

# Housing Needs Assessment

## Emsworth Neighbourhood Forum, Havant, Hampshire

April 2016  
Final Report

## Contents

<b>Glossary of terms used in the text.....</b>	<b>4</b>
<b>Executive Summary .....</b>	<b>5</b>
<b>1 Introduction .....</b>	<b>12</b>
<b>Housing Needs Assessment in Neighbourhood Planning .....</b>	<b>12</b>
<b>Local Study Context.....</b>	<b>12</b>
<b>2 Approach .....</b>	<b>13</b>
<b>PPG-Based Assessment.....</b>	<b>13</b>
<b>Summary of Methodology .....</b>	<b>13</b>
<b>Gathering and Using a Range of Data.....</b>	<b>13</b>
<b>Focus On Demand Rather Than Supply .....</b>	<b>14</b>
<b>Study Objectives .....</b>	<b>14</b>
<b>3 Relevant Data .....</b>	<b>15</b>
<b>Local Planning Context .....</b>	<b>15</b>
Local economic context.....	25
<b>Characteristics of Population .....</b>	<b>26</b>
<b>Household Type .....</b>	<b>28</b>
<b>Household Tenure.....</b>	<b>30</b>
<b>Local Household Composition .....</b>	<b>31</b>
<b>Economic Activity .....</b>	<b>35</b>
<b>4 Conclusions .....</b>	<b>38</b>
Overview .....	38
Quantity of Housing Needed .....	38
Characteristics of housing needed .....	45
Recommendations for next steps.....	49

## Limitations

AECOM Infrastructure & Environment UK Limited (“AECOM”) has prepared this Report for the sole use of **Emsworth Neighbourhood Forum** (“Client”) in accordance with the Agreement under which our services were performed. No other warranty, expressed or implied, is made as to the professional advice included in this Report or any other services provided by AECOM.

Where the conclusions and recommendations contained in this Report are based upon information provided by others it is upon the assumption that all relevant information has been provided by those parties from whom it has been requested and that such information is accurate. Information obtained by AECOM has not been independently verified by AECOM, unless otherwise stated in the Report.

The methodology adopted and the sources of information used by AECOM in providing its services are outlined in this Report. The work described in this Report was undertaken in the period January 2016 to April 2016 and is based on the conditions encountered and the information available during the said period of time. The scope of this Report and the services are accordingly factually limited by these circumstances.

Where assessments of works or costs identified in this Report are made, such assessments are based upon the information available at the time and where appropriate are subject to further investigations or information which may become available.




AECOM disclaim any undertaking or obligation to advise any person of any change in any matter affecting the Report, which may come or be brought to AECOM's attention after the date of the Report.

Certain statements made in the Report that are not historical facts may constitute estimates, projections or other forward-looking statements and even though they are based on reasonable assumptions as of the date of the Report, such forward-looking statements by their nature involve risks and uncertainties that could cause actual results to differ materially from the results predicted. AECOM specifically does not guarantee or warrant any estimate or projections contained in this Report.

Where field investigations are carried out, these have been restricted to a level of detail required to meet the stated objectives of the services. The results of any measurements taken may vary spatially or with time and further confirmatory measurements should be made after any significant delay in issuing this Report.

**Copyright**

© This Report is the copyright of AECOM Infrastructure & Environment UK Limited. Any unauthorised reproduction or usage by any person other than the addressee is strictly prohibited.

<i>Project Role</i>	<i>Name</i>	<i>Position</i>	<i>Actions Summary</i>	<i>Signature</i>	<i>Date</i>
<b>Researcher(s)</b>	Charlotte Simpson	Senior Assistant Planner	Drafted Report		30/03/16
<b>Project Manager</b>	Jesse Honey	Principal Planner	Reviewed draft and final text		30/03/16
<b>Director/QA</b>	Stuart Woodin	Technical Director	QA of draft for comment		30/03/16
<b>Qualifying Body</b>	Mike Bateman	Group contact, Emsworth Neighbourhood Forum	Co-ordinated Neighbourhood Forum inputs and comments	Confirmed via e-mail	29/03/13

## Glossary of terms used in the text

DCLG	Department for Communities and Local Government
HBC	Havant Borough Council
HMA	Housing Market Area
HNA	Housing Needs Assessment
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
PPG	Planning Practice Guidance
PUSH	Portsmouth and Urban South Hampshire (sub-region)
SHMA	Strategic Housing Market Assessment
SHLAA	Strategic Housing Land Availability Assessment

## Executive Summary

### Introduction

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

### PPG-Based Assessment

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

### Summary of Methodology

7. Housing Needs Assessment at neighbourhood plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
8. In the case of Emsworth, the Havant Core Strategy does not give a specific target for Emsworth. However, a calculation of its inferred target for Emsworth is simple and straightforward, and is set out in Chapter 3 of this assessment.

9. At the same time, we have calculated a separate target based on the more recent 2012-based Household Projections (for details, again see Chapter 3 below).
10. The rationale for this recommended approach is that neighbourhood plans need to pass a number of Basic Conditions to be adopted. One of these, Basic Condition E, requires the Neighbourhood Plan to be in 'general conformity with the strategic policies' of the Local Plan, in this case the Havant Core Strategy. The Government's Planning Practice Guidance indicates that the level of housing development is likely to count as a strategic policy.<sup>1</sup>
11. By contrast, in terms of the types of housing needed, there is generally more flexibility on what neighbourhood plans can cover. In order to understand the types of housing needed in Emsworth, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing characteristics.
12. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Emsworth, this would mean aligning with the Core Strategy period, which extends from 2006 to 2026.

### **Gathering and Using a Range of Data**

13. The PPG states that:

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

14. It continues: *'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance'*.
15. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.
16. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. We have gathered data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data.

### **Focus On Demand Rather Than Supply**

17. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*

---

<sup>1</sup> See Planning Practice Guidance Paragraph: 006 Reference ID: 2a-006-20140306

18. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study<sup>2</sup>.

### Quantity of Housing Needed

19. We identified six separate projections of dwelling numbers for Emsworth between 2006 and 2026 based on:
- A figure derived from the South Hampshire Strategic Housing Market Assessment: Partnership for Urban South Hampshire, (January 2014) (which gives a total of 840 dwellings, or 42 per year);
  - The Havant Borough Core Strategy, disaggregated to Emsworth (which gives a total of 537 dwellings, or 27 per year);
  - The Government's 2012-based household projections, extrapolated to Emsworth translated from households to dwellings, and rebased to actual 2014 population (which gives 462 dwellings, or 23 per year);
  - A projection forward of dwelling completion rates 2001-2011 (which gives 400 dwellings, or 20 per year);
  - A projection forward of dwelling completion rates 2011-2015 (which gives 1,520 dwellings, or 76 per year); and
  - *The Havant Borough SHLAA (an identified capacity of 590 dwellings, or 30 per year).*
20. Note here the PPG advice is not to constrain demand assessment with supply-side considerations (which here, relates to the Havant SHLAA-derived figure) into account when calculating future need. For this reason, we have italicised this projection above to show that it should be used for reference only.
21. The average of the forward projections summarised above excluding the SHLAA projection provided for reference only is 732 dwellings. However, the neighbourhood forum has pointed out, and AECOM agrees, that the dwelling completion rate 2011-2015 is such a significant outlier from the other projection rates (due to the fact that it includes a number of very large 'one-off' completions) that its effect is to distort the average.
22. The average of the remaining four forward projections (SHMA, Core Strategy, dwelling completions 2001-2011 and DCLG household projections), therefore, is considered to be a more accurate estimate of future demand. The average of these four is 535 dwellings.
23. Table 18 in the main body of the report suggests that on balance, the dwelling target selected should be significantly higher than 535 but no higher than the highest of the remaining four projections, namely the PUSH SHMA projection of 840.
24. The 840 dwellings arising from the PUSH SHMA is Emsworth's pro-rata, unconstrained share of the total assuming all areas, including Portsmouth, grow at the same rate. In practice, and in the interests of sustainable development, it is likely that proportionately more housing will be allocated to the largest settlements through the planning process, including Portsmouth

---

<sup>2</sup> Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was recently endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)



and Havant itself. As such, it can be assumed that Emsworth's share, as a relatively smaller settlement, will be lower than 840.

25. However, it is clear that the range of factors and market signals interrogated collectively act to drive demand in Emsworth to a significant extent, suggesting that the target range selected should not be too much lower than 840, given factors such as Emsworth's older population, its high average house prices and its resulting high level of need for affordable housing.
26. Therefore, based on the data summarised on the quantity of dwellings required and the market factors affecting those quantities, AECOM recommends that unconstrained housing need for the neighbourhood plan area (i.e. that does not reflect supply-side constraints) in the period 2006-2026 would be approximately 750-800 net additional dwellings, or around 38-40 dwellings per year over the plan period.
27. Note that the approximately 430 dwellings<sup>3</sup> completed or committed in the plan area since 2011 count towards the dwelling total, meaning the outstanding number of dwellings needed as of 2015 drops to 320-370 dwellings. The SHLAA indicates outstanding capacity for 288 dwellings on remaining identified sites, and there are also likely to be existing and future opportunities submitted by developers that it has not captured.
28. As such, it will probably be possible to meet the need arising from Emsworth within the neighbourhood plan area boundaries, although it should be noted that there is no specific obligation to meet unconstrained need in full within the neighbourhood plan area itself (and indeed, in many locations, this may not be possible).

### Characteristics of housing needed

29. Table 18 (main body of the report, and replicated below) summarises the data we have gathered with a potential impact on the characteristics of the housing needed in the neighbourhood. Factors are in alphabetical but no other order.

**Table 18: Summary of local factors specific to Emsworth with a potential impact on neighbourhood plan housing characteristics**

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Affordable housing</b>	Census, Hampshire Home Choice	<p>The Census data indicates a high level of owner occupation in Emsworth, and a low proportion of socially rented housing compared to the local and national averages. However, locational preferences in the Hampshire Home Choice waiting list indicate that there is a high level of demand for affordable housing in Emsworth.</p> <p>The SHMA notes that there is a shortage of one and two bedroom socially-rented homes, and the shortage has become more acute as a result of the 'bedroom' tax.</p>	Across the borough as a whole, the existing Havant target is for 30-40% of all new housing, on average, to be affordable, so we would recommend that Emsworth ensures Havant seeks an affordable percentage target for Emsworth that is more towards the 40% rather than the 30% end of this spectrum.

<sup>3</sup> This comprises, as at the time of writing in March 2016, the 305 dwellings completed since 2011 as advised by Havant and the 125 dwellings with permission at SHLAA site UE13 (Land West of Horndean Road).

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Need for homes for younger people</b>	SHMA, Census, Neighbourhood Forum	<p>The SHMA indicates that young people leave the local area for Portsmouth and Southampton. The Neighbourhood Forum also suggests that young people struggle to join the local housing market, and the SHMA notes this is an issue across the PUSH area. This would suggest that there is a need for smaller, cheaper (market) homes within the Neighbourhood Plan Area to help retain this element of the population. Census data indicates decreases in people aged 16 to 44, i.e. young people moving out of the area.</p> <p>Sale prices for homes under £150k are rising due to demand split from both first time buyers and investors.</p>	<p>Homes designed for younger purchasers are needed to help young adults join the housing market.</p> <p>These are likely to need to be smaller units, including flats.</p> <p>This could help ensure fewer young people leave Emsworth; even if they may still need to commute to work elsewhere, at least they can start on the local housing ladder.</p>
<b>Demand/need for smaller dwellings</b>	SHMA, Census	<p>The SHMA notes that there is a shortage of one and two bedroom socially-rented homes, which has become more acute as a result of the 'bedroom' tax.</p> <p>The SHMA also notes the ageing population of Havant including Emsworth. Delivering 1-2 bedroom dwellings would offer older people the opportunity to downsize and free up existing larger dwellings for families.</p> <p>The Census shows significant levels of under-occupation. In other words, larger units that once housed families are gradually losing residents (from children moving away, and then parents becoming widowed or moving into care), resulting in decreasing number of persons per room.</p>	<p>Provide within range of new dwelling sizes a proportion of smaller dwellings (1-2 bedrooms), for which there is evidenced demand.</p> <p>Providing these smaller units will also be an effective response to the increase in private renting seen locally, younger people moving away (see above) and would offer the opportunity for the older population to downsize locally.</p> <p>For smaller units aimed at older people downsizing, bungalows or flats could be suitable.</p>

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Housing type</b>	Core Strategy, Census	<p>The Core Strategy aims for mixed communities, with concentrations of affordable housing to be avoided. A mix of dwelling types, sizes and tenures to help meet identified local housing need should be provided.</p> <p>The Census shows that dwellings in the neighbourhood plan area are predominately detached houses or bungalows. There is a lower than average number of flats when compared to the regional and national averages.</p>	<p>To provide a wider range of dwellings and a more balanced community, the neighbourhood plan area may wish to encourage the provision of more flats and terraced housing which would complement the large number of existing larger detached houses.</p> <p>This is supported by our conclusions on the need for smaller dwellings above; they would meet a need arising from both the older and younger populations.</p>
<b>Need for larger/family households</b>	SHMA, Census	<p>The SHMA and Census both indicate that Havant is popular among commuters, who tend to demand larger, often detached or semi-detached housing, and thus resulting in a continued need for larger housing.</p> <p>The SHMA also notes that investors buying properties within the area are usually letting to families than converting to flats due to demand for larger dwellings.</p> <p>Dwelling requirement by number of bedrooms from 2011 to 2036 in Havant will be greatest for three bedroom properties.</p> <p>The Census indicates an upward trend for 3 and 8 room or more houses within the Neighbourhood Plan Area. This increase in rooms per household may be driven by incoming families.</p>	<p>In order to provide a greater balance/mix of dwellings, and to cater for the increase in families with children evidenced by the Census data within the range of new dwelling size, there is likely to be a need for a proportion of larger, family sized dwellings</p> <p>Although family housing will continue to be in demand, a proportion of it should be three bedroom units- i.e. smaller than the standard 4-5 bedroom offer.</p> <p>If smaller housing is to be provided, then older person households can downsize into it, thus freeing up existing 4-5 bedroom units for family occupation and reducing the number of larger new units that need to be built.</p>

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<p><b>Need for specialist housing for the disabled and/or elderly</b></p>	<p>SHMA, Core Strategy, Census</p>	<p>The proportion of people aged 65 and over is significantly higher in Emsworth compared to Havant and England. The SHMA notes that there remains a significant market for retirement housing.</p> <p>This is likely to result in a requirement for additional levels of care/support along with provision of some specialist accommodation in both the market and affordable sectors.</p> <p>The Core Strategy aims to deliver 450 extra-care dwellings across Havant Borough between 2006 and 2026.</p>	<p>The growing number of people over 60 living in Emsworth suggests a requirement for specialist housing for the elderly and/or disabled.</p> <p>Specialist housing for the elderly, including smaller units suitable for independent living as well as more specialised housing types such as sheltered accommodation, need to be provided in appropriate locations within walking distance of services, facilities and public transport, recognising the accessibility requirements of the older population and the fact that care homes are also places of employment.</p>

# 1 Introduction

## **Housing Needs Assessment in Neighbourhood Planning**

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

## **Local Study Context**

35. Emsworth is a small town in Hampshire with a population of just under 10,000. Located to the north of Chichester Harbour, it is about 3km east of the town of Havant. Emsworth lies astride the A27 and A 259, allowing for road connections to Portsmouth and Chichester.
36. Emsworth is served by Emsworth railway station, which offers connections to Portsmouth, Brighton, Southampton and London Victoria. The nearest major airport is Gatwick with Southampton Airport also within easy reach.
37. The Neighbourhood Plan area is the same as Emsworth Ward. This greatly simplifies the gathering of statistics, as all are available at ward level.
38. Emsworth's local authority is Havant Borough Council. This means that for planning purposes, it is covered by the adopted Havant Borough Core Strategy.
39. This also means that it is part of the South Hampshire Housing Market Area, and as such, the Havant part of the South Hampshire Strategic Housing Market Assessment (SHMA) is relevant to this housing needs analysis. It will be interrogated as appropriate.

## 2 Approach

### PPG-Based Assessment

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

### Summary of Methodology

41. Housing Needs Assessment at neighbourhood plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
42. In the case of Emsworth, the Havant Core Strategy does not give a specific target for Emsworth. However, a calculation of its inferred target for Emsworth is simple and straightforward, and is set out in Chapter 3 of this assessment.
43. At the same time, we have calculated a separate target based on the more recent 2012-based Household Projections (for details, again see Chapter 3 below).
44. The rationale for this recommended approach is that neighbourhood plans need to pass a number of Basic Conditions to be adopted. One of these, Basic Condition E, requires the Neighbourhood Plan to be in 'general conformity with the strategic policies' of the Local Plan, in this case the Havant Core Strategy. The Government's Planning Practice Guidance indicates that the level of housing development is likely to count as a strategic policy.<sup>4</sup>
45. By contrast, in terms of the types of housing needed, there is generally more flexibility on what neighbourhood plans can cover. In order to understand the types of housing needed in Emsworth, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing characteristics.
46. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Emsworth, this would mean aligning with the Core Strategy period, which extends from 2006 to 2026.

### Gathering and Using a Range of Data

47. The PPG states that:

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

48. It continues: *'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to*

<sup>4</sup> See Planning Practice Guidance Paragraph: 006 Reference ID: 2a-006-20140306

*produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance<sup>5</sup>.*

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

### **Focus On Demand Rather Than Supply**

51. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*
52. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study<sup>5</sup>.

### **Study Objectives**

53. The objectives of this report can be summarised as:
- Collation of a range of data with relevance to housing need in Emsworth relative to Havant and the wider PUSH area as a whole;
  - Analysis of that data to determine patterns of housing demand;
  - Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.
54. The remainder of this report is structured around the objectives set out above:
- Chapter 3 sets out the data gathered from all sources; and
  - Chapter 4 sets out our conclusions and recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

---

<sup>5</sup> Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was recently endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

### 3 Relevant Data

#### Local Planning Context

*South Hampshire Strategic Housing Market Assessment: Partnership for Urban South Hampshire (January 2014)*

55. The PPG states that neighbourhood planners can refer to existing needs assessment at local authority level and above as a starting point. As Emsworth is located within the South Hampshire Housing Market Area, we therefore turned to the South Hampshire Strategic Housing Market Assessment (2014, henceforth SHMA)<sup>6</sup> which covers the housing market area and informs housing policies at a local authority level, including affordable housing policy<sup>7</sup>.
56. The SHMA draws upon a range of statistics including population projections, housing market transactions and employment scenarios to recommend objectively-assessed housing need. As such, it contains a number of points of relevance when determining the degree to which the housing needs context of Emsworth Neighbourhood Plan area differs from the authority-wide picture.
57. The SHMA defines two housing market areas (HMAs) which cover the majority of the PUSH Sub-Region, with the Isle of Wight functioning as its own separate HMA. These two HMAs are Southampton-focused (PUSH West) and Portsmouth-focused (PUSH East). Emsworth falls within PUSH East. Although there is a degree of overlap between these two Housing Market Areas, the analysis undertaken in this SHMA concludes that the PUSH area remains a sensible basis for strategic planning for housing provision based on the information currently available.
58. The Portsmouth HMA comprises:
- Portsmouth;
  - Gosport;
  - Havant;
  - The eastern wards of Fareham Borough; and
  - The southern parts of Winchester District.
59. The SHMA states that the overall pattern of migration within South Hampshire is one of net flows out from the cities of Portsmouth and Southampton to adjoining areas, including Havant, and, potentially within the Havant total, a proportion to Emsworth (para 3.23).
60. The SHMA states that over 90% of the workforce in the PUSH area is drawn from the PUSH authorities, including Havant. There is also a strong commuting flow into East Hampshire from Havant. The SHMA suggests that the strongest commuting flows to Portsmouth are from Fareham and Havant.
61. The SHMA identifies that the broad housing price zone for Havant is £170,000-£200,000, suggesting that house prices in Havant remain below market levels elsewhere.

---

<sup>6</sup> Available online at: [http://www.push.gov.uk/south\\_hampshire\\_shma\\_final\\_report\\_16.1.14\\_.pdf](http://www.push.gov.uk/south_hampshire_shma_final_report_16.1.14_.pdf)

<sup>7</sup> Here and throughout this report, we have defined affordable housing according **only** to the standard definition found in Annex 2 of the National Planning Policy Framework (NPPF), namely: 'Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.' We have avoided the definition of affordable housing in its colloquial sense of 'relatively cheaper market housing'.



62. The socio-economic analysis shows that there is a lower proportion of the population aged over 60 in Havant. In addition, within the PUSH area, some of the highest deprivation levels, including unemployment, are within Havant.
63. Table 16 of the SHMA is reproduced as Figure 1 below, and shows that Havant Borough, with 51,311 households in 2011, provided 11.6% of the PUSH Area total.

**Figure 1: PUSH – Number of Households, 2011**

	Households	% of PUSH Area
PUSH Area	440,460	100.0%
PUSH East HMA	219,254	49.8%
PUSH West HMA	221,206	50.2%
East Hampshire (Part)	8,361	1.9%
New Forest (Part)	29,546	6.7%
Test Valley (Part)	17,060	3.9%
Winchester (Part)	16,269	3.7%
Eastleigh	52,177	11.8%
Fareham	46,579	10.6%
Gosport	35,430	8.0%
Havant	51,311	11.6%
Portsmouth	85,473	19.4%
Southampton	98,254	22.3%

Source: South Hampshire SHMA, 2014

64. Across the Core PUSH authorities, 17.9% of homes were in public sector ownership (owned by local authorities, Registered Providers or other parties such as the MOD); whilst 82.1% were in private ownership (either owner occupied or private rented). Table 17 of the SHMA is reproduced as Figure 2 below, and shows that Havant in 2011 had higher than average public housing ownership than the PUSH as a whole.

**Figure 2: Broad Tenure Profile, 2011**

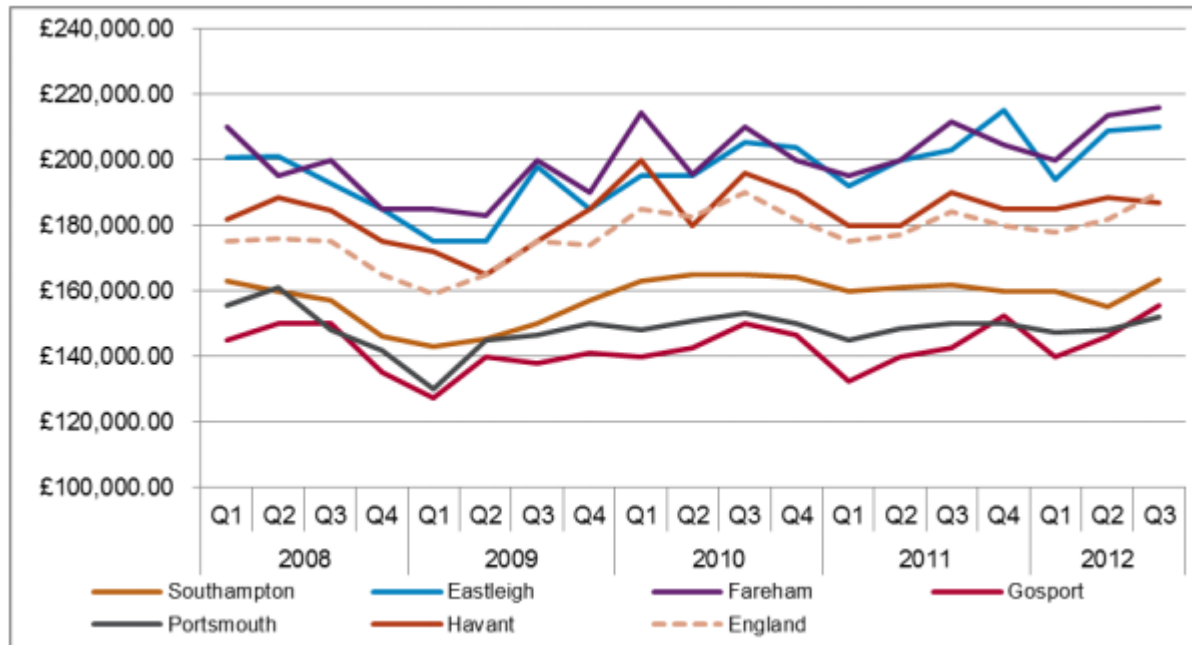
	Public	Private
Eastleigh	12.2%	87.8%
Fareham	8.1%	91.9%
Gosport	19.2%	80.8%
Havant	19.0%	80.9%
Portsmouth	18.8%	81.2%
Southampton	23.4%	76.6%
Core PUSH Authorities	17.9%	82.1%
South East	14.0%	86.0%
England	18.0%	82.0%

Source: South Hampshire SHMA, 2014

65. The SHMA states that the housing offer in Havant is slightly broader than the rest of the PUSH area, but that publically-owned or affordable housing is above average. Two- and three-bed properties predominate. Over 40% of homes fall within Council Tax Bands A and B, and over 16% of households live in the social rented sector. The housing offer is focused on mid-market housing.

- 66. The SHMA notes that property prices between 1998 and 2007 grew substantially in Havant (by 192%). This was slightly above the regional average of 188%. Overall, this pre-recession price growth points towards an imbalance between housing supply and demand over this period. However the SHMA states that house price dynamics since 2007 have been vastly different as a result of the economic situation.
- 67. This is illustrated in Figure 21 of the SHMA, reproduced as Figure 3 below. House prices across the PUSH area were broadly flat between 2007 and 2012. This indicates a market characterised by higher supply than demand.

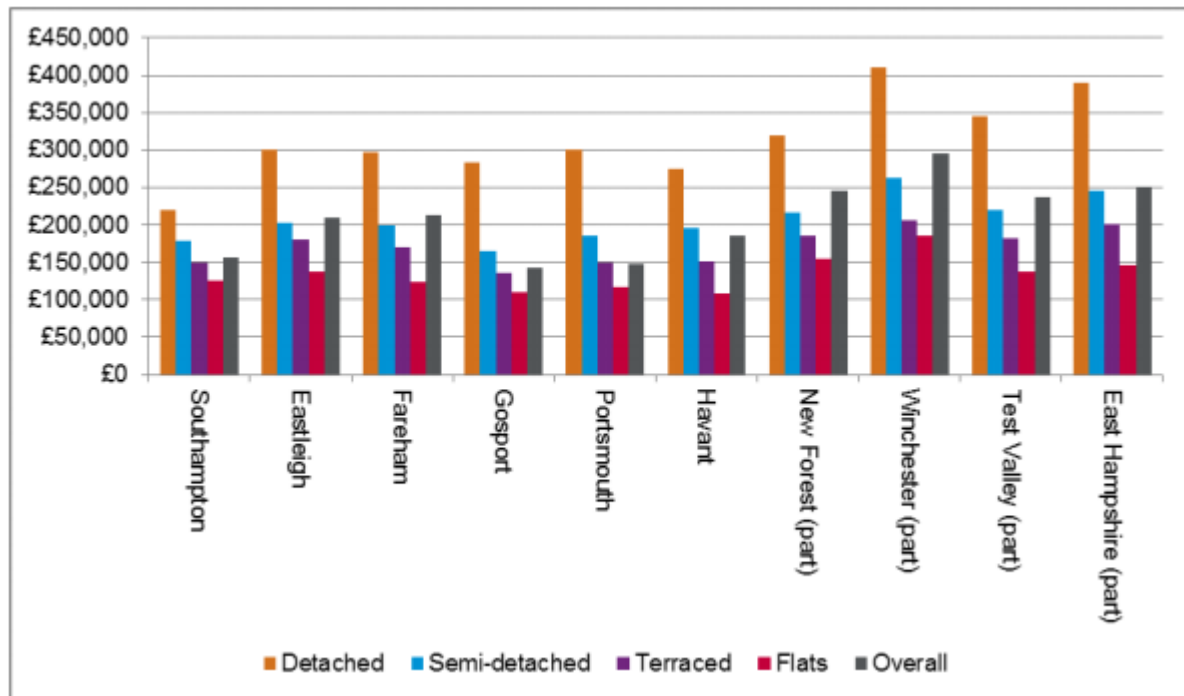
**Figure 3: Median House Price Trends, 2007-2012 (Q3), Core PUSH Authorities**



Source: South Hampshire SHMA, 2014

68. Figure 22 of the SHMA is reproduced as Figure 4 below, and shows that across Havant, house prices are relatively lower than many nearby areas.

**Figure 4: Median House Prices by Type – Local Authorities (Aug 2012-Feb 2013)**



Source: South Hampshire SHMA, 2014

69. The SHMA surveyed estate agents across Havant Borough. The following market characteristics and trends were identified:

- Sales and letting volumes are rising. Transactions are overwhelmingly for local people.
- Sale prices for homes under £150k are rising due to demand. Rents are also rising very gradually as landlords test the market. Demand is 50/50 from first time buyers and investors at this price point.
- Investors in the Borough are letting to families rather than converting to flats and bedsits.
- There is a significant market for retirement housing, again mostly to assist older people to downsize and release equity.
- Officers state that the shortage of 1 and 2 bedroom socially-rented homes has become more acute because of the 'bedroom' tax. There is a shortage of shared accommodation for single benefit claimants aged under 35; over 40% of homeless applicants are from private rental tenancies that have failed or ended.

70. Table 21 of the SHMA is reproduced as Figure 5 below. It shows that the number of households in Havant that are vacant or second homes is 2.8%, which is particularly low for the PUSH area and well below the England average.

**Figure 5: Vacant and Second Homes, 2011**

	Household spaces with no usual residents	All categories: Dwelling type	% Households with no usual residents
East Hampshire (Part)	198	8558	2.3%
New Forest (Part)	613	30146	2.0%
Test Valley (Part)	506	17556	2.9%
Winchester (Part)	695	16962	4.1%
Eastleigh	1,238	53401	2.3%
Fareham	1,371	47,941	2.9%
Gosport	1,282	36,677	3.5%
Havant	1,503	52,781	2.8%
Portsmouth	3,165	88,091	3.6%
Southampton	3,018	100,596	3.0%
PUSH Area	13589	452709	3.0%
PUSH East	7257	225885	3.2%
PUSH West	6332	226824	2.8%
Hampshire	3,165	88,091	3.6%
South East	148,710	3694388	4.0%
England	980,729	22,976,066	4.3%

Source: South Hampshire SHMA, 2014

71. Table 51 of the SHMA is reproduced as Figure 6 below. It shows that the estimated dwelling requirement by number of bedrooms from 2011 to 2036 in Havant is the greatest for three bedroom properties (45.2%), which would indicate that more (smaller) family housing is needed. It is lowest for one bedroom properties.

**Figure 6: Estimated Dwelling Requirement by Number of Bedrooms (2011 to 2036) – Market Sector**

Sub-area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Eastleigh	7.7%	30.5%	45.5%	16.3%
Fareham (West)	14.3%	45.0%	42.4%	-1.7%
New Forest (part)	7.8%	33.9%	47.9%	10.4%
Southampton	13.6%	30.3%	42.3%	13.8%
Test Valley (part)	10.3%	32.9%	43.5%	13.3%
Winchester (part-west)	6.0%	29.4%	39.5%	25.2%
SOUTHAMPTON HMA	10.5%	31.7%	43.9%	13.9%
East Hampshire (part)	5.6%	27.3%	44.1%	23.1%
Fareham (East)	12.3%	40.6%	44.4%	2.8%
Gosport	10.3%	36.4%	43.0%	10.3%
Havant	8.9%	34.2%	45.2%	11.6%
Portsmouth	10.3%	30.6%	46.8%	12.2%
Winchester (part-east)	5.7%	28.5%	38.6%	27.2%
PORTSMOUTH HMA	10.0%	33.8%	45.0%	11.3%
PUSH	10.2%	32.8%	44.5%	12.5%

Source: South Hampshire SHMA, 2014

72. Table 52 of the SHMA is reproduced as Figure 7 below. It shows that the estimated affordable dwelling requirement by number of bedrooms from 2011 to 2036 in Havant is the greatest for one bedroom properties (41.6%). The smallest portion of properties needed is for four bedrooms or more (2.8%).

**Figure 7: Estimated Dwelling Requirement by Number of Bedrooms (2011 to 2036) – Affordable Sector**

Sub-area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Eastleigh	33.0%	43.0%	22.1%	1.9%
Fareham (West)	51.4%	30.8%	15.8%	2.0%
New Forest (part)	33.6%	36.0%	27.5%	3.0%
Southampton	48.0%	31.2%	17.7%	3.1%
Test Valley (part)	45.9%	34.8%	17.9%	1.4%
Winchester (part-west)	43.1%	31.8%	22.6%	2.5%
SOUTHAMPTON HMA	41.5%	35.7%	20.3%	2.5%
East Hampshire (part)	38.3%	40.5%	19.4%	1.8%
Fareham (East)	51.0%	31.1%	16.5%	1.5%
Gosport	56.7%	25.1%	16.5%	1.8%
Havant	41.6%	36.0%	19.6%	2.8%
Portsmouth	41.2%	33.7%	21.9%	3.2%
Winchester (part-east)	44.2%	29.7%	23.8%	2.4%
PORTSMOUTH HMA	45.9%	32.2%	19.4%	2.5%
PUSH	43.8%	33.9%	19.8%	2.5%

Source: South Hampshire SHMA, 2014

73. The SHMA concludes that provision of 4,160 homes per annum across the PUSH area would between 2011 and 2036 represents a robust basis for forward planning based on the

demographic evidence and market signals. This is split between the two housing market areas, with the PUSH East total estimated as 2,115 homes per annum up until 2036.

74. We can disaggregate this housing target for Emsworth itself. If we assume that this annual housing target covers all years between 2014 to 2036, then the overall housing target for the PUSH East area is 46,530 dwellings. This gives one new dwelling for every 4.855 existing homes in the PUSH East area. In Emsworth at the 2011 Census there were 4,496 dwellings. As a result, Emsworth's housing target would be 926 homes between 2014 and 2036, or 42 dwellings per year. Therefore Emsworth's dwelling requirement from the SHMA is **840 dwellings** in total for the Havant Core Strategy period of 2006 and 2026. Dwellings completed in Emsworth since 2006 therefore count towards this total, and have been calculated below.
75. The SHMA indicates that a particular driver of housing need over the period to 2036 will be a growing population of older persons. The number of people aged 65 and above is expected to increase by 63,000 (21%) from 2011 to 2021, with further strong increases post-2021. This is likely to lead to a requirement for additional levels of care/support and provision of specialist accommodation in both the market and affordable sectors.
76. However, the SHMA notes that many older people will seek to remain in mainstream housing. This will include downsizing, particularly in the market sector, to release equity and reduce maintenance costs. Provision of smaller homes in accessible locations to meet localised needs will therefore be required.
77. The SHMA also provides evidence that young persons under 35 within the PUSH Area have some difficulty in accessing home ownership.

#### *SHMA Caveats*

78. It is important to remember that there is no single definitive method available to attribute need for new market housing to specific geographical areas within Havant. The precise geographic distribution of future housing was therefore left as a policy choice for the local authority.
79. This caveat applies equally for neighbourhood planners in Emsworth. As we recommend an approach based on the assessment of need at a local authority level, the Neighbourhood Forum should monitor any updates to the assessment of housing need at that level, as well as the release of any relevant new statistics.

#### *Havant Borough Core Strategy (2011)*

80. Emsworth's housing target is not explicit within the Havant Core Strategy. Rather, a target for the authority as a whole has been provided. However, disaggregating the housing target for Emsworth itself from the overall Havant target is relatively straightforward and is explained below.
81. The Core Strategy aims to provide 6,300 new homes across Havant between 2006 and 2026, as identified in Policy CS9 Housing. On sites of 15 dwellings (gross) or more, a 30-40% affordable housing target will be applied.
82. In 2011, there were 52,781 dwellings in Havant, according to Census 2011 data. This means that the housing target of 6,300 equates to one new dwelling for every 8.378 existing dwellings.
83. Based on this ratio, Emsworth itself, with 4,496 dwellings, has a Core Strategy-derived target of **537 dwellings** for the period 2006-2026. Of these 537 dwellings, between 322 and 376 would be market housing and between 161 and 215 affordable units.
84. The Core Strategy also aims for mixed communities, with concentrations of affordable housing to be avoided. A mix of dwelling types, sizes and tenures to help meet identified local housing

need should be provided. Accommodation for the ageing population with a flexible range of dwelling types to take account of the variety of care needs is also required, with a Borough-wide requirement to deliver 450 extra-care dwellings between 2006 and 2026.

85. In relation to the tenure split of affordable housing, 65-70% of affordable homes should be socially-rented with the remaining 30-35% for affordable home ownership (or intermediate housing).
86. There are two further Core Strategy policies with relevance for housing provision in Emsworth, namely:
- Policy CS17 Concentration and Distribution of Development within the Urban Areas, which seeks development, including housing, to be concentrated within five urban areas, including Emsworth. The implication of this policy is that the dwelling target selected in the neighbourhood plan should be thought of as a minimum target; and
  - Policy DM7 Elderly and Specialist Housing Provision, which states that the development of this type of housing will be allowed if it does not result in a concentration of such uses in any of the five urban areas.

#### *DCLG Household Projections (2015)*

87. The Department for Communities and Local Government (DCLG) periodically publishes household projections.
88. The most recent (2012-based) household projections were published in February 2015, and extend to 2037. Although population projections are only available at a local authority level, a calculation of the share for Emsworth is nevertheless possible for the household projections based on the neighbourhood's household numbers in 2011.
89. In Census 2011, as previously noted, Havant had 51,311 households and the neighbourhood plan area had 4,329 households, or 8.44% of the district total.
90. In the 2012-based household projections, the projection for 2026 is for 56,556 households in Havant. Assuming it continues to form 8.44% of the District total, the neighbourhood plan area's new total number of households would be 4,773 and therefore 444 new households would have formed over the Plan period.
91. Number of households does not, however, equate precisely to number of dwellings, with the latter usually slightly higher. In the 2011 census, the plan area had 4,329 households but 4,496 dwellings, giving a ratio of 0.963 households per dwelling. This means that the projection of 444 new households would entail a need for  $(444/0.963=)$  461 dwellings over the period 2006 to 2026.
92. However, the 2012-based household projections need to be 'rebased' for accuracy now that the mid-2014 population estimates are available. This is because the mid-2014 population estimates give the actual number of people in Havant at that point, meaning the difference between the actual and the projected number of dwellings can be taken into account in future projections.
93. The 2012-based projections were based on the 2012-based Sub-National Population Projections, which estimated that by 2014 there would be 122,000 people in Havant. The mid-2014 estimates show that there were actually 122,210 people, which is higher than the projections, but only by a very small amount (0.172%). This allows us to rebase the 461 dwellings in 2026 to a very slightly increased figure of **462 dwellings** within the plan area at that point.

94. This projection is an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase and thus does not take into account political, economic, demographic or any other drivers that might influence planning policy decisions.

*Dwelling Growth 2001-2011*

95. By comparing the number of dwellings in Emsworth in Census 2001 against the number in Census 2011, we can project forward the completion rate to 2026. This provides the first of two dwelling growth-based projections to complement the projections mentioned above.
96. In Census 2001, Emsworth had a total of 4,299 dwellings, and in Census 2011 it had 4,496. This entails a total 10-year growth rate of 197 dwellings, or a gain of around 20 per year. Projecting this forward between 2006 and 2026 would give a plan period total (20 years x 20 dwellings=) of **400 new dwellings**.

*Dwelling growth 2011 to present*

97. Havant has also provided AECOM with completion rates in the neighbourhood plan area between 1<sup>st</sup> April 2011 and 31<sup>st</sup> December 2015. This will help us determine the extent to which the 2001-2011 rate of dwelling change differed from the average.
98. Between April 2011 and December 2015, 305 dwellings were completed, equating to a rate of 76 completions per year. Translating the 2011-2015 dwelling growth rate to the 2006-2026 period as a separate projection, would therefore result in a total of **1,520 new dwellings**.

*Havant Borough Council SHLAA (October 2014)*

99. The SHLAA forms part of the evidence base for the Havant Local Plan. Though a supply-side document, and therefore not to be used as any kind of indication of or constraint on housing need, it provides a useful benchmark of the capacity considered to be available by the Borough Council within Emsworth. That capacity can be considered in the light of the range of need projections, thus helping to inform the final neighbourhood plan target, which will need to take into account both demand-side and supply-side data, as well as any policy aspirations.
100. We have summarised the capacity within the ward identified as suitable and achievable within the SHLAA in Table 1 below.



**Table 1: Summary of sites within the ward considered as potentially suitable and achievable for housing development by the Havant SHLAA (2014)**

SHLAA site reference	SHLAA site name	Identified capacity (units)
EM18	Land off Oaktree Drive, Emsworth	48
UE32	Land east of Horndean Road	80
UE39	Land North of Hollybank Lane and Long Copse Lane, Emsworth	105
UE13	Land west of Horndean Road, Emsworth	125
UE37	West of Coldharbour Farm	53
UE11	Land west of Emsworth (opp. Brookfield Hotel, Havant Road)	50
UE10	Hampshire Farm, Emsworth	129
<b>Total identified capacity</b>		<b>590</b>

Source: Havant SHLAA, 2014

101. Of the 590 units identified in Table 1, EM18 and UE10 have already been completed (177 dwellings in total) and UE13 already benefits from planning permission (125 dwellings). Therefore, a total of 302 completions and commitments on SHLAA sites<sup>8</sup> can be counted towards the 2006-2026 Neighbourhood Plan housing requirement.<sup>9</sup>

*Local housing waiting list (Havant Borough Council, March 2016)*

102. We contacted Havant Borough Council for an assessment of the number of households on the Hampshire Home Choice waiting list that expressed a preference for Emsworth or its surrounding area.
103. The Council stated that of the 1,984 households currently on the waiting list, 74 have stated that they have a local connection to Emsworth. However, it is important to note that as

<sup>8</sup> In addition to other completions and commitments on non-SHLAA sites.

<sup>9</sup> We understand from the Neighbourhood Forum that UE37 and UE39 are also close to application stage, but at the time of writing, no applications had yet been decided on either site. However, if granted permission, these, too, will count towards the neighbourhood plan housing requirement.

Hampshire Home Choice is a choice based lettings scheme it means in theory that all the applicants could chose to live in Emsworth if they wanted to as there are no restrictions on choice of location, unlike in some other local authorities.

104. On the assumption that only those applicants on the waiting list who have stated a local connection to Emsworth can be taken into account by this assessment (i.e. ignoring theoretical preference), we can calculate relative level of affordable housing need based on Emsworth's share of all households across the Hampshire Home Choice area, which comprises the five local authorities of East Hampshire, Eastleigh, Havant, Test Valley and Winchester.
105. The total number of households across the Hampshire Home Choice area is 245,237, and the total number in Emsworth is 4,329, or 1.77% of the total. This percentage share can be contrasted with the proportion stating a preference for Emsworth on the waiting list for the area, which equates to a disproportionate 3.73%.
106. As such, Emsworth's affordable housing need is likely to be towards the higher end of the spectrum. Across the borough as a whole, the existing Havant target is for 30-40% of all new housing, on average, to be affordable, so there appears to be evidence that the Borough Council should aim for an affordable percentage towards the 40% rather than the 30% end of this spectrum, at least for Emsworth.
107. Note that even after the Neighbourhood Plan is adopted, Havant's affordable housing policy will continue to apply within the area, and it will still be the Council's responsibility to manage the housing waiting list and negotiate affordable housing commitments with developers as part of the development management process.

### **Local economic context**

108. The PPG states that housing market assessments should take employment trends into account. This is to ensure that any conclusions on housing need take into account the likely change in job numbers based on past trends or economic forecasts/aspirations as appropriate and also have regard to the growth of the working age population in the housing market area. In this case, we have taken into account the relevant Strategic Economic Plan and Employment Land Review update, which combine economic forecasts with statements of economic aspiration.

*Transforming Solent: Solent Strategic Economic Plan 2014-2020 (Solent Local Enterprise Partnership, 2014)*

109. For the purposes of economic planning, Emsworth lies within the Solent Local Enterprise Partnership area and is therefore subject to the 2014 Strategic Economic Plan (SEP). However, the SEP is an aspirational document used to bid for funds, and has not been fully tested at examination, so any figures and facts collated from it should be used cautiously.
110. Like all economic plans and strategies, the Solent SEP seeks generally to grow and promote the local economy. The SEP sets out a vision for the Solent Local Enterprise Partnership area to provide 15,500 new jobs by 2020.
111. The SEP states that Solent is very well placed in terms of strategic accessibility and is important to the national economy. There are three international gateways: the Port of Southampton, the Port of Portsmouth (Commercial and Naval Dockyard) and Southampton International Airport. These represent key assets playing a significant role within the local economy.

112. Solent also benefits from good road links to London and the ports play a vital role in access to global markets. The attractiveness of Solent means that the economy benefits from the higher wages of highly-skilled commuters into London who reside locally, enjoying the area's quality of life.
113. However, the SEP does not state or point to any specific economic developments either within or close to Emsworth.

*Havant Borough Employment Land Review Update 2012 (DTZ, 2012)*

114. The Employment Land Review (ELR) seeks to demonstrate the need for, and deliverability of, employment allocations throughout the Borough. The ELR informed the Havant Plan.
115. The ELR 2010 showed two sites within the Emsworth ward boundary proposed to accommodate new employment uses. This includes Interbridges West which is currently allocated as employment land and Interbridges East which is proposed for new employment land as of 2009. Both would provide suitable employment space for the local economy.
116. The ELR Update refers to the PUSH Economic Development Strategy (2010) which aims that by 2026, South Hampshire will have 51,200 additional jobs.
117. Interbridges East, due to land constraints, is only seen to have potential for 32-62 additional jobs. Interbridges West has since been discarded and not recommended for employment allocation. This is because it is highly constrained by road access problems. As a result, Emsworth will only provide 1% of the new employment floorspace across Havant Borough between 2006 and 2026.

### Characteristics of Population

118. Through analysis of Census 2011 data, we have investigated how Emsworth neighbourhood plan area is similar to or differs from the Havant and England averages.
119. Table 2 gives the population and number of households in Emsworth, Havant and England, as recorded in the 2011 census. In 2011, Emsworth had a population of 9,492, and an average household size of 2.2 persons. This is below both the local and national averages.

**Table 2: Population and household size in Emsworth, 2011<sup>10</sup>**

	Emsworth	Havant	England
Population	9,492	120,684	53,012,456
Households	4,329	51,311	22,063,368
Household size	2.2	2.4	2.4
Dwellings	4,496	52,781	22,976,066

*Source: ONS, Census 2011. AECOM calculations*

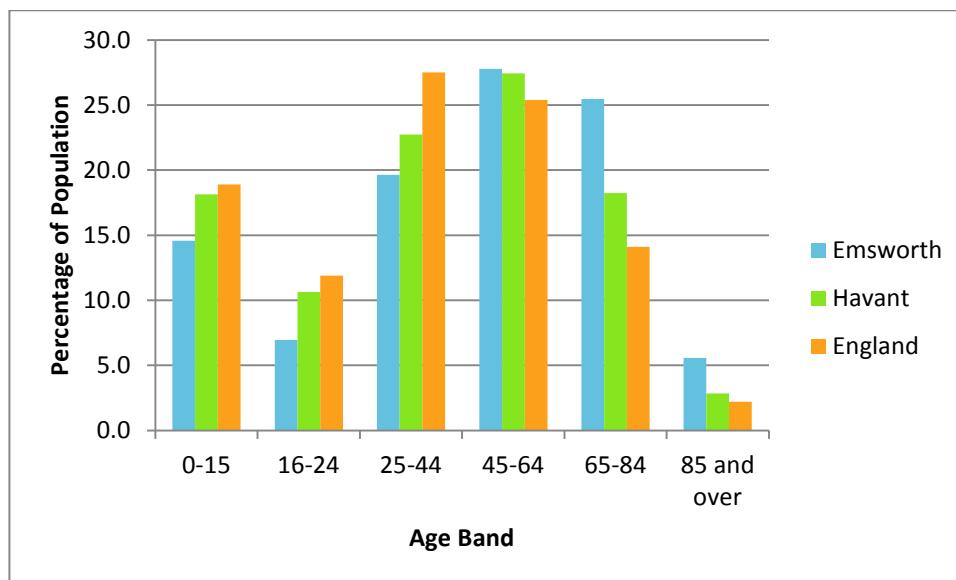
120. As illustrated in Figure 8 below, the largest age group in Emsworth is ages 45-64, at 27.8%. This is slightly higher than the figures for Havant (27.4%) and England (25.4%). The proportion of children aged 0-15 is lower than the local and national averages, at 14.6% in

<sup>10</sup> ONS, Census 2011, Population Density (QS102EW); Household Size, 2011 (QS406EW).

Emsworth compared with 18.1% across Havant and 18.9% across England. This is the same for the 16-24 age group and the 25-44 age group.

- 121. The proportion of people aged 65-84 is higher in Emsworth (25.5%) compared to Havant (18.2%) and England averages (14.1%). The proportion of people aged 85 and over is again higher in Emsworth compared to both the local and national averages.
- 122. Table 3 shows the rate of change of the population by age band. It shows that the proportion of people in the 65-84 and 85 and over age groups increased significantly in Emsworth between 2001 and 2011, with slight growth in the 45-64 age group.

**Figure 8: Age structure in Emsworth<sup>11</sup>**



Source: ONS, Census 2011. AECOM calculations

**Table 3: Rate of change in the age structure of the population of Emsworth, 2001-2011<sup>12</sup>**

Age group	Emsworth	Havant	England
0-15	-8.5%	-6.1%	1.2%
16-24	-6.5%	14.4%	17.2%
25-44	-12.1%	-9.5%	1.4%
45-64	5.7%	10.7%	15.2%
65-84	10.7%	12.0%	9.1%
85 and over	49.3%	38.6%	23.7%

Source: ONS, Census 2001 and 2011. AECOM calculations

<sup>11</sup> ONS, Census 2011, Age Structure (KS102EW)

<sup>12</sup> ONS, Census 2011, Age Structure (KS102EW); ONS, Census 2001, Age Structure (KS02)

123. There was a decrease across the 0-15 and 25-44 age bands in Emsworth, which is in line with the local decreases but contrasts with the national increase. There was also a decrease in the 16-24 age groups which contrasts with the increase locally and nationally.
124. Population averages in **Figure 9** and **Table 3** show a decrease in the proportion of young people in Emsworth.
125. **Table 4** shows that Emsworth is home to slightly more people born outside the UK (6.7%) than Havant as a whole (5.1%), but that this proportion is nevertheless significantly lower than the national average (13.8%).

**Table 4: Country of birth and length of residence**

Place of birth	Population breakdown		Emsworth	Havant	England
Born in the UK	Total		93.3%	94.9%	86.2%
Born outside the UK	Total		6.7%	5.1%	13.8%
	EU		2.1%	1.8%	3.7%
	Other		4.1%	2.9%	9.4%
	Length of residence	Less than 2 years	0.3%	0.3%	1.8%
		2-5 years	0.4%	0.5%	2.2%
5-10 years		0.8%	0.7%	2.9%	
10 years or more		5.1%	3.6%	7%	

Source: ONS, Census 2011. AECOM calculations

126. Of the 6.7% of Emsworth residents who were born overseas, the majority have lived in the UK for ten years or more, thus indicating that recent higher levels of international migration do not appear to have had a significant impact locally.

### Household Type

127. Table 5 shows that the number of rooms per household in Emsworth has shown a generally upward trend. In line with the local and national picture, there has been a particularly significant increase in three room and eight or more room households within the plan area. This could well reflect families moving into the plan area.
128. There has been a significant decrease in one room households, in the same way as the trend for Havant, but much more significant a decrease than in England as a whole. There has been no change in two room households. The decrease in four and five room households has been greater than the decreases locally and nationally.

**Table 5: Rates of change in number of rooms per household in Emsworth, 2001-2011<sup>13</sup>**

Number of Rooms	Emsworth	Havant	England
1 Room	-41.7%	-27.6%	-5.2%
2 Rooms	0.0%	5.6%	24.2%
3 Rooms	30.6%	23.9%	20.4%
4 Rooms	-6.2%	-3.0%	3.5%
5 Rooms	-13.9%	-4.7%	-1.8%
6 Rooms	11.1%	9.0%	2.1%
7 Rooms	8.2%	15.9%	17.9%
8 Rooms or more	32.6%	26.3%	29.8%

Source: ONS, Census 2001 and 2011. AECOM calculations

129. The PPG states that factors such as overcrowding, concealed and shared households, homelessness and the numbers in temporary accommodation can demonstrate un-met need for housing. Increases in the number of such households may be a signal to consider increasing planned housing numbers.
130. Table 6 emphasises that, bucking this trend, Emsworth is in fact becoming significantly more under-crowded, which is strongly indicative of an ageing population. In other words, larger units that once housed a family are gradually losing residents (from children moving away, and then parents becoming widowed or moving into care), resulting in decreasing number of persons per room. The only category similar to the Havant trend is for over 1.0 and up to 1.5 persons per room.

<sup>13</sup> ONS, Census 2011, Number of Rooms (QS407EW); ONS, Census 2001, Number of Rooms (UV57)

**Table 6: Trends in number of persons per room in Emsworth, 2001-2011<sup>14</sup>**

Persons per room	Emsworth	Havant	England
Up to 0.5 persons per room	8.4%	9.0%	7.9%
Over 0.5 and up to 1.0 persons per room	-9.7%	-2.6%	7.0%
Over 1.0 and up to 1.5 persons per room	35.3%	14.5%	27.3%
Over 1.5 persons per room	-33.3%	-9.8%	2.5%

Source: ONS, Census 2001 and 2011. AECOM calculations

### Household Tenure

131. The PPG states that housing needs studies should investigate household tenure in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs. Plan makers should therefore examine current and future trends in tenure.

**Table 7: Tenure (households) in Emsworth, 2011<sup>15</sup>**

Tenure	Emsworth	Havant	England
Owned; total	75.7%	69.0%	63.3%
Shared ownership	0.4%	0.5%	0.8%
Social rented; total	10.0%	19.6%	17.7%
Private rented; total	12.5%	9.9%	16.8%

Source: ONS, Census 2011. AECOM calculations

132. Table 7 shows that the level of owner occupation in Emsworth is significantly higher than the Havant and England averages. At the same time, the proportion of socially rented housing (rented from the Council or a Registered Social Landlord) is significantly lower than local and national averages. There is also a slightly higher proportion of privately rented units in Emsworth compared to Havant, but this is lower than the national average.
133. Table 8 shows how tenure has changed in Emsworth between the 2001 and 2011 Censuses. Home ownership in the area has fallen slightly, largely in line with local and national trends, but there was a significant increase in private rented tenures in the plan area. However, this was a lower increase than locally and nationally.

<sup>14</sup> ONS, Census 2011, Persons Per Room - Households (QS409EW); ONS, Census 2001, Persons per Room - Households (UV58)

<sup>15</sup> ONS, Census 2011, Tenure - Households (QS405EW)

134. Emsworth experienced an increase in shared ownership between 2001 and 2011. However this was small in absolute terms. Social renting has slightly decreased in Emsworth compared to the small increase in Havant.

**Table 8: Rate of tenure change in Emsworth, 2001-2011**

Tenure	Emsworth	Havant	England
Owned; total	-0.9%	-1.4%	-0.6%
Shared ownership	100.0%	44.1%	30.0%
Social rented; total	-4.2%	6.8%	-0.9%
Private rented; total	77.7%	110.8%	82.4%

Source: ONS, Census 2001 and 2011, AECOM calculations.

135. We can analyse the rental sector using data from the home.co.uk website. This provides, for each postcode area and city, data on average price of rented property (adjusted for local range of housing type to enable like-for-like comparison).
136. It can be assumed that the higher average rental price, the higher local demand for rental property, and by implication, the higher the local demand for owner-occupied stock as many prospective home-owners will rent if they cannot yet afford to buy.
137. The average price of rented property in Emsworth (£1,106 pcm) is 29.1% higher than the average across Havant (£857 pcm).
138. Demand is also relatively strong for house sales. House price data from Zoopla shows that as of February 2016, the average house price in PO10, Emsworth's postcode area (house prices are not available at any lower geography), was £343,045. This compares with a significantly lower Havant average of £218,028.

### Local Household Composition

139. Table 9 shows that the proportion of single person households in Emsworth is higher than the Havant and England averages. However, the proportion of households with a single family occupancy is lower than the Havant average but higher than the England average.



**Table 9: Household composition (by household) in Emsworth, 2011<sup>16</sup>**

		Emsworth	Havant	England
One person household	Total	32.3%	28.6%	30.2%
	Aged 65 and over	20.7%	14.6%	12.4%
	Other	11.6%	14.0%	17.9%
One family only <sup>17</sup>	Total	63.7%	65.6%	61.8%
	All aged 65 and over	16.1%	11.4%	8.1%
	With no children	19.2%	18.3%	17.6%
	With dependent children	20.1%	25.7%	26.5%
	All children Non-Dependent	8.3%	10.3%	9.6%
Other household types	Total	4.0%	5.8%	8%

Source: ONS, Census 2011. AECOM calculations

140. The proportion of single person and single family households aged 65 and over in Emsworth is higher than both the Havant and England averages.
141. The plan area is home to a higher than average proportion of families with no children. The proportion of households with dependent and non-dependent children is lower than both the local and national averages. The proportion of other household types is low.
142. Table 10 shows how household composition changed in the 10 years between the 2001 and 2011 Censuses. Overall, there was an increase in single person households in the plan area, which was similar to the local and national increases. This increase in single person households, coupled with a small change in people aged 65 and over living alone, signifies an increase in people aged under 65 living alone.

<sup>16</sup> ONS, Census 2011, Household Composition - Households (QS113EW)

<sup>17</sup> This includes: married couples, cohabiting couples, same-sex civil partnership couples and lone parents.

**Table 10: Rates of change in household composition in Emsworth, 2001-2011<sup>18</sup>**

Household type		Percentage change, 2001-2011		
		Emsworth	Havant	England
One person household	Total	13.1%	14.0%	8.4%
	Aged 65 and over	6.8%	2.1%	-7.3%
	Other	26.3%	29.7%	22.7%
One family only	Total	1.1%	1.7%	5.4%
	All aged 65 and over	2.6%	-1.9%	-2%
	With no children	4.7%	1.6%	7.1%
	With dependent children	-3.9%	-0.1%	5%
	All children non-dependent	3.2%	11.2%	10.6%
Other household types	Total	3.0%	19.9%	28.9%

Source: ONS, Census 2001 and 2011. AECOM calculations.

143. In Emsworth, there was a small increase in one family households aged 65 and over, as well as households with non-dependent children and no children. There was a decrease of one family households with dependent children, similar to local trends.
144. As noted previously, Emsworth's household size is lower than the local and national averages. However, Table 11 shows that the plan area experienced an increase in its population and households over the period 2001-2011- but that at the same time, there was a decrease in household size. The decrease in household size at the same time as an increase in population is indicative of a growing number of under-occupied dwellings.

<sup>18</sup> ONS, Census 2011, Household Composition - Households (QS113EW); ONS, Census 2001, Household Composition - Households (UV65)

**Table 11: Change in household numbers and size in Emsworth, 2001-2011**

Key indicator	Percentage change, 2001-2011		
	Emsworth	Havant	England
Population	1.3%	3.3%	7.9%
Households	4.8%	5.9%	7.9%
Household size	-3.4%	-2.5%	0%
Dwellings	4.6%	5.1%	8.3%

Source: ONS, Census 2001 and 2011. AECOM calculations.

145. Table 12 shows that the proportion of dwellings in Emsworth that are detached houses or bungalows is significantly higher than the local and national averages. However, the proportion of semi-detached and terraced dwellings is lower than local and national averages. The proportion of flats is also lower than the local and national averages.

**Table 12: Accommodation type (households), 2011**

Dwelling type		Emsworth	Havant	England
Whole house or bungalow	Detached	40.3%	28.3%	22.4%
	Semi-detached	25.4%	28.7%	31.2%
	Terraced	20.5%	24.1%	24.5%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	10.1%	16.4%	16.4%
	Parts of a converted or shared house	2.2%	1.2%	3.8%
	In commercial building	1.5%	1.0%	1.0%

Source: ONS, Census 2001 and 2011. AECOM calculations

146. A 'concealed family' means any group of people who want to form a new household but are unable to do so, typically for economic reasons such as high house prices or a lack of suitable property. Table 13 shows the low levels of concealed families in the plan area; one would normally expect a correlation between lower numbers of people per household and lower numbers of concealed families, and this is indeed the case. The proportion of concealed families is lower than the Havant and England proportions.

**Table 13: Concealed families in Emsworth, 2011<sup>19</sup>**

Concealed families	Emsworth	Havant	England
All families: total	2,892	36,256	14,885,145
Concealed families: total	21	520	275,954
Concealed families as % of total	0.7%	1.4%	1.9%

Source: ONS, Census 2001 and 2011. AECOM calculations

147. Official statistics do not clarify the overlap, if any, between the Emsworth housing waiting list and the stated number of concealed families locally.

### **Economic Activity**

148. Table 14 shows that Emsworth has a slightly lower proportion of economically active residents than both the Havant and England averages. Of these, fewer are unemployed or full time students compared to the Havant and England averages. Full-time employee levels in Emsworth are significantly higher than nationally but lower than the Havant level, while its part-time employee levels are lower than both the local and national levels. The plan area has a higher proportion of self-employment than both local and national levels.

<sup>19</sup> NOMIS, LC1110EW - Concealed family status by family type by dependent children by age of Family Reference Person (FRP)

**Table 14: Economic activity in Emsworth, 2011<sup>20</sup>**

Economic category		Emsworth	Havant	England
Economically active	Total	66.8%	69.1%	69.9%
	Employee: Full-time	34.9%	37.5%	13.7%
	Employee: Part-time	15.0%	15.2%	38.6%
	Self-employed	12.1%	9.6%	9.8%
	Unemployed	2.4%	4.0%	4.4%
	Full-time student	2.3%	2.9%	3.4%
Economically inactive	Total	33.2%	30.9%	30.1%
	Retired	23.3%	17.3%	13.7%
	Student	3.3%	3.4%	5.8%
	Looking after home or family	3.4%	4.4%	4.4%
	Long-term sick or disabled	2.2%	4.2%	4.1%
	Other	1.2%	1.6%	2.2%

Source: ONS, Census 2001 and 2011. AECOM calculations

149. Among economically inactive categories, the proportion of residents who look after home or family is lower than the local and national averages. The proportion of residents that are retired is significantly higher than both the local and national averages, but other economically inactive categories are lower than average.

**Table 15: Rates of long-term health problems or disability in Emsworth, 2011<sup>21</sup>**

Extent of activity limitation	Emsworth	Havant	England
Day-to-day activities limited a lot	8.6%	8.8%	8.3%
Day-to-day activities limited a little	11.7%	10.5%	9.3%
Day-to-day activities not limited	79.6%	80.7%	82.4%

Source: ONS, Census 2001 and 2011. AECOM calculations

150. The PPG advises taking account in housing need assessment of the number of people with long-term limiting illness. Table 15 shows that rates of activity limitation are lower than

<sup>20</sup> ONS, Census 2011, Economic Activity (QS601EW)

<sup>21</sup> ONS, Census 2011, Long-Term Health Problem or Disability (QS303EW)

average or average in Emsworth for all categories except 'day-to-day activities limited a little', where Emsworth is slightly higher than the national and local averages.

151. Table 16 shows that Emsworth residents travel further to work than the both the Havant and England averages. Note in particular the higher than average proportion travelling within the 10km and over distance bands, and the lower than average proportion in the less than 10km distance band. This indicates Emsworth is popular among commuters, with, based on the distance data, many workers travelling to jobs in nearby employment centres including Portsmouth, Chichester and Southampton.

**Table 16: Distance travelled to work, 2011<sup>22</sup>**

Location of work	Emsworth	Havant	England
Less than 10km	39.6%	53.2%	52.3%
10km to less than 30km	27.2%	19.8%	21%
30km and over	11.3%	7.9%	8%
Work mainly at or from home	12.4%	8.9%	10.3%
Other	9.5%	10.1%	8.5%

Source: ONS, Census 2011, AECOM calculations

<sup>22</sup> NOMIS, QS702EW - Distance travelled to work

## 4 Conclusions

### Overview

152. This neighbourhood plan housing needs assessment has interrogated a wide range of data sources, which, taken together, can inform key trends and messages relevant to the Neighbourhood Plan's housing policies.
153. In this first section of our conclusions we make recommendations on the overall quantum of housing growth required.
154. In the second section, we assess, based on the data uncovered, indications of the components and characteristics of future housing based on the data analysed.
155. In line with recommended best practice, our preferred methodology is to present the projections our analysis has produced as a starting point, and then highlight the factors<sup>23</sup> that the Neighbourhood Plan Forum might wish to take into consideration as they determine the final housing policy text, bearing in mind the requirement to be in general conformity with strategic housing policy at the Havant Borough Council.

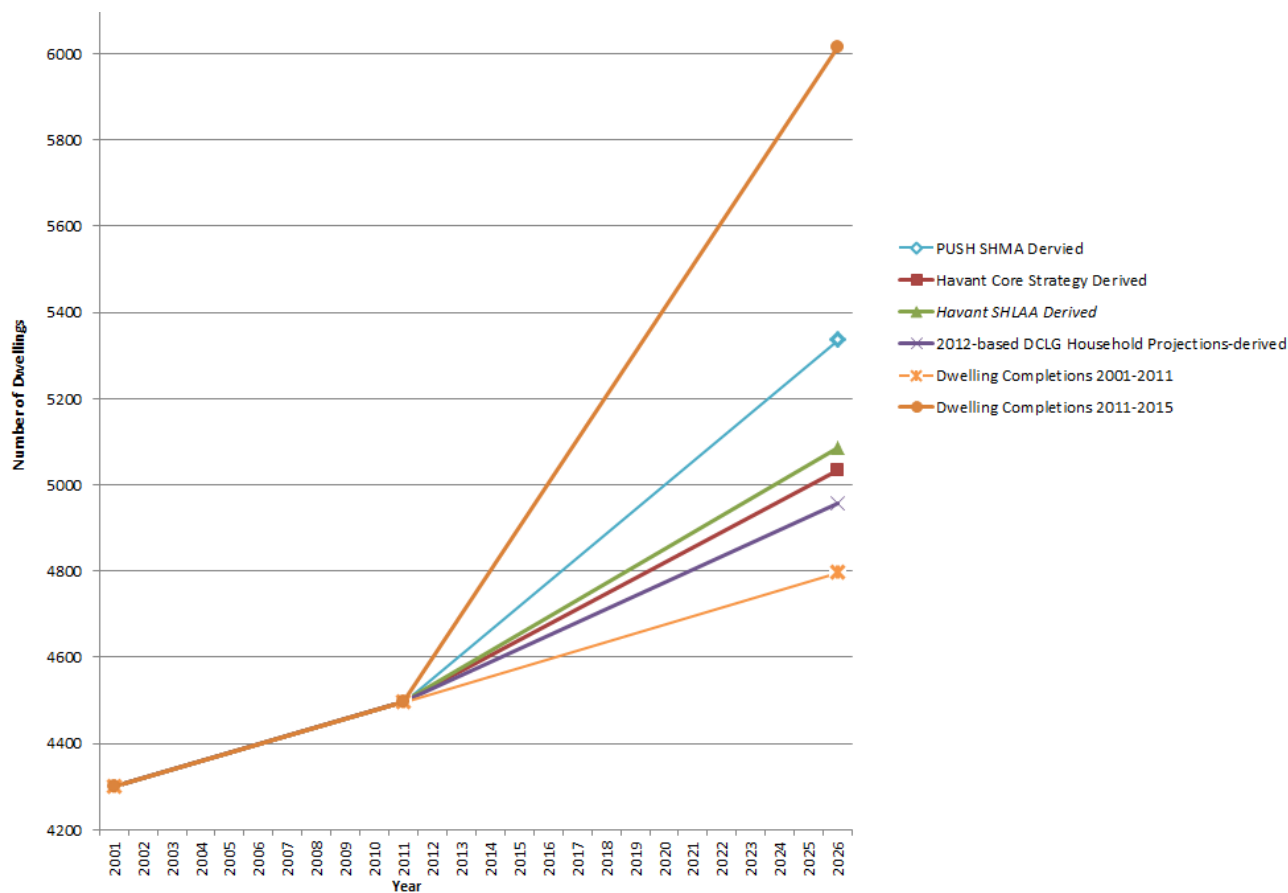
### Quantity of Housing Needed

156. To recap, we have identified six separate projections of dwelling numbers for Emsworth between 2006 and 2026 based on:
- A figure derived from the South Hampshire Strategic Housing Market Assessment: Partnership for Urban South Hampshire, (January 2014) (which gives a total of 840 dwellings, or 42 per year);
  - The Havant Borough Core Strategy, disaggregated to Emsworth (which gives a total of 537 dwellings, or 27 per year);
  - The Government's 2012-based household projections, extrapolated to Emsworth translated from households to dwellings, and rebased to actual 2014 population (which gives 462 dwellings, or 23 per year);
  - A projection forward of dwelling completion rates 2001-2011 (which gives 400 dwellings, or 20 per year);
  - A projection forward of dwelling completion rates 2011-2015 (which gives 1,520 dwellings, or 76 per year); and
  - *The Havant Borough SHLAA (an identified capacity of 590 dwellings, or 30 per year).*
157. Note here the PPG advice is not to constrain demand assessment with supply-side considerations (which here, relates to the Havant SHLAA-derived figure) into account when calculating future need. For this reason, we have italicised this projection above and in Figure 9 below to show that it should be used for reference only.
158. These dwelling number projections are illustrated in **Figure 9** below.

---

<sup>23</sup> These factors are also referred to as 'indicators' in the PPG.

**Figure 9: Comparison of dwelling number projections (supply-side projection italicised)**




Source: PUSH SHMA 2014, Havant Borough Council Core Strategy and SHLAA, DCLG 2012-Based Household Projections (rebased to 2014), Census 2001, Census 2011, AECOM calculations



- 159. We have summarised the findings of the data gathered in Chapter 3 above in Table 17 below. The source for each factor with particular relevance to the neighbourhood is shown, together with AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area’s future housing need. Following PPG guidance, the factors relate both to housing price and housing quantity.
- 160. We have applied our professional judgement on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates ‘some impact’, two arrows ‘stronger impact’ and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.
- 161. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Neighbourhood Planning Forum is invited to use its judgement in resolving any conflicts, but we would advise that the more local and more recent data should generally have priority over data gathered at a larger spatial scale or older data.
- 162. However, our general approach reflects PPG advice to adjust the housing quantity suggested by household projections to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings, such as house prices and past build-out rate.



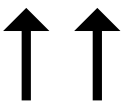
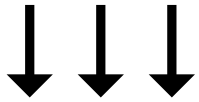

163. The PPG also advises that market signals are affected by a number of factors, and plan makers should not attempt to estimate the precise impact of an increase in housing supply. Rather they should increase planned supply by an amount that, on reasonable assumptions and consistent with principles of sustainable development, could be expected to improve affordability, and monitor the response of the market over the plan period.
164. As such, Table 17 should be used as a basis for qualitative judgement rather than quantitative calculation. It is designed to form the starting point for steering group decisions on housing policy rather than to provide definitive answers. Again, this reflects the PPG approach- it states that when considering future need for different types of housing, planners have the option to consider whether they plan to attract an age profile that differs from the present situation. They should look at the household types, tenure and size in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs.
165. The PPG also states that appropriate comparisons of indicators (i.e. factors) should be made and that trends uncovered may necessitate adjustment to planned housing numbers compared to ones based solely on household projections. Where upward adjustment is considered necessary, it should be at a reasonable level and not negatively affect strategic conformity with the adopted Core Strategy.
166. To help inform the steering group discussions that will be necessary to determine a neighbourhood plan housing target, we have provided our own professional judgement of need level, based on the projections presented in Figure 9 and the market factors presented in Table 17, and taking into account our own knowledge and experience of housing need at neighbourhood plan level.

**Table 17: Summary of factors specific to Emsworth with a potential impact on neighbourhood plan housing quantity**

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>Age structure of population</b>	SHMA, Census		<p>The SHMA projects that a particular driver of housing need over the period to 2036 will be a growing population of older persons.</p> <p>The Census shows that the proportion of people aged 65 and over increased significantly between 2001 and 2011, at a faster rate than Havant and England. In addition, the proportion of single person and single family households aged 65 and over in Emsworth is higher than both the Havant and England averages.</p> <p>The area is becoming significantly more under-crowded, which is also a strong indication of an ageing population.</p> <p>As such, an assessment of three up arrows has been given to show a likely significant demand arising from this section of the population compared with the Havant average.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>Economic performance and potential</b>	SEP, ELR		<p>The SEP does not provide any indications of major new employment opportunities close to or within Emsworth.</p> <p>The ELR does note one site potentially available for employment, but it is very small and as a result Emsworth will only provide 1% of the new employment floorspace across Havant Borough between 2006 and 2026.</p> <p>It is also notable that fewer than average residents work within the 10km distance band, which indicates that many residents travel further to access jobs, likely a reflection of limited jobs available locally. Although a higher proportion than average work from home, the link between economic growth and demand for dwellings is both weaker and harder to measure for those working from home compared to those working in designated employment areas.</p> <p>Taking these factors together, two down arrows is our assessment, as the very low level of new employment locally is partially offset by Emsworth's attraction to longer-distance commuters.</p> <p>Having said this, more widely the LEP sub-region is growing which could well result in increased demand among the longer-distance commuter market.</p> <p>We consider the planned lack of new employment growth at Emsworth itself (acting to constrain demand on this criterion) will effectively be cancelled out by demand from longer-distance commuters for new jobs across the wider PUSH region; as such we have given an assessment of 'no net impact'.</p>
<b>House prices relative to surroundings</b>	SHMA, Zoopla		<p>Although the SHMA indicates that the house prices for Havant Borough are lower than market levels elsewhere, Zoopla indicates that house prices in Emsworth are significantly higher than the Havant average.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>International and UK in-migration rate</b>	SHMA, Census,	↑	<p>The SHMA notes that migration flows are apparent between Chichester and Havant. In addition, migration drives growth of the main cities (Portsmouth and Southampton), and then older migrants move out from these cities into the surrounding area. We consider this to reflect accurately the drivers behind population growth in Emsworth between 2001 and present.</p> <p>On the other hand, the SHMA surveyed estate agents in Havant who noted that transactions for house sales are overwhelmingly from local people. Equally, Census data shows that Emsworth’s population grew only a third as fast as Havant’s in the period 2001-2011.</p> <p>Emsworth is home to slightly more people born outside the UK than Havant as a whole. However, of these people born outside the UK, the majority have been living in Emsworth for longer than 10 years, which shows recent high levels of international migration do not appear to be having a significant impact on Emsworth.</p> <p>Overall, we have given an assessment of one up arrow, as although Emsworth’s population has increased, and the SHMA’s conclusions on in-migration are considered accurate; other data suggests that the level of growth is low.</p>
<b>Level of new supply in local housing market</b>	Census, Core Strategy, Havant Borough Council, SHMA	↓ ↓ ↓	<p>Recent completion rates provided by the Council show a very high level of housing delivery in Emsworth since 2011 compared with the rate before. This will have the effect of meeting a significant level of demand in the short term</p> <p>On the basis of this unusually high level of completions (almost a quadrupling of the 2001-2011 rate) we have given three down arrows to indicate the plentiful supply of new housing currently in the town.</p>
<b>Local housing waiting list/need for affordable housing</b>	Hampshire Home Choice	↑ ↑ ↑	<p>The proportion of households on the Hampshire Home Choice waiting list indicating a preference for Emsworth (3.73%) is relatively far higher than the proportion that would be expected on a population basis (1.77%). As such, it can be concluded that there is significant demand for affordable properties in Emsworth, as might be expected from an area with higher than average house prices, and we have as a result given an assessment of three up arrows.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>Long-term vacancy rates</b>	SHMA		The SHMA notes that the proportion of households in Havant that are either vacant or second homes is particularly low for the PUSH area and well below the England average. This indicates a high level of demand, which we have reflected in our assessment of two up arrows.
<b>Overcrowding, including concealed families</b>	Census		<p>The Census shows Emsworth's average household size is lower than the average England household size, indicating a low rate of overcrowding. Additionally, the number of people per room is decreasing. This shows that the area is becoming significantly more under-crowded.</p> <p>Despite an increase in Emsworth's population and households 2001-2011, there was a decrease in household size over the same period. This is indicative of a growing number of under-occupied dwellings.</p> <p>The proportion of concealed families in Emsworth is also lower than in Havant or England.</p> <p>All indicators therefore point to three down arrows.</p>
<b>Rental market relative to wider area</b>	Census, home.co.uk		<p>The Census shows there is a slightly higher proportion of privately rented units in Emsworth compared to Havant Borough, The size of the rental market increased from 2001 to 2011, but at a lesser rate than across Havant.</p> <p>However properties rent significantly more slowly in Emsworth than Havant, indicating a lower level of demand for rental properties in Emsworth.</p> <p>Private rented units are often indicative of an unmet desire for owner-occupation. However, the modest increase in popularity of this tenure is offset by the relatively longer times properties remain on the market, and as such an assessment of 'no change' has been given.</p>

167. The average of the forward projections summarised in Figure 9 excluding the SHLAA projection provided for reference only is 732 dwellings. However, the neighbourhood forum has pointed out, and AECOM agrees, that the dwelling completion rate 2011-2015 is such a significant outlier from the other projection rates (due to the fact that it includes a number of very large 'one-off' completions) that its effect is to distort the average.

168. The average of the remaining four forward projections (SHMA, Core Strategy, dwelling completions 2001-2011 and DCLG household projections), therefore, is considered to be a more accurate estimate of future demand. The average of these four is 535 dwellings.

169. Table 17 includes a total of twelve up arrows and six down arrows, suggesting that on balance, the dwelling target selected should be significantly higher than 535 but no higher than the highest of the remaining four projections, namely the PUSH SHMA projection of 840.
170. The 840 dwellings arising from the PUSH SHMA is Emsworth's pro-rata, unconstrained share of the total assuming all areas, including Portsmouth, grow at the same rate. In practice, and in the interests of sustainable development, it is likely that proportionately more housing will be allocated to the largest settlements through the planning process, including Portsmouth and Havant itself. As such, it can be assumed that Emsworth's share, as a relatively smaller settlement, will be lower than 840.
171. However, it is clear that the range of factors and market signals interrogated collectively act to drive demand in Emsworth to a significant extent, suggesting that the target range selected should not be too much lower than 840, given factors such as Emsworth's older population, its high average house prices and its resulting high level of need for affordable housing.
172. Therefore, based on the data summarised on the quantity of dwellings required and the market factors affecting those quantities, AECOM recommends that unconstrained housing need for the neighbourhood plan area (i.e. that does not reflect supply-side constraints) in the period 2006-2026 would be approximately 750-800 net additional dwellings, or around 38-40 dwellings per year over the plan period.
173. Note that the approximately 430 dwellings<sup>24</sup> completed or committed in the plan area since 2011 count towards the dwelling total, meaning the outstanding number of dwellings needed as of 2015 drops to 320-370 dwellings. The SHLAA indicates outstanding capacity for 288 dwellings on remaining identified sites, and there are also likely to be existing and future opportunities submitted by developers that it has not captured.
174. As such, it will probably be possible to meet the need arising from Emsworth within the neighbourhood plan area boundaries, although it should be noted that there is no specific obligation to meet unconstrained need in full within the neighbourhood plan area itself (and indeed, in many locations, this may not be possible).

### **Characteristics of housing needed**

175. Table 18 summarises the data we have gathered with a potential impact on the characteristics of the housing needed in the neighbourhood. Factors are in alphabetical but no other order.

---

<sup>24</sup> This comprises, as at the time of writing in March 2016, the 305 dwellings completed since 2011 as advised by Havant and the 125 dwellings with permission at SHLAA site UE13 (Land West of Horndean Road).

**Table 18: Summary of local factors specific to Emsworth with a potential impact on neighbourhood plan housing characteristics**

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Affordable housing</b>	Census, Hampshire Home Choice	<p>The Census data indicates a high level of owner occupation in Emsworth, and a low proportion of socially rented housing compared to the local and national averages. However, locational preferences in the Hampshire Home Choice waiting list indicate that there is a high level of demand for affordable housing in Emsworth.</p> <p>The SHMA notes that there is a shortage of one and two bedroom socially-rented homes, and the shortage has become more acute as a result of the 'bedroom' tax.</p>	<p>Across the borough as a whole, the existing Havant target is for 30-40% of all new housing, on average, to be affordable, so we would recommend that Emsworth ensures Havant seeks an affordable percentage target for Emsworth that is more towards the 40% rather than the 30% end of this spectrum.</p>
<b>Need for homes for younger people</b>	SHMA, Census, Neighbourhood Forum	<p>The SHMA indicates that young people leave the local area for Portsmouth and Southampton. The Neighbourhood Forum also suggests that young people struggle to join the local housing market, and the SHMA notes this is an issue across the PUSH area. This would suggest that there is a need for smaller, cheaper (market) homes within the Neighbourhood Plan Area to help retain this element of the population. Census data indicates decreases in people aged 16 to 44, i.e. young people moving out of the area.</p> <p>Sale prices for homes under £150k are rising due to demand split from both first time buyers and investors.</p>	<p>Homes designed for younger purchasers are needed to help young adults join the housing market.</p> <p>These are likely to need to be smaller units, including flats.</p> <p>This could help ensure fewer young people leave Emsworth; even if they may still need to commute to work elsewhere, at least they can start on the local housing ladder.</p>

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Demand/need for smaller dwellings</b>	SHMA, Census	<p>The SHMA notes that there is a shortage of one and two bedroom socially-rented homes, which has become more acute as a result of the 'bedroom' tax.</p> <p>The SHMA also notes the ageing population of Havant including Emsworth. Delivering 1-2 bedroom dwellings would offer older people the opportunity to downsize and free up existing larger dwellings for families.</p> <p>The Census shows significant levels of under-occupation. In other words, larger units that once housed families are gradually losing residents (from children moving away, and then parents becoming widowed or moving into care), resulting in decreasing number of persons per room.</p>	<p>Provide within range of new dwelling sizes a proportion of smaller dwellings (1-2 bedrooms), for which there is evidenced demand.</p> <p>Providing these smaller units will also be an effective response to the increase in private renting seen locally, younger people moving away (see above) and would offer the opportunity for the older population to downsize locally.</p> <p>For smaller units aimed at older people downsizing, bungalows or flats could be suitable.</p>
<b>Housing type</b>	Core Strategy, Census	<p>The Core Strategy aims for mixed communities, with concentrations of affordable housing to be avoided. A mix of dwelling types, sizes and tenures to help meet identified local housing need should be provided.</p> <p>The Census shows that dwellings in the neighbourhood plan area are predominately detached houses or bungalows. There is a lower than average number of flats when compared to the regional and national averages.</p>	<p>To provide a wider range of dwellings and a more balanced community, the neighbourhood plan area may wish to encourage the provision of more flats and terraced housing which would complement the large number of existing larger detached houses.</p> <p>This is supported by our conclusions on the need for smaller dwellings above; they would meet a need arising from both the older and younger populations.</p>



Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Need for larger/family households</b>	SHMA, Census	<p>The SHMA and Census both indicate that Havant is popular among commuters, who tend to demand larger, often detached or semi-detached housing, and thus resulting in a continued need for larger housing.</p> <p>The SHMA also notes that investors buying properties within the area are usually letting to families than converting to flats due to demand for larger dwellings.</p> <p>Dwelling requirement by number of bedrooms from 2011 to 2036 in Havant will be greatest for three bedroom properties.</p> <p>The Census indicates an upward trend for 3 and 8 room or more houses within the Neighbourhood Plan Area. This increase in rooms per household may be driven by incoming families.</p>	<p>In order to provide a greater balance/mix of dwellings, and to cater for the increase in families with children evidenced by the Census data within the range of new dwelling size, there is likely to be a need for a proportion of larger, family sized dwellings</p> <p>Although family housing will continue to be in demand, a proportion of it should be three bedroom units- i.e. smaller than the standard 4-5 bedroom offer.</p> <p>If smaller housing is to be provided, then older person households can downsize into it, thus freeing up existing 4-5 bedroom units for family occupation and reducing the number of larger new units that need to be built.</p>
<b>Need for specialist housing for the disabled and/or elderly</b>	SHMA, Core Strategy, Census	<p>The proportion of people aged 65 and over is significantly higher in Emsworth compared to Havant and England. The SHMA notes that there remains a significant market for retirement housing.</p> <p>This is likely to result in a requirement for additional levels of care/support along with provision of some specialist accommodation in both the market and affordable sectors.</p> <p>The Core Strategy aims to deliver 450 extra-care dwellings across Havant Borough between 2006 and 2026.</p>	<p>The growing number of people over 60 living in Emsworth suggests a requirement for specialist housing for the elderly and/or disabled.</p> <p>Specialist housing for the elderly, including smaller units suitable for independent living as well as more specialised housing types such as sheltered accommodation, need to be provided in appropriate locations within walking distance of services, facilities and public transport, recognising the accessibility requirements of the older population and the fact that care homes are also places of employment.</p>

## Recommendations for next steps

176. This neighbourhood plan housing needs advice has aimed to provide Emsworth Neighbourhood Forum with evidence on housing trends from a range of sources. We recommend that the Forum should, as a next step, discuss the contents and conclusions with Havant Borough Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:
- the contents of this report, including but not limited to Tables 17 and 18;
  - Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the strategic development plan (here, the adopted Local Plan);
  - the types (detached, semi-detached, terraced etc.) and sizes (1 bedroom, 2 bedroom etc.) of existing dwelling commitments, and cross-referencing the findings of this assessment with Table 18, as what has already been provided will have an impact on the types and sizes of the remaining homes to be provided over the rest of the plan period;
  - the views of the Borough Council;
  - the views of local residents;
  - the views of other relevant local stakeholders, including housing developers; and
  - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the Council, including but not limited to the SHLAA.
177. As noted previously, recent changes in the planning system and new legislation, including forthcoming amendments to the National Planning Policy Framework and the Housing and Planning Bill, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
178. This advice note has been provided in good faith by AECOM consultants on the basis of housing projections, distribution and assessment current at the time of writing (alongside other relevant and available information).
179. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by Havant Borough Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.
180. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 17 and 18 would be particularly valuable.

AECOM (NYSE: ACM) is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. With approximately 45,000 employees around the world, AECOM is a leader in all of the key markets that it serves. AECOM provides a blend of global reach, local knowledge, innovation, and collaborative technical excellence in delivering solutions that enhance and sustain the world's built, natural, and social environments. A Fortune 500 company, AECOM serves clients in more than 100 countries and has annual revenue in excess of \$6 billion.

More information on AECOM and its services can be found at [www.aecom.com](http://www.aecom.com).

Address: 6-8 Greencoat Place, London SW1P 1PL  
Phone number +44 (0)20 7798 5000