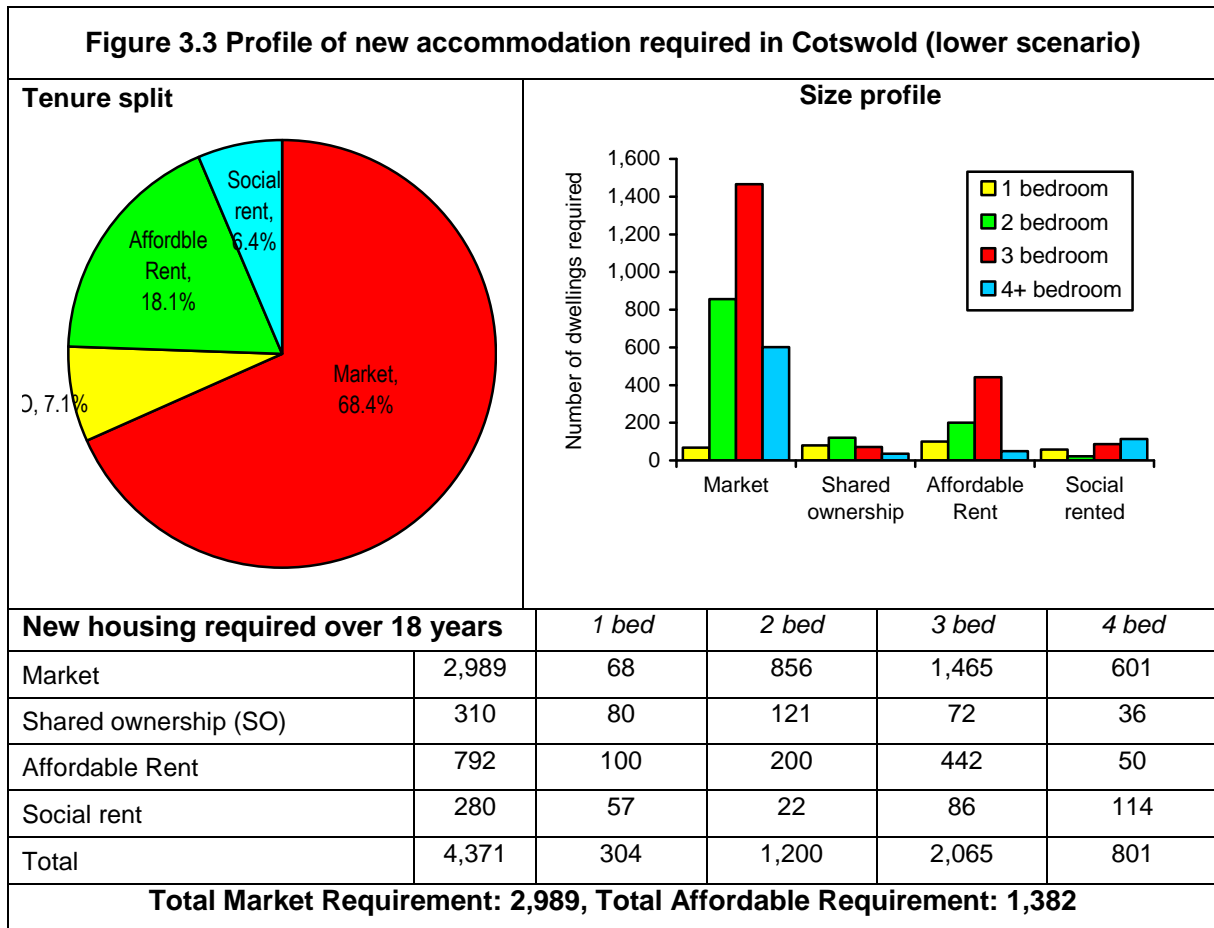
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 3.11 Size of all new affordable homes required in Cotswold over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	304	0	304
One bedroom	195	87	282
Two bedrooms	122	288	410
Three bedrooms	0	671	671
Four or more bedrooms	0	211	211
Total	317	1,257	1,574

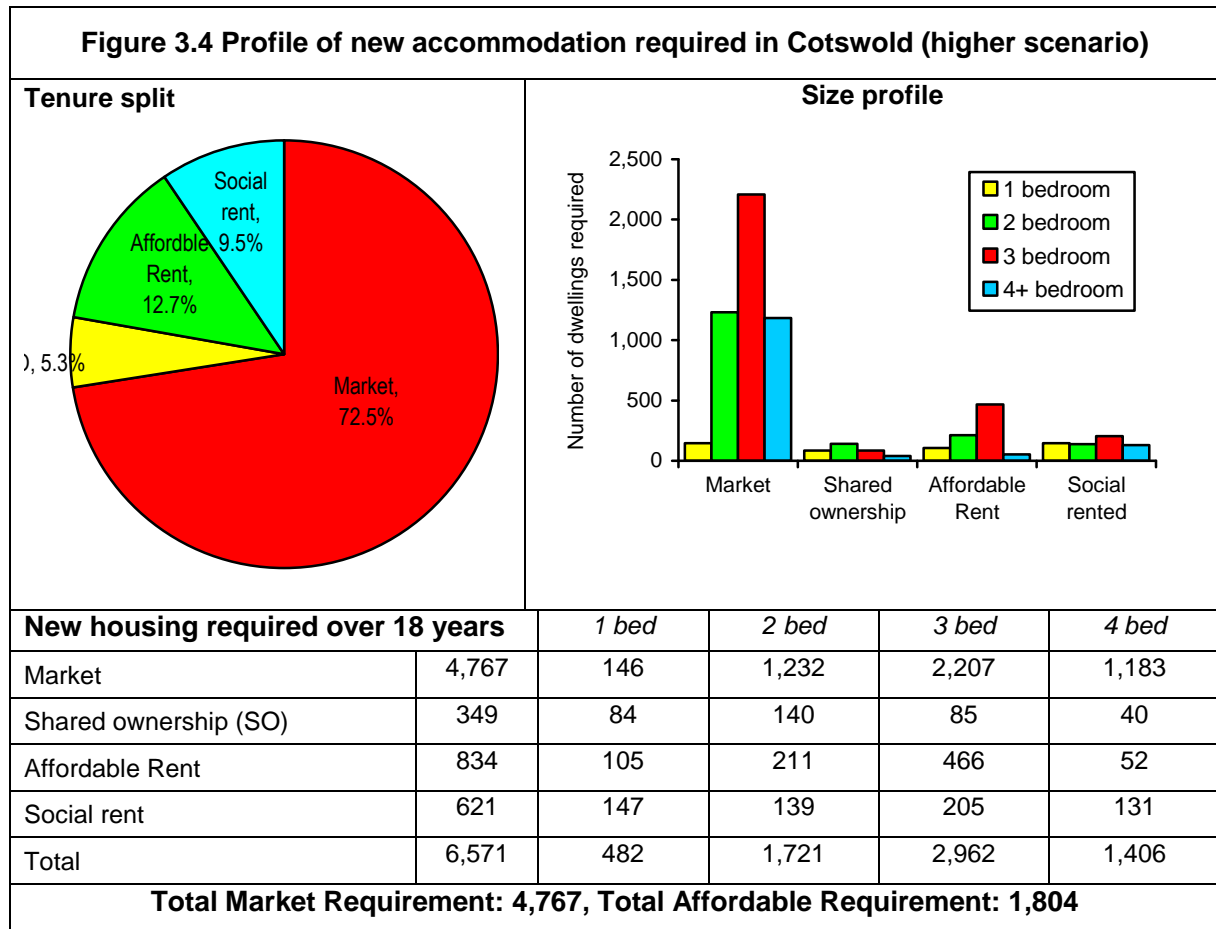
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Alternative LTBHM scenarios outputs for Cotswold

3.19 The model has been run to provide equivalent detail for the different potential levels of Objectively Assessed Need set out in the published reports (set out in Table 1.1). Figures 3.3 and 3.4 set out summary results for the size and tenure of new homes required within the lower and upper estimates of Objectively Assessed Need in Cotswold.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

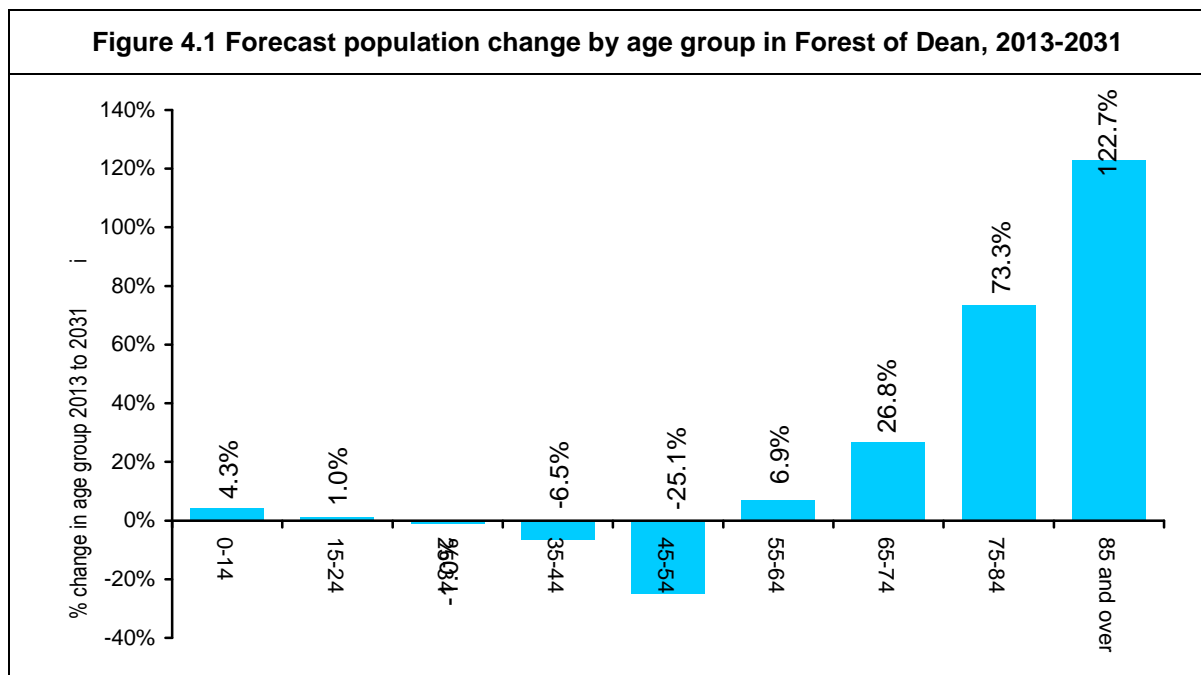
4. LTBHM Model Results for Forest of Dean

Introduction

4.1 Chapter 1 establishes the OAN in Forest of Dean between 2013 and 2031. This chapter sets out the nature of new housing required in Forest of Dean to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in detail in Chapter 1. Initially the projected change in population of the authority as determined as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves onto present the outputs of the model, setting out the tenure and size of new accommodation required in Forest of Dean over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenarios included at the end of the chapter.

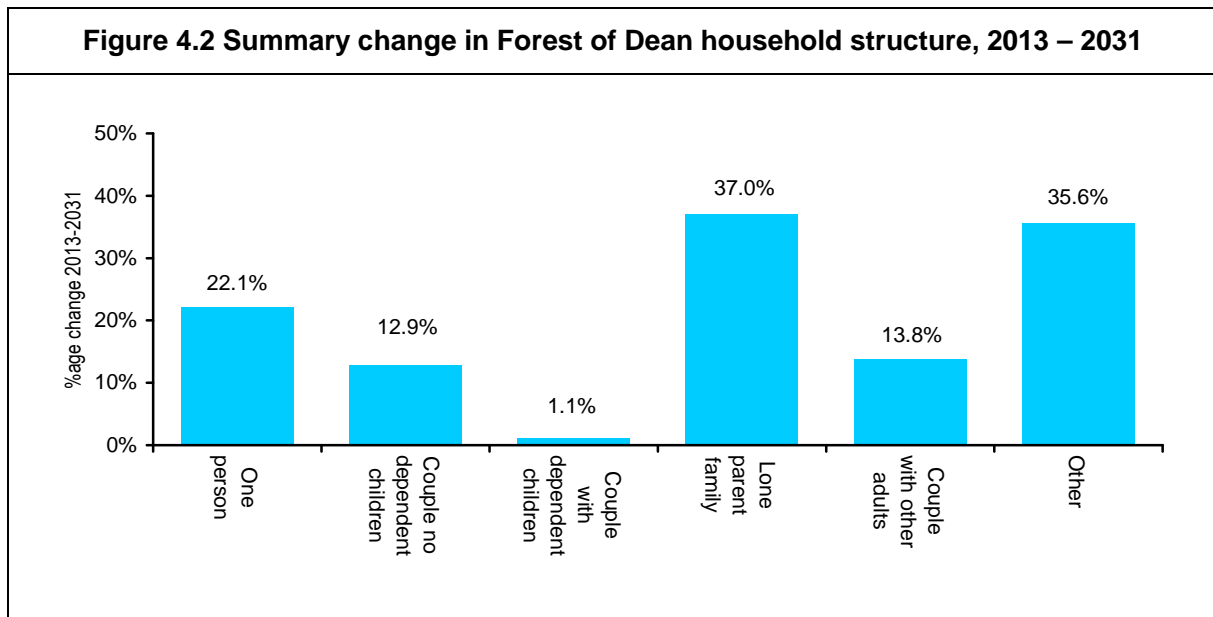
Demographic projections

4.2 Neil McDonald and Christine Whitehead provided detail of the change in the composition of the population in Forest of Dean derived as a part of their OAN calculations. Figure 4.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 years olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by over 120% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

- 4.3 The projections also suggest that the structure of households in Forest of Dean is likely to change over time as set out in Figure 4.2. The data indicates that the number of 'couple with dependent children' households is expected to increase by 1.1%, whilst in contrast lone parent households are anticipated to increase by 37.0%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (October, 2014)

- 4.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years' time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However rather than simply prescribing current occupation patterns into the future the model looks to ensure future households are adequately housed and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years' time, the new accommodation suggested by the model is still useful in the interim, as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

- 4.5 Table 4.1 shows the tenure profile of households resident in Forest of Dean currently. The table indicates that over 80% of households are resident in market accommodation (without the aid of

LHA), 0.4% live in a shared ownership home, 4.4% live in a social rented property (without the aid of HB) and 13.7% live in rented accommodation with the aid of benefit (HB or LHA).

Table 4.1 Current tenure profile in Forest of Dean		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	28,369	81.5%
Shared ownership	154	0.4%
Social rented	1,521	4.4%
Benefit supported (both private and social rented)	4,756	13.7%
Total	34,800	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or HB to live in the rented sector). Taking this into account, Table 4.2 shows the ideal tenure profile for Forest of Dean in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 79.5% market dwellings, 1.4% shared ownership properties, 2.4% Affordable Rented homes and 16.8% dwellings occupied with the support of benefit.

Table 4.2 Ideal tenure profile in 2031 in Forest of Dean		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	32,343	79.5%
Shared Ownership	579	1.4%
Affordable Rent	957	2.4%
Benefit supported (both private and social rented)	6,826	16.8%
Total	40,705	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.7 Table 4.3 shows the tenure profile required by households resident in Forest of Dean in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 67.3% of new housing should be in the market sector, 7.2% should be shared ownership properties and 16.2% Affordable Rent.

- 4.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable

Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 549 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 9.3% of the total new homes required in Forest of Dean. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	28,369	32,343	3,974	67.3%
Shared ownership	154	579	425	7.2%
Affordable Rent*	0	957	957	16.2%
Social rented	1,521	6,826	549	9.3%
Benefit supported	4,756			
Total	34,800	40,705	5,905	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Forest of Dean, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

4.9 The total requirement for market housing is 3,974 dwellings with the total requirement for affordable housing 1,931 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

4.10 Table 4.4 presents the size of market accommodation required in Forest of Dean in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 43.4% of new market dwellings should be three bedroom properties, with 31.5% having two bedrooms, 15.0% containing four or more bedrooms and 10.1% having one bedroom.

Table 4.4 Size of new market accommodation required in Forest of Dean over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	905	1,307	402	10.1%
Two bedrooms	6,387	7,638	1,251	31.5%
Three bedrooms	13,331	15,055	1,724	43.4%
Four or more bedrooms	7,747	8,344	597	15.0%
Total	28,369	32,343	3,974	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.11 This analysis can be repeated for shared ownership housing and is presented in Table 4.5. The data indicates that of the 425 shared ownership dwellings required within Forest of Dean, 42.6% should be two bedroom properties with a further 23.3% three bedroom accommodation. Some 16.2% should have one bedroom and 17.9% should have four or more bedrooms.

Table 4.5 Size of new shared ownership accommodation required in Forest of Dean over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	0	69	69	16.2%
Two bedrooms	74	255	181	42.6%
Three bedrooms	62	161	99	23.3%
Four or more bedrooms	18	94	76	17.9%
Total	154	579	425	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.12 Table 4.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 957 additional Affordable Rented units required within Forest of Dean over the next 18 years, the majority should be two and three bedroom properties.

Table 4.6 Size of new Affordable Rented homes required in Forest of Dean over the next 18 years		
<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	373	39.0%
Two bedrooms	379	39.6%
Three bedrooms	186	19.4%
Four or more bedrooms	19	2.0%
Total	957	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.13 Table 4.7 presents the size of social rented/LHA supported private rented accommodation required in Forest of Dean in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size as it is now and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 38.4% of the new social rented housing required should comprise three bedrooms, 26.0% should have four or more bedrooms, 18.9% should have two bedrooms and 16.6% should contain a single bedroom.

Table 4.7 Size of new social rented accommodation required in Forest of Dean over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	1,816	1,907	91	16.6%
Two bedrooms	2,008	2,112	104	18.9%
Three bedrooms	2,286	2,497	211	38.4%
Four or more bedrooms	167	310	143	26.0%
Total	6,277	6,826	549	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in Chapter 5 of the 2013

SHMA), it is possible that households unable to afford it will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 4.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 4.8 Size of new Affordable Rented homes required in Forest of Dean over the next 18 years – if house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	1,816	2,280	464	30.8%
Two bedrooms	2,008	2,491	483	32.1%
Three bedrooms	2,286	2,683	397	26.4%
Four or more bedrooms	167	329	162	10.8%
Total	6,277	7,783	1,506	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.15 It should be noted that if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons' accommodation required

- 4.16 Table 4.9 sets out the nature of older persons' accommodation required in Forest of Dean over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. intuitional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.
- 4.17 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 4.9 Tenure and size of new older persons accommodation required in Forest of Dean over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	241	332	573
One bedroom	179	399	578
Two bedrooms	259	96	354
Total	679	827	1,506

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 4.18 This requirement for (non-bedspace) older persons' accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 4.10 and 4.11 therefore show the overall requirement split between older persons and ordinary accommodation in Forest of Dean between 2013 and 2031.

Table 4.10 Size of all new market homes required in Forest of Dean over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	241	0	241
One bedroom	179	223	402
Two bedrooms	259	992	1,251
Three bedrooms	0	1,724	1,724
Four or more bedrooms	0	597	597
Total	438	3,536	3,974

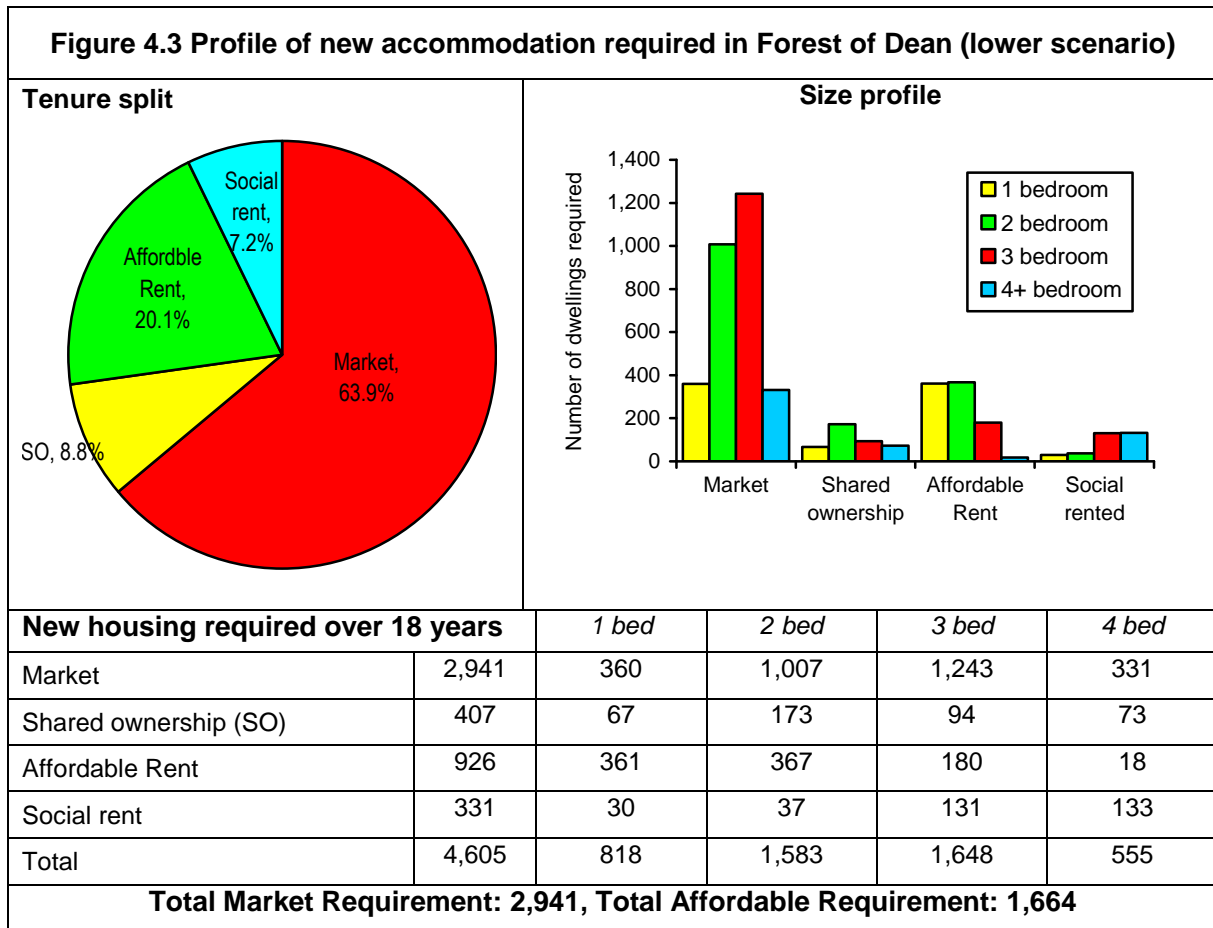
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 4.11 Size of all new affordable homes required in Forest of Dean over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	332	0	332
One bedroom	399	134	533
Two bedrooms	96	568	664
Three bedrooms	0	496	496
Four or more bedrooms	0	238	238
Total	495	1,436	1,931

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

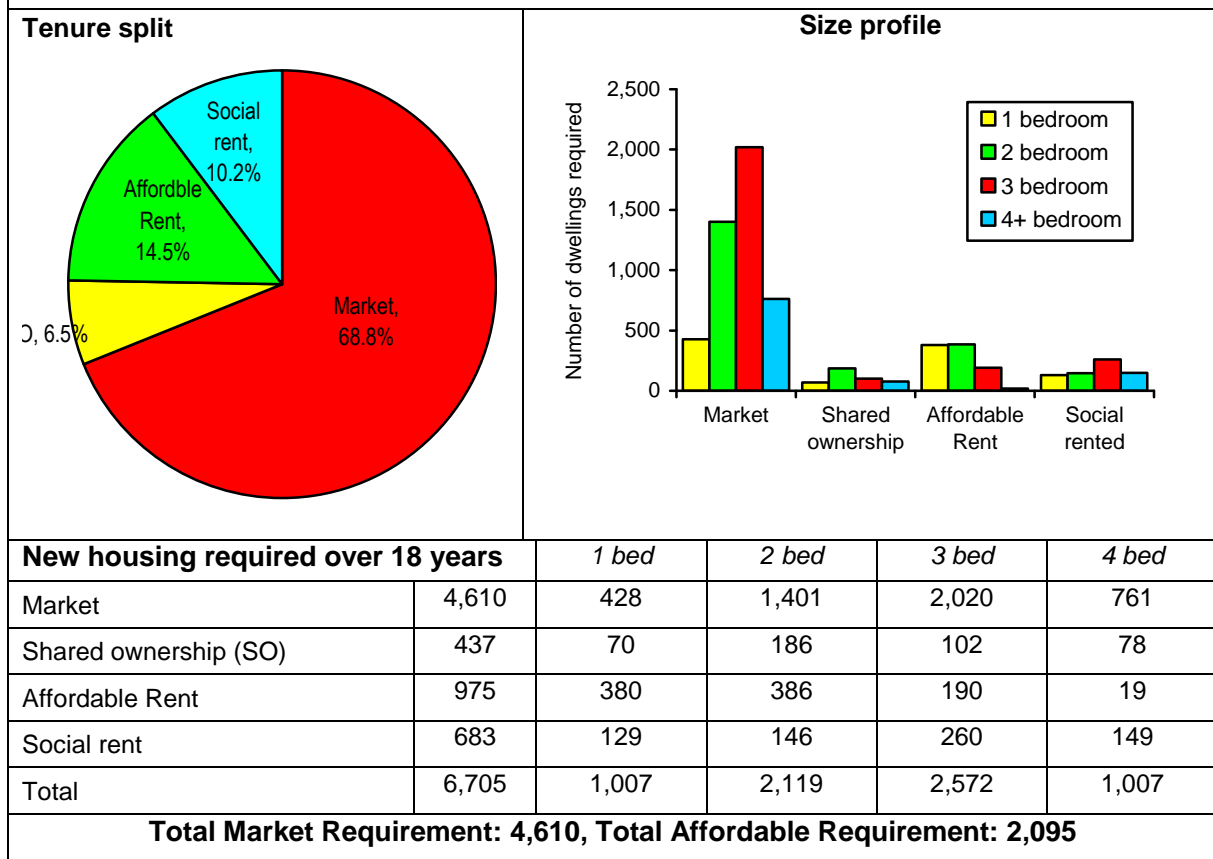
Alternative LTBHM scenarios outputs for Forest of Dean

4.19 The model has been run to provide equivalent detail for the different potential levels of OAN set out in the published reports (set out in Table 1.1). Figures 4.3 and 4.4 set out summary results for the size and tenure of new homes required within the lower and upper estimates of OAN in Forest of Dean.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Figure 4.4 Profile of new accommodation required in Forest of Dean (higher scenario)



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

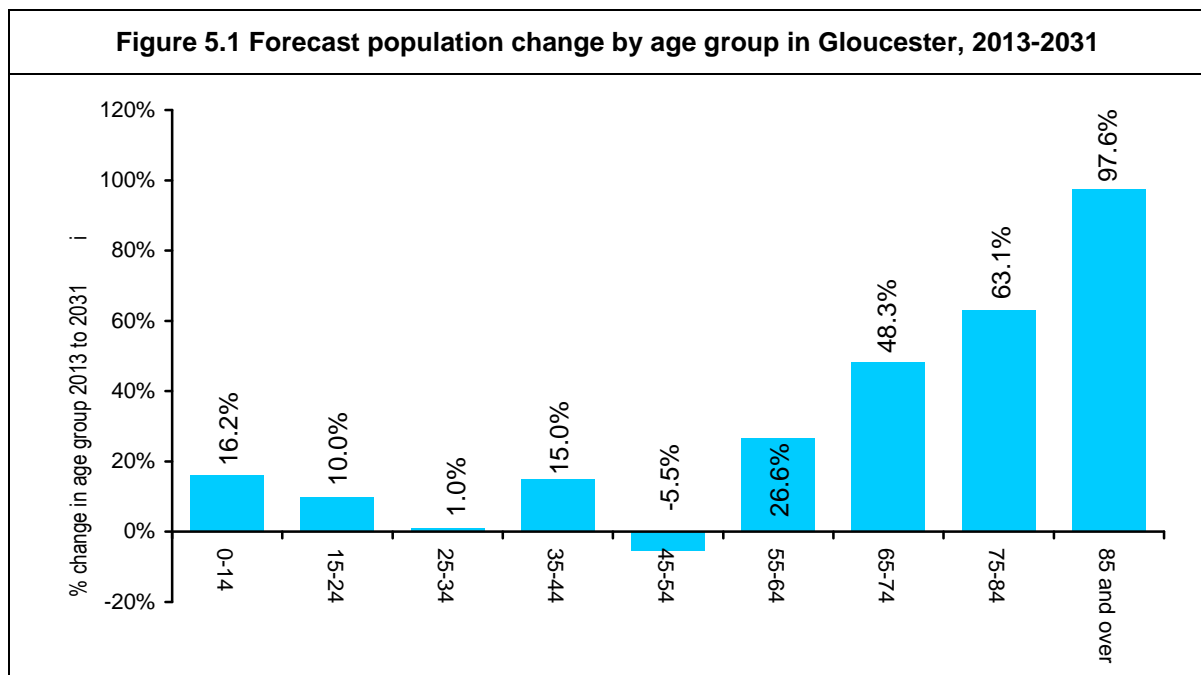
5. LTBHM Model Results for Gloucester

Introduction

5.1 Chapter 1 establishes the OAN in Gloucester between 2013 and 2031. This chapter sets out the nature of new housing required in Gloucester to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in detail in Chapter 1. Initially the projected change in population of the authority as determined as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves on to present the outputs of the model, setting out the tenure and size of new accommodation required in Gloucester over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenarios included at the end of the chapter.

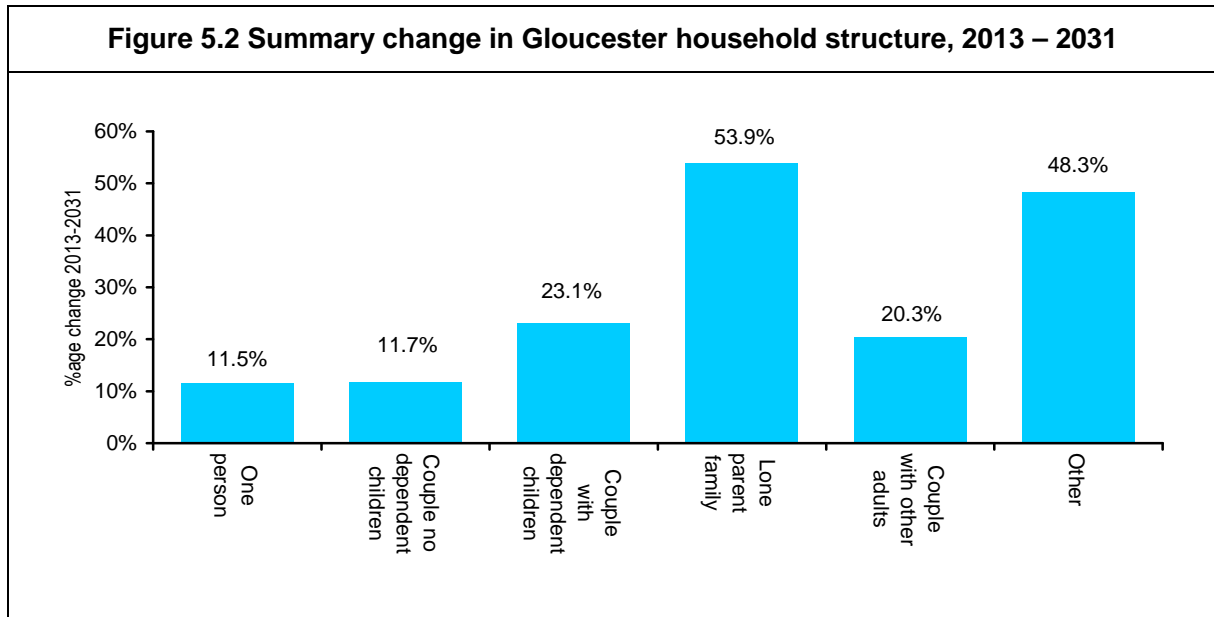
Demographic projections

5.2 Neil McDonald and Christine Whitehead provided detail of the change in the composition of the population in Gloucester derived as a part of their OAN calculations. Figure 5.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 years olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by almost 100% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Gloucester and Cotswold (October, 2014)

5.3 The projections also suggest that the structure of households in Gloucester is likely to change over time as set out in Figure 5.2. The data indicates that the number of one person households is expected to increase by 11.5%, whilst in contrast lone parent households are anticipated to increase by 53.9%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Gloucester and Cotswold (October, 2014)

5.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years' time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However rather than simply prescribing current occupation patterns into the future the model looks to ensure future households are adequately housed and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years' time, the new accommodation suggested by the model is still useful in the interim, as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

5.5 Table 5.1 shows the tenure profile of households resident in Gloucester currently. The table indicates that over 75% of households are resident in market accommodation (without the aid of LHA), 1.1%



live in a shared ownership home, 5.1% live in a social rented property (without the aid of HB) and 17.5% live in rented accommodation with the aid of benefit (HB or LHA).

Table 5.1 Current tenure profile in Gloucester		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	39,371	76.3%
Shared ownership	580	1.1%
Social rented	2,612	5.1%
Benefit supported (both private and social rented)	9,047	17.5%
Total	51,610	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 5.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or HB to live in the rented sector). Taking this into account, Table 5.2 shows the ideal tenure profile for Gloucester in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 74.4% market dwellings, 2.0% shared ownership properties, 5.0% Affordable Rented homes and 18.7% dwellings occupied with the support of benefit.

Table 5.2 Ideal tenure profile in 2031 in Gloucester		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	47,025	74.4%
Shared Ownership	1,242	2.0%
Affordable Rent	3,108	5.0%
Benefit supported (both private and social rented)	191	18.7%
Total	63,225	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 5.7 Table 5.3 shows the tenure profile required by households resident in Gloucester in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 65.9% of new housing should be in the market sector, 5.7% should be shared ownership properties and 26.8% Affordable Rent.

- 5.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable

Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 191 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 1.6% of the total new homes required in Gloucester. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	39,371	47,025	7,654	65.9%
Shared ownership	580	1,242	662	5.7%
Affordable Rent*	0	3,108	3,108	26.8%
Social rented	2,612	11,850	191	1.6%
Benefit supported	9,047			
Total	51,610	63,225	11,615	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Gloucester, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

5.9 The total requirement for market housing is 7,654 dwellings with the total requirement for affordable housing 3,961 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

5.10 Table 5.4 presents the size of market accommodation required in Gloucester in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 36.8% of new market dwellings should be three bedroom properties, with 29.2% having two bedrooms, 22.3% containing four or more bedrooms and 11.7% having one bedroom.

Table 5.4 Size of new market accommodation required in Gloucester over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	2,364	3,259	895	11.7%
Two bedrooms	8,839	11,076	2,237	29.2%
Three bedrooms	18,990	21,805	2,815	36.8%
Four or more bedrooms	9,178	10,885	1,707	22.3%
Total	39,371	47,025	7,654	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 5.11 This analysis can be repeated for shared ownership housing and is presented in Table 5.5. The data indicates that of the 662 shared ownership dwellings required within Gloucester, 39.9% should be two bedroom properties with a further 37.8% three bedroom accommodation. Some 13.4% should have one bedroom and 8.9% should have four or more bedrooms.

Table 5.5 Size of new shared ownership accommodation required in Gloucester over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	40	129	89	13.4%
Two bedrooms	269	533	264	39.9%
Three bedrooms	203	453	250	37.8%
Four or more bedrooms	68	127	59	8.9%
Total	580	1,242	662	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 5.12 Table 5.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 3,136 additional Affordable Rented units required within Gloucester over the next 18 years, the majority should be two and one bedroom properties.

Table 5.6 Size of new Affordable Rented homes required in Gloucester over the next 18 years		
<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	1,010	32.2%
Two bedrooms	1,137	36.3%
Three bedrooms	833	26.6%
Four or more bedrooms	156	5.0%
Total	3,136	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

5.13 Table 5.7 presents the size of social rented/LHA supported private rented accommodation required in Gloucester in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size is now and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 66.5% of the new social rented housing required should comprise four or more bedrooms and 33.5% should have three bedrooms. A surplus of one and two bedroom social rented homes is indicated by the model.

Table 5.7 Size of new social rented accommodation required in Gloucester over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	3,560	3,534	-26	0.0%
Two bedrooms	4,714	4,712	-2	0.0%
Three bedrooms	2,904	2,968	64	33.5%
Four or more bedrooms	481	608	127	66.5%
Total	11,659	11,822	163	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

5.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in Chapter 5 of the 2013

SHMA), it is possible that households unable to afford it will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 5.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 5.8 Size of new Affordable Rented homes required in Gloucester over the next 18 years – if house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	3,560	4,544	984	29.8%
Two bedrooms	4,714	5,849	1,135	34.4%
Three bedrooms	2,904	3,801	897	27.2%
Four or more bedrooms	481	764	283	8.6%
Total	11,659	14,958	3,299	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 5.15 It should be noted that if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons' accommodation required

- 5.16 Table 5.9 sets out the nature of older persons' accommodation required in Gloucester over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. institutional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.
- 5.17 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 5.9 Tenure and size of new older persons accommodation required in Gloucester over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	304	372	676
One bedroom	189	295	483
Two bedrooms	104	33	136
Total	596	699	1,296

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

5.18 This requirement for (non-bedroom) older persons accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 5.10 and 5.11 therefore show the overall requirement split between older persons and ordinary accommodation in Gloucester between 2013 and 2031.

Table 5.10 Size of all new market homes required in Gloucester over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	304	0	304
One bedroom	189	706	895
Two bedrooms	104	2,133	2,237
Three bedrooms	0	2,815	2,815
Four or more bedrooms	0	1,707	1,707
Total	292	7,362	7,654

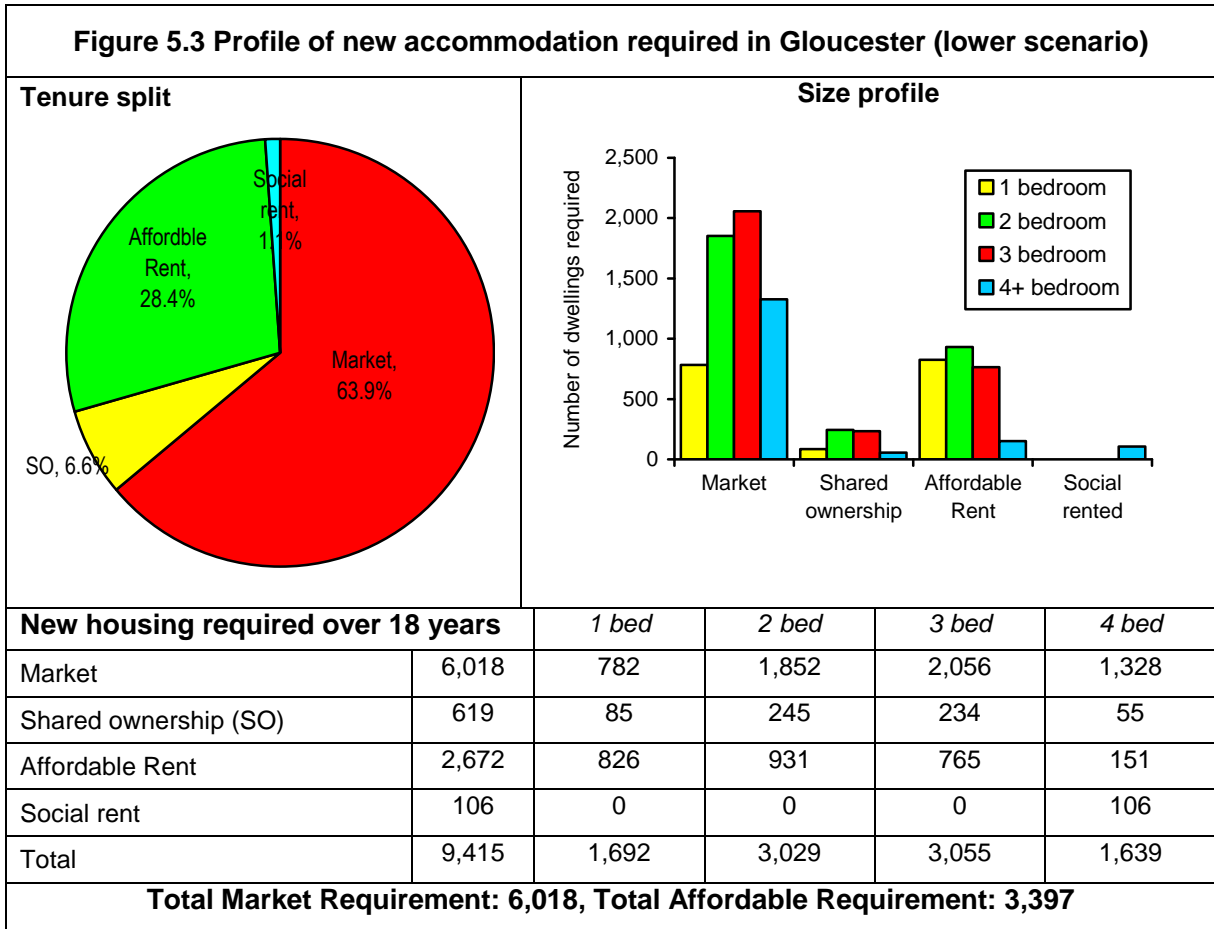
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 5.11 Size of all new affordable homes required in Gloucester over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	372	0	372
One bedroom	295	778	1,073
Two bedrooms	33	1,366	1,399
Three bedrooms	0	1,147	1,147
Four or more bedrooms	0	342	342
Total	328	3,633	3,961

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Alternative LTBHM scenarios outputs for Gloucester

5.19 The model has been run to provide equivalent detail for the different potential levels of OAN set out in the published reports (set out in Table 1.1). Figure 5.3 sets out summary results for the size and tenure of new homes required within the lower estimate of OAN in Gloucester.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

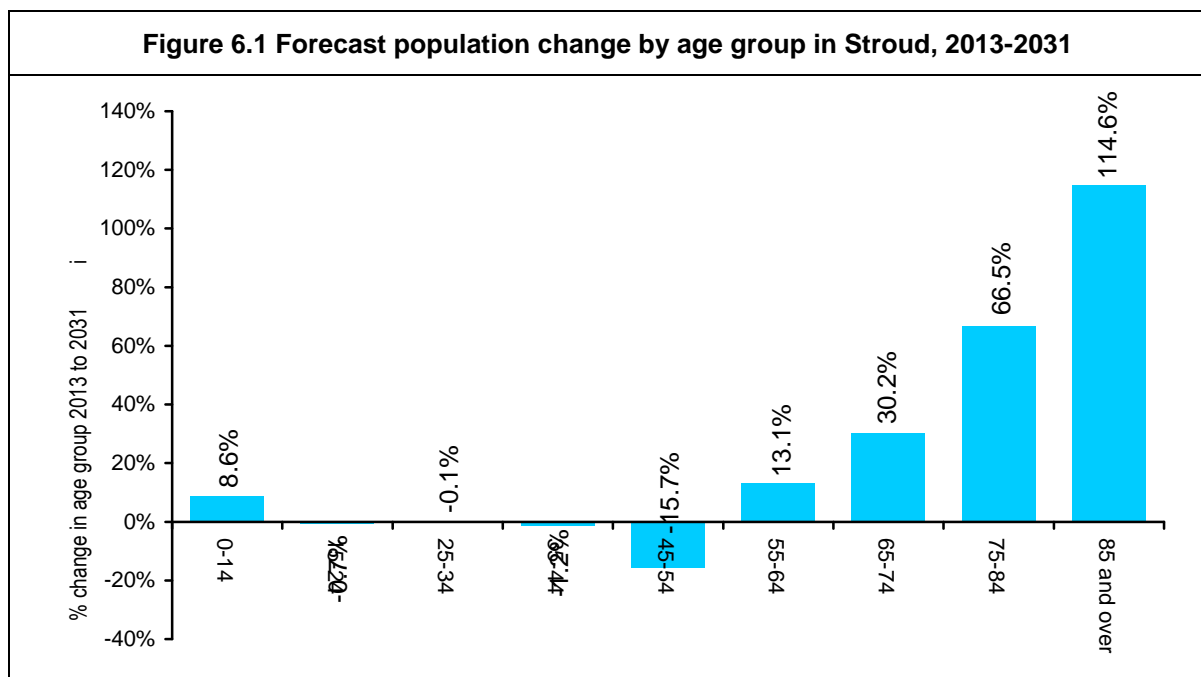
6. LTBHM Model Results for Stroud

Introduction

6.1 Chapter 1 establishes the OAN in Stroud between 2013 and 2031. This chapter sets out the nature of new housing required in Stroud to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in detail in Chapter 1. Initially the projected change in population of the authority as determined as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves on to present the outputs of the model, setting out the tenure and size of new accommodation required in Stroud over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenario included at the end of the chapter.

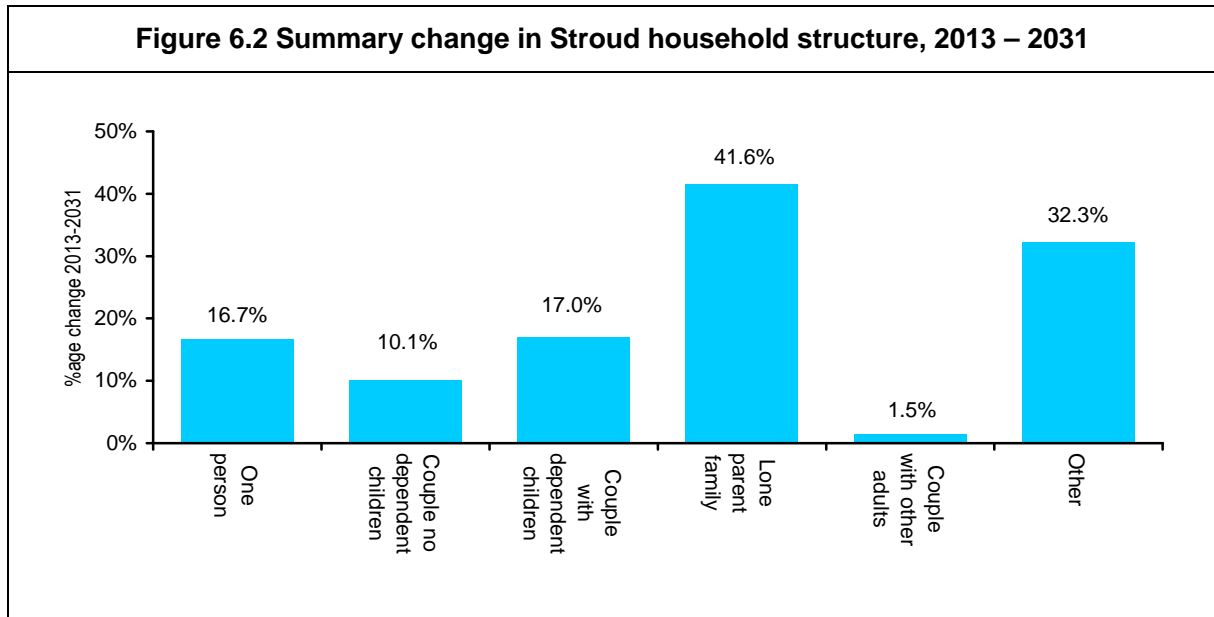
Demographic projections

6.2 Neil McDonald and Christine Whitehead provided detail on the change in the composition of the population in Stroud derived as part of their OAN calculations. Figure 6.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 years olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by over 100% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Stroud and Cotswold (October, 2014)

6.3 The projections also suggest that the structure of households in Stroud is likely to change over time as set out in Figure 6.2. The data indicates that the number of 'couple with other adults' households is expected to increase by 1.5%, whilst in contrast lone parent households are anticipated to increase by 41.6%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Stroud, Stroud and Cotswold (October, 2014)

6.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years' time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However rather than simply prescribing current occupation patterns into the future the model looks to ensure future households are adequately housed and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years' time, the new accommodation suggested by the model is still useful in the interim, as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

6.5 Table 6.1 shows the tenure profile of households resident in Stroud currently. The table indicates that over 80% of households are resident in market accommodation (without the aid of LHA), 0.6% live in

a shared ownership home, 6.6% live in a social rented property (without the aid of HB) and 10.7% live in rented accommodation with the aid of benefit (HB or LHA).

Table 6.1 Current tenure profile in Stroud		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	39,873	82.1%
Shared ownership	288	0.6%
Social rented	3,216	6.6%
Benefit supported (both private and social rented)	5,193	10.7%
Total	48,570	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or HB to live in the rented sector). Taking this into account, Table 6.2 shows the ideal tenure profile for Stroud in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 80.3% market dwellings, 1.5% shared ownership properties, 2.9% Affordable Rented homes and 15.3% dwellings occupied with the support of benefit.

Table 6.2 Ideal tenure profile in 2031 in Stroud		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	45,297	80.3%
Shared Ownership	851	1.5%
Affordable Rent	1,610	2.9%
Benefit supported (both private and social rented)	8,628	15.3%
Total	56,385	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.7 Table 6.3 shows the tenure profile required by households resident in Stroud in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 69.4% of new housing should be in the market sector, 7.2% should be shared ownership properties and 20.6% Affordable Rent.

6.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable

Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 219 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 2.8% of the total new homes required in Stroud. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	39,873	45,297	5,424	69.4%
Shared ownership	288	851	563	7.2%
Affordable Rent*	0	1,610	1,610	20.6%
Social rented	3,216	8,628	219	2.8%
Benefit supported	5,193			
Total	48,570	56,385	7,815	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Stroud, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.9 The total requirement for market housing is 5,424 dwellings with the total requirement for affordable housing 2,391 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

6.10 Table 6.4 presents the size of market accommodation required in Stroud in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 49.5% of new market dwellings should be three bedroom properties, with 37.7% having two bedrooms, 16.6% containing four or more bedrooms and 6.1% having one bedroom.

Table 6.4 Size of new market accommodation required in Stroud over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	2,167	2,496	329	6.1%
Two bedrooms	8,307	10,354	2,047	37.7%
Three bedrooms	16,440	18,585	2,145	39.5%
Four or more bedrooms	12,958	13,861	903	16.6%
Total	39,873	45,297	5,424	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 6.11 This analysis can be repeated for shared ownership housing and is presented in Table 6.5. The data indicates that of the 563 shared ownership dwellings required within Stroud, 32.1% should be two bedroom properties with a further 15.8% three bedroom accommodation. Some 37.8% should have one bedroom and 14.2% should have four or more bedrooms.

Table 6.5 Size of new shared ownership accommodation required in Stroud over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	18	231	213	37.8%
Two bedrooms	145	326	181	32.1%
Three bedrooms	97	186	89	15.8%
Four or more bedrooms	28	108	80	14.2%
Total	288	851	563	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 6.12 Table 6.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 1,610 additional Affordable Rented units required within Stroud over the next 18 years, the majority should be two and three bedroom properties.

Table 6.6 Size of new Affordable Rented homes required in Stroud over the next 18 years		
<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	246	15.3%
Two bedrooms	855	53.1%
Three bedrooms	427	26.5%
Four or more bedrooms	82	5.1%
Total	1,610	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.13 Table 6.7 presents the size of social rented/LHA supported private rented accommodation required in Stroud in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size as it is now and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 39.7% of the new social rented housing required should comprise three bedrooms, 23.3% should have four or more bedrooms, 17.8% should have two bedrooms and 19.2% should contain a single bedroom.

Table 6.7 Size of new social rented accommodation required in Stroud over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	2,253	2,295	42	19.2%
Two bedrooms	3,385	3,424	39	17.8%
Three bedrooms	2,576	2,663	87	39.7%
Four or more bedrooms	196	247	51	23.3%
Total	8,409	8,628	219	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in Chapter 5 of the 2013

SHMA), it is possible that households unable to afford it will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 6.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 6.8 Size of new Affordable Rented homes required in Stroud over the next 18 years – if house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	2,253	2,541	288	15.7%
Two bedrooms	3,385	4,279	894	48.9%
Three bedrooms	2,576	3,090	514	28.1%
Four or more bedrooms	196	329	133	7.3%
Total	8,409	10,238	1,829	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 6.15 It should be noted that if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons' accommodation required

- 6.16 Table 6.9 sets out the nature of older persons' accommodation required in Stroud over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. institutional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.
- 6.17 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 6.9 Tenure and size of new older persons accommodation required in Stroud over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	464	483	947
One bedroom	131	292	424
Two bedrooms	268	210	478
Total	863	986	1,849

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

6.18 This requirement for (non-bedspace) older persons' accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 6.10 and 6.11 therefore show the overall requirement split between older persons and ordinary accommodation in Stroud between 2013 and 2031.

Table 6.10 Size of all new market homes required in Stroud over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	464	0	464
One bedroom	131	198	329
Two bedrooms	268	1,779	2,047
Three bedrooms	0	2,145	2,145
Four or more bedrooms	0	903	903
Total	399	5,025	5,424

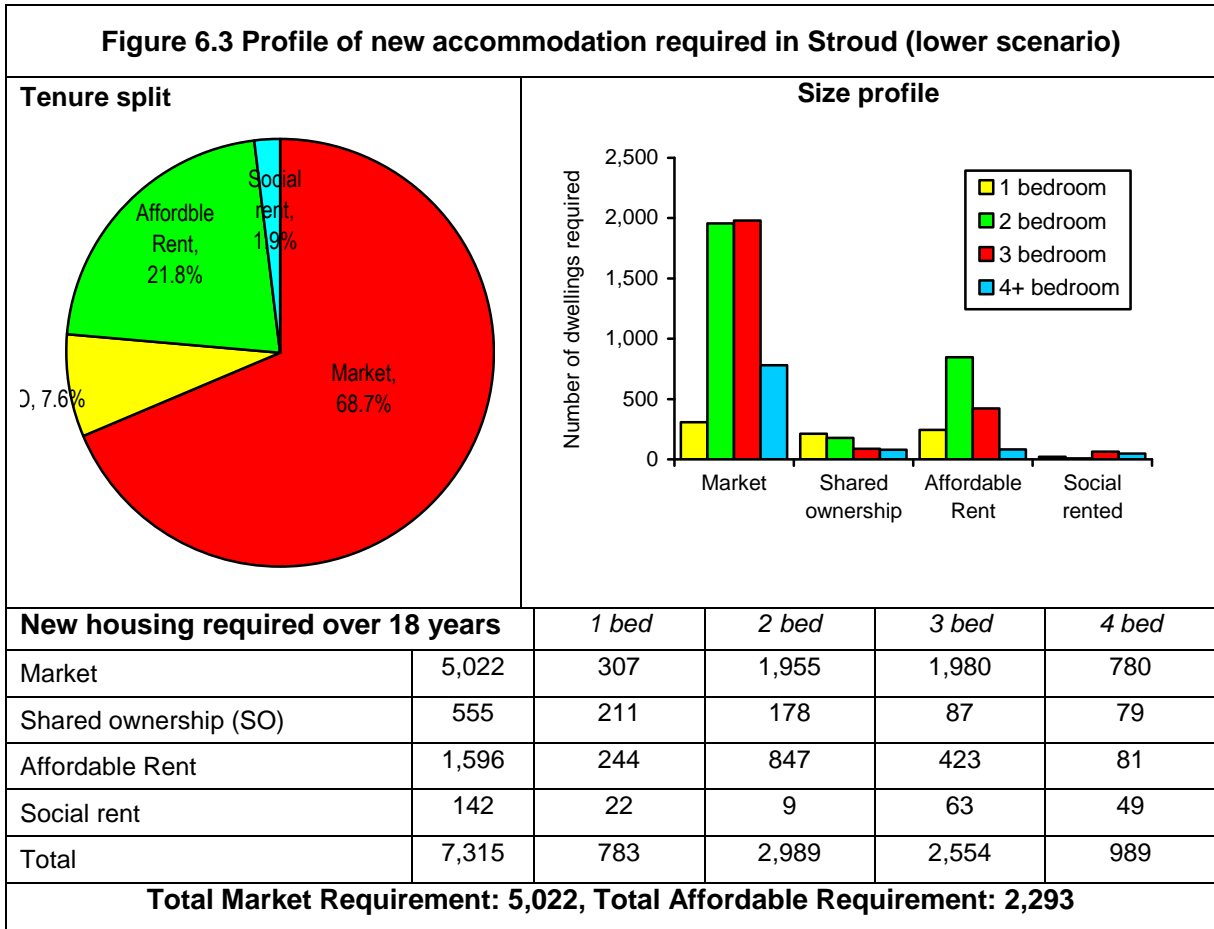
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 6.11 Size of all new affordable homes required in Stroud over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	483	0	483
One bedroom	292	209	501
Two bedrooms	210	865	1,075
Three bedrooms	0	603	603
Four or more bedrooms	0	213	213
Total	503	1,889	2,392

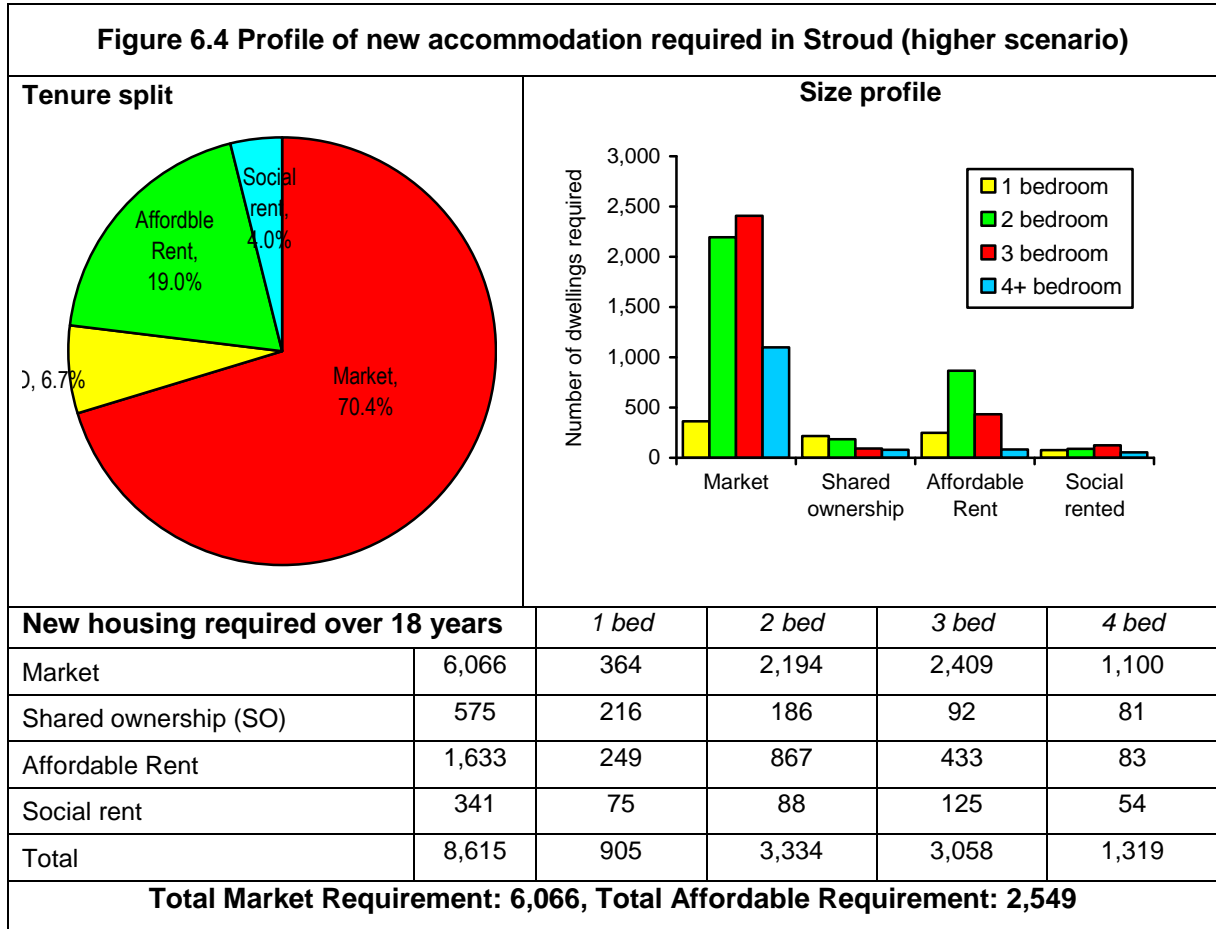
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Alternative LTBHM scenarios outputs for Stroud

6.19 The model has been run to provide equivalent detail for the different potential levels of OAN set out in the published reports (set out in Table 1.1). Figures 6.3 and 6.4 set out summary results for the size and tenure of new homes required within the lower and upper estimates of OAN in Stroud.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

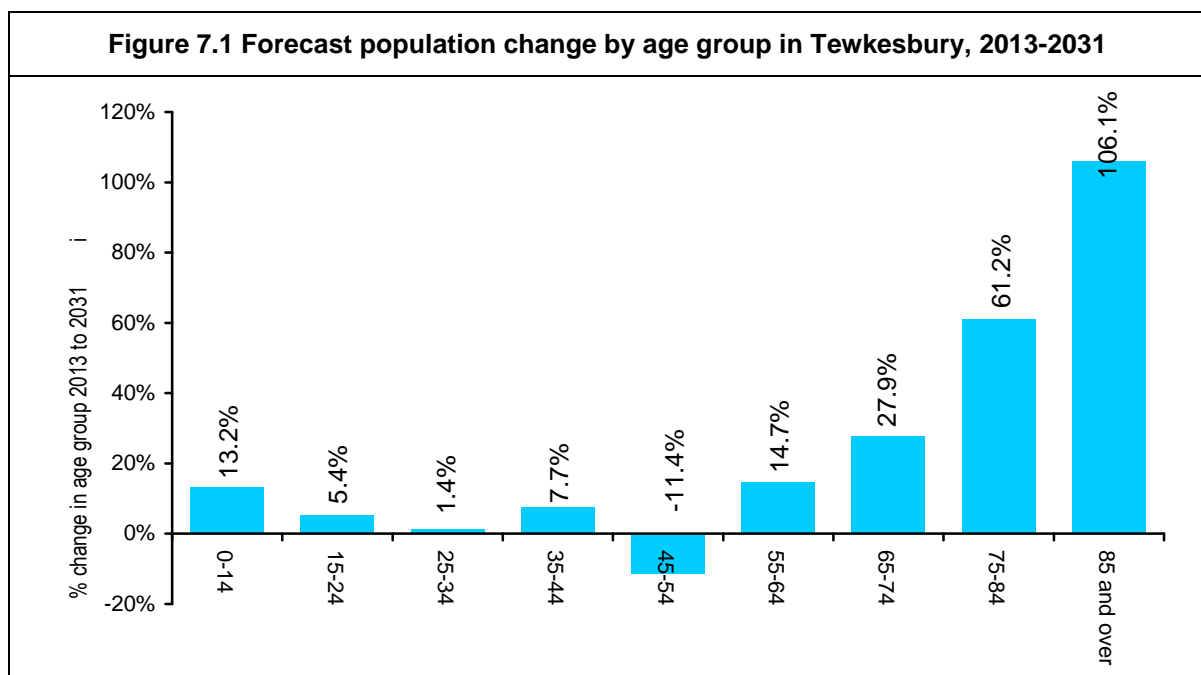
7. LTBHM Model Results for Tewkesbury

Introduction

7.1 Chapter 1 establishes the OAN in Tewkesbury between 2013 and 2031. This chapter sets out the nature of new housing required in Tewkesbury to most suitably meet the future population projected within the OAN. The results shown in this chapter are derived from the LTBHM model, which is described in detail in Chapter 1. Initially the projected change in population of the authority as determined as part of OAN calculation is presented. This is used to create the profile of the future population used in the LTBHM. The chapter then moves on to present the outputs of the model, setting out the tenure and size of new accommodation required in Tewkesbury over the next 18 years. The initial results presented are based on the main OAN scenario (the demographic OAN set out in Chapter 1), with equivalent data for the alternative scenario included at the end of the chapter.

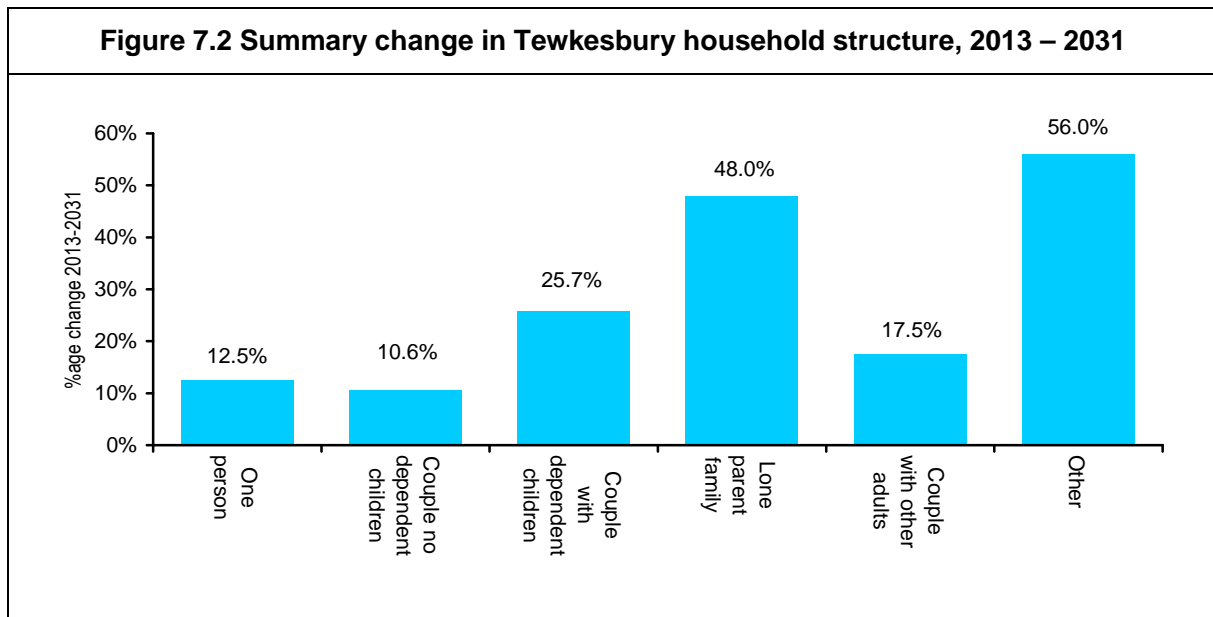
Demographic projections

7.2 Neil McDonald and Christine Whitehead provided detail of the change in the composition of the population in Tewkesbury derived as a part of their OAN calculations. Figure 7.1 shows the projected change within each age cohort between 2013 and 2031. The data indicates that there will be reductions in certain age groups (most notably 45-54 years olds) but the majority of cohorts are predicted to grow, albeit moderately. The exception is the number of older people, which is projected to grow quite notably; with the number of people aged 85 or over expected to increase by over 100% by 2031.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Tewkesbury, Tewkesbury and Cotswold (October, 2014)

7.3 The projections also suggest that the structure of households in Tewkesbury is likely to change over time as set out in Figure 7.2. The data indicates that the number of ‘couple with no dependent children’ households is expected to increase by 10.6%, whilst in contrast ‘other’ households are anticipated to increase by 56.0%.



Source: Neil McDonald with Christine Whitehead. The Objectively Assessed Housing Needs of Tewkesbury, Tewkesbury and Cotswold (October, 2014)

7.4 These projections alongside the employment growth indicated in the OAN calculations have been applied to the household survey dataset to provide an estimated household profile for 18 years’ time. The model identifies the range of accommodation required to house the profile of future households within the Objectively Assessed housing growth. The accommodation requirements are compared to the current stock resulting in the suggested provision for new housing in terms of tenure and dwelling size to balance the housing stock. However rather than simply prescribing current occupation patterns into the future the model looks to ensure future households are adequately housed and that they use the housing market more efficiently. This process is detailed fully in Chapter 1. It should be noted that whilst the model focuses on housing the population in 18 years’ time, the new accommodation suggested by the model is still useful in the interim, as the changes to the household structure are part of an ongoing trend rather than a variable pattern.

Tenure of housing required

7.5 Table 7.1 shows the tenure profile of households resident in Tewkesbury currently. The table indicates that over 80% of households are resident in market accommodation (without the aid of

LHA), 1.0% live in a shared ownership home, 5.2% live in a social rented property (without the aid of HB) and 10.4% live in rented accommodation with the aid of benefit (HB or LHA).

Table 7.1 Current tenure profile in Tewkesbury		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	29,911	83.4%
Shared ownership	362	1.0%
Social rented	1,850	5.2%
Benefit supported (both private and social rented)	3,747	10.4%
Total	35,870	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 7.6 The tenure of Affordable Rent is being introduced and the distinction in the affordable sector will be between those able to afford Affordable Rent (or shared ownership) and those requiring subsidy for their housing costs (those needing LHA or HB to live in the rented sector). Taking this into account, Table 7.2 shows the ideal tenure profile for Tewkesbury in 18 years' time (if all households are to be adequately housed and the affordable stock is to be used most efficiently). The data shows that in 2031 the housing stock should comprise 81.4% market dwellings, 2.2% shared ownership properties, 2.5% Affordable Rented homes and 13.9% dwellings occupied with the support of benefit.

Table 7.2 Ideal tenure profile in 2031 in Tewkesbury		
<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	34,839	81.4%
Shared Ownership	923	2.2%
Affordable Rent	1,038	2.5%
Benefit supported (both private and social rented)	5,998	13.9%
Total	42,792	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 7.7 Table 7.3 shows the tenure profile required by households resident in Tewkesbury in 18 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 71.2% of new housing should be in the market sector, 8.1% should be shared ownership properties and 15.6% Affordable Rent.

- 7.8 It is assumed that the current LHA supported private rented homes and the social rented stock will principally house households unable to afford Affordable Rent, including those requiring benefit (although it is acknowledged that these households could also be accommodated in Affordable

Rented accommodation as long as the rent levels were below the LHA rate). The model indicates that an additional 395 homes will be required for these households. It is suggested that these new dwellings be social rented accommodation (although suitably priced Affordable Rented dwellings would also be suitable). These additional social rented dwellings constitute 5.1% of the total new homes required in Tewkesbury. The model therefore assumes that the LHA supported private rented sector stays the same size as it is currently and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector.

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
Market	29,911	34,839	4,928	71.2%
Shared ownership	362	923	561	8.1%
Affordable Rent*	0	1,038	1,038	15.6%
Social rented	1,850	5,998	395	5.1%
Benefit supported	3,747			
Total	35,870	42,792	6,922	100.0%

*It should be noted that there are a very limited number of Affordable Rented units already in Tewkesbury, so for the purpose of this model the stock is presumed to be 0.

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

7.9 The total requirement for market housing is 4,928 dwellings with the total requirement for affordable housing 1,994 homes. The LTBHM model is able to also provide detail on the size of new dwellings required within each of these tenures. This is shown in the section below.

Size of housing required within each tenure

7.10 Table 7.4 presents the size of market accommodation required in Tewkesbury in 18 years' time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 43.1% of new market dwellings should be three bedroom properties, with 26.2% having two bedrooms, 19.0% containing four or more bedrooms and 11.2% having one bedroom.

Table 7.4 Size of new market accommodation required in Tewkesbury over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	1,557	2,109	552	11.2%
Two bedrooms	5,979	7,292	1,313	26.6%
Three bedrooms	13,445	15,571	2,126	43.1%
Four or more bedrooms	8,930	9,867	937	19.0%
Total	29,911	34,839	4,928	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 7.11 This analysis can be repeated for shared ownership housing and is presented in Table 7.5. The data indicates that of the 561 shared ownership dwellings required within Tewkesbury, 48.0% should be two bedroom properties with a further 28.2% three bedroom accommodation. Some 12.5% should have one bedroom and 11.4% should have four or more bedrooms.

Table 7.5 Size of new shared ownership accommodation required in Tewkesbury over the next 18 years				
<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2031</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	17	87	70	12.5%
Two bedrooms	184	453	269	48.0%
Three bedrooms	127	285	158	28.2%
Four or more bedrooms	34	98	64	11.4%
Total	362	923	561	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 7.12 Table 7.6 shows the size of accommodation required in the Affordable Rented sector; as there is very little of this tenure in existence, it will almost all be new. The table shows that of the 1,080 additional Affordable Rented units required within Tewkesbury over the next 18 years, the majority should be two and three bedroom properties.

<i>Dwelling size</i>	<i>Size profile 2031</i>	<i>% of change required</i>
One bedroom	177	16.4%
Two bedrooms	471	43.6%
Three bedrooms	401	37.1%
Four or more bedrooms	31	2.9%
Total	1,080	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

7.13 Table 7.7 presents the size of social rented/LHA supported private rented accommodation required in Tewkesbury in 18 years' time in comparison to the size profile recorded in the social rented and LHA supported private rented sector currently. The implied additional housing required is also presented. It is assumed that the current LHA supported private rented sector stock will continue to be available to this group of households in the future and will form an 'alternative affordable housing' supply. It is presumed that all of the additional housing required for the group will be social rented, because Local Authorities lack the ability to enable the effective delivery of private rented housing at LHA rates. The model therefore assumes that the LHA supported private rented sector stays the same size as is now and that there is no additional market housing required arising from households that would most appropriately be housed in the affordable sector. The table shows that 20.4% of the new social rented housing required should comprise three bedrooms, 28.2% should have four or more bedrooms, 51.4% should have two bedrooms. There is a surplus of one bedroom homes.

<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (social rented and LHA private rented)</i>	<i>Change required (new social rented dwellings only)</i>	<i>% of change required</i>
One bedroom	1,308	1,260	-48	0.0%
Two bedrooms	2,383	2,589	206	51.4%
Three bedrooms	1,719	1,801	82	20.4%
Four or more bedrooms	186	299	113	28.2%
Total	5,597	5,950	353	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

7.14 To facilitate a more detailed profile of affordability outside the market sector this model has made a distinction between those able to afford Affordable Rent (whom are presumed to access it) and those unable to (whom are presumed to require other affordable accommodation). However, as the Affordable Rent levels are likely to be below the LHA rate (as suggested in Chapter 5 of the 2013

SHMA), it is possible that households unable to afford it will be able to reside in Affordable Rented accommodation via the payment of LHA. Table 7.8 therefore shows the size of new Affordable Rented dwellings required if the tenure were to house both those able to afford Affordable Rent and those requiring benefit support to live there.

Table 7.8 Size of new Affordable Rented homes required in Tewkesbury over the next 18 years – if house all households unable to afford market or shared ownership housing				
<i>Dwelling size</i>	<i>Current size profile (social rented and LHA private rented)</i>	<i>Size profile 2031 (all households potentially suitable for Affordable Rent)</i>	<i>Change required (new Affordable rented homes)</i>	<i>% of change required</i>
One bedroom	1,308	1,437	129	9.0%
Two bedrooms	2,383	3,060	677	47.2%
Three bedrooms	1,719	2,202	483	33.7%
Four or more bedrooms	186	330	144	10.0%
Total	5,597	7,030	1,433	100.0%

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

7.15 It should be noted that if the amount of LHA supported private rented sector homes reduces as a consequence of the reduction of the LHA rates and the accommodation reverts to 'standard' market accommodation, then the reverted dwellings should be deducted from the total market requirement and dwellings of equivalent size be added to the affordable (social rented or Affordable Rented) requirement.

Older persons' accommodation required

7.16 Table 7.9 sets out the nature of older persons' accommodation required in Tewkesbury over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential (i.e. institutional) population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.

7.17 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 7.9 Tenure and size of new older persons accommodation required in Tewkesbury over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	164	402	566
One bedroom	133	150	283
Two bedrooms	159	147	306
Total	456	699	1,155

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

7.18 This requirement for (non-bedspace) older persons' accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 7.10 and 7.11 therefore show the overall requirement split between older persons and ordinary accommodation in Tewkesbury between 2013 and 2031.

Table 7.10 Size of all new market homes required in Tewkesbury over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	164	0	164
One bedroom	133	419	552
Two bedrooms	159	1,154	1,313
Three bedrooms	0	2,126	2,126
Four or more bedrooms	0	937	937
Total	292	4,636	4,928

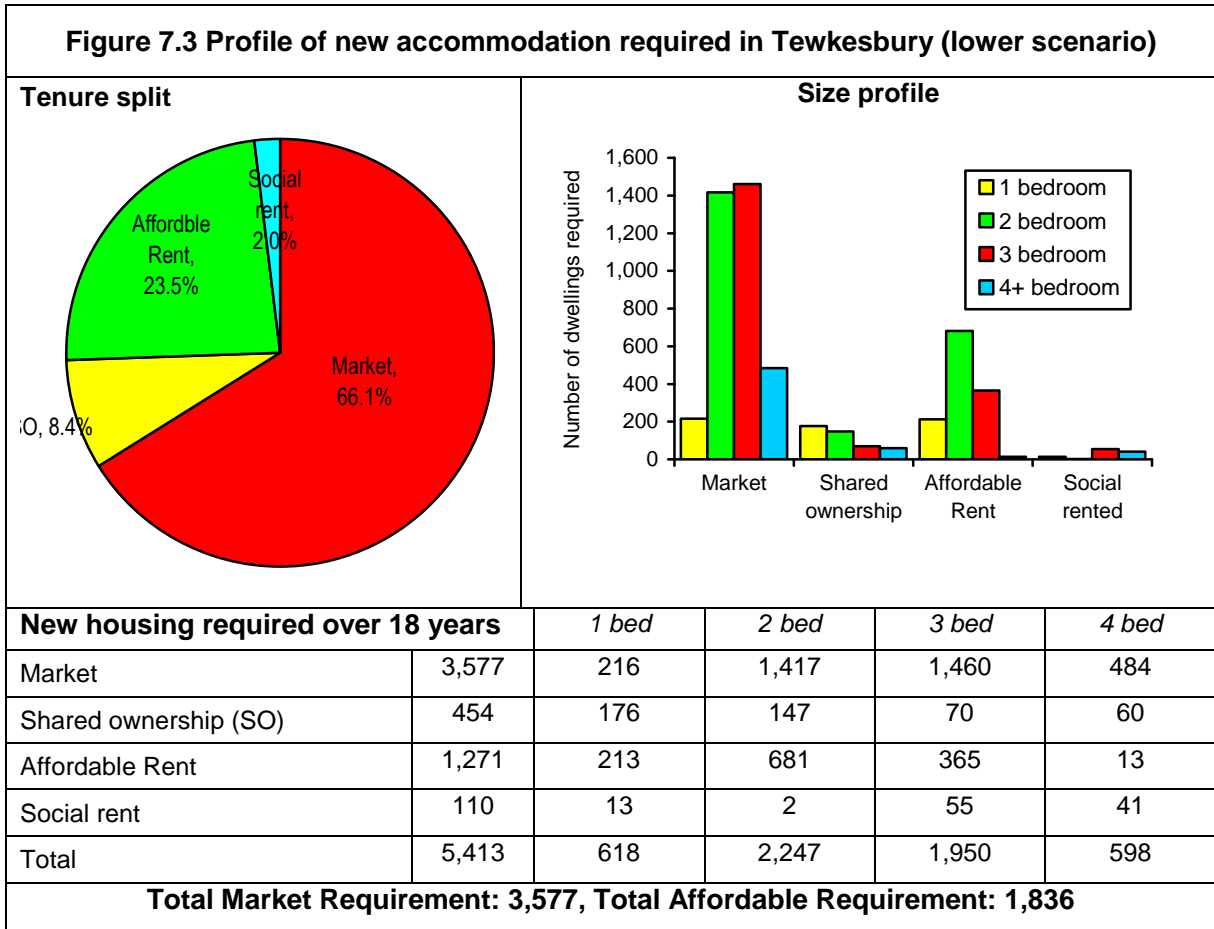
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 7.11 Size of all new affordable homes required in Tewkesbury over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	402	0	402
One bedroom	150	49	199
Two bedrooms	147	799	946
Three bedrooms	0	641	641
Four or more bedrooms	0	208	208
Total	297	1,697	1,994

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Alternative LTBHM scenarios outputs for Tewkesbury

7.19 The model has been run to provide equivalent detail for the different potential levels of OAN set out in the published reports (set out in Table 1.1). Figure 7.3 set out summary results for the size and tenure of new homes required within the lower estimate of OAN in Tewkesbury.

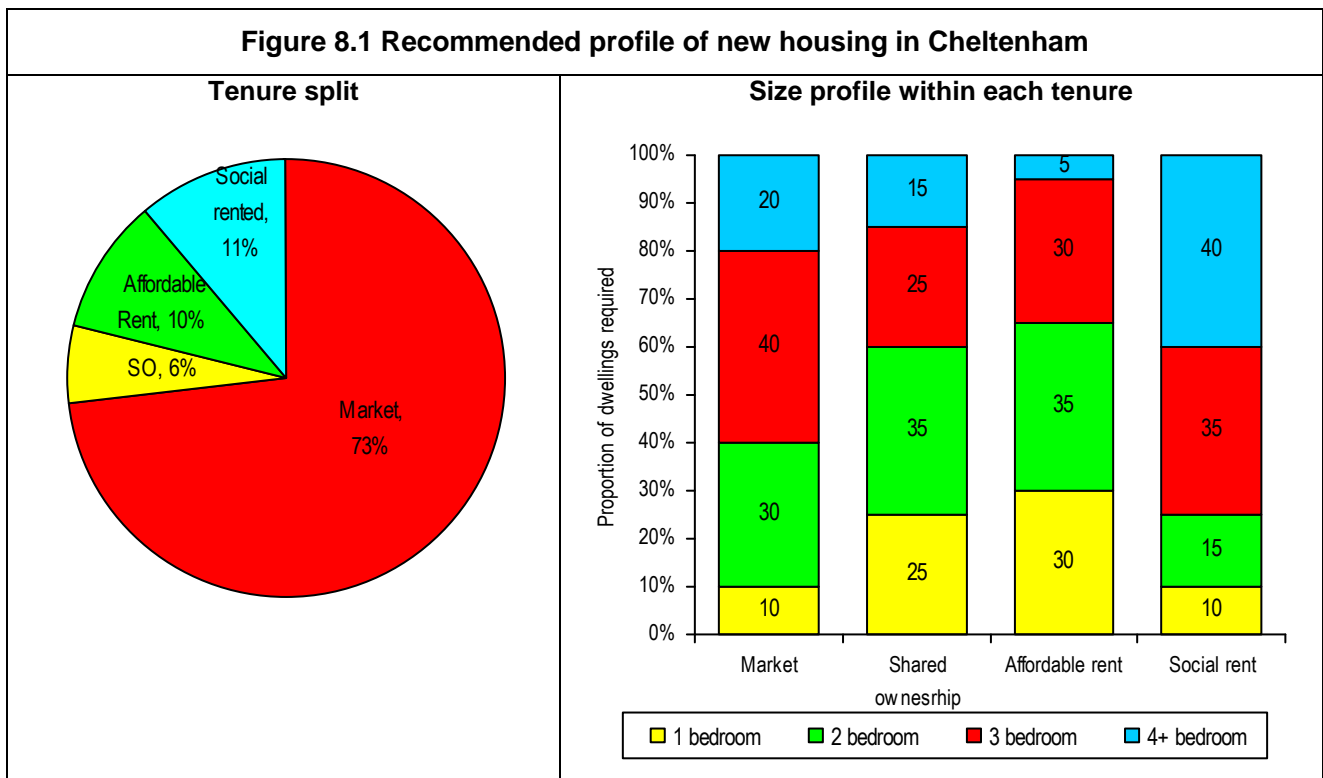


Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

8. Revised policy implications

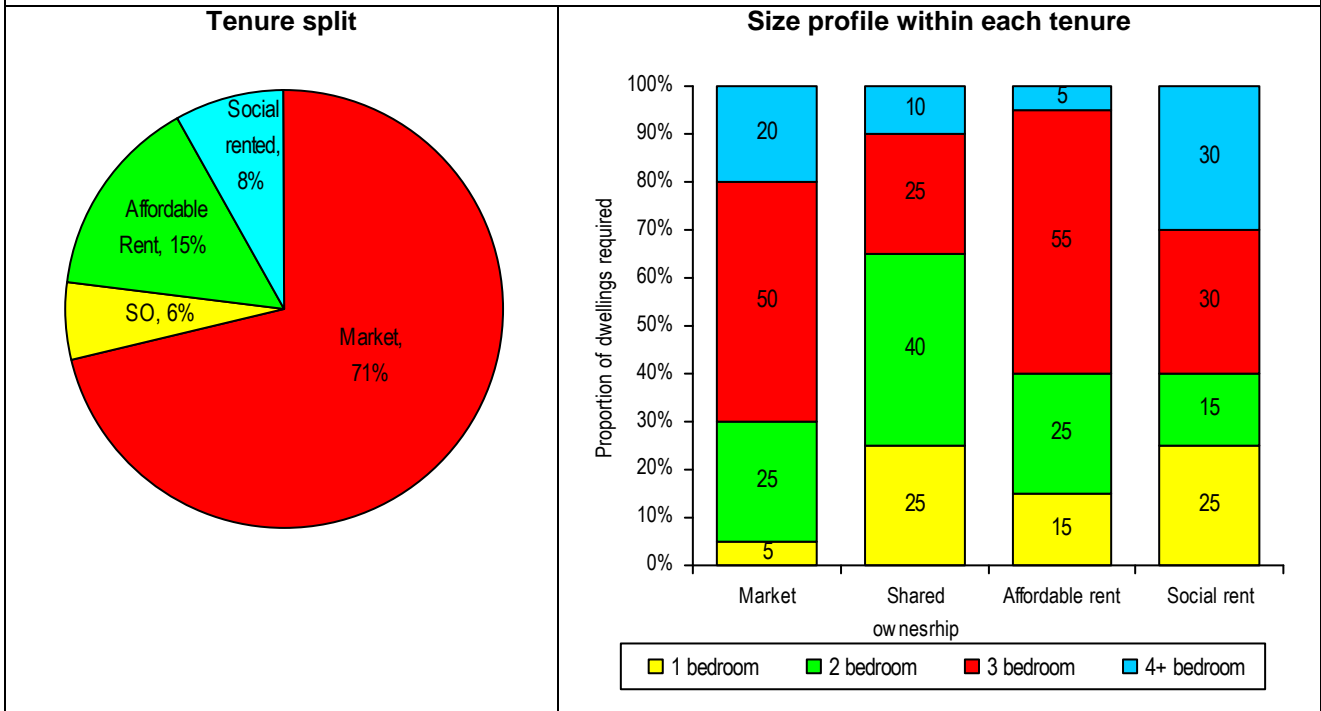
Introduction

8.1 The ultimate aim of a Strategic Housing Market Assessment is to provide robust evidence that will inform local housing strategy and planning policies. The 2013 SHMA commented on a range of issues, however this report has been focused on the appropriate mix and type of new housing in each authority so shall only comment on the mix and type of housing required. The LTBHM model provides detail on the size and tenure of accommodation required within each tenure. The main scenario (as set out in Table 1.1) outputs have been used to inform the recommended dwelling mix within each authority in Gloucestershire. These results are summarised in Figures 8.1 to 8.6 below. Whilst the outputs separate a requirement for new social rented dwellings from the Affordable Rent requirement, it is acknowledged that these groups could be amalgamated and all this new housing be Affordable Rent.



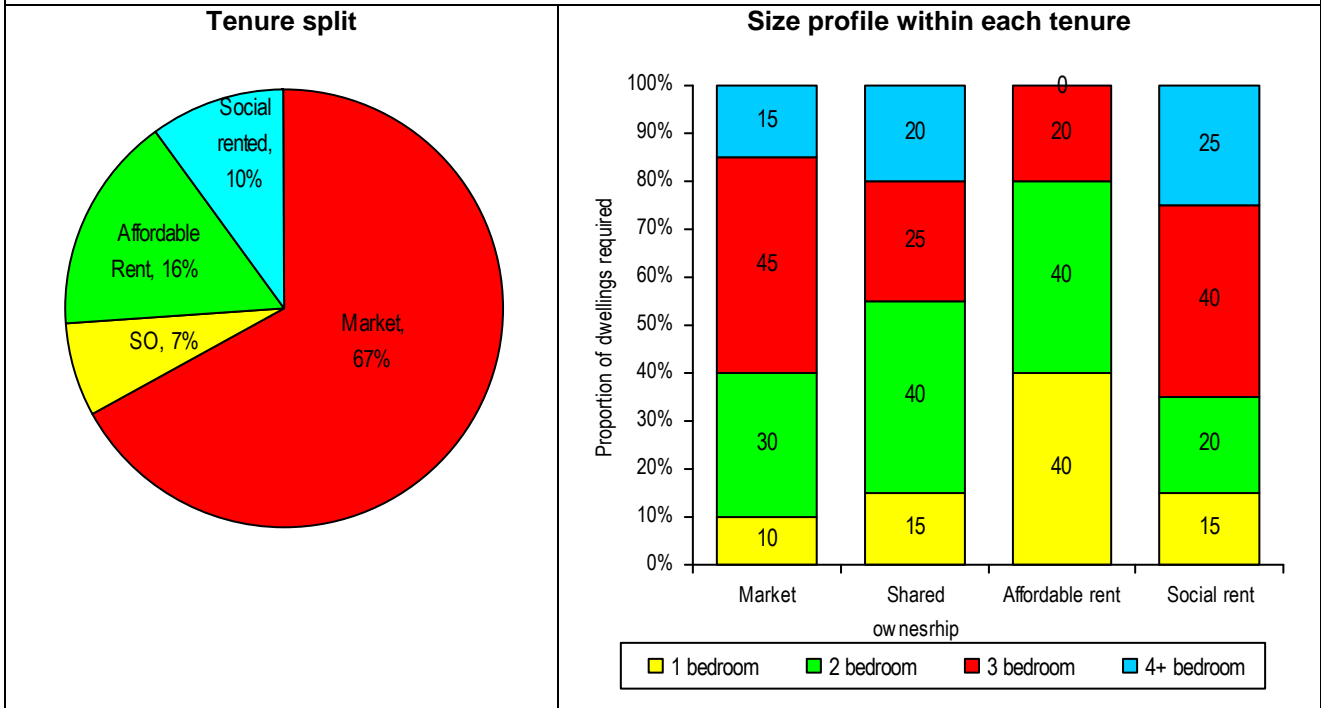
Source: Gloucestershire Strategic Housing Market Assessment, 2014

Figure 8.2 Recommended profile of new housing in Cotswold



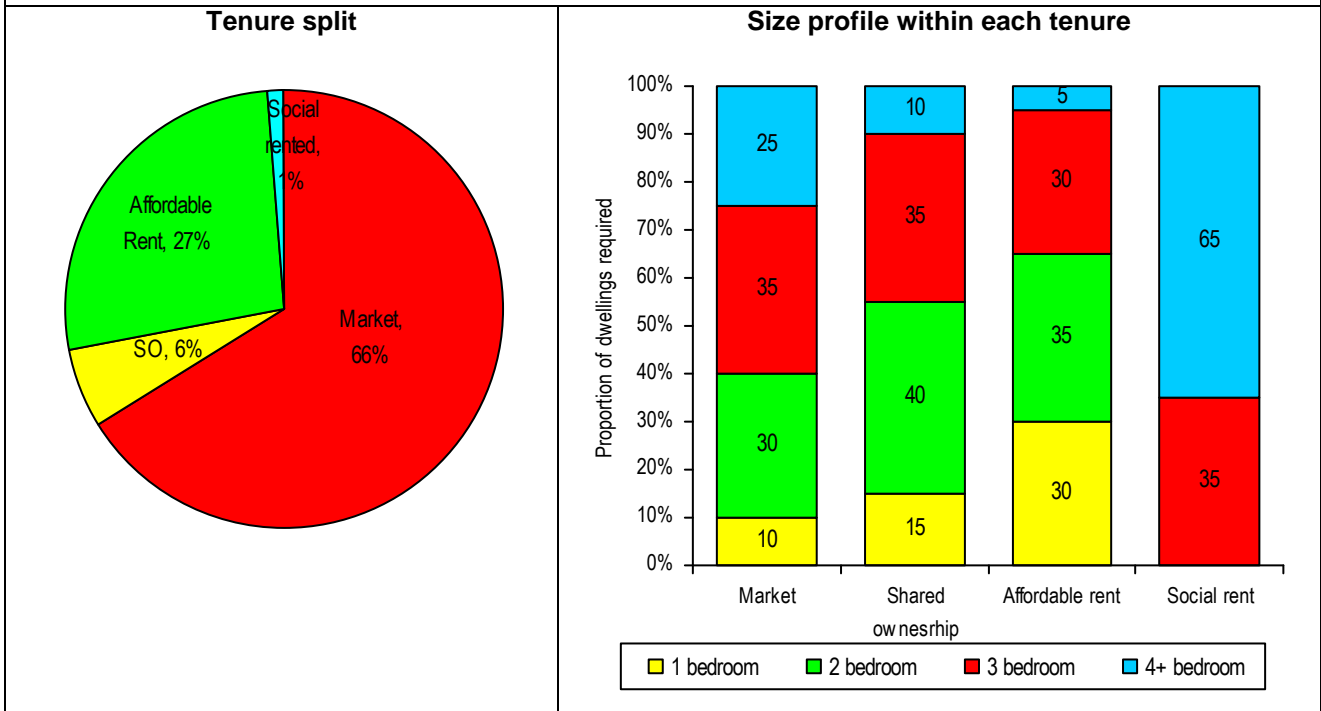
Source: Gloucestershire Strategic Housing Market Assessment, 2014

Figure 8.3 Recommended profile of new housing in Forest of Dean



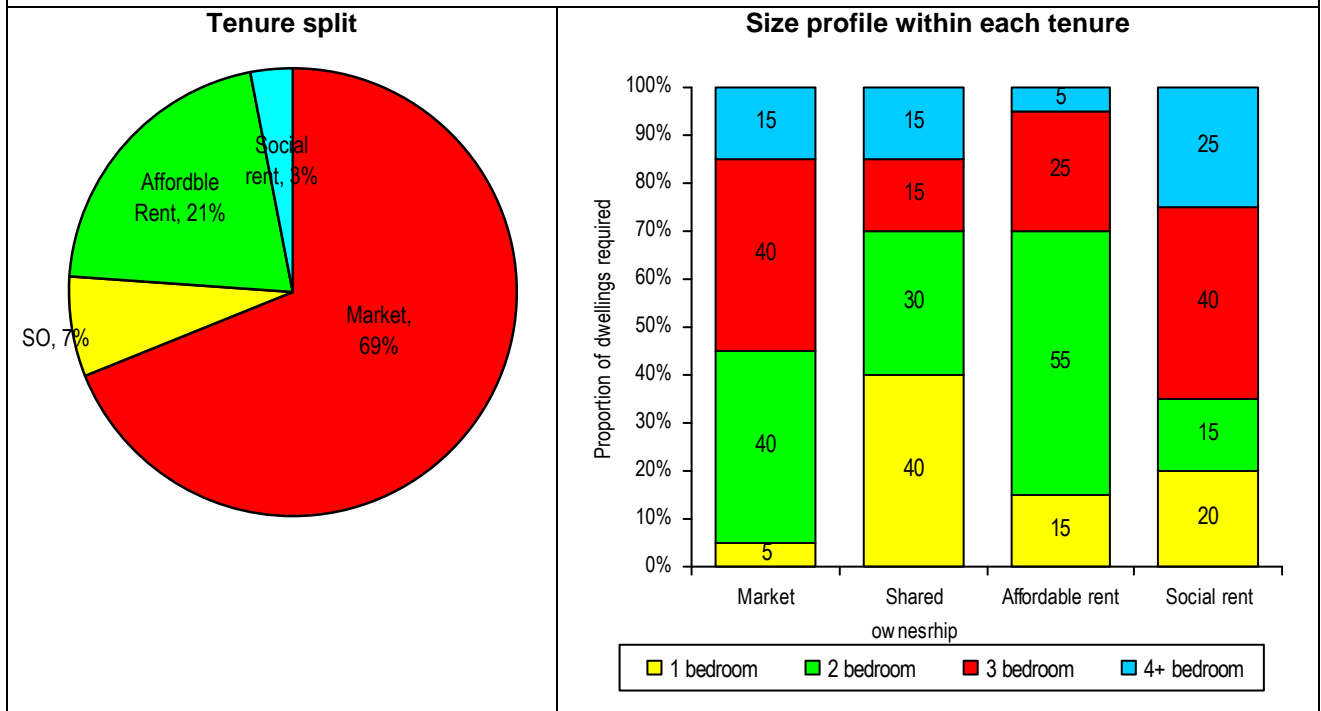
Source: Gloucestershire Strategic Housing Market Assessment, 2014

Figure 8.4 Recommended profile of new housing in Gloucester

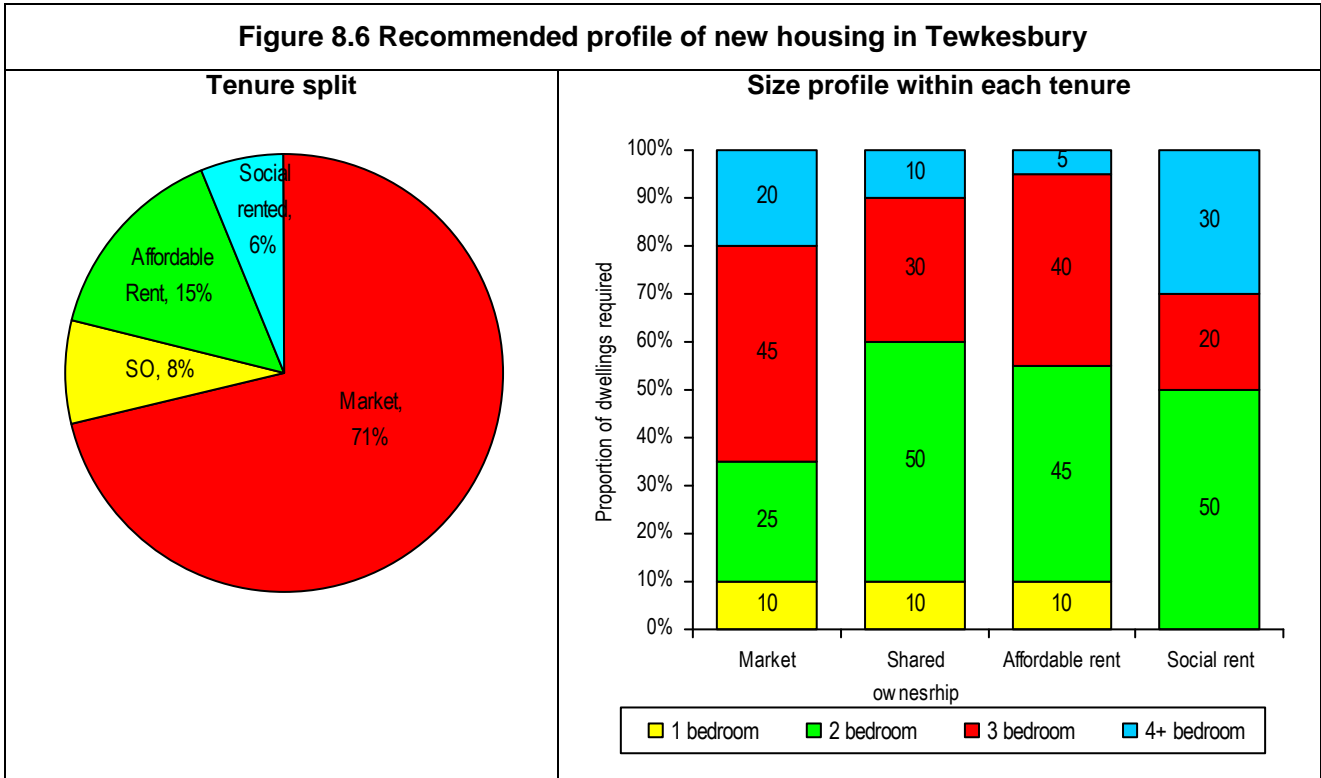


Source: Gloucestershire Strategic Housing Market Assessment, 2014

Figure 8.5 Recommended profile of new housing in Stroud



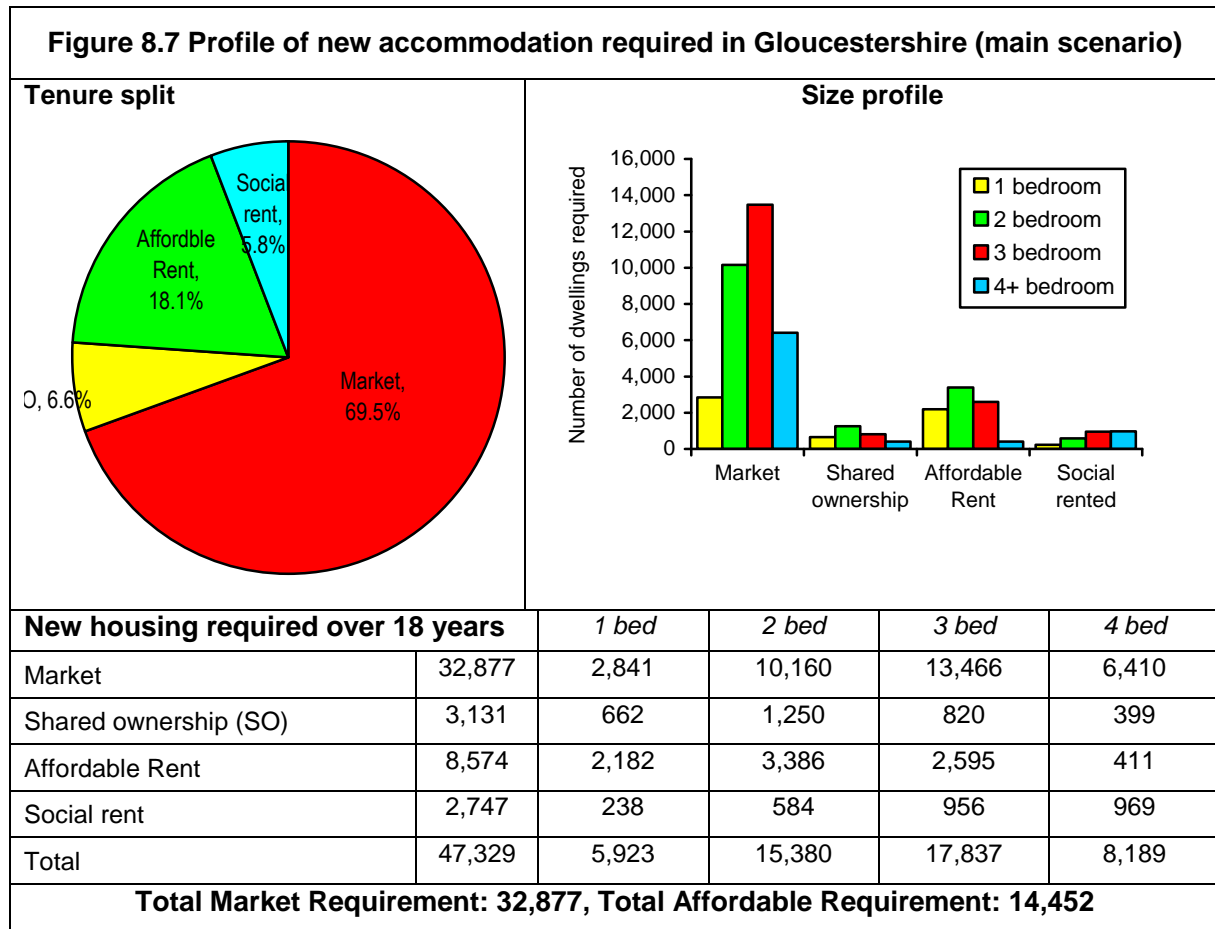
Source: Gloucestershire Strategic Housing Market Assessment, 2014



Source: Gloucestershire Strategic Housing Market Assessment, 2014

Gloucestershire-wide outputs

8.2 The results from the individual authorities can be summed to provide an indication of the nature of housing required across the County over the next 18 years. This is presented in Figure 8.7 and is based on the main OAN scenario in each authority.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Older persons' accommodation required

- 8.3 Table 8.1 sets out the nature of older persons' accommodation required in Gloucestershire over the next 18 years, a sum of the individual authority requirements presented in chapters 2 to 6. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations, and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.
- 8.4 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 8.1 Tenure and size of new older persons accommodation required in Gloucestershire over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	1,805	2,348	4,153
One bedroom	871	1,603	2,474
Two bedrooms	1,145	630	1,775
Total	3,821	4,580	8,402

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 8.5 This requirement for (non-bedspace) older persons' accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 8.1 and 8.2 therefore show the overall requirement split between older persons and ordinary accommodation in Gloucestershire between 2013 and 2031.

Table 8.2 Size of all new market homes required in Gloucestershire over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	1,805	0	1,805
One bedroom	871	1,970	2,841
Two bedrooms	1,145	9,015	10,160
Three bedrooms	0	13,466	13,466
Four or more bedrooms	0	6,410	6,410
Total	2,016	30,861	32,877

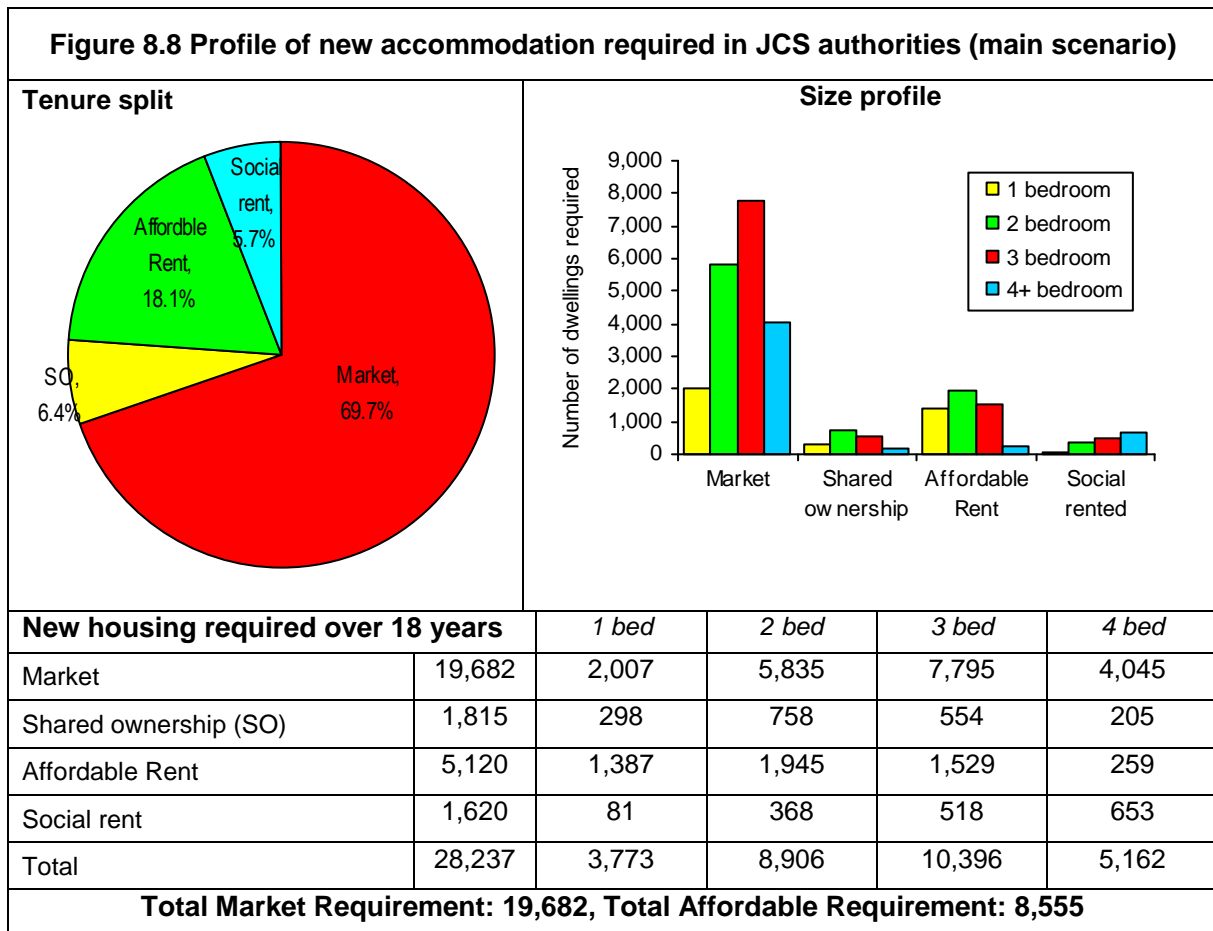
Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 8.3 Size of all new affordable homes required in Gloucestershire over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	2,348	0	2,348
One bedroom	1,603	1,479	3,082
Two bedrooms	630	4,590	5,220
Three bedrooms	0	4,371	4,371
Four or more bedrooms	0	1,779	1,779
Total	2,233	12,219	14,452

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Results for the 3 JCS authorities combined

8.6 The authorities of Cheltenham, Gloucester and Tewkesbury are producing a Joint Core Strategy. It is therefore useful to present the results for these three areas as a whole. Figure 8.8 presents the mix of housing required across the JCS area, based on the main OAN scenario.



Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Older persons' accommodation required

8.7 Table 8.4 sets out the nature of older persons, accommodation required in the JCS area over the next 18 years. The table sets out the requirement arising from within the general household population, who would require a one or two bedroom home with additional services or adaptations and also the requirement for those needing accommodation in a residential facility, indicated as a single bedspace rather than an additional home. As the OAN calculations exclude the residential population (they only indicate the number of homes required to accommodate the household population), the residential bedspace requirement is presented in addition to the OAN.

8.8 For the purposes of this analysis the shared ownership, Affordable Rented and social rented tenures have been grouped together as a single affordable tenure. Whilst there is some limited demand for

older persons' accommodation with more than two bedrooms, the dataset is unable to accurately differentiate this, therefore it is presumed for the purposes of the model that all new older persons' accommodation will contain no more than two bedrooms.

Table 8.4 Tenure and size of new older persons accommodation required in the JCS area over the next 18 years			
<i>Dwelling size</i>	<i>Market</i>	<i>Affordable</i>	<i>Total</i>
Bedspaces	872	1,228	2,100
One bedroom	481	717	1,198
Two bedrooms	392	202	594
Total	1,744	2,147	3,892

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

- 8.9 This requirement for (non-bedspace) older persons' accommodation can be deducted from the overall requirement for all accommodation as presented in the original SHMA. Tables 8.5 and 8.6 therefore show the overall requirement split between older persons' and ordinary accommodation in the JCS area between 2013 and 2031.

Table 8.5 Size of all new market homes required in the JCS area over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	872	0	872
One bedroom	481	1,526	2,007
Two bedrooms	392	5,443	5,835
Three bedrooms	0	7,795	7,795
Four or more bedrooms	0	4,045	4,045
Total	873	18,809	19,682

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

Table 8.6 Size of all new affordable homes required in the JCS area over the next 18 years split between older persons and ordinary accommodation			
<i>Dwelling size</i>	<i>Older persons accom</i>	<i>Ordinary accom</i>	<i>All new homes required</i>
Bedspaces	1,228	0	1,228
One bedroom	717	1,049	1,766
Two bedrooms	202	2,869	3,071
Three bedrooms	0	2,601	2,601
Four or more bedrooms	0	1,117	1,117
Total	919	7,636	8,555

Source: Gloucestershire Strategic Housing Market Assessment updated household dataset 2013

HDH Planning and Development Ltd is a specialist planning consultancy providing evidence to support planning authorities, land owners and developers.

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