HONEYBOURNE NEIGHBOURHOOD PLAN REVIEW
Steering Group Meeting Minutes
Date: Thursday, 21st January 2026
Time: 6:45pm
Venue: Honeybourne Village Hall

Present:

Cllr Heath Jobes (Chair - Steering Group and Parish Council), Mr Stuart Nimmo, Mrs Wendy Pickler, Mrs Melanie Bent & Mr Martin Clark

In attendance:
Mr Nick Pellegram (Andrea Pellegram Ltd - Planning Consultant) (Virtual)
Mrs Linda Stanton (Clerk) (Virtual)

Apologies for Absence:
Cllr S Sidwell (personal), Cllr J Mellor (personal), Cllr S Walsh (personal), Mr Trevor Askew (personal) and Mr I Mellor (personal)

1. Apologies for Absence
Apologies have been received and noted as above.

2. Declaration of Interest
No declarations of interest were made.

3. Approval of Previous Minutes (13th November)

Resolved: The minutes of the Steering Group meeting held on 13th November 2025 were approved as a true and accurate record.

The Chair clarified the remit of the Neighbourhood Plan Review, noting that it addresses land use planning policies and development matters, rather than operational maintenance matters which fall under the responsibility of other authorities and service providers.

4. Proposed NPPF Reforms – Implication for Neighbourhood Plan Review

Nick Pellegram presented the briefing note on the proposed National Planning Policy Framework (NPPF) reforms **(Appendix A)**, which outlined significant changes to the planning system expected to come into force in May 2026.

The new framework introduces a four-tier planning system:

1. National Planning Policy Framework (NPPF) - national level policies
2. Spatial Development Strategies (SDS) - new strategic documents across combined authority areas setting out 20+ year growth strategies
3. Local Plans - district/borough level (e.g., South Worcestershire Development Plan)
4. Neighbourhood Plans - parish level

Key implications discussed included:

- The consultation on the draft NPPF closes on 10th March 2026, with the new NPPF expected to be published in May 2026
- Neighbourhood Plans not submitted for Regulation 15 before the new NPPF is published must comply with the new framework
- Policies that do not comply will be given "very limited weight" in decision-making

- The new NPPF prohibits duplication of national policies and requires stronger evidence to justify local policies
- Stricter requirements for Local Green Space designation - land must be "close" (rather than "reasonably close") to the community it serves
- Greater emphasis on identifying and evidencing existing community facilities, rights of way, sports facilities, and non-designated heritage assets

Following discussion, the Steering Group noted that as the Review is unlikely to reach Regulation 15 before mid-2026, aligning draft policies with the new framework requirements from the outset would ensure they carry full weight in decision-making. The timing was considered advantageous as the Review process provides an opportunity to adapt policies accordingly.

RECOMMENDED: That the Parish Council approves proceeding with the Neighbourhood Plan Review on the assumption that the new NPPF will apply, with draft policies prepared to align with the new framework requirements.

5. Progress on Steering Group Assignments (Deadline 3rd January 2026)

The Steering Group reviewed progress on the assigned evidence-gathering tasks:

i) Flood Prevention & Infrastructure (Appendix B)

It was noted that before work commences on the flooding policy, further information needs to be collected to provide robust evidence. This should include a local incident case log, photographic evidence, and historic flooding information to substantiate policy requirements.

ACTION: Mrs W Pickler to forward photographs and evidence of flooding incidents to Mr S Nimmo; Mr S Nimmo to compile information and forward to the Clerk for submission to the consultant.

ii) Footpaths, Cycle Paths & Bridleways (Appendix C)

Work on the Public Rights of Way Network policy can be started, with further information able to be supplemented as the policy develops. The feasibility of providing a cycle lane to the school will also be investigated.

ACTION: Consultant to commence work on Rights of Way policy with information provided.

iii) Environment & Heritage (including Non-designated Heritage Assets) (Appendix D)

A number of important street scenes have been provided. These will be investigated to form the basis of a design code/character gaps policy.

ACTION: Consultant to review street scenes and develop design policy framework.

iv) Community Facilities v) Employment Sites

The Chair confirmed that information for Community Facilities and Employment Sites will be compiled and forwarded to the consultant.

ACTION: Chair to provide Community Facilities and Employment Sites information to the Clerk for submission to the consultant as soon as possible.

6. Initial Community Survey (Information Gathering)

Nick Pellegram shared the draft survey questions on screen **(Appendix E)** and explained the purpose of the initial survey as an early evidence-gathering exercise to inform policy development, separate from the formal Regulation 14 consultation.

The Steering Group discussed the timing and logistics for launching the survey. It was agreed that the consultant would send the draft questions to the Clerk, who would circulate them to Steering Group members for review and comment.

Once the questions are finalised, the survey will be made available through two channels:

- **Online survey:** Link to be published on the Parish Council website and set up by the consultant
- **Hard copy distribution:** Clerk to arrange printing and distribution to 920 households via Village News in March 2026

Collection arrangements:

- Hard copy surveys to be returned to the Parish Council locked letterbox at the Village Hall
- Clerk to contact Wychavon District Council to borrow ballot boxes
- Clerk to contact The Thatched Public House and One Stop shop to enquire if they can host ballot boxes for survey returns

It was confirmed that Nick Pellegram/Andrea Pellegram Ltd will analyse the returned survey results.

ACTIONS:

- Consultant to send draft survey questions to the Clerk
- Clerk to circulate draft questions to Steering Group members for comments
- Clerk to arrange printing and distribution via Village News once questions finalised
- Clerk to contact Wychavon District Council regarding ballot box loan
- Clerk to contact The Thatched and One Stop regarding hosting ballot boxes
- Consultant to analyse survey results

7. Community Infrastructure Assessment

The Steering Group reviewed the Community Infrastructure Assessment **(Appendix F)**, which included contributions from the Clerk, Mr I Mellor, Cllr J Mellor, and Mr Martin Clark.

The assessment documents existing facilities, evaluates quality and capacity for future needs, and identifies gaps using the standard methodology applied across Neighbourhood Plans to justify policies and secure developer contributions.

The work will continue to be developed to support the evidence base for the Neighbourhood Plan Review.

8. Local Green Spaces Review (EDI) (Appendix G)

The Steering Group reviewed existing Local Green Space designations and considered potential new designations in light of the proposed NPPF requirements.

a) **Mill Mound (Site 2)** The consultant will investigate the merits of designating Mill Mound as either a Local Green Space or as a non-designated heritage asset, taking into account ownership and access considerations.

b) **Allotments (Site 13)** The allotments, which are leased by the Parish Council from Heart of England Forest, were discussed in the context of the new NPPF requirement that Local Green Space must be "close" to the community it serves. It was agreed to gather additional evidence to support the designation and to also identify the allotments as a community facility in the Infrastructure Assessment.

c) **Sports Field (Site 9)** It was agreed that the Sports Field designation should protect the playing field itself but exclude the sports field building, to maintain flexibility.

Potential new designations:

- **Site 14 (Village Hall area and Fallow Field)** The village hall building area would not be designated as open space to maintain flexibility. The play area at Fallow Field would be protected as open space.
- **Site 15 (Owl Homes development)** This site would be protected as open space.

For Sites 14 and 15, it was clarified that designation as open space would provide planning protection only and would not transfer ownership or maintenance responsibilities to the Parish Council, which would remain with the landowner. This is in accordance with government Planning Practice Guidance, which states that management of land designated as Local Green Space remains the responsibility of its owner.

ACTIONS:

- Consultant to review Mill Mound designation options and gather additional evidence for Mill Mound and Allotments designations
- Allotments to be identified as a community facility in the Infrastructure Assessment

9. Train Station Capacity and Policy (Appendix H)

Due to time constraints, this item was deferred to the next meeting. It was noted that parking arrangements at the station would be discussed at that time.

10. Housing Mix Requirements

This item was deferred to the next meeting.

11. Programme and Timeline

This item was deferred to the next meeting.

ACTION: Consultant to provide briefing notes for items 9-11 for the next meeting

12. Actions and Next Steps

Due to time constraints, this item was deferred to the next meeting. Actions arising from this meeting are recorded under the relevant items in these minutes.

13. Date of Next Meeting

The next meeting will be held on Wednesday, 25th February 2026 at 6:45pm at Honeybourne Village Hall. The consultant and Clerk will attend virtually.

Meeting closed at 9:00pm

Background Papers:

The following appendices were circulated with the meeting agenda dated 12th January 2026:

- Appendix A: Briefing note from Andrea Pellegram Ltd (Proposed NPPF Reforms)
- Appendix B: Flood Prevention & Infrastructure
- Appendix C: Footpaths, Cycle paths & Bridleways
- Appendix D: Environment & Heritage (including Non-designated Heritage Assets)
- Appendix E: Draft survey questions
- Appendix F: Community Infrastructure Assessment
- Appendix G: Local Green Spaces Review (ED1)
- Appendix H: Train timetable & Travel to work Areas (TTWA)
- Appendix I: SHMA (Strategic Housing Market Assessment)

Signed: __________________________ Date: ______________

(Chair)

Table 2: Travel to Work Areas (TTWA), gross value added, pounds ı

TTWA code	TTWA name	2023
E30000234	London	565349.727
E30000239	Manchester	102563.253
E30000266	Slough and Heathrow	79272.118
E30000169	Birmingham	58655.920
S22000065	Glasgow	45034.727
E30000180	Bristol	41144.200
S22000059	Edinburgh	38705.781
E30000229	Leeds	36841.300
E30000256	Reading	32729.514
E30000212	Guildford and Aldershot	32068.332
N12000002	Belfast	31590.084
E30000233	Liverpool	31016.630
E30000186	Cambridge	30722.767
E30000230	Leicester	30323.182
E30000245	Newcastle	29362.419
E30000237	Luton	28329.300
E30000267	Southampton	27527.050
E30000196	Crawley	26712.936
E30000284	Warrington and Wigan	25903.252
E30000250	Oxford	24689.858
E30000249	Nottingham	24212.196
W22000024	Cardiff	24197.281
E30000261	Sheffield	22968.180
E30000195	Coventry	21450.005
E30000242	Medway	20173.089
E30000276	Swindon	19884.314
E30000243	Milton Keynes	19563.901
E30000288	Wolverhampton and Walsall	18462.429
E30000188	Chelmsford	17259.077
E30000254	Portsmouth	16467.392
S22000047	Aberdeen	16101.541
E30000268	Southend	15946.626
E30000200	Derby	15333.321
K01000011	Chester	15214.442
E30000218	High Wycombe and Aylesbury	15033.823
E30000248	Norwich	14992.037
E30000255	Preston	14921.837
E30000206	Exeter	14915.765
E30000272	Stevenage and Welwyn Garden C	14786.672
E30000220	Hull	14317.169
E30000247	Northampton	13774.119
E30000273	Stoke-on-Trent	13730.744
E30000179	Brighton	13565.419

E30000294	York	13550.355
E30000202	Dudley	12818.635
S22000071	Motherwell and Airdrie	12714.438
E30000228	Leamington Spa	12562.249
E30000093	Middlesbrough and Stockton	12545.761
E30000222	Ipswich	12412.509
E30000018	Bradford	12223.490
E30000197	Crewe	12067.834
E30000164	Basingstoke	11880.553
E30000175	Bournemouth	11586.275
E30000108	Peterborough	11585.216
E30000231	Lincoln	10493.457
E30000283	Wakefield and Castleford	10414.206
E30000281	Tunbridge Wells	10025.570
E30000275	Sunderland	9846.744
E30000253	Plymouth	9662.579
W22000032	Swansea	9492.880
E30000289	Worcester and Kidderminster	9222.025
E30000170	Blackburn	9057.123
K01000013	Newport	8693.321
S22000061	Falkirk and Stirling	8551.948
E30000240	Mansfield	8408.687
E30000209	Gloucester	8350.516
E30000219	Huddersfield	7778.420
E30000166	Bedford	7744.346
E30000203	Durham and Bishop Auckland	7677.014
E30000280	Trowbridge	7543.759
S22000057	Dunfermline and Kirkcaldy	7406.428
E30000171	Blackpool	7400.028
E30000189	Cheltenham	7223.512
E30000201	Doncaster	7191.252
E30000168	Birkenhead	6972.511
E30000193	Colchester	6891.096
E30000278	Telford	6760.327
E30000110	Poole	6758.931
E30000191	Chichester and Bognor Regis	6676.123
S22000070	Livingston	6607.273
E30000292	Worthing	6427.882
E30000244	Newbury	6383.580
E30000183	Burton upon Trent	6297.463
E30000224	Kettering and Wellingborough	6281.799
E30000211	Grimsby	6175.122
E30000214	Harrogate	6032.299
S22000056	Dundee	5846.204
E30000029	Halifax	5845.191

E30000190	Chesterfield	5801.015
E30000004	Barnsley	5799.585
E30000204	Eastbourne	5751.568
E30000221	Huntingdon	5465.823
E30000293	Yeovil	5435.489
E30000165	Bath	5359.724
E30000184	Bury St Edmunds	5264.757
E30000187	Canterbury	5249.630
E30000161	Banbury	4993.906
E30000258	Salisbury	4843.499
S22000069	Kilmarnock and Irvine	4791.618
E30000208	Folkestone and Dover	4666.738
E30000271	Stafford	4562.371
W22000034	Wrexham	4541.761
E30000262	Shrewsbury	4528.013
N12000005	Craigavon	4392.058
E30000182	Burnley	4346.241
E30000257	Redruth and Truro	4341.792
E30000216	Hereford	4326.584
W22000003	Bridgend	4323.832
K01000010	Carlisle	4269.443
W22000029	Merthyr Tydfil	4246.306
S22000074	Perth	4173.942
S22000068	Inverness	4160.730
E30000285	Weston-super-Mare	4087.324
E30000260	Scunthorpe	4042.897
E30000246	Northallerton	4029.266
W22000028	Llanelli	3995.739
E30000160	Ashford	3938.873
E30000225	King's Lynn	3924.294
E30000076	Lancaster and Morecambe	3830.935
N12000009	Newry and Banbridge	3751.322
E30000241	Margate and Ramsgate	3746.196
E30000173	Blyth and Ashington	3742.329
E30000270	St Austell and Newquay	3718.634
E30000277	Taunton	3662.713
E30000046	Dorchester and Weymouth	3605.401
N12000006	Derry	3572.975
E30000061	Hastings	3461.898
W22000031	Rhyl	3411.631
E30000163	Barrow-in-Furness	3373.867
E30000070	Isle of Wight	3246.117
W22000022	Bangor and Holyhead	3202.169
E30000159	Andover	3175.386
E30000199	Darlington	3175.068

E30000279	Torquay and Paignton	3156.615
S22000060	Elgin	3131.851
S22000051	Ayr	3109.704
E30000176	Bridgwater	3063.052
E30000162	Barnstaple	2951.539
S22000055	Dumfries	2882.202
E30000135	Thetford and Mildenhall	2870.218
E30000291	Worksop and Retford	2844.449
E30000235	Lowestoft	2682.210
E30000124	Spalding	2586.070
E30000205	Evesham	2573.654
E30000223	Kendal	2553.999
N12000004	Cookstown and Magherafelt	2449.863
E30000210	Great Yarmouth	2422.645
N12000001	Ballymena	2364.999
K01000005	Cinderford and Ross-on-Wye	2256.243
N12000007	Dungannon	2168.279
E30000194	Corby	2156.173
N12000003	Coleraine	2144.021
N12000010	Omagh and Strabane	2123.391
S22000054	Dumbarton and Helensburgh	2114.911
E30000259	Scarborough	2110.260
E30000174	Boston	2106.299
E30000054	Grantham	2087.193
E30000264	Skegness and Louth	2086.903
E30000287	Wisbech	1983.002
E30000039	Skipton	1925.210
E30000274	Street and Wells	1904.150
E30000290	Workington	1862.573
E30000192	Clacton	1855.578
W22000009	Haverfordwest and Milford Haven	1855.285
E30000172	Blandford Forum and Gillingham	1820.960
W22000026	Colwyn Bay	1799.427
E30000051	Falmouth	1793.813
E30000106	Penrith	1744.158
E30000215	Hartlepool	1654.621
S22000063	Galashiels and Peebles	1650.798
N12000008	Enniskillen	1583.723
K01000014	Oswestry	1525.353
E30000238	Malton	1523.893
E30000286	Whitehaven	1416.039
S22000049	Arbroath and Montrose	1398.350
W22000021	Aberystwyth	1277.828
S22000085	Greenock	1272.961
E30000177	Bridlington	1257.660

S22000078	St Andrews and Cupar	1232.432
E30000252	Penzance	1176.451
E30000185	Buxton	1155.920
W22000015	Newtown and Welshpool	1143.206
E30000232	Liskeard	1112.942
E30000236	Ludlow	1079.216
E30000167	Bideford	1032.966
W22000016	Pembroke and Tenby	998.923
S22000075	Peterhead	986.180
K01000009	Berwick	978.264
E30000064	Hexham	870.394
E30000198	Cromer and Sheringham	866.372
S22000039	Shetland Islands	854.944
E30000263	Sidmouth	845.643
E30000227	Launceston	761.439
E30000282	Wadebridge	749.501
W22000025	Cardigan	730.190
S22000067	Hawick and Kelso	728.865
S22000062	Fort William	727.856
E30000226	Kingsbridge and Dartmouth	721.250
S22000048	Alness and Invergordon	713.771
E30000095	Minehead	700.449
S22000035	Orkney Islands	699.416
W22000030	Pwllheli and Porthmadog	651.023
S22000013	Western Isles	644.561
E30000181	Bude	639.017
W22000011	Llandrindod Wells and Builth Well	596.040
E30000178	Bridport	579.571
S22000081	Turriff and Banff	563.094
W22000023	Brecon	547.286
S22000084	Fraserburgh	543.411
S22000080	Thurso	536.961
S22000073	Oban	516.119
S22000079	Stranraer	514.394
S22000058	Dunoon and Rothesay	467.366
W22000033	Tywyn and Dolgellau	443.291
E30000147	Whitby	439.725
S22000053	Dalbeattie and Castle Douglas	378.160
S22000050	Aviemore and Grantown-on-Spey	364.817
S22000064	Girvan	320.429
S22000032	Mull and Islay	304.420
S22000083	Wick	303.307
S22000076	Pitlochry and Aberfeldy	302.974
S22000086	Lochgilphead	298.012
S22000066	Golspie and Brora	231.555

S22000077	Portree	227.114
S22000072	Newton Stewart	216.050
S22000052	Broadford and Kyle of Lochalsh	203.538
S22000005	Campbeltown	192.855
S22000082	Ullapool	181.168

million

Appendix B - Train timetable 18th

STP	Plan_Arr	Destination	Pl	Train_ID	TOC	Origin	Plan_Dep
WTT	542	London Paddington	2	1P06	GW	Worcester Shrub Hill	543
VAR	546	Worcester Shrub Hill	1	2E77	GW	Oxford	546
WTT	641	London Paddington	2	1P10	GW	Hereford	642
WTT	pass	London Paddington	2	1P12	GW	Worcester Shrub Hill	705
WTT	727	Didcot Parkway	2	2E80	GW	Worcester Shrub Hill	728
WTT	737	Great Malvern	1	1W11	GW	London Paddington	738
WTT	757	London Paddington	2	1P14	GW	Great Malvern	758
WTT	833	Great Malvern	1	1W13	GW	London Paddington	834
WTT	844	London Paddington	2	1P16	GW	Worcester Shrub Hill	844
WTT	929	Great Malvern	1	1W15	GW	London Paddington	930
WTT	941	London Paddington	2	1P18	GW	Great Malvern	941
WTT	pass	Long Marston	1	5Q67	ZZ	Reading Traincare Depot	957
WTT	1030	Great Malvern	1	1W17	GW	London Paddington	1031
WTT	1043	London Paddington	2	1P20	GW	Great Malvern	1044
WTT	pass	Reading Traincare Depot	2	5Q74	ZZ	Long Marston	1121
WTT	1130	Hereford	1	1W01	GW	London Paddington	1131
WTT	1143	London Paddington	2	1P22	GW	Great Malvern	1144
WTT	1233	Worcester Shrub Hill	1	1W21	GW	London Paddington	1234
WTT	1242	London Paddington	2	1P24	GW	Great Malvern	1243
WTT	1328	Hereford	1	1W02	GW	London Paddington	1329
WTT	1342	London Paddington	2	1P26	GW	Worcester Shrub Hill	1343
VAR	pass	Derby R.T.C.(Network Rail)	1	1Q23	ZZ	Bristol Kingsland Road	1348
WTT	1429	Worcester Foregate Street	1	1W25	GW	London Paddington	1429
WTT	1442	London Paddington	2	1P28	GW	Hereford	1443
WTT	1530	Great Malvern	1	1W27	GW	London Paddington	1530
WTT	1630	Worcester Foregate Street	1	1W29	GW	London Paddington	1631
WTT	1642	London Paddington	2	1P32	GW	Hereford	1643
WTT	1708	Worcester Foregate Street	1	1W30	GW	London Paddington	1709

WTT	1720	London Paddington	2	1P34	GW	Great Malvern	1721
WTT	1729	Great Malvern	1	1W31	GW	London Paddington	1730
WTT	1757	London Paddington	2	1P36	GW	Worcester Foregate Street	1758
WTT	pass	Evesham	1	2E14	GW	Didcot Parkway	1818
WTT	1832	London Paddington	2	1P38	GW	Worcester Foregate Street	1834
WTT	1835	Great Malvern	1	1W33	GW	London Paddington	1836
WTT	1857	Oxford	2	2E16	GW	Evesham	1858
WTT	pass	Hereford	1	1W03	GW	London Paddington	1908
WTT	1940	Worcester Foregate Street	1	1W34	GW	London Paddington	1940
VAR	1950	London Paddington	2	1P40	GW	Great Malvern	1950
VAR	pass	London Paddington	2	1P40	GW	Great Malvern	1950
WTT	2030	London Paddington	2	1P42	GW	Great Malvern	2032
WTT	2032	Great Malvern	1	1W36	GW	London Paddington	2033
WTT	2130	Hereford	1	1W05	GW	London Paddington	2131
VAR	2131	London Paddington	2	1P44	GW	Worcester Foregate Street	2133
WTT	2229	Great Malvern	1	1W41	GW	London Paddington	2229
VAR	2319	London Paddington	2	1P46	GW	Hereford	2320
WTT	2332	Worcester Shrub Hill	1	1W43	GW	London Paddington	2333

Malvern Hills, Worcester City and Wychavon Strategic Housing Market Assessment 2021 Update

Summary report for the South Worcestershire Development Plan Area

Final Report

November 2021

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Please note that in this report some of the tables include rounded figures. This can result in some column or row totals not adding up to 100 or to the anticipated row or column 'total' due to the use of rounded decimal figures. We include this description here as it covers all tables and associated textual commentary included. If tables or figures are to be used in-house then we recommend the addition of a similarly worded statement being included as a note to each table used.

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Executive Summary

Introduction

The South Worcestershire Strategic Housing Market Assessment (SHMA) 2021 updates the summary report prepared as part of the 2019 SHMA. The report updates evidence for Malvern Hills, Worcester City and Wychavon local authority areas which together form the South Worcestershire Development Plan (SWDP) area. .

SHMA findings will inform the development of local housing strategies and the commissioning of new affordable and other housing products in each authority area. It considers the need for affordable housing and the size, type and tenure of housing need for different groups within the community over the period 2021 to 2041. This research provides an up-to-date analysis of the social, economic, housing and demographic situation across the SWDP area.

The SHMA update has been prepared in accordance with the National Planning Policy Framework (NPPF) and associated Planning Practice Guidance (PPG).

Dwelling stock

There are 142,080 dwellings (MHCLG 2020 dwelling stock estimates) and 136,365 households (ONS 2018-based projections for 2021) across the SWDP area. The vacancy rate is 2.8% which is similar to the rate across England (2.7%). Most dwellings are houses (74.5%), 15.2% are flats and 10.3% bungalows. 69.7% of households are owner occupiers, 14.9% privately rent and 15.4% live in affordable housing. There are around 1,505 affordable home ownership properties across the SWDP area.

House prices and rents

House prices across the SWDP area are consistently higher than West Midlands prices and broadly in alignment with England prices. Within SWDP, prices in Malvern Hills and Wychavon are highest and Worcester prices are the lowest, although they remain higher than the West Midlands average. Median prices in 2020 were £210,000 in Worcester, £267,750 in Malvern Hills and £280,000 in Wychavon.

In 2020, median private rents were £659 in Worcester, £702 in Malvern Hills and £750 in Wychavon. This compares with £694 in the West Midlands and £1,148 across England.

Demographic drivers

The population of the SWDP area is projected to increase by 13.6% over the period 2021-2041, from around 316,000 in 2021 to around 359,000 in 2041 (ONS 2018-based Subnational Population Projections). There will be a marked increase in the number and proportion of older residents. The population aged 65 years or older, is expected to increase by 43.2% from 75,300 in 2016 to 107,800 in 2041. This compares with an increase of 32.4% across the West Midlands and 36.7% across England over the period 2021-2041.

Economic drivers

Across the SWDP area, 64.4% of Household Reference People (HRP) are economically active and in employment (2011 Census) and a further 14.3% are retired from work, 8.8% are economically inactive, 8.5% are students and 4% are unemployed. The ONS identifies that across the SWDP lower quartile earnings in 2020 were £18,671 in Malvern Hills, £20,748 in Worcester City and £21,865 in Wychavon. This compares with £21,734 across the West Midlands and £22,932 across England. Median earnings were £22,812 in Malvern Hills , £27,801 in Worcester City and £28,161 in Wychavon. This compares with £29,481 across the West Midlands and £31,766 across England.

Future dwelling mix and development priorities

The SHMA update has carefully considered the future population and household projections over the period 2021 to 2041, the range of dwellings lived in by different households and dwelling aspirations (likes) and expectations. This helps to determine an appropriate mix of dwellings to inform future development priorities to better reflect the housing needs of communities across the SWDP area

This SHMA report considers **future housing need** based on the 'standard methodology' outlined in December 2020 Planning Practice Guidance (PPG). Using 2014-based household projections and latest (2020) affordability indicators, the minimum local housing need figure for the SWDP area is 1,283 dwellings each year. This is similar to the 1,257 need identified in the 2019 SHMA.

The scale of **affordable need** has been assessed using latest (June 2021) housing register data. The overall net annual imbalance is calculated to be 906 dwellings each year which compares with 489 in the 2019 SHMA. It is important that the council maintains an affordable housing target to ensure the continued delivery of affordable housing to support long-term community sustainability and provide affordable housing for newly-forming households. It is recommended that across the SWDP area:

- For new social/affordable dwellings, 36.5% have one-bedroom, 35.4% two-bedrooms, 24% three-bedrooms and 4.2% four or more-bedrooms. This represents a change in the evidence from the 2019 SHMA as this takes into account actual delivery across SWDP.
- For affordable home ownership 10% to have one-bedroom, 40% two-bedrooms, 35% three-bedrooms and 15% four or more-bedrooms

A summary of the overall range of dwelling types and sizes appropriate to SWDP and individual local authorities is presented in Tables ES1 to ES4.

Table ES1 Overall dwelling mix by tenure: Malvern Hills

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	10-15%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table ES2 Overall dwelling mix by tenure: Worcester

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	15-20%	0-5%	15-20%
1-bedroom flat	5-10%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	0-5%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table ES3 Overall dwelling mix by tenure: Wychavon

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	10-15%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table ES4 Overall dwelling mix by tenure: SWDP

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

The needs of other groups

Particular needs which have been identified in the SHMA update are:

- Increasing and diversifying the supply of specialist housing for older people. There is a need for 4,836 more units of accommodation for older people by 2041 including sheltered/retirement, Extra Care and co-housing (3,198 or 160 each year) and 1,638 units of residential care accommodation (82 each year).
- Based on an assessment of additional needs and longer-term demographics, 4.5% of new dwellings (58 each year) should be built to M4(3)b wheelchair accessible standard; and all other new dwellings should be built to M4(2) accessible and adaptable standard.

Note that there is overlap between affordable, specialist older person and M4(3) need, so for instance the development of an older person's level access, wheelchair accessible affordable dwelling would help address three aspects of housing need.

There is interest in **self and custom-build** and at August 2021, 345 households across the SWDP area had registered interest for a self/custom build plot. This compares with 119 households in November 2018.

1. Introduction

Background, aims and objectives

1.1 arc4 prepared a comprehensive Strategic Housing Market Assessment (SHMA) for the South Worcestershire local authorities of Malvern Hills, Wychavon and Worcester City in 2019. This included a summary report for a South Worcestershire Development Plan area published in September 2019.

1.2 An update of this crucial evidence base is now necessary to reflect updated demographic data (ONS 2018-based household and population projections) and changes to Planning Practice Guidance (PPG) which underpins the National Planning Policy Framework (NPPF). Of particular note, the standard method for assessing minimum housing need was updated in December 2020.

1.3 The SHMA update considers future housing need across all sections of the community to 2041.

National Planning Policy Framework

1.4 The evidence base needs to take account of the requirements of the National Planning Policy Framework (NPPF). The latest version was published in July 2021 and supported by Planning Practice Guidance (PPG). The NPPF 2021 sets out the government's planning policies for England and how these are expected to be applied. Paragraph 10 of the NPPF states that plans, and decisions should apply a 'presumption in favour of sustainable development'. As part of this, in relation to plan-making, it sets out that this means that 'strategic policies should, as a minimum, provide for objectively assessed needs for housing…'.

1.5 Paragraph 60 provides an important context to the policy for housing delivery, as follows:

'To support the Government's objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without unnecessary delay'

1.6 Paragraphs 61 and 62 relate to the evidence base requirements which underpin this study:

Paragraph 61: **'To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.'**

Paragraph 62: **'Within this context, the size, type and tenure of housing need for different groups in the community should be assessed and reflected in planning policies including but not limited to: those who**

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

Paragraph 62: **'where a need for affordable housing is identified, planning policies should specify the type of affordable housing required'.**

1.7 The NPPF 2021 (Paragraph 66) requires that:

'strategic policy-making authorities should establish a housing requirement figure for their whole area, which shows the extent to which their identified housing need (and any needs that cannot be met within neighbouring areas) can be met over the plan period. Within this overall requirement, strategic policies should set out a housing requirement for designated neighbourhood areas which reflects the overall strategy for the pattern and scale of development and any relevant allocations.'

1.8 The Localism Act 2010 introduced the 'Duty to Co-operate' as a replacement for Regional Spatial Strategy and this requirement is also established in National Planning Policy (NPPF 2021, Paragraphs 24-27). Section 110 requires local authorities and other bodies, including Local Enterprise Partnerships to co-operate in maximising the effectiveness of strategic matters within development plan documents. The provision of housing development is a strategic priority and the council will have to ensure that it is legally compliant with the Localism Act at Local Plan examination.

1.9 The NPPF 2021 sets out affordable housing definitions which are presented at Technical Appendix A.

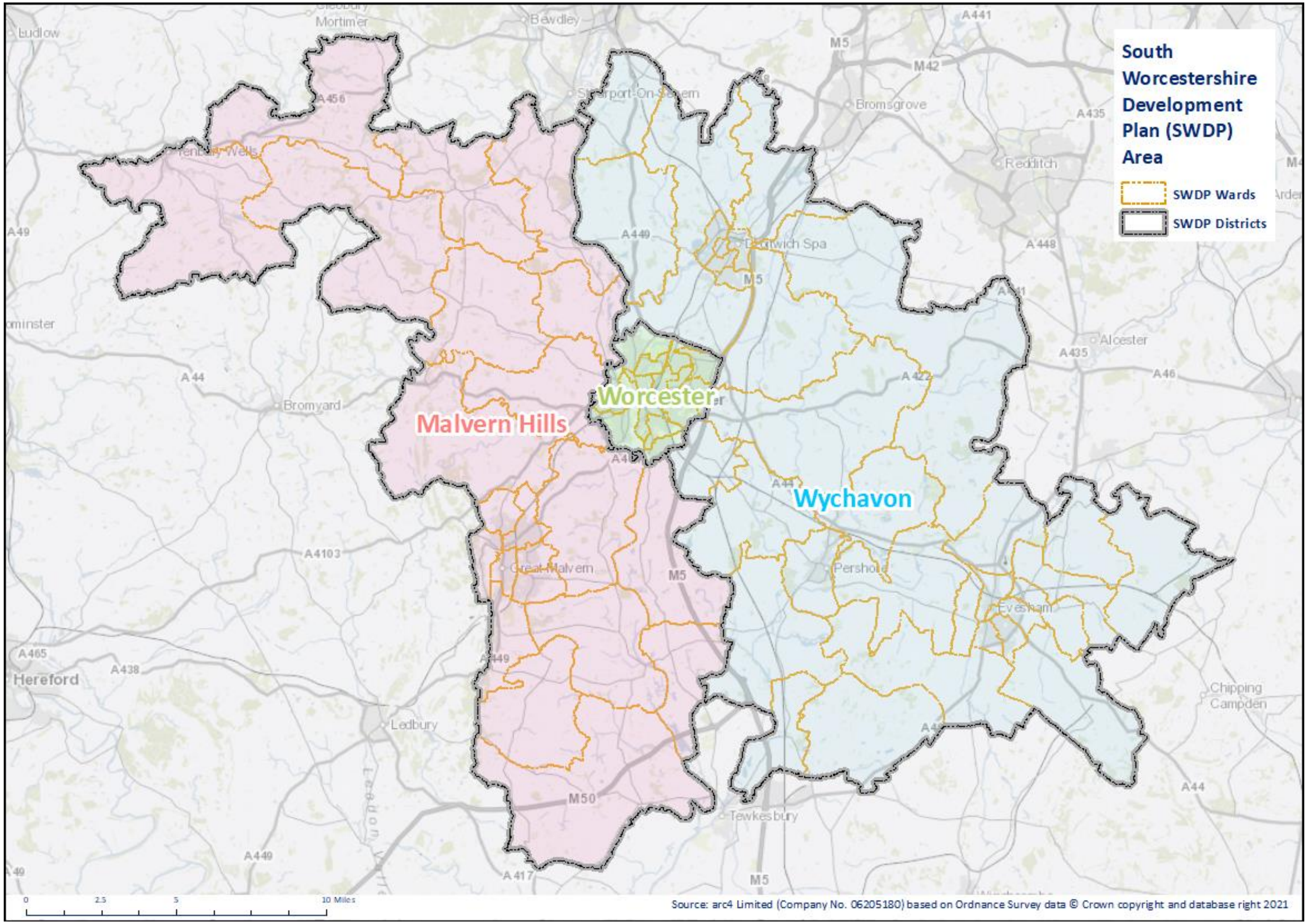
Geography

1.10 Map 1.1 illustrates the geographical context of the South Worcestershire Development Plan and its constituent local authority areas.

1.11 The South Worcestershire Development Plan area is located within the county of Worcestershire, in the West Midlands of England. To the north are the districts of Wyre Forest, Bromsgrove and Redditch Borough (Worcestershire). To the east and south are the districts of Stratford-upon-Avon, Cotswold and Tewkesbury. The resident population of the SWDP area is estimated at around **316,013** people in 2021 (using 2018-based Office for National Statistics (ONS) population projections) broken down as follows:

- Malvern Hills 80,420;
- Worcester City 102,202; and
- Wychavon 133,391.

Map 1.1 South Worcestershire Development Plan Area



Neighbourhood Development Plans

1.12 The 2011 Localism Act introduced a new type of planning which allows local people to come together to decide how they want their area to develop within the strategic framework within the Local Plan. Once adopted, Neighbourhood Development Plans form part of the statutory development plan for the neighbourhood and must be taken into consideration when determining planning applications. Table 1.1 summarises the neighbourhood plan areas across the SWDP area.

Research methodology

1.13 A multi-method approach was used to prepare the 2019 SHMAs and summary report comprising:

- a review of relevant secondary data;
- an online stakeholder survey and interviews; and
- interviews with estate and lettings agents.

1.14 The 2021 SHMA update specifically focuses on the updating of relevant secondary data.

Presentation of data

1.15 Data are clearly sourced throughout the report. Where possible, data are ‘triangulated’ which means several sources are drawn upon to establish a robust output.

COVID-19 impact

1.16 Regarding the COVID-19 situation, it is too early to consider the longer-term implication of the pandemic on demography, economy and housing but there are several emerging trends. The pandemic has accelerated trends in home working, retail and office use. There are implications for the housing offer, with a ‘race for space’ within dwellings, the need for larger gardens/outdoor space and better access to public space which may alter the demand/need for larger homes in less dense settings. A redistribution of demand between urban and more rural locations has also been suggested. Repurposing town centres and commercial buildings provides opportunities for new forms of residential occupancy, for instance micro-homes and co-living.

Table 1.1 Neighbourhood Planning Areas in South Worcestershire (with dates of plan designation/submission/made) as at August 2021

Malvern Hills	Worcester City	Wychavon
Plans Adopted (Made)	Plans Adopted (Made)	Plans Adopted (Made)
Apperley (July 2021)	None	Bredon, Bredon's Norton and Westmancote (made July 2017)
Broadwas and Cotheridge (Sept 2019)		Cleeve Prior (made Feb 2018)
Clifton upon Terne (Nov 2017)		Drakes Broughton and Wadborough with Priton (made April 2017)
Hallow (July 2021)		Eckington (made Sept 2019)
Kempsey (Nov 2017)		Harvington (made Sept 2019)
Martley, Knightwick & Doddenham (Feb 2018)		North Claines (April 2017)
Hanley Castle (Jan 2019)		Pebworth Parish (Sept 2019)
Malvern Town (June 2019)		Honeybourne (April 2020)
Plans at Referendum Stage	Plans at Referendum Stage	Plans at Referendum Stage
None currently	None currently	Ombersley and Doverdale (referendum date Sept 2021)
Plans at Examination Stage	Plans at Examination Stage	Plans at Examination Stage
None currently	None Currently	Norton-juxta-Kempsey (examiners report received August 2021)
Draft Neighbourhood Plans	Draft Neighbourhood Plans	Draft Neighbourhood Plans
Welland (Draft consulted on in Dec 15/Jan 2016)	Warndon (draft consulted May-June 2021)	Broadway (consultation ran Sept – Oct 2020)
Designated Neighbourhood areas	Designated Neighbourhood areas	Designated Neighbourhood areas
Alfrick and Lulsley (designated Sept 2013)	None Currently	Ashton under Hill (designated Dec 2015)
Eldersfield (designated Sept 2019)		Beckford Parish (designated April 2018)
Great Whitley and Hillhampton (designated Dec 2013)		Dodderhill (designated April 2019)
Leigh and Bransford (designated Sept 2013)		Droitwich Spa (designated Jan 2017)
Malvern Wells (designated March 2017)		Elmley Castle, Bricklehampton and Netherton (designated Nov 2019)
Powick (designated June 2020)		Hanbury (designated Oct 2014)
Rushwick (designated August 2018)		Inkberrow (designated May 2018)
Tenbury Town and Burford (designated March 2016)		Sedgeberrow (designated Oct 2013)
Upton upon Severn (designated March 2015)		South Lenches (designated Sept 2015)
		Whittington (designated Oct 2013)

Report structure

1.17 The 2021 SHMA update report structure has been simplified and updated to take account of changes to PPG since the original reports were published. The 2021 SHMA update report is structured as follows:

- Chapter 2 considers the housing market key drivers focusing on dwelling stock, demographic drivers, household characteristics including income, economic drivers, migration and travel to work trends;
- Chapter 3 provides analysis of prices, rents and affordability;
- Chapter 4 considers the needs of different groups as referenced in NPPF and includes analysis of the need for property adaptations;
- Chapter 5 focuses on overall housing need, affordable need and dwelling mix; and
- Chapter 6 concludes the report with a summary of key findings and a consideration of strategic and policy issues.

1.18 The main report is accompanied by a separate technical appendix which provides detailed material that underpins the core outputs of the SHMA. The technical appendix material includes:

- Affordable housing tenure definitions (Appendix A);
- Research methodology (Appendix B);
- Affordable housing need calculations (Appendix C);
- Dwelling mix analysis (Appendix D).

2. Housing market and key drivers

Introduction

2.1 This chapter provides a detailed background to dwelling stock and tenure and the underlying economic, demographic and household drivers across the SWDP area.

Dwelling stock, vacant stock and household estimates

2.2 Current estimates of dwelling stock, vacant stock and households from multiple sources are presented in Table 2.1. For the purposes of the 2021 SHMA, the total dwelling stock base across the SWDP area is **142,080** and the number of households as **136,365.** Around 2.8% of dwellings are vacant compared with the national rate of 1.2% based in MHCLG data.

Table 2.1 Dwelling stock and household estimates

Dwelling stock	Malvern Hills	Worcester City	Wychavon	SWDP	Source
2020 Valuation Office Agency (all dwellings)	36,620	46,380	59,070	142,070	VOA Table CTSOP3.0
2020 Valuation Office Agency (excluding annex and unknown)	34,370	45,340	55,520	135,230	VOA Table CTSOP3.0
2020 MHCLG Dwelling Stock Estimates	**36,646**	**46,253**	**59,181**	**142,080**	MHCLG Live Tables
Vacant stock	**Malvern Hills**	**Worcester City**	**Wychavon**	**SWDP**	**Source**
2020 MHCLG Vacancy estimate (all dwellings)	1,165	1,251	1,495	3,911	MHCLG Table LT_615
2020 MHCLG Long-term vacancy estimate (all dwellings)	533	490	674	1,697	MHCLG Table LT_615
Households	**Malvern Hills**	**Worcester City**	**Wychavon**	**SWDP**	**Source**
2014-based DCLG Household Projections 2021 figure	34,936	45,506	56,490	136,932	DCLG (now MHCLG)
2018-based ONS Household Projections 2021 figure	**35,615**	**44,260**	**56,490**	**136,365**	ONS

Dwelling type and size

2.3 The 2020 Valuation Office Agency data provides details on overall dwelling stock by type, number of bedrooms and council tax band. Table 2.2 presents the overall dwelling stock profile of the SWDP area and individual districts compared with the West Midlands and England.

2.4 In summary:

- 37.1% of dwellings across the SWDP area are council tax band A or B properties and 62.9% are band C or above, with highest proportions of A and B properties in Worcester and F+ properties in Wychavon.
- 74.5% of dwellings are houses (19.6% terraced, 26.7% semi-detached and 28.2% detached), 15.2% are flats and 10.3% are bungalows. The proportion of flats was highest in Worcester and the proportion of bungalows highest in Malvern Hills.
- 9.8% of dwellings have one bedroom, 25.8% two bedrooms, 43.2% three bedrooms and 21.1% four or more bedrooms. The proportion of smaller 1 bedroom dwellings was highest in Worcester and proportion of 4 or more bedrooms was highest in Wychavon.

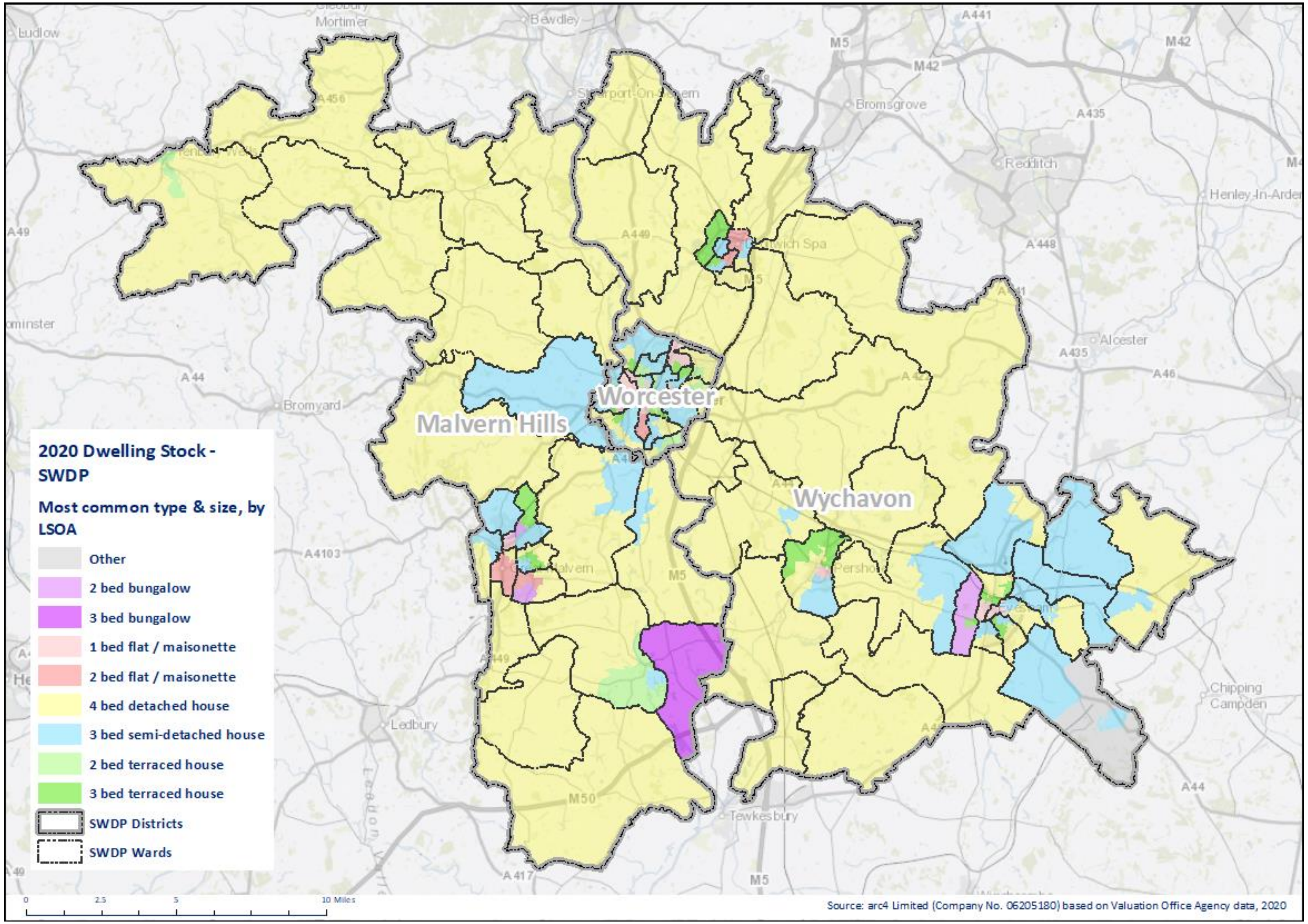
2.5 Map 2.1 illustrates the predominant dwelling type and size by LSOA based on 2020 Valuation Office Agency data.

2.6 There are an estimated 1860 houses in multiple occupancy (HMOs) in the SWDP according to Local Authority Housing Statistics 2019/20, mainly located in Worcester (Malvern Hills 50, Worcester 1,500 and Wychavon 310). It may be appropriate to carry out further work on the characteristics of HMO dwellings in Worcester and their impact on overall housing supply.

Table 2.2 Dwelling type, number of bedrooms and council tax band summary						
Dwelling type and number of bedrooms	**Malvern Hills**	**Worcester**	**Wychavon**	**South Worcestershire**	**West Midlands**	**England**
1 or 2-bedroom house	13.4%	14.7%	14.9%	14.5%	14.8%	14.0%
3-bedroom house	34.9%	44.6%	38.4%	39.6%	47.3%	38.8%
4 or more-bedroom house	21.8%	14.2%	24.5%	20.4%	13.5%	14.4%
1 bedroom flat	5.9%	12.3%	5.6%	7.9%	8.2%	10.8%
2 or 3 bedroom flat	7.8%	9.8%	5.0%	7.3%	8.6%	12.4%
1 bedroom bungalow	1.8%	0.2%	1.6%	1.2%	1.4%	1.1%
2 bedroom bungalow	7.8%	2.5%	5.9%	5.2%	3.9%	4.7%
3 or more bedroom bungalow	6.6%	1.6%	4.0%	3.9%	2.4%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Number of bedrooms	**Malvern Hills**	**Worcester**	**Wychavon**	**South Worcestershire**	**West Midlands**	**England**
1-bedroom	8.0%	13.1%	8.2%	9.8%	10.0%	12.6%
2-bedrooms	27.8%	25.8%	24.6%	25.8%	25.9%	28.6%
3-bedrooms	41.2%	46.3%	42.0%	43.2%	50.0%	43.4%
4-bedrooms	23.0%	14.9%	25.1%	21.1%	14.1%	15.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Council Tax Band	**Malvern Hills**	**Worcester**	**Wychavon**	**South Worcestershire**	**West Midlands**	**England**
A	8.6%	18.6%	9.0%	12.1%	29.8%	23.7%
B	21.2%	33.3%	20.7%	25.0%	25.4%	19.7%
C-E	52.7%	44.1%	51.2%	49.2%	38.4%	47.4%
F+	17.6%	4.0%	19.1%	13.7%	6.4%	9.1%
Total	100.1%	100.0%	100.0%	100.0%	100.0%	100.0%
Base	34,370	45,340	55,520	135,230	2,482,930	24,165,880

Source: VOA 2020

Map 2.1 Predominant dwelling type and size by built-up areas within LSOAs: SWDP



Source: VOA 2020

Property age and condition

The age and condition of SWDP's housing

2.7 The age profile of the dwelling stock across the SWDP area is summarised in Table 2.3.

Table 2.3 Age of dwellings

Age of Dwellings	Malvern Hills	Worcester	Wychavon	SWDP
pre-1919	28.4%	18.9%	17.0%	20.5%
1919-44	6.5%	12.8%	7.2%	8.9%
1945-64	15.4%	16.5%	13.3%	14.9%
1965-82	22.3%	16.5%	22.2%	20.4%
1983-99	12.3%	23.0%	19.8%	18.9%
post 1999	15.0%	12.4%	20.4%	16.4%
Total	100.0%	100.0%	100.0%	100.0%
Base	36,500	46,410	58,920	141,830
Unknown	280	60	220	560
Grand Total	36,780	46,470	59,140	142,390

Source: VOA 2020

2.8 The English Housing Survey (EHS) produces national data on dwelling condition. Applying national trends to the stock profile across the SWDP area (Table 2.4) would suggest that around 16.4% of dwelling stock is non-decent, which is lower than the national average of 20.6%. The number of dwellings likely to fail the minimum standard of decent homes criteria is estimated to be 9.7% (compared with 11.9% nationally).

2.9 A full definition of what constitutes a decent home is available from MHCLG (source: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/7812/138355.pdf) but in summary a decent home meets the following four criteria:

a. it meets the current statutory minimum for housing;

b. it is in a reasonable state of repair;

c. it has reasonably modern facilities and services; and

d. it provides a reasonable degree of thermal comfort.

Table 2.4 Dwelling stock condition estimates in England and the SWDP area						
	Fails decent homes criteria (estimate)					
District	Non-decent	Minimum standard	Repair	Modern facilities and services	Thermal comfort	All dwellings
Malvern Hills	6,659	4,075	1,253	706	2,257	36,500
Worcester	7,731	4,489	1,425	843	2,756	46,410
Wychavon	8,887	5,179	1,503	926	3,207	58,920
SDWP	23,277	13,743	4,181	2,475	8,221	141,830
% SWDP dwellings	16.4	9.7	2.9	1.7	5.8	100
% England dwellings	**20.6**	**11.9**	**4.6**	**1.9**	**7.5**	

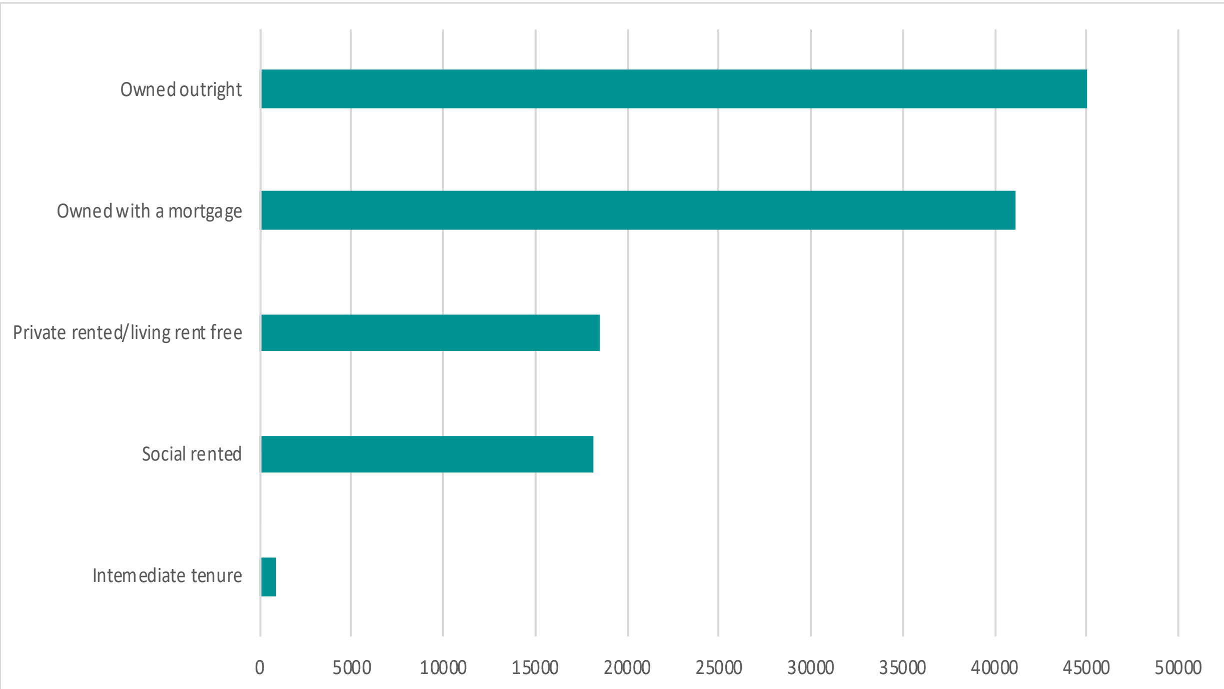
Source: English Housing Survey 2013 data applied to 2020 Valuation Office Agency dwelling stock age

Housing tenure

2.10 The 2011 Census provides a broad range of household data relating to the tenure of occupied dwellings. There are also several sources which provide more up to date information on the tenure of dwelling stock.

2.11 Based on the 2011 Census, the tenure profile of the SWDP is summarised in Figure 2.1. Overall, 69.7% of occupied dwellings are owner-occupied, 15.4% are rented from a social housing provider (including intermediate tenure) and 14.9% are private rented (including tied accommodation/living rent free).

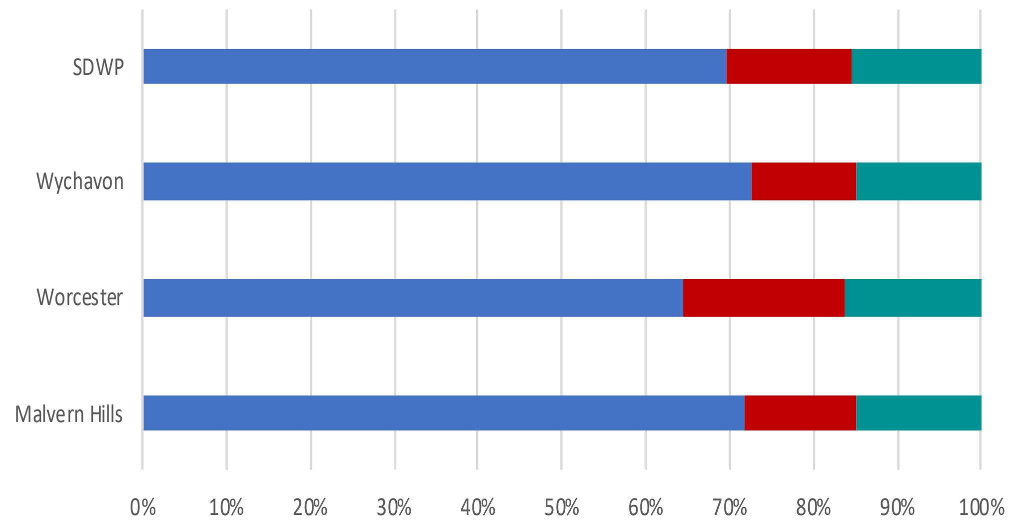
Figure 2.1 SWDP: tenure profile of occupied dwellings



Source: 2011 Census

2.12 Figure 2.2 summarises the tenure profile by district. Wychavon has the highest proportion of owner-occupied households and Worcester City the highest proportion of households living in private rented and affordable dwellings.

Figure 2.2 SWDP and constituent local authority tenure profile of occupied dwellings



	Malvern Hills	Worcester	Wychavon	SDWP
Owner Occupied	71.9	64.4	72.7	69.7
Private Rented	13.2	19.2	12.3	14.9
Affordable (Rented/Intermediate)	14.9	16.4	14.9	15.4

Source: 2011 Census

2.13 The ONS has produced subnational dwelling stock by tenure estimates for local authorities across England 2012-2017. Combined data for the SWDP area show (sample errors exceed +/-5% for these data) that the:

- owner occupied stock was 68.1% of total stock in 2012 and 66.2% in 2017;
- private rented stock was 17.3% in 2012 and 18.9% in 2017; and
- by deduction, and using MHCLG dwelling stock data as a base, affordable stock represented around 14.6% of stock in 2012 and 15% in 2017.

2.14 Data from the Regulator of Social Housing SDR return 2020 indicates a total of 23,152 affordable dwellings (18,561 social rented, 3,086 supported /older person housing and 1,505 affordable home ownership tenures) intermediate tenure. Based on this information, the affordable stock represents 16.3% of all dwellings.

2.15 These data would suggest that the tenure profile of the SWDP has changed slightly since the 2011 Census, with an increasing number of private rented households and households living in affordable housing, with a reduction in owner occupying households. However, it should be noted that the 2011 Census relates to households and the ONS/SDR data relates to dwellings.

2.16 Further information on the owner occupied, affordable and private rented sectors of the housing market are presented in the individual local authority SHMA reports.

Past trends in housing delivery

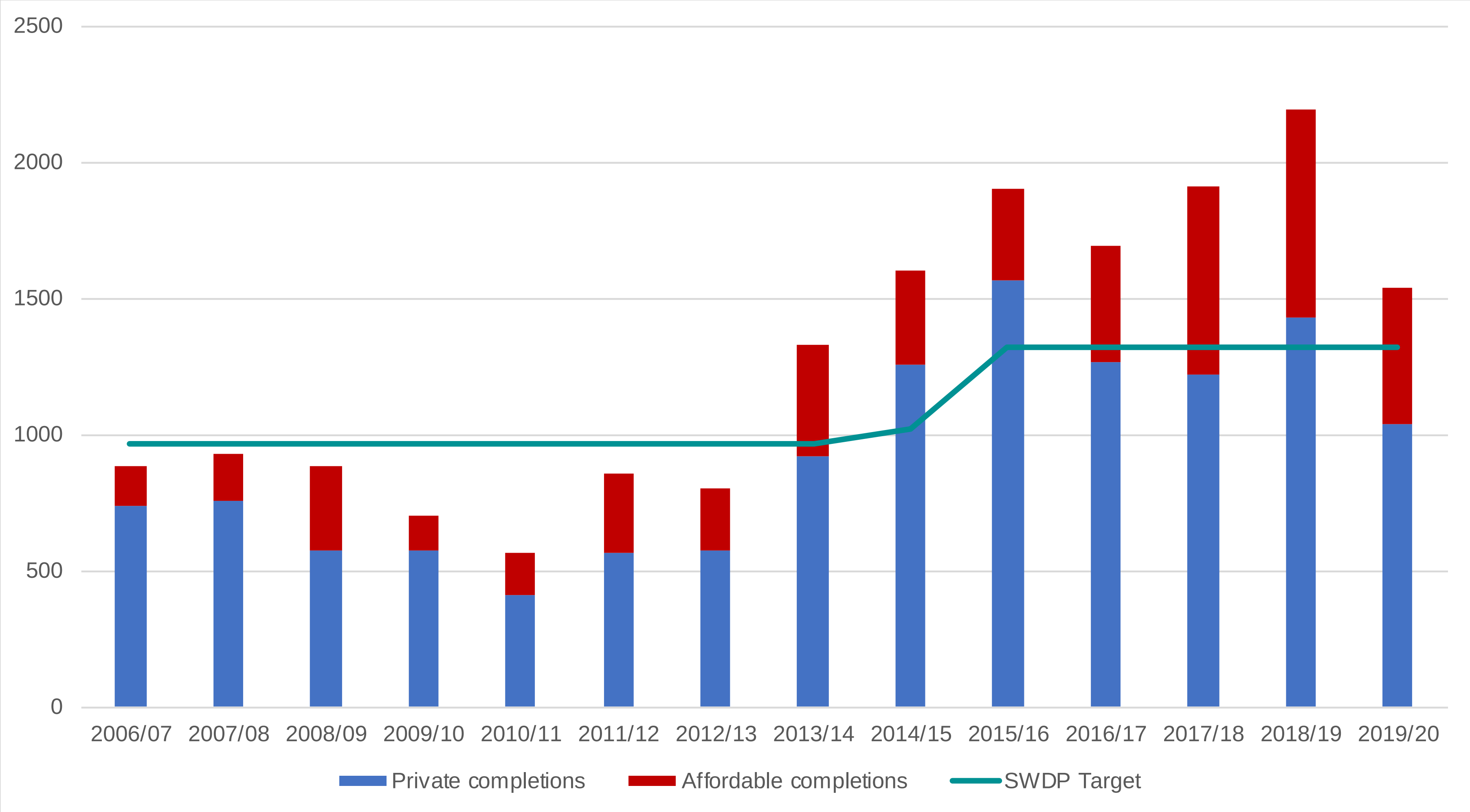
2.17 Over the past 14 years (2006/07 to 2019/20) 17,773 net completions have been delivered across the SWDP area (Table 2.5). In the past 5 years, 9,230 have been built (1,846 annual average) of which 29.5% were affordable.

2.18 A comparison of annual completions with the annual housing requirement is presented in Figure 2.3. There demonstrates that housing targets have been exceeded since 2013/14 and the overall housing target from 2006/7 has been achieved.

Table 2.5 Net dwelling completions 2006/07 to 2019/20

Year	Affordable Completions	Private Completions	Total Dwelling Completions	SWDP Target
2006/07	145	738	883	960
2007/08	175	757	932	960
2008/09	304	575	879	960
2009/10	133	569	702	960
2010/11	152	408	560	960
2011/12	286	565	851	960
2012/13	227	576	803	960
2013/14	411	919	1,330	960
2014/15	352	1,251	1,603	1016
2015/16	334	1,563	1,897	1314
2016/17	430	1,263	1,693	1314
2017/18	691	1,222	1,913	1314
2018/19	766	1,425	2,191	1314
2019/20	501	1,035	1,536	1314
14-year Total	**4,907**	**12,866**	**17,773**	**15,266**
Annual Average	**351**	**919**	**1270**	

Figure 2.3 Dwelling completions compared with the annual requirement 2006/07 to 2019/20



Source: Annual Monitoring Returns/Reports

Demographic drivers: population and households

Population projections

2.19 The ONS produces population projections every two years. The latest 2018-based principal ONS population projections report a 2021 population of around 316,000 across the SWDP area which is expected to increase by around 43,000 (13.6%) to around 359,000 by 2041 (Table 2.6 and Figure 2.7). Across the SWDP area, older age groups are expected to increase the most. Within SWDP, there is a projected reduction in the numbers in several age cohorts in Worcester but in Wychavon, there is growth projected across all cohorts and most age cohorts in Malvern Hills.

Table 2.6 Change in population by age group 2021 to 2041 by district and SWDP area

Malvern Hills

Age groups	2021	2041	Number change 2021-2041	% change 2021-2041
0-19	15,924	16,747	824	5.2%
20-39	13,622	13,978	357	2.6%
40-54	15,069	16,165	1,096	7.3%
55-64	12,709	12,370	-339	-2.7%
65-74	11,650	13,860	2,210	19.0%
75-84	8,003	12,233	4,230	52.9%
85+	3,445	6,521	3,076	89.3%
All Ages	80,421	91,874	11,454	14.2%

Wychavon

Age groups	2021	2041	Number change 2021-2041	% change 2021-2041
0-19	27,896	31,908	4,012	14.4%
20-39	25,977	28,996	3,020	11.6%
40-54	25,694	29,562	3,867	15.1%
55-64	19,833	20,359	526	2.7%
65-74	18,100	22,596	4,495	24.8%
75-84	11,398	18,729	7,331	64.3%
85+	4,493	8,854	4,361	97.0%
All Ages	133,391	161,002	27,612	20.7%

Worcester

Age groups	2021	2041	Number change 2021-2041	% change 2021-2041
0-19	23,553	22,191	-1,363	-5.8%
20-39	28,939	30,035	1,096	3.8%
40-54	19,198	17,860	-1,338	-7.0%
55-64	12,279	11,012	-1,267	-10.3%
65-74	9,663	11,317	1,654	17.1%
75-84	6,035	9,303	3,268	54.2%
85+	2,535	4,430	1,895	74.8%
All Ages	102,202	106,148	3,946	3.9%

SWDP

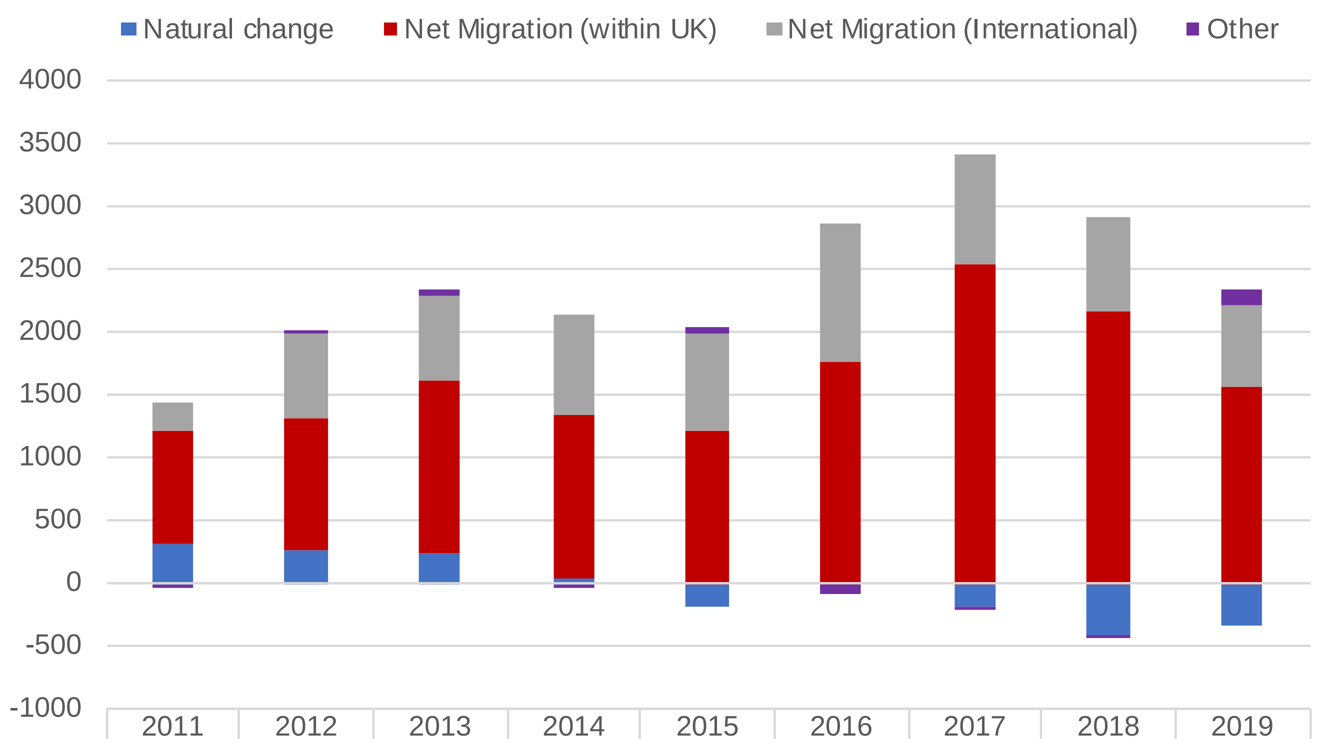
Age groups	2021	2041	Number change 2021-2041	% change 2021-2041
0-19	67,373	70,845	3,473	5.2%
20-39	68,537	73,009	4,472	6.5%
40-54	59,961	63,586	3,625	6.0%
55-64	44,821	43,741	-1,080	-2.4%
65-74	39,414	47,773	8,359	21.2%
75-84	25,435	40,265	14,830	58.3%
85+	10,472	19,804	9,332	89.1%
All Ages	316,013	359,024	43,011	13.6%

Source: ONS 2018-based population projections

Components of population change

2.20 The ONS publish mid-year population estimates at local authority level which includes an analysis of components of population change, that is natural change, national migration and international migration. The component analysis also includes ‘other’ change which can include boundary adjustment and military population moves. The data for the SWDP area 2011-2019 is shown in Figure 2.4. Over the period 2011 to 2019, migration has had the most positive impact on overall population.

Figure 2.4 Components of population change 2011 to 2019 for the SWDP area



	2011	2012	2013	2014	2015	2016	2017	2018	2019
Other	-46	24	34	-9	35	-68	-7	-19	115
Net Migration (International)	237	686	691	817	798	1113	869	750	656
Net Migration (within UK)	903	1057	1381	1297	1208	1761	2547	2177	1565
Natural change	305	263	234	36	-181	-10	-178	-421	-327

Source: ONS Components of Change

Note this is based on data for the three districts so migration between districts will be included in the net migration (within UK)

Migration trends 2011-2019

2.21 Table 2.7 presents a detailed analysis of internal and international migration by year and Table 2.8 summarises the data by broad age and year groups. The base numbers may differ slightly from the ONS components of change analysis due to rounding but provides useful insight into the age group of migrants, their origins and destinations and the relative importance of international migration.

2.22 Key trends in migration over the period 2011 to 2019 include:

- Net inflows each year which peaked in 2017 at 3,416. Largest inflows are from other areas of the West Midlands and these have been sustained throughout the period. Some net outflows to the rest of England, Wales and Northern Ireland. There has been a sustained level of international net in-migration
- In terms of migration by age group:
  - During 2011-19, net inflows of the 30-64 age group has been the dominant migration flow, with people moving from both neighbouring areas within the West Midlands and from elsewhere in the UK.
  - For the under 30 cohort, there has been a net in-migration driven by international migration but this has been counteracted with outflows to the rest of the UK.
  - For the 65+ age group, overall net inflows are also evidenced, with people moving from both neighbouring areas within the West Midlands and from elsewhere in the UK.

2.23 An analysis of migration flows indicates that both shorter and longer-distance national migration and net international inflows of younger people have driven population growth across the SWDP area.

Table 2.7 National and international migration by year

YEAR	SWDP area	REST OF WORCESTERSHIRE				ELSEWHERE WEST MIDLANDS				OTHER NEIGHBOURING AREAS / ELSEWHERE UK							TOTAL (UK internal)	International	TOTAL (internal & international)
		Bromsgrove	Redditch	Wyre Forest	Worcestershire TOTAL	Stratford-on-Avon	Herefordshire, County of	Shropshire	Rest of West Midlands	Cotswold	Forest of Dean	Tewkesbury	ENGLAND (rest of)	SCOTLAND	NORTHERN IRELAND	WALES			
2011	*Migrated OUT to*	330	242	506	1,078	313	627	148	1,488	165	112	323	5,018	12	151	576	10,012	1,256	11,268
	Migrated IN from	472	347	569	1,387	356	767	143	1,956	190	88	297	4,998	23	141	552	10,900	1,493	12,393
	NET	142	105	63	309	43	140	-5	469	26	-25	-26	-19	11	-11	-24	887	237	1,124
2012	*Migrated OUT to*	410	213	549	1,172	298	739	303	1,578	173	107	390	5,222	12	158	634	10,787	909	11,696
	Migrated IN from	552	361	722	1,635	411	760	292	2,229	198	116	357	5,081	21	136	601	11,838	1,595	13,433
	NET	142	148	173	463	113	21	-11	651	26	9	-33	-141	9	-21	-32	1,052	686	1,738
2013	*Migrated OUT to*	387	264	668	1,319	316	737	252	1,548	173	116	368	4,982	24	134	593	10,562	878	11,440
	Migrated IN from	564	386	651	1,601	454	774	318	2,322	227	123	368	5,045	25	127	559	11,943	1,569	13,512
	NET	177	122	-17	282	138	36	66	773	54	8	0	63	1	-7	-34	1,381	691	2,072
2014	*Migrated OUT to*	430	238	642	1,310	338	771	323	1,654	176	127	404	5,326	26	177	578	11,210	1,008	12,218
	Migrated IN from	594	379	723	1,697	393	737	324	2,393	221	111	421	5,430	28	116	637	12,507	1,825	14,332
	NET	164	141	81	387	55	-35	0	739	45	-16	17	104	2	-61	59	1,297	817	2,114
2015	*Migrated OUT to*	408	227	653	1,289	332	686	303	1,703	177	118	370	5,283	23	153	653	11,090	1,075	12,165
	Migrated IN from	651	411	694	1,756	470	684	300	2,405	228	99	403	5,213	25	145	569	12,298	1,873	14,171
	NET	242	184	41	467	138	-2	-2	703	51	-19	33	-70	2	-8	-84	1,208	798	2,006
2016	*Migrated OUT to*	356	225	623	1,204	336	694	239	1,797	194	118	338	5,290	25	154	589	10,977	909	11,886
	Migrated IN from	613	529	750	1,892	454	756	305	2,456	243	98	476	5,311	20	139	588	12,738	2,022	14,760
	NET	257	305	126	688	118	62	66	659	49	-20	138	21	-5	-14	0	1,761	1,113	2,874
2017	*Migrated OUT to*	417	256	716	1,389	419	742	352	1,959	250	119	361	6,188	28	207	755	12,769	855	13,624
	Migrated IN from	739	545	828	2,112	576	792	365	3,016	257	118	613	6,648	29	152	639	15,316	1,724	17,040
	NET	322	289	112	723	157	50	13	1,057	7	-1	252	460	1	-56	-116	2,547	869	3,416
2018	*Migrated OUT to*	421	254	804	1,479	477	737	328	1,981	205	109	425	5,974	15	146	767	12,643	1,204	13,847
	Migrated IN from	759	472	784	2,016	506	817	363	2,912	246	123	498	6,447	32	148	712	14,820	1,954	16,774
	NET	338	219	-19	537	29	80	35	931	41	14	73	473	17	2	-55	2,177	750	2,927
2019	*Migrated OUT to*	414	271	672	1,356	446	697	282	2,202	252	102	512	6,407	24	152	815	13,246	1,098	14,344
	Migrated IN from	675	482	849	2,006	509	755	308	3,002	257	161	504	6,500	11	134	664	14,811	1,754	16,565
	NET	261	212	178	650	63	58	26	800	5	59	-7	93	-13	-18	-151	1,565	656	2,221

Sources:

Internal: ONS detailed estimates of by origin and destination by local authorities age and sex

International: ONS Detailed time series 2001 -2019 (Table: MYEB2)

Table 2.8 Summary of national and international migration by year group and age group

PERIOD	AGE GROUP	South Worcestershire	REST OF WORCESTERSHIRE				ELSEWHERE WEST MIDLANDS				OTHER NEIGHBOURING AREAS / ELSEWHERE UK							TOTAL (UK internal)	International	TOTAL (internal & international)
			Bromsgrove	Redditch	Wyre Forest	Worcestershire TOTAL	Stratford-on-Avon	Herefordshire, County of	Shropshire	Rest of West Midlands	Cotswold	Forest of Dean	Tewkesbury	ENGLAND (rest of)	SCOTLAND	NORTHERN IRELAND	WALES			
2011-2013	<30	Migrated OUT to	512	363	748	1,623	374	853	347	2,898	223	166	420	9,505	27	223	1,215	17,875	1,580	19,455
		Migrated IN from	635	481	816	1,932	486	1,026	398	3,644	252	187	351	8,676	42	209	1,180	18,383	3,054	21,437
		NET	122	118	68	309	112	172	50	745	29	22	-69	-829	16	-14	-35	509	1,474	1,983
	30-64	Migrated OUT to	478	276	782	1,535	416	1,025	280	1,497	208	120	510	4,636	19	187	447	10,879	1,372	12,251
		Migrated IN from	761	533	921	2,214	613	981	265	2,381	294	105	534	5,241	24	146	397	13,195	1,445	14,640
		NET	283	257	139	679	197	-43	-15	884	86	-15	24	605	5	-41	-50	2,315	73	2,388
	65+	Migrated OUT to	137	81	194	411	136	226	76	219	80	49	152	1,082	2	33	140	2,606	91	2,697
		Migrated IN from	193	80	206	478	121	294	90	578	70	34	137	1,180	2	49	135	3,170	158	3,328
		NET	56	-1	12	67	-15	68	14	359	-10	-15	-14	98	0	16	-5	563	67	630
2014-2016	<30	Migrated OUT to	520	337	802	1,658	391	828	421	3,407	201	159	413	9,996	33	224	1,164	18,896	1,666	20,562
		Migrated IN from	725	580	935	2,240	515	954	478	3,946	268	154	469	8,463	52	198	1,154	18,892	3,473	22,365
		NET	205	243	133	582	124	126	56	539	67	-5	56	-1,533	19	-25	-10	-4	1,807	1,803
	30-64	Migrated OUT to	498	263	860	1,621	442	1,095	313	1,498	261	156	511	4,659	37	210	461	11,262	1,259	12,521
		Migrated IN from	859	594	926	2,380	656	912	318	2,666	323	119	664	5,798	17	156	455	14,464	1,975	16,439
		NET	362	331	66	759	214	-182	5	1,168	63	-38	153	1,139	-19	-53	-6	3,202	716	3,918
	65+	Migrated OUT to	177	91	257	524	173	229	131	250	85	47	187	1,244	4	51	195	3,119	67	3,186
		Migrated IN from	273	145	306	725	145	310	134	790	101	35	167	1,676	3	36	159	4,280	272	4,552
		NET	97	55	49	201	-28	80	3	540	16	-12	-20	431	0	-15	-37	1,161	205	1,366
2017-2019	<30	Migrated OUT to	573	407	944	1,924	556	844	452	3,953	280	161	524	11,600	34	228	1,440	21,995	1,736	23,731
		Migrated IN from	853	581	994	2,428	598	1,090	520	4,807	298	212	635	10,500	41	184	1,270	22,584	3,307	25,891
		NET	281	174	50	505	41	246	69	854	19	51	111	-1,100	7	-45	-170	589	1,571	2,160
	30-64	Migrated OUT to	501	282	949	1,733	556	1,018	401	1,876	337	131	579	5,505	30	207	691	13,064	1,331	14,395
		Migrated IN from	996	710	1,128	2,834	759	925	354	3,326	334	156	782	7,097	26	189	513	17,295	1,868	19,163
		NET	495	427	179	1,101	203	-94	-47	1,450	-3	25	203	1,592	-4	-18	-178	4,231	537	4,768
	65+	Migrated OUT to	178	92	298	568	229	314	108	313	90	38	195	1,464	3	69	206	3,598	90	3,688
		Migrated IN from	324	209	339	872	234	349	161	919	128	34	199	1,991	4	53	216	5,159	257	5,416
		NET	145	118	41	305	5	35	52	606	38	-4	4	527	1	-17	9	1,561	167	1,728

Sources:

Internal: ONS detailed estimates of by origin and destination by local authorities age and sex

International: ONS Detailed time series 2001 -2019 (Table: MYEB2)

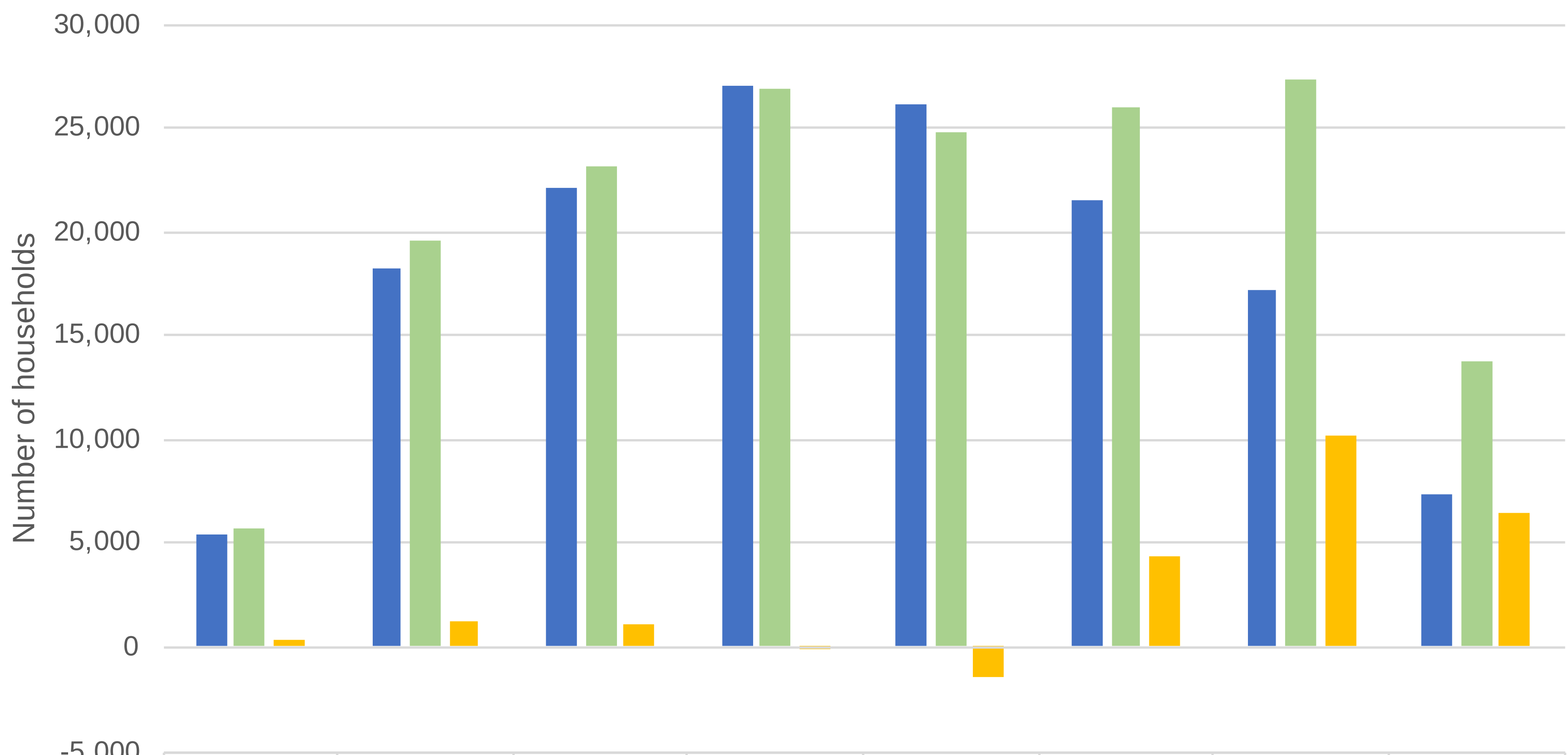
Household projections

2.24 The ONS produces household projections which are based on population projections. The ONS estimates the proportions of people who are likely to be household reference people by age, gender and household type based on census data. Variant household projections are also produced.

2.25 According to the 2018-based principal ONS household projections there are 145,010 households across the SWDP area borough in 2021 and this is projected to increase by 22,220 (15.3%) to 167,230 by 2041.

2.26 Table 2.9 provides a detailed breakdown of household type by the age of Household Reference Person to 2041. Data shows that the overall household type profile is not expected to change to 2041, although the main increases will be in single and other households with two or more adults. However, as illustrated in Figure 2.5, there will be a marked increase in the number of households where the Household Reference Person is aged 65 or over and this will be the dominant driver of household change over the 2021 to 2041 period.

Figure 2.5 Profile of households by age of Household Reference Person 2021 and 2041 and overall change



	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+
2021	5,438	18,262	22,065	26,952	26,201	21,561	17,140	7,390
2041	5,795	19,574	23,186	26,823	24,747	25,939	27,361	13,805
Change	357	1,312	1,121	-129	-1,454	4,378	10,220	6,415

Source: 2018-based ONS household projections

Table 2.9 Household types and change 2021-2041 across the SWDP area									
Year and household type	**Age of household reference person (HRP)**								
2021	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65-74**	**75-84**	**85+**	**TOTAL**
One Person	1,732	4,539	5,232	6,313	7,545	7,605	7,639	4,704	45,310
Household with 1 dependent child	1,162	3,927	4,926	5,532	2,290	318	118	39	18,314
Household with 2 dependent children	404	2,807	5,585	4,436	987	97	19	2	14,336
Household with 3 or more dependent children	172	1,304	1,964	1,255	229	20	1	0	4,946
Other households with two or more adults	1,969	5,684	4,358	9,416	15,150	13,521	9,363	2,645	62,105
Total	5,438	18,262	22,065	26,952	26,201	21,561	17,140	7,390	145,010
2041	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65-74**	**75-84**	**85+**	**TOTAL**
One Person	1,822	4,833	5,405	6,144	7,067	9,153	12,094	8,611	55,129
Household with 1 dependent child	1,244	4,218	5,156	5,547	2,085	371	185	81	18,888
Household with 2 dependent children	436	3,028	5,949	4,572	896	111	31	4	15,027
Household with 3 or more dependent children	185	1,395	2,075	1,286	203	23	2	0	5,168
Other households with two or more adults	2,107	6,099	4,601	9,274	14,496	16,281	15,049	5,109	73,017
Total	5,795	19,574	23,186	26,823	24,747	25,939	27,361	13,805	167,230
Change 2021-2041	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65-74**	**75-84**	**85+**	**TOTAL**
One Person	90	294	173	-170	-478	1,548	4,455	3,907	9,820
Household with 1 dependent child	82	290	231	15	-205	53	67	41	575
Household with 2 dependent children	33	221	363	137	-91	15	12	2	691
Household with 3 or more dependent children	13	91	111	31	-26	3	1	0	223
Other households with two or more adults	138	415	243	-142	-654	2,760	5,686	2,465	10,912
Total	**357**	**1,312**	**1,121**	**-129**	**-1,454**	**4,378**	**10,220**	**6,415**	**22,220**

Source: 2018-based ONS household projections

Defining the Housing Market Sub-area: household migration and travel to work

2.27 PPG asks councils to consider the extent to which their local authority area is a self-contained housing market area. This remains an important consideration for the council as the degree of interaction may require policy responses.

Household migration

2.28 Data reported in the 2011 Census illustrates the extent to which the SWDP area can be described as a self-contained housing market area based on migration data. Planning Advisory Service guidance recommends that when migration data are tested against the PPG criterion for self-containment, at least 70% of all migration excluding long-distance migration should be contained within the Housing Market Sub-area. A suitable test are two migration containment ratios:

- **Supply side (origin):** moves within the area divided by all moves whose origin is in the area, excluding long-distance moves; and
- **Demand side (destination):** moves within the area divided by all moves whose destination is in the area, excluding long-distance migration.

2.29 Table 2.10 presents the relevant migration data for SWDP and the individual local authority SHMA reports provide further detail of interactions between the areas. Of the total 29,316 moving residents in the year preceding the census, 66% originated in the SWDP area, 15.9% from elsewhere in the West Midlands, 2.7% from the South West and 15.3% from elsewhere in the UK. Excluding long-distance moves (elsewhere in the UK), the base is 24,286 movers of whom 78% originated in the SWDP area.

2.30 Table 2.11 summarises the migration containment ratios that apply to the origin and destination of moving residents. In line with former PPG, this excludes long-distance migration (which in this case is taken as moves from outside the West Midlands). Based on these criteria, the origin containment ratio is 78% and the destination is 79.7%. This indicates high level of self-containment in terms of population migration.

Table 2.10	Population movement by origin and destination					
Origin/	Supply Side (Origin)			Demand Side (Destination)		
	All Moves		Excluding Long Distance Moves	All Moves		Excluding Long Distance Moves
Destination	Number	%	%	Number	%	%
SWDP area	19,362	66.0	78.0	19,362	66.0	79.7
Elsewhere in the West Midlands	4,671	15.9	18.8	3,806	13.0	15.7
South West	789	2.7	3.2	1,118	3.8	4.6
Elsewhere in the UK	4,494	15.3		5,057	17.2	
Total	29,316	100	100.0	29,343	100	100.0
Base (excluding long-distance moves)			24,286			29,343

Source: 2011 Census table MM01CUK_ALL

Table 2.11	Migration containment ratios		
Origin	Moves within the area	All moves originating in the area	Containment Ratio
	19,362	24,822	**78.0%**
Destination	Moves within the area	All moves whose destination is in the area	Containment Ratio
	19,362	24,286	**79.7%**

Travel to work

2.31 The 2011 Census provides an analysis of travel to work (TTW) patterns and the extent to which residents in the SWPD area travel to other areas together with details of how many people commute into the area. Table 2.12 presents this data and indicates that 74.2% of people who live in SWDP area work in the area; by comparison, 76.6% of workers in the SWDP area, live in the area. This indicates that the SWDP area is a functional economic area and also has wider links to other areas in the West Midlands in particular.

Table 2.12 2011 Census commuting flows: workers (aged 16-74 years)			
Where do people who live in the SWDP area work?			
Live	Work	Number	%
SWDP area	SWDP area	98,692	74.2
	Elsewhere in the West Midlands	13,064	9.8
	South West	5,803	4.4
	Elsewhere in the UK	15,469	11.6
	Workers	**133,028**	**100.0**
Where do people who work in the SWDP area live?			
Live	Work	Number	%
SWDP area	SWDP area	98,692	76.6
Elsewhere in the West Midlands		14,069	10.9
South West		2,520	2.0
Elsewhere in the UK		13,585	10.5
	Jobs	**128,866**	100.0

Source: 2011 Census

2.32 In terms of defining market areas, the ONS provides a definition of Travel to Work (TTW) areas as follows:

'The current criterion for defining TTWs is that generally at least 75% of an area's resident workforce in the area and at least 75% of the people who work in the area also live in the area…however, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted' (source: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/commutingtoworkchangestotraveltoworkareas/2001to2011

2.33 On this basis, it is concluded that the SWDP area can be considered to be self-contained in terms of the travel-to-work patterns of its own resident working population.

Conclusions on Housing Market Area

2.34 The evidence suggests that the SWDP area is a self-contained housing market area both in terms of migration and travel to work. This corroborates the findings of the Worcestershire Economic Development Needs Assessment (September 2018) which concludes in paragraph 6.6 that 'the primary functional economic market area for the South Worcestershire area can be approximated by the Worcestershire County area. A broader area extending to Stratford-upon-Avon, Cotswold, Tewkesbury and Cheltenham local authorities in the south and east and Birmingham in the north would be an approximation of a secondary functional economic area for South Worcestershire.' This evidence provides continued justification for the South Worcestershire Development Plan area.

Income data

2.35 There are a range of income data sources available to inform this study which are now summarised. 2021 CAMEO income data provide range, quartile and average data of gross household income. ONS Annual Survey of Hours and Earnings data provides gross earnings of economically active residents at district level. Data for the SWDP area and individual districts is shown in Table 2.13.

Table 2.13 Household income and individual earnings

Cameo 2021 Household income				
Income	Malvern Hills	Worcester	Wychavon	South Worcestershire
<£10k	2.3%	2.3%	2.4%	2.3%
£10k to <£20k	12.3%	24.3%	16.3%	18.0%
£20k -<£30k	19.4%	23.5%	15.7%	19.3%
£30k-<£40k	25.5%	23.4%	19.2%	22.3%
£40k-<£50k	23.3%	16.5%	24.6%	21.5%
£50k-<£75k	15.8%	9.7%	20.1%	15.5%
£75k or more	1.4%	0.3%	1.7%	1.1%
Total	100.0	100.0%	100.0%	100.0%
Lower Quartile	£25,000	£15,000	£25,000	£25,000
Median	£35,000	£25,000	£35,000	£25,000
Average	£40,801	£32,541	£40,994	£29,115
ONS Annual Survey of Hours and Earnings 2020				
Income	Malvern Hills	Worcester	Wychavon	South Worcestershire
Lower Quartile	£18,671	£20,748	£21,865	£20,428
Median	£22,812	£27,801	£28,161	£26,258
Average	£35,990	£34,389	£36,908	£35,762

Sources: 2021 CAMEO; ONS Annual Survey of Hours and Earnings 2020

Note: CAMEO data reports income bands and for SWDP the lower quartile and median incomes both fall within the £20,000 to £29,999 band which is reported as £25,000 in the table.

Summary

2.36 Across the SWDP area there are an estimated 142,080 dwellings and 136,365 households and 2.8% of dwellings are vacant.

2.37 In terms of occupied dwelling stock:

- The 2011 Census reported 69.7% of occupied dwellings are owner occupied, 14.9% are private rented and 15.4% are affordable (including social/affordable renting and shared ownership). The proportion of affordable has increased to around 16.3% by 2020;
- 74.5% of dwellings are houses (19.6% terraced, 26.7% semi-detached and 28.2% detached), 15.2% are flats and 10.3% are bungalows.;
- 9.8% of dwellings have one bedroom, 25.8% two bedrooms, 43.2% three bedrooms and 21.1% four or more bedrooms; and
- 29.4% of dwellings were built before 1945, 35.3% between 1945 and 1982 and 35.3% since 1983. An estimated 16.4% of all dwelling stock is non-decent.

2.38 Over the 14 years 2006/07 to 2019/20, 17,773 net new dwellings have been delivered across the SWDP area. In the past 5 years to 2019/20, 9,230 have been built (1,846 annual average) of which 29.5% were affordable.

2.39 The population in 2021 was around 316,000 and this is projected to increase by around 43,000 to 359,000 by 2041, with the largest increases across older age groups. Latest 2018-based ONS household projections suggest a total of 145,010 households in 2021 and this is projected to increase by 22,250 (15.3%) to 167,230 by 2041. Largest increases will be one person and other households with two or more adults, and the increase in the number of households with a Household Reference Person aged 65 and over will be a dominant driver of household change.

2.40 An analysis of migration flows indicates that both shorter and longer-distance national migration and net international inflows of younger people have driven population growth across the SWDP area.

2.41 The SWDP area is a self-contained housing market area both in terms of migration and travel to work. It is therefore an appropriate market area for the purposes of Local Plan policy making.

3. Price, rents and affordability

Introduction

3.1 This chapter sets out the cost of buying and renting properties across the SWDP area. The affordability of tenure options is then considered with reference to local incomes along with the incomes of key workers and households on minimum/living wages.

House price trends

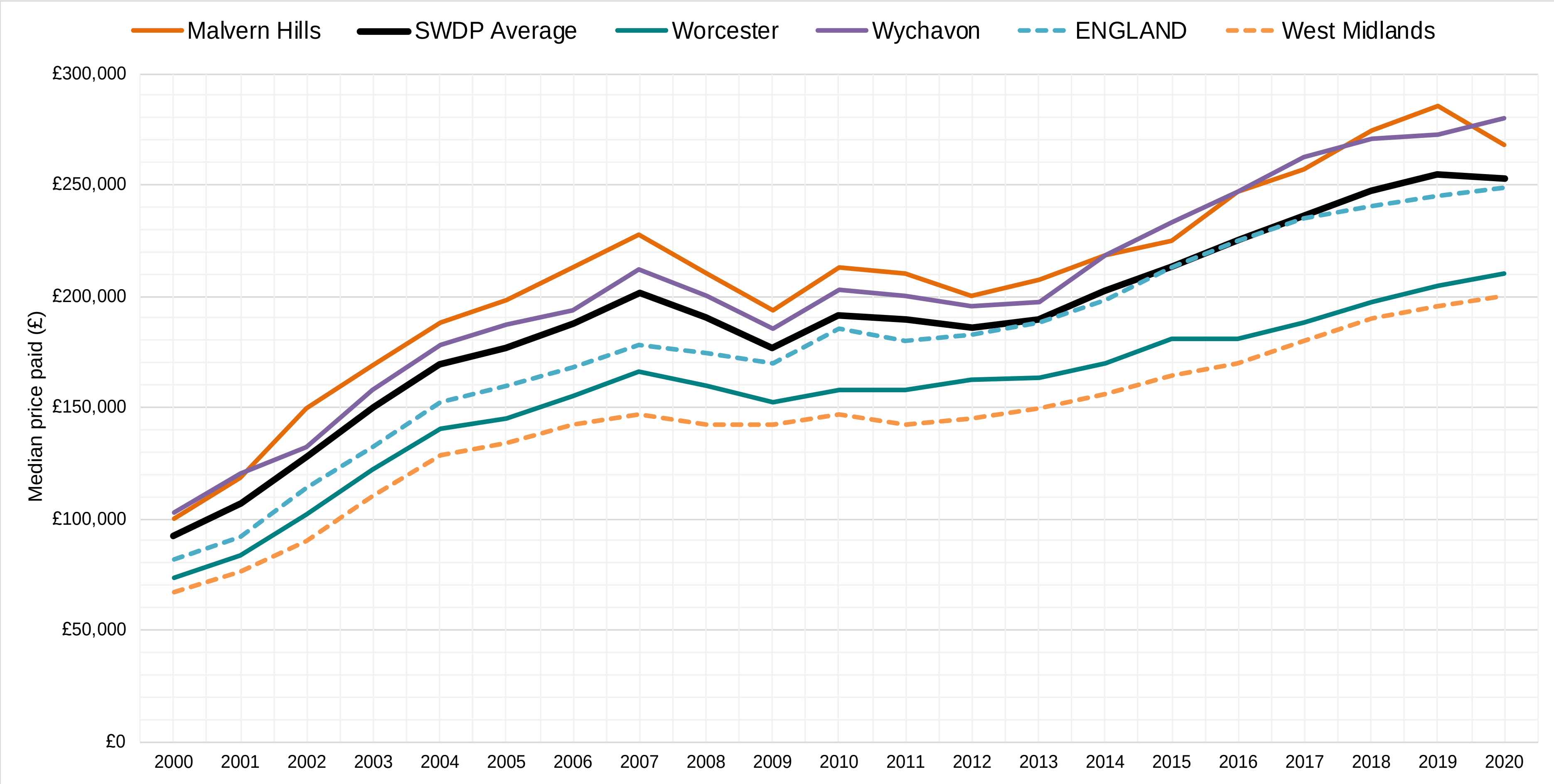
3.2 Figure 3.1 shows how median house prices in the SWDP area have changed over the years 2000 to 2020, based on full-year Land Registry price paid data. This is compared with the West Midlands and England.

3.3 Prices across the SWDP are consistently higher than West Midlands prices and broadly in alignment with England prices. Within SWDP, prices in Malvern Hills and Wychavon are highest and Worcester prices are the lowest, although they remain higher than the West Midlands average.

3.4 Table 3.1 sets out median house price change over the period, ranked in order of percentage change from highest to lowest. This indicates that with the SWDP area, the rate of growth has ranged between 168% (Malvern Hills) and 188% (Worcester), but this has been a lower level of change overall than across the West Midlands and England. Table 3.2 sets out similar data for lower quartile prices.

3.5 During 2020, median prices were £210,000 in Worcester, £267,750 in Malvern Hills and £280,000 in Wychavon.

Figure 3.1 Median house price trends 2000 to 2020: SWDP districts and overall average, West Midlands and England



Source: Data produced by Land Registry © Crown copyright 2021

Table 3.1 Comparative median house price change 2000-2020 with neighbouring districts, West Midlands and England

Location	Median price (£)		% Change 2000-2020
	2000	2020	
Forest of Dean	74,500	233,998	214.1
ENGLAND	82,000	249,000	203.7
Tewkesbury	89,250	269,995	202.5
Shropshire	75,000	225,000	200.0
West Midlands	67,000	200,000	198.5
Herefordshire, County of	83,500	242,500	190.4
Worcester	**73,000**	**210,000**	**187.7**
Redditch	77,000	216,000	180.5
Wyre Forest	69,000	192,000	178.3
Wychavon	**103,000**	**280,000**	**171.8**
Cotswold	132,500	357,500	169.8
Malvern Hills	**100,000**	**267,750**	**167.8**
Bromsgrove	111,000	290,000	161.3
Stratford-upon-Avon	123,500	315,000	155.1

Source: Data produced by Land Registry © Crown copyright 2021

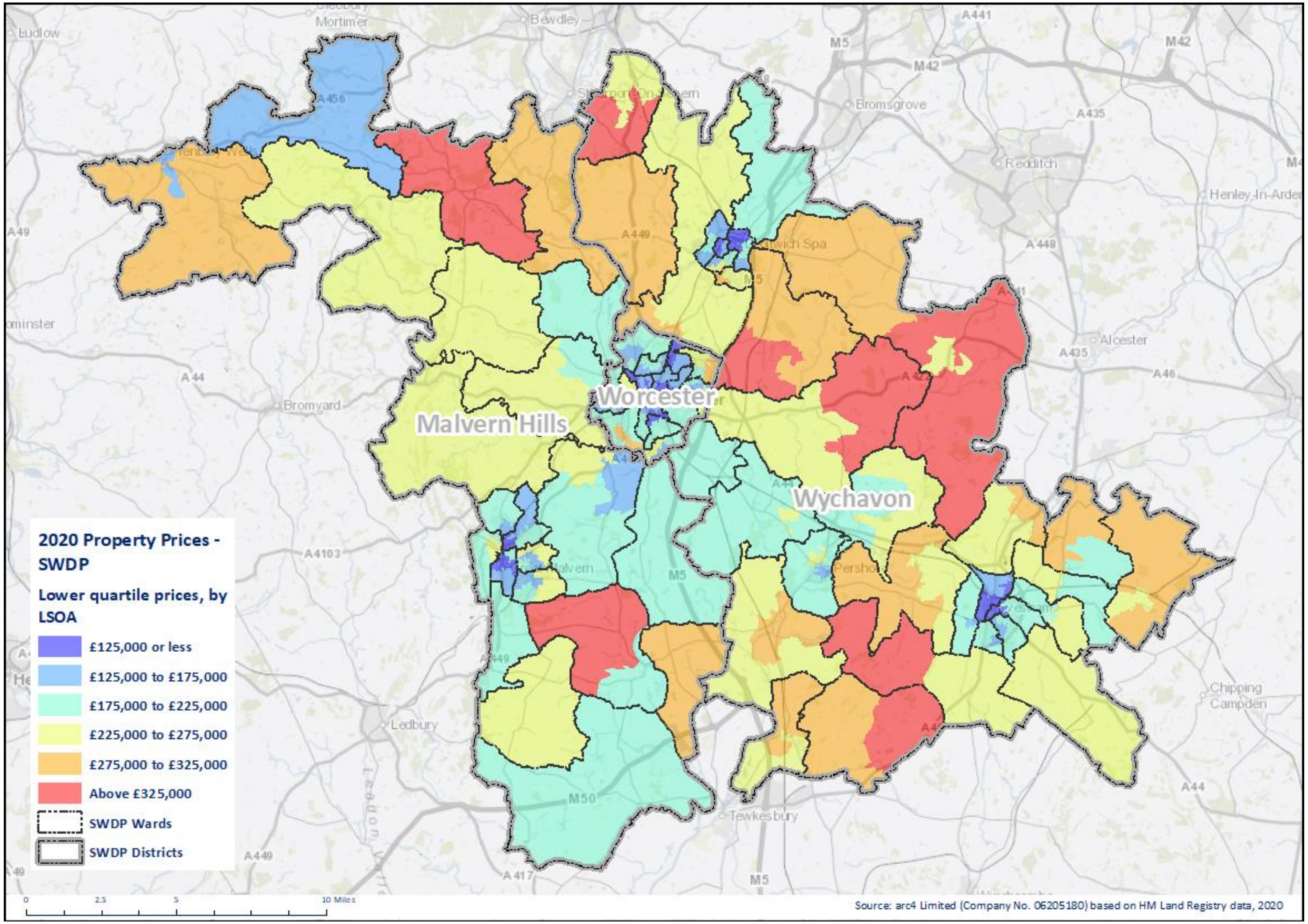
Table 3.2 Comparative lower quartile (LQ) house price change 2000-2020 with neighbouring districts, West Midlands and England

Location	LQ price (£)		% Change 2000-2020
	2000	2020	
Forest of Dean	55,000	175,000	218.2
ENGLAND	47,000	147,500	213.8
Tewkesbury	68,950	212,000	207.5
Shropshire	54,000	164,000	203.7
West Midlands	60,000	182,000	203.3
Herefordshire, County of	72,000	213,500	196.5
Worcester	**56,000**	**163,000**	**191.1**
Redditch	72,250	209,975	190.6
Wyre Forest	56,950	165,000	189.7
Wychavon	**76,500**	**218,000**	**185.0**
Cotswold	59,950	170,500	184.4
Malvern Hills	**93,500**	**265,500**	**184.0**
Bromsgrove	54,000	150,000	177.8
Stratford-upon-Avon	85,000	235,000	176.5

Source: Data produced by Land Registry © Crown copyright 2021

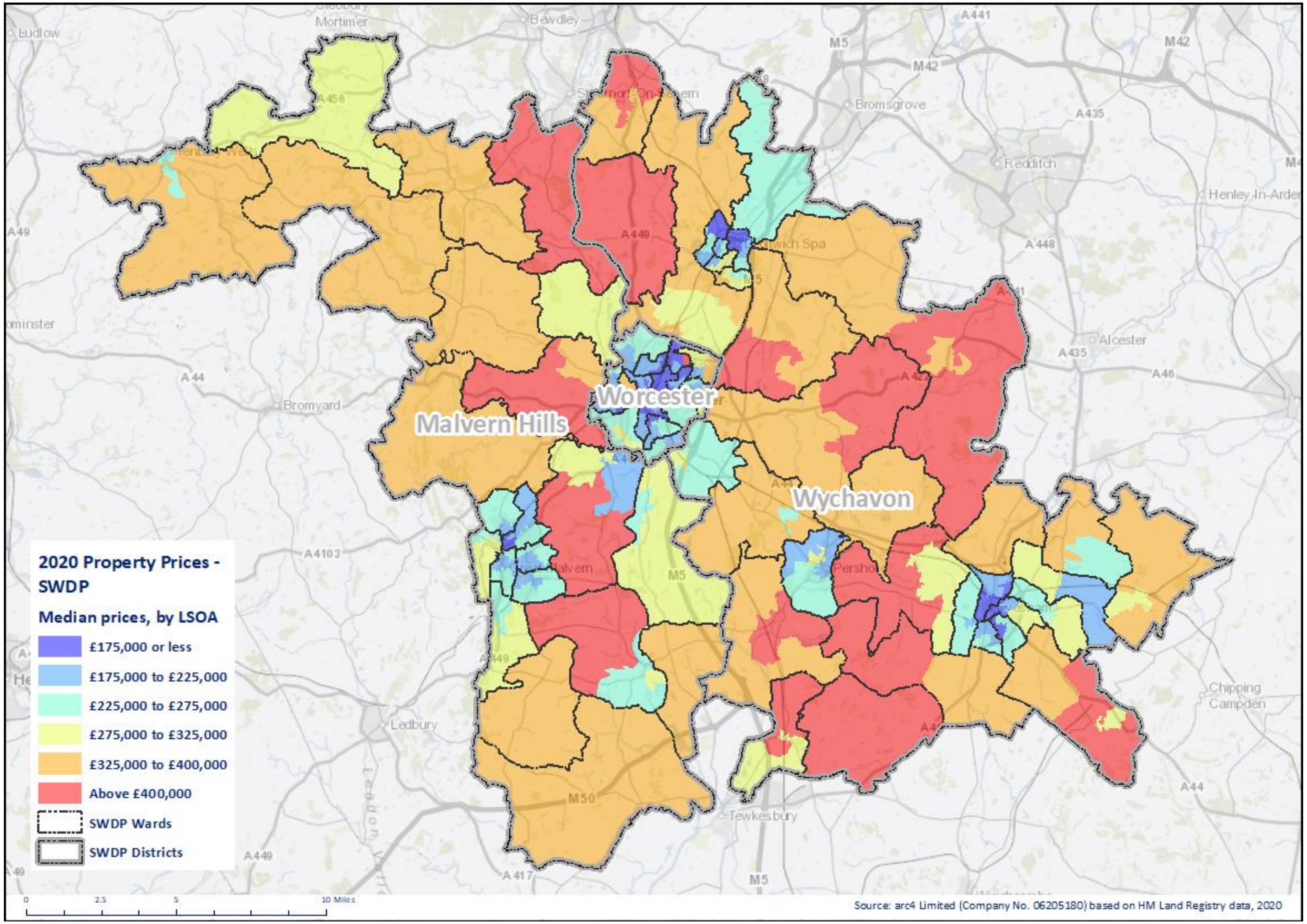
3.6 Maps 3.1 and 3.2 provide an illustration of LQ and median prices using Lower Super Output Area. The maps show a range of market prices, with lower prices in urban areas and highest prices across rural areas.

Map 3.1 Lower quartile house prices 2020 by Lower Super Output Area



Source: Data produced by Land Registry © Crown copyright 2021

Map 3.2 Median house prices 2020 by Lower Super Output Area



Source: Data produced by Land Registry © Crown copyright 2021

Private renting

3.7 Table 3.3 summarises private rental costs across the SWDP area and compares rents with the West Midlands and England over the period 2010 to 2020. Over this time lower quartile rents have increased by 11.3% and median rents have increased by 16.7% across the SWDP area, with highest increases in Wychavon and lowest in Malvern Hills.

3.8 Rental increases across the SWPD area as a whole have been lower than those for the West Midlands and England.

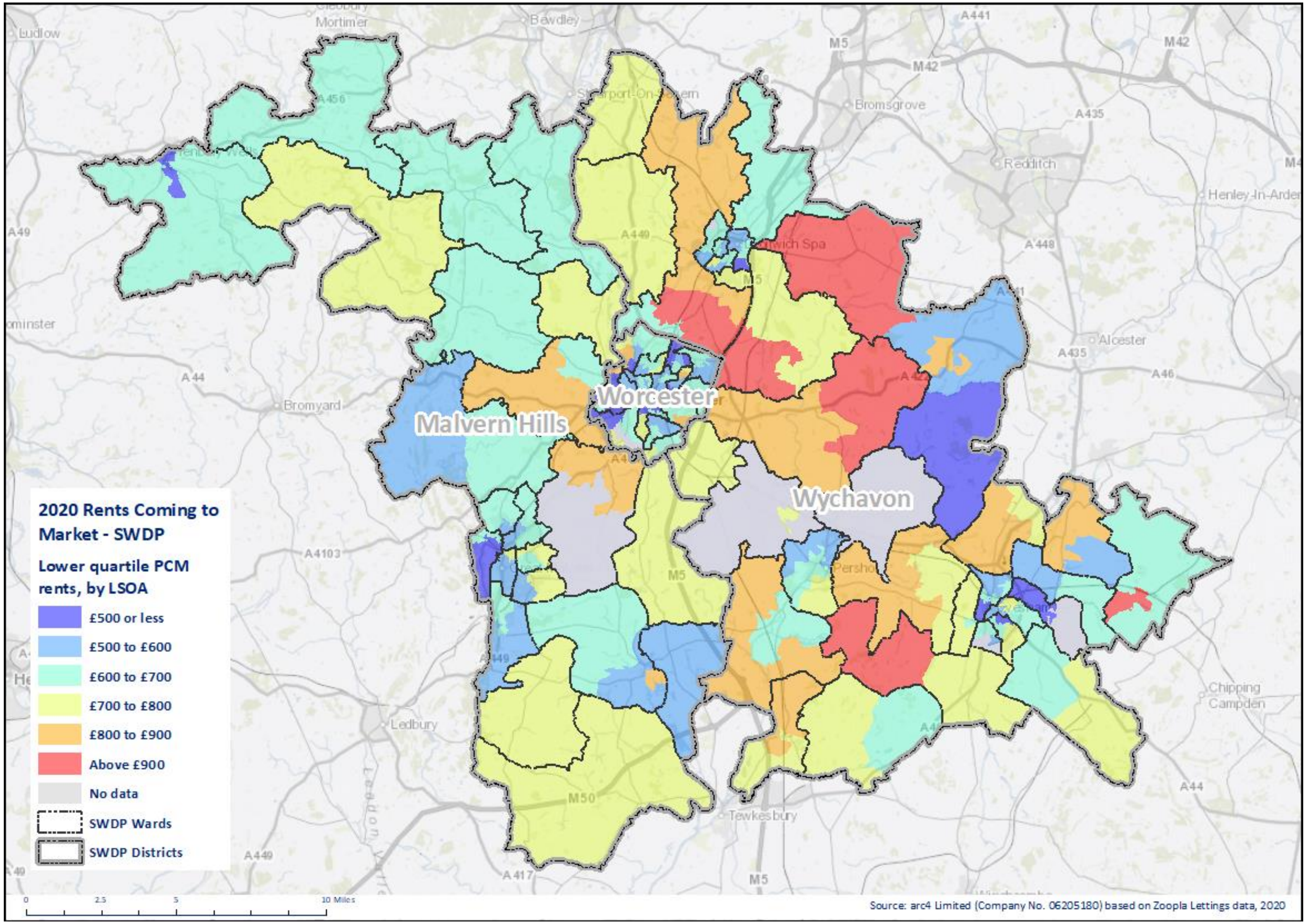
Table 3.3 Comparative lower quartile and median rental price 2010-2020

Location	Lower quartile price by year (£)		% change
	2010	2020	2010-2020
Malvern Hills	£594	£598	0.7%
Worcester	£472	£524	11.0%
Wychavon	£498	£650	30.5%
South Worcestershire	£494	£550	11.3%
West Midlands	£472	£550	16.5%
England	£598	£724	21.1%
Location	**Median price by year (£)**		**% change**
	2010	2020	2010-2020
Malvern Hills	£646	£702	8.7%
Worcester	£572	£659	15.2%
Wychavon	£594	£750	26.3%
South Worcestershire	£594	£693	16.7%
West Midlands	£546	£693	26.9%
England	£893	£1,148	28.6%

Source: Zoopla PPD 2021

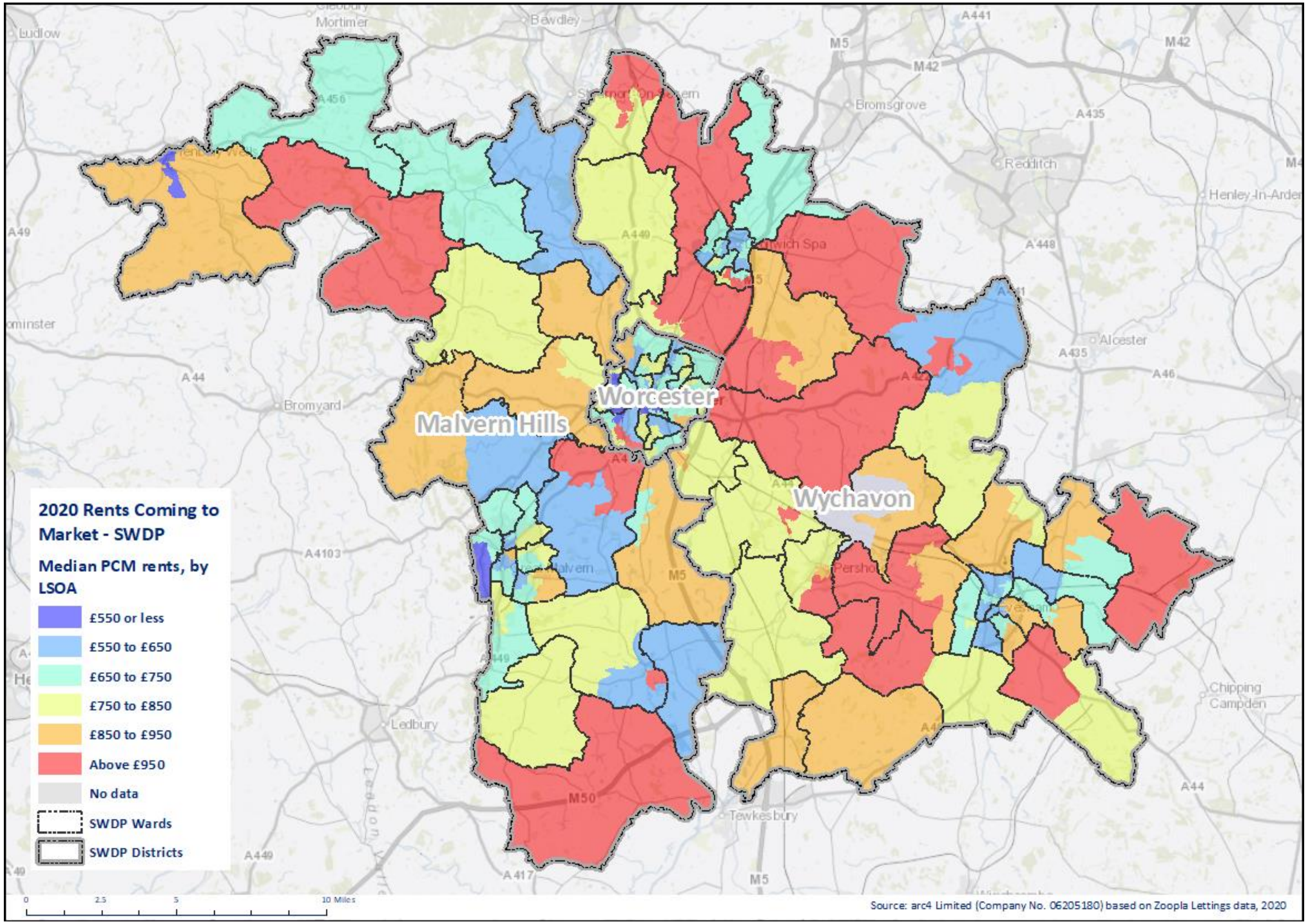
3.9 Variations in rental prices across the SWDP are illustrated in Map 3.3 (lower quartile) and Map 3.4 (median). The private rented sector accommodates a proportion of low-income households that are eligible for assistance with rental costs. Map 3.5 illustrates the proportion of households in receipt of housing benefit assistance across the SWDP area. This shows particular concentrations in urban areas.

Map 3.3 2020 lower quartile rents across SWDP by lower super output area



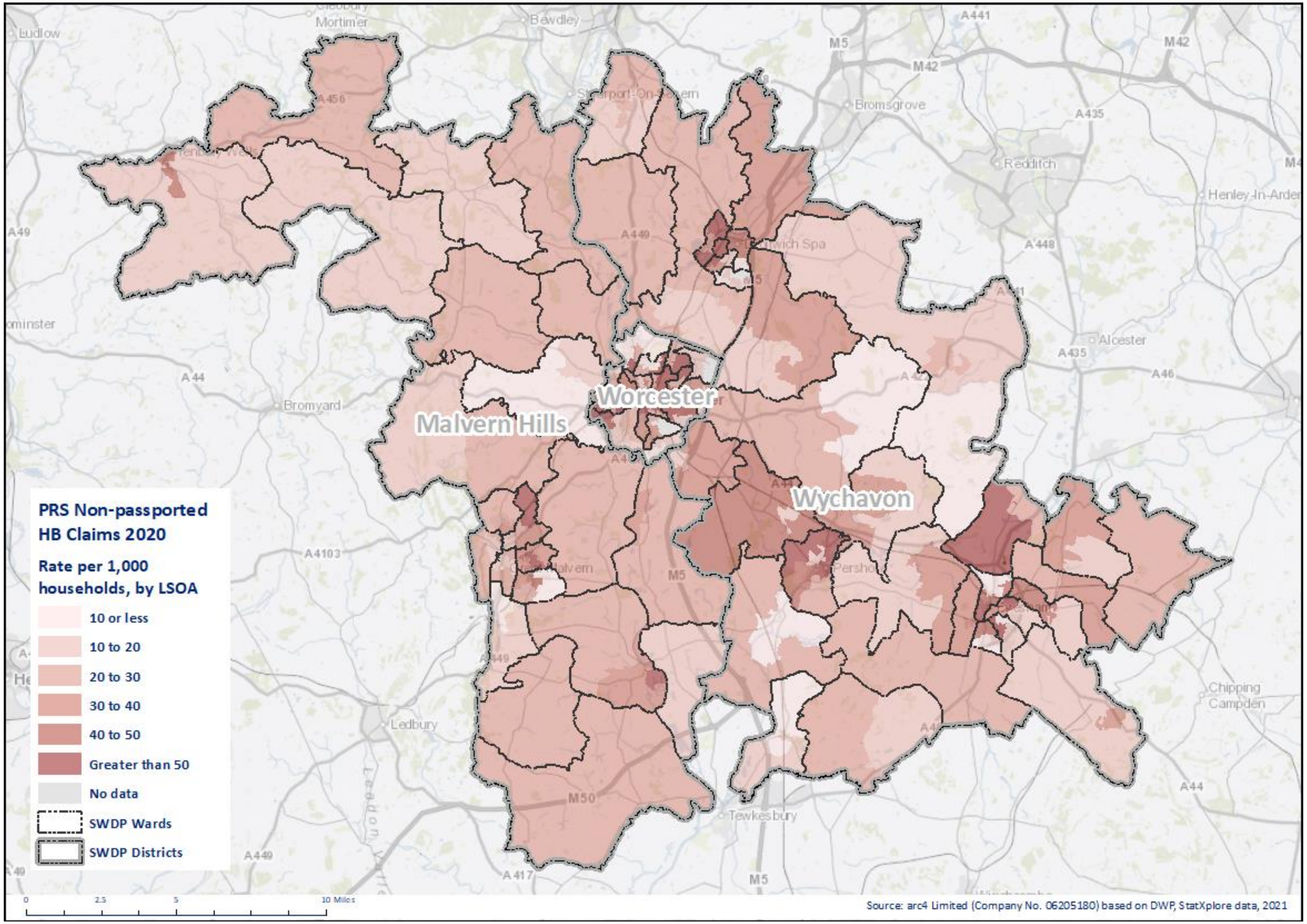
Source: Zoopla PPD 2021

Map 3.4 2020 median rents across SWDP by lower super output area



Source: Zoopla PPD 2021

Map 3.5 Private rented sector Non-Passported Housing Benefit 2020



Source: 2021 DWP Stat explore

3.10 The amount that can be claimed for assistance with rental costs is capped to a local allowance that varies by area. The cap is estimated by the Valuation Office Agency (VOA) and published in the form of a Local Housing Allowance (LHA) rate for a broad market area (BRMA). There are five BRMAs which cover the SWDP area (Table 3.4).

Table 3.4 Broad Rental Market Area Local Housing Allowance Rates (August 2021)

District	Broad Rental Market Area (BRMA)				
	Cheltenham	Worcester North	Worcester South	Warwickshire South	Gloucester
Malvern Hills	Yes	Yes	Yes		Yes
Worcester			Yes		
Wychavon	Yes	Yes	Yes	Yes	
No. of Bedrooms and weekly Local Housing Allowance rate (£)					
Shared accommodation rate / aged under 35	£78.59	£66.50	£84.27	£85.50	£78.59
1-bedroom rate	£126.58	£101.26	£115.07	£143.84	£103.56
2-bedroom rate	£159.95	£126.72	£143.84	£172.60	£138.08
3-bedroom rate	£195.62	£149.59	£172.60	£207.12	£172.60
4-bedroom rate	£275.01	£195.62	£218.63	£276.16	£218.63

Source: Valuation Office Agency

Relative affordability

3.11 The ONS produces national data on the ratio of earnings to house prices. Two sets of data are available: workplace-based and resident-based. For each, lower quartile and median ratios are produced. The data are based on Land Registry Price Paid data and ONS Annual Survey of Hours and Earnings data.

3.12 Table 3.5 sets out the 2019 lower quartile and median affordability ratios for the SWDP area districts and compares these with neighbouring authorities, the West Midlands and England. Using workplace-based median ratios to illustrate the data, prices are between 7x and 9.9x incomes across the SWDP local districts. This compares with 6.9x across the West Midlands and 7.8x across England.

Table 3.5 Relative affordability of lower quartile and median prices by local authority area, West Midlands and England (workplace-based and residence-based)

Locality	2019 Lower Quartile		2019 Median	
	Workplace-based	Residence-based	Workplace-based	Residence-based
Cotswold	13.05	12.17	13.47	11.5
Malvern Hills	11.42	10.86	11.27	9.93
Stratford-upon-Avon	11.82	10.49	11.26	9.66
Herefordshire, County of	9.16	8.62	9.31	8.95
Wychavon	10.07	9.08	9.61	8.78
Bromsgrove	10.49	8.96	10.05	8.35
Tewkesbury	8.92	9.10	8.07	8.34
Redditch	8.16	8.40	8.48	8.3
ENGLAND	7.27	7.27	7.83	7.83
Forest of Dean	8.31	7.57	9.44	7.64
Shropshire	7.57	7.29	7.97	7.32
Worcester	7.61	7.44	6.88	6.97
West Midlands	6.92	6.97	6.83	6.90
Wyre Forest	7.14	7.14	7.12	6.77

Source: ONS

Note: ratios sorted on median residence-based earnings

Relative affordability of housing tenure options and defining genuinely affordable housing

3.13 The relative cost of alternative housing options across the borough and housing market sub-areas has been considered from two perspectives. Firstly, analysis considers prevailing prices at housing market sub-area level across a range of market and affordable tenures and the incomes required to afford these properties. Secondly, analysis considers what is genuinely affordable to households based on local incomes and assumptions around the proportion of income that should be spent on renting and the multiples of income for buying. The analysis of what is genuinely affordable also considers the incomes of selected key workers and those on minimum and living wages.

3.14 The thresholds for what is affordable and not affordable are as follows:

- for renting, 25% of gross household income is used as the ‘tipping point’ for affordability, with properties not affordable if more than 25% of income is spent on rent. There is no official guidance on what proportion of income should be used. Former CLG SHMA Practice Guidance (2007) recommended 25% and Shelter suggest using 35% of net income; and
- for buying, affordability is based on a 3.5x gross household income multiple. Former CLG SHMA Practice Guidance (2007) recommended a 3.5x multiple for a household with a single earner and 2.9x for a dual earner.

3.15 Table 3.6 sets out the range of market and affordable tenures considered in analysis and any assumptions relating to the cost of properties. The cost of alternative affordable and market tenure options by districts within the SWDP area is set out in Table 3.7. Table 3.7 also shows the incomes needed to afford different tenure based on the 25% rental and 3.5x income multiples. Table 3.8 considers the impact of deposits on sale price across the SWDP area.

Table 3.6 Summary of tenure (including affordable options), price assumptions and data sources

Tenure	Tenure price assumptions	Affordability assumptions	Data Source
Social rent	2020 prices	25% of income	Regulator of Social Housing Statistical Data Return 2020
Affordable Rent	80% of average market rent	25% of income	Regulator of Social Housing Statistical Data Return 2020
Market Rent – lower quartile	2020 prices	25% of income	Zoopla 2020
Market Rent – median	2020 prices	25% of income	Zoopla 2020
Market Sale – lower quartile	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Market Sale – median	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Market Sale – average	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Shared ownership (50%)	Total price based on median price and 50% ownership. Mortgage based on 40%. 10% deposit required; annual service charge £395, Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x income for equity and 25% of income for rental element	Assumptions applied to Land Registry Price Paid data
Shared ownership (25%)	Total price based on median price and 25% ownership. Mortgage based on 20%, 5% deposit required, annual service charge £395. Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x income for equity and 25% of income for rental element	Assumptions applied to Land Registry Price Paid data
Help to buy	Total price based on median price. Mortgage based on 75% equity. 20% loan and deposit of 5%. Loan fee of 1.75% in year 6 of outstanding equity loan increasing annually from yr7 at RPI+1%	70% LTV, 3.5x income	Assumptions applied to Land Registry Price Paid data
Discounted home ownership 30%	70% of median price (note this is comparable to the proposed government First Home tenure option). Mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 30%	Assumptions applied to Land Registry Price Paid data
Discounted home ownership 25%	75% of median price mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 25%	Assumptions applied to Land Registry Price Paid data
Discounted home ownership 20%	80% of median price mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 20%	Assumptions applied to Land Registry Price Paid data

Table 3.7 Cost of alternative tenures by district and income required to be affordable

Tenure option	Price (2020)			
	Malvern Hills	Worcester	Wychavon	South Worcestershire
Social Rent (average)	£411	£371	£403	£395
Affordable Rent (monthly cost)	£562	£527	£600	£554
Market Rent - Lower Quartile	£598	£524	£650	£550
Market Rent - Median	£702	£659	£750	£693
Market Rent - Average	£805	£689	£882	£757
Market Sale - Lower Quartile	£198,625	£169,963	£207,000	£185,000
Market Sale - Median	£267,250	£210,000	£280,000	£250,000
Market Sale - Average	£328,310	£363,736	£345,209	£346,706
Shared ownership (50%)	£133,625	£105,000	£140,000	£125,000
Shared ownership (25%)	£66,813	£52,500	£70,000	£62,500
Help to buy	£267,250	£210,000	£280,000	£250,000
Discounted Home Ownership (30%)	£187,075	£147,000	£196,000	£175,000
Discounted Home Ownership (25%)	£200,438	£157,500	£210,000	£187,500
Discounted Home Ownership (20%)	£213,800	£168,000	£224,000	£200,000
Tenure option	**Income required (2020)**			
	Malvern Hills	**Worcester**	**Wychavon**	**South Worcestershire**
Social Rent (average)	£17,632	£15,909	£17,274	£16,938
Affordable Rent (monthly cost)	£24,069	£22,594	£25,714	£23,760
Market Rent - Lower Quartile	£28,704	£25,152	£31,200	£26,400
Market Rent - Median	£33,696	£31,632	£36,000	£33,264
Market Rent - Average	£38,620	£33,058	£42,323	£36,345
Market Sale - Lower Quartile	£51,075	£43,705	£53,229	£47,571
Market Sale - Median	£68,721	£54,000	£72,000	£64,286
Market Sale - Average	£84,422	£93,532	£88,768	£89,153
Shared ownership (50%)	£50,499	£39,990	£52,840	£47,333
Shared ownership (25%)	£41,623	£33,015	£43,540	£39,029
Help to buy	£53,450	£42,000	£56,000	£50,000
Discounted Home Ownership (30%)	£50,778	£39,900	£53,200	£47,500
Discounted Home Ownership (25%)	£54,404	£42,750	£57,000	£50,893
Discounted Home Ownership (20%)	£58,031	£45,600	£60,800	£54,286
CAMEO Income data				
Median income	£25,000	£15,000	£25,000	£25,000
Median income	£35,000	£25,000	£35,000	£35,000

Source: Data produced by Land Registry © Crown copyright 2020, Zoopla PPD 2020, MHCLG, RSH SDR 2020

Note affordability based on 25% of income for rents and 3.5x income for buying) by ward

Table 3.8 Impact of alternative deposits on sale price and income required for open market properties across the SWDP area

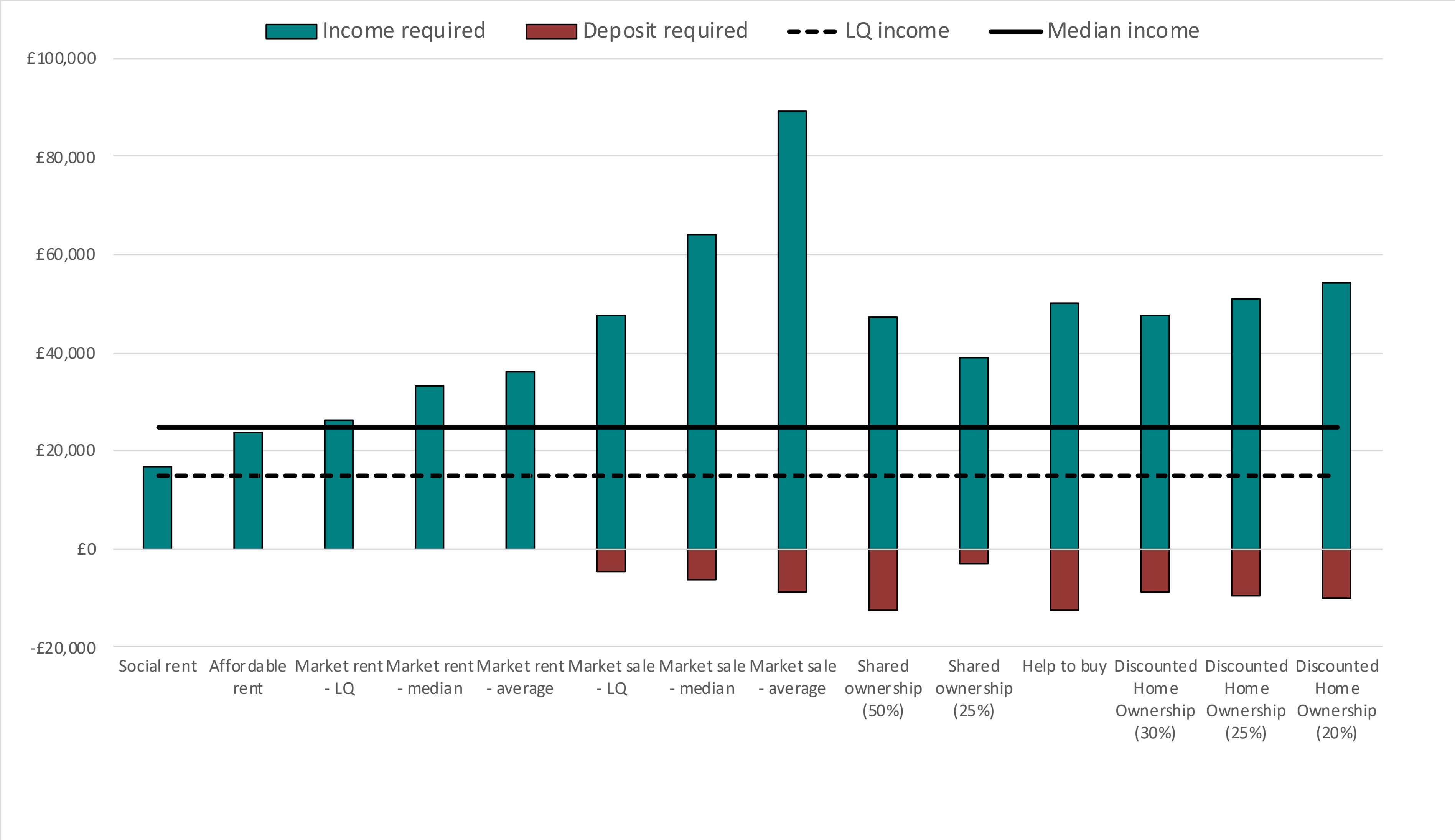
Market sale price	Amount of deposit				SWDP Price
	10%	20%	30%	40%	
Market sale - lower quartile	£166,500	£148,000	£129,500	£111,000	£185,000
Market sale - median	£225,000	£200,000	£175,000	£150,000	£250,000
Market sale - average	£311,400	£276,800	£242,200	£207,600	£346,000
Household income required (3.5x multiple)	10%	20%	30%	40%	
Market sale - lower quartile	£47,571	£42,286	£37,000	£31,714	
Market sale - median	£64,286	£57,143	£50,000	£42,857	
Market sale - average	£88,971	£79,086	£69,200	£59,314	
Household income required (5x multiple)	10%	20%	30%	40%	
Market sale - lower quartile	£33,300	£29,600	£25,900	£22,200	
Market sale - median	£45,000	£40,000	£35,000	£30,000	
Market sale - average	£62,280	£55,360	£48,440	£41,520	

3.16 Figure 3.2 summarises in graphical form the relative affordability of alternative tenures across the SWDP area, setting out the incomes and deposits required for different options set against prevailing lower quartile and median earnings derived from 2021 CAMEO data.

3.17 This indicates that households on lower quartile incomes cannot afford any tenure option/product at the current prices except for social renting. For households on median incomes, social/affordable and lower quartile market rents are affordable. By comparison, households on median incomes cannot afford market sales at any of the price points or affordable home ownership products without resorting to higher mortgage multiples than 3.5 or having higher deposits.

3.18 This comparison of local incomes with the cost of local house prices and rents illustrates the affordability challenge faced by residents within the SWDP area. It shows the particular challenge faced by households who do not have either existing equity or savings.

Figure 3.2 Household income and housing costs across the SWDP area



Source: Data produced by Land Registry © Crown copyright 2020, RSH SDR 2020, Zoopla PPD 2020

What is genuinely affordable housing in the SWDP context?

3.19 Having considered what a household needs to earn to afford alternative tenures, consideration is now given to the actual incomes of households across the borough and how this relates to prevailing prices. This analysis helps to establish what is genuinely affordable based on reasonable income multipliers for renting and buying. The analysis takes into account:

- lower quartile and median household incomes from the 2020 CAMEO data;
- 2020 entry-level incomes from a range of key worker occupations;
- incomes associated with 2020 minimum and living wages (using single, dual income and 1.5x income measures);
- the proportion of income a household would need to spend on rent;
- the extent to which affordable rental options are genuinely affordable to households; and
- the extent to which households could afford home ownership based on multiples of household income, with up to 3.5x being affordable.

Genuinely affordable rents

3.20 Having considered what a household needs to earn to afford alternative tenures, consideration is now given to the actual incomes of households across the SWDP and how this relates to current market prices and rents. The analysis helps to establish the extent to which different tenures are affordable and what are genuinely affordable prices and rents based on local incomes.

3.21 Table 3.9 focuses on the affordability of market renting and shows the cost of renting a lower quartile and median priced property by district; how this compares with incomes; and what would be genuinely affordable based on local incomes. For example, lower quartile rents are £598 across Malvern Hills where the lower quartile income is £2,083. This means that a household is spending 28.7% of income on rent. To be genuinely affordable, that is, costing no more than 25% of gross income, a lower quartile should be £521 each month and median rent should be £729 each month.

Genuinely affordable open market prices

3.22 Table 3.10 focuses on the affordability of home ownership and shows the cost of buying a lower quartile and median-priced property. This shows that prices across the SWDP area are in excess of 3.5x household incomes and SWDP-wide, a property should cost no more than £87,500 to be affordable to households on lower quartile and £122,500 to households and median incomes.

Table 3.9 Affordability of private rents by district and the SWDP area								
Local Authority	LQ Rent and Income				Median rent and income			
	Actual LQ rent 2020	LQ Gross household income 2021 (Monthly £)	% LQ income required to be spent on LQ rent	What would be an affordable rent based on actual LQ income	Actual Median rent 2020	Median Gross household income 2021 (Monthly £)	% median income required to be spent on median rent	What would be an affordable rent based on actual median income
Malvern Hills	£598	£2,083	28.7	£521	£702	£2,917	24.1	£729
Worcester	£524	£1,250	41.9	£313	£659	£2,083	31.6	£521
Wychavon	£650	£2,083	31.2	£521	£750	£2,917	25.7	£729
South Worcestershire	£550	£2,083	26.4	£521	£693	£2,917	23.8	£729

Key:

% of income spent on rent

Up to and including 25%	24
Between 25% and 35%	32
35% or more	40

Sources: Zoopla PPD 2020, household income from 2021 CAMEO

Table 3.10 Affordability of owner occupation by district and the SWDP area								
Local Authority	Actual LQ price 2020	LQ Gross household income 2021 (Annual £)	Income multiple required (assumes 10% deposit)	What would be an affordable property based on a 3.5x income multiple	Actual median price 2020	Median Gross household income 2021 (Annual £)	Income multiple required (assumes 10% deposit)	What would be an affordable property based on a 3.5x income multiple
Malvern Hills	£198,625	£25,000	7.2	£87,500	£267,250	£35,000	6.9	£122,500
Worcester	£169,963	£15,000	10.2	£52,500	£210,000	£25,000	7.6	£87,500
Wychavon	£207,000	£25,000	7.5	£87,500	£280,000	£35,000	7.2	£122,500
SWDP area	£185,000	£25,000	6.7	£87,500	£250,000	£35,000	6.4	£122,500

Key:

House price

5.2	Price is more than 4.5x household income (assuming 10% deposit
3.9	Price is between 3.5x and 4.5x household income (assuming 10% deposit)
2.9	Price is less than 3.5x household income (assuming 10% deposit)

Sources: Land Registry © Crown copyright 2020, household income from 2021 CAMEO

Affordability of prices and rents to selected key workers and households on minimum/living wages

3.23 The extent to which SWDP-wide open market rents are affordable to selected keyworkers and households on minimum and living wages are explored in Table 3.11. Key workers on entry-level grades are generally having to spend more than 25% of their income on rent.

3.24 Table 3.12 considers the income multiples needed to buy a property based on the incomes of selected key workers and households on minimum/living wages. Analysis assumed that a 10% deposit was available for market properties and indicates that multiples in excess of 3.5x were generally needed when buying a property. Prices that are genuinely affordable were also considered based on a 3.5x income multiple.

Table 3.11 Incomes of key workers and households on minimum/living wage and rental affordability

Income/Occupation/ Wage	Gross household income 2020 (Annual £)	Gross household income 2020 (Monthly £)	% income needed to afford LQ rent	% income needed to afford median rent	Genuinely affordable rent
			Monthly LQ Rent= £550	Monthly Median Rent= £693	
Police officer					
Pay Point 0	£21,402	£1,784	30.8	38.8	£446
Pay Point 2	£25,902	£2,159	25.5	32.1	£540
Pay Point 4	£28,158	£2,347	23.4	29.5	£587
Nurse					
Band 1	£18,005	£1,500	36.7	46.2	£375
Band 3	£19,337	£1,611	34.1	43.0	£403
Band 5	£24,907	£2,076	26.5	33.4	£519
Fire officer					
Trainee	£23,366	£1,947	28.2	35.6	£487
Competent	£31,144	£2,595	21.2	26.7	£649
Teacher					
Unqualified (min)	£18,169	£1,514	36.3	45.8	£379
Main pay range (min)	£25,714	£2,143	25.7	32.3	£536
Minimum/Living Wage					
Age 25 and over					
Single household	£15,696	£1,308	42.0	53.0	£327
1xFull-time, 1xPart-time	£23,544	£1,962	28.0	35.3	£491
Two working adults	£31,392	£2,616	21.0	26.5	£654
Age 21 to 24					
Single household (21-24)	£14,760	£1,230	44.7	56.3	£308
1xFull-time, 1xPart-time	£22,140	£1,845	29.8	37.6	£461
Two working adults	£29,520	£2,460	22.4	28.2	£615

Key

(pink)	More than 35% of income spent on rent
(amber)	Between 25% and 35% of income spent on rent
(green)	Less than 25% of income spent on rent

Table 3.12 Incomes of households, selected key workers and households on minimum/living wage and open market prices

		Property Prices								
		LQ	Median	Shared ownership (50%)	Shared ownership (25%)	Help to buy	Discounted Home Ownership (30%)	Discounted Home Ownership (25%)	Discounted Home Ownership (20%)	Genuinely affordable price
	Price>>	£185,000	£250,000	£125,000	£62,500	£250,000	£175,000	£187,500	£200,000	
	Price after deposit/loan>>	£166,500	£225,000	£112,500	£59,375	£187,500	£166,250	£178,125	£190,000	
Occupation	Wage	Ratio of house price to income								
Police officer										
Pay Point 0	£21,402	7.8	10.5	5.3	2.8	11.7	8.2	8.8	9.3	£74,907
Pay Point 2	£25,902	6.4	8.7	4.3	2.3	9.7	6.8	7.2	7.7	£90,657
Pay Point 4	£28,158	5.9	8.0	4.0	2.1	8.9	6.2	6.7	7.1	£98,553
Nurse										
Band 1	£18,005	9.2	12.5	6.2	3.3	13.9	9.7	10.4	11.1	£63,018
Band 3	£19,337	8.6	11.6	5.8	3.1	12.9	9.1	9.7	10.3	£67,680
Band 5	£24,907	6.7	9.0	4.5	2.4	10.0	7.0	7.5	8.0	£87,175
Fire officer										
Trainee	£23,366	7.1	9.6	4.8	2.5	10.7	7.5	8.0	8.6	£81,781
Competent	£31,144	5.3	7.2	3.6	1.9	8.0	5.6	6.0	6.4	£109,004
Teacher										
Unqualified (min)	£18,169	9.2	12.4	6.2	3.3	13.8	9.6	10.3	11.0	£63,592
Main pay range (min)	£25,714	6.5	8.8	4.4	2.3	9.7	6.8	7.3	7.8	£89,999
Minimum/Living Wage										
Age 25 and over										
Single household (25 and (	£15,696	10.6	14.3	7.2	3.8	15.9	11.1	11.9	12.7	£54,936
1xFull-time, 1xPart-time	£23,544	7.1	9.6	4.8	2.5	10.6	7.4	8.0	8.5	£82,404
Two working adults	£31,392	5.3	7.2	3.6	1.9	8.0	5.6	6.0	6.4	£109,872
Age 21 to 24										
Single household (21-24)	£14,760	11.3	15.2	7.6	4.0	16.9	11.9	12.7	13.6	£51,660
1xFull-time, 1xPart-time	£22,140	7.5	10.2	5.1	2.7	11.3	7.9	8.5	9.0	£77,490
Two working adults	£29,520	5.6	7.6	3.8	2.0	8.5	5.9	6.4	6.8	£103,320

Key

(pink)	More than 4.5x income multiple required
(yellow)	Between 3.5x and 4.5x income multiple required
(green)	Less than 3.5x income multiple required

Concluding comments

3.25 In 2020, across the SWDP area lower quartile house prices were £185,000 and median prices were £250,000. Prices across the SWDP are consistently higher than West Midlands prices and broadly in alignment with England prices. Within SWDP, prices in Malvern Hills and Wychavon are highest and Worcester prices are the lowest, although they remain higher than the West Midlands average.

3.26 Across the SWDP area, lower quartile private rents were £550 and median rents £693. These are similar to West Midlands rents but lower than those of England. With the SWDP area, rents were highest in Wychavon and lowest in Worcester.

3.27 The relative affordability of dwellings to buy or rent was explored. Across the SWDP minimum income required for entry-level/lower quartile renting was £26,400. For buying an entry-level/lower quartile property, the minimum income required was £47,571. These calculations assumed that a rent is affordable if no more than 25% of household income is spent on rent and if buying a property should cost no more than 3.5x household income.

3.28 Analysis considered the affordability of rents and prices. Across the SWDP area, lower quartile rents were 26.4% of lower quartile income and median rents were 23.8% of median income. However, within the SWDP areas rents were least affordable in Worcester where 41.9% of lower quartile incomes and 31.6% of median incomes had to be spent on rent. This indicates some affordability pressures within the private rented sector.

3.29 For open market purchase, the ratio of lower quartile income to price across the SWDP was 6.7x and for median income to median price it was 6.4x. Both ratios are above the benchmark of 3.5x income and without substantial deposits the ability to buy is a challenge to many households. Worcester was the least affordable place to buy a property when local incomes and house prices were considered.

3.30 Specific analysis of the affordability of renting and buying for key worker incomes and those on minimum/living wages was carried out. At least 25% of income had to be spent on private rents across most key worker income bands considered. Private renting was generally affordable to households who had multiple earners on minimum/living wage. However, single earners on minimum/living wage had to spend upwards of 40% of income on lower quartile rents.

3.31 For buying, analysis assumed that a 10% deposit was available but indicated that income multiples in excess of 3.5x were generally needed to buy on the open market.

3.32 Using the evidence presented in this chapter, it is possible to establish what would be a genuinely affordable rent and purchase price across the SWDP area and constituent local authorities (Table 3.13). This is based on local incomes and assumes that no more than 25% of income is spent on rent and a household income multiple of 3.5x is applied to local household incomes when testing the affordability of buying.

Table 3.13 Genuinely affordable rents and purchase prices by district

Local Authority	LQ rents (25% of income)	Median rents (25% of income)	LQ purchase (3.5x income multiple)	Median purchase (3.5x income multiple)
Malvern Hills	£521	£729	£87,500	£122,500
Worcester	£313	£521	£52,500	£87,500
Wychavon	£521	£729	£87,500	£122,500
SWDP area	£521	£521	£87,500	£87,500

4. Overall housing need and affordable housing need

Introduction

4.1 This chapter considers the future number of dwellings needed across the district. This report considers:

- the housing need standard method outcome based on December 2020 Planning Practice Guidance;
- the underlying demographics of the borough, alternative demographic scenarios, future economic scenarios and whether housing targets need to be adjusted to support economic growth.

4.2 The analysis considers the period 2021 to 2041

Establishing housing need using the 'standard method'

4.3 The 2021 National Planning Policy Framework (NPPF) (Paragraph 61) states 'to determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance - unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for'.

4.4 Planning Practice Guidance (PPG) defines housing need as 'an unconstrained assessment of the number of homes needed in an area' (source: PPG 2019 Paragraph: 001 Reference ID: 2a-001-20190220).

4.5 PPG comments that 'the standard method uses a formula to identify the minimum number of homes expected to be planned for, in a way which addresses projected household growth and historic under-supply. It identifies a minimum annual housing need figure. It does not produce a housing requirement figure.'(PPG Paragraph: 002 Reference ID: 2a-002-20190220)

4.6 In December 2020, Planning Practice Guidance updated the standard methodology for assessing overall housing need which involves: setting a baseline; adjusting for affordability; capping increases where necessary and applying uplifts in some urban areas; and considering if it is appropriate to plan for a higher housing need figure.

Step 1: Setting the baseline

4.7 Planning Practice Guidance states that a baseline should be set using 2014-based national household projections for the local authority area. The projections are used to calculate the average annual household growth over a 10-year consecutive period. (PPG Paragraph 004 Reference ID: 2a-004-20201216)

4.8 The period 2021 to 2031 is being used in this assessment. Over the period, the total number of households under the 2014-based household projections is set to increase by 9,446 or 945 each year (Table 4.1).

Table 4.1 Household change under 2014-based household projections

DCLG 2014-based projection	2021 households	2031 households	2021-31 household change	Annual Change
Malvern Hills	34,936	37,717	2,781	278
Worcester City	45,506	48,511	3,005	301
Wychavon	53,502	57,162	3,660	366
South Worcestershire	133,944	143,390	9,446	945

Step 2: An adjustment to take account of affordability

4.9 The average annual projected household figure from Step 1 is the adjusted based on the affordability of the area using median workplace-based affordability ratios published by the ONS.

Adjustment factor = 1 + ((Local Affordability Ratio – 4)/4)*0.25

4.10 The latest affordability ratio (2020) and associated affordability uplift is set out in Table 4.2.

Table 4.2 Affordability ratios and affordability uplift

2020 ratio	Median price to income affordability ratio	Adjustment factor*
Malvern Hills	11.74	1.4838
Worcester City	7.55	1.2219
Wychavon	9.94	1.3713

* Adjustment factor is 1 + ((Local Affordability Ratio – 4)/4)*0.25

Source: ONS Ratio of house price to workplace-based earnings

4.11 The reason for the affordability adjustment is set out in PPG:

'An affordability adjustment is applied as household growth on its own is insufficient as an indicator of housing demand because:

- household formation is constrained to the supply of available properties – new households cannot form if there is nowhere for them to live; and
- people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.

The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that minimum annual housing need starts to address the affordability of homes.' (PPG Paragraph 006 Reference ID: 2a-006-20190220).

4.12 Table 4.3 sets out the components of the dwelling need calculation using 2021 as a base year and 2020 affordability ratios. The basic demographic need under the 2014-based DCLG household projections are presented along with the affordability adjustment to establish the total annual dwelling need using the standard methodology.

Table 4.3 Components of the dwelling need calculation for the SWDP area

Time period 2021-31	Baseline annual demographic need	Affordability Adjustment	Total dwelling need under standard methodology
Malvern Hills	278	135	413
Worcester City	301	67	368
Wychavon	366	136	502
SWDP	945	338	1,283

4.13 This establishes an annual need for 1,283 dwellings across South Worcestershire.

Step 3: Capping the level of any increase

4.14 PPG states that 'the standard methodology may identify a minimum local housing need figure that is significantly higher than the number of homes currently being planned for. The cap is applied to help ensure that the minimum local housing need figure calculated using the standard methodology is as deliverable as possible' (PPG Paragraph 007 Reference ID: 2a-007-20190220). The PPG continues 'the cap reduces the minimum number generated by the standard method but does not reduce housing need itself. Therefore, strategic policies adopted with a cap applied may require an early review and updating to ensure that any housing need above the capped level is planned for as soon as is reasonably possible' (PPG Paragraph 007 Reference ID: 2a-007-20190220).

4.15 How the cap is calculated 'depends on the current status of relevant strategic policies for housing' (PPG Paragraph 004 Reference ID: 2a-004-20201216).

4.16 The last officially endorsed dwelling target was set out in the South Worcestershire Development Plan (SWDP) published in February 2016. This set out a need to deliver 28,400 net dwellings during the period 2006 to 2030 or an annual need for 1,136 net dwellings (assuming a 25 year period).

4.17 The PPG states 'where the relevant strategic polices for housing were adopted more than 5 years ago (at the point of making the calculation), the local housing need figure is capped at 40% above whichever is higher of:

a. The projected household growth for the area over the 10 year period identified in Step 1 (945 each year); or

b. The average annual housing requirement set out in the most recently adopted strategic policies (this would be 1,136 based on the SWDP figures)'

4.18 The 40% cap which would therefore apply to the Step 2 figure of 1,136 each year and would be **1,590 dwellings each year** (1,136+ (40% x1,136).

4.19 Under the parameters set out in the PPG no cap on delivery needs to be applied.

Step 4: Cities and urban centres uplift

4.20 A 35% uplift is then applied for those urban local authorities in the top 20 cities and urban areas list devised by ONS (PPG Paragraph 004 Reference ID: 2a-004-20190220). This does not apply to South Worcestershire.

Housing need using the standard methodology

4.21 Based on the December 2020 PPG standard methodology and 2020 affordability ratios, the minimum local housing need for the SWDP area, from 2021, is **1,283** dwellings each year.

Potential adjustments to the standard method

Overview

4.22 Having identified the minimum housing need under the standard model, further demographic analysis considers alternative demographic scenarios. A review of alternative demographic scenarios provides the evidence to confirm if the standard method provides an appropriate base for the assessment of need or whether there are any exceptional circumstances that would justify an alternative approach.

4.23 There is also provision in PPG to adjust the minimum housing need:

'The standard method for assessing local housing need provides the minimum starting point in determining the number of homes needed in an area. It does not attempt to predict the impact that future government policies, changing economic circumstances or other factors might have on demographic behaviour. Therefore, there will be circumstances where it is appropriate to consider whether actual housing need is higher than the standard method indicates.

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

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

There may, occasionally, also be situations where previous levels of housing delivery in an area, or previous assessments of need (such as a recently produced Strategic Housing Market Assessment) are significantly greater than the outcome from the standard method. Authorities will need to take this into account when considering whether it is appropriate to plan for a higher level of need than the standard model suggests. '(PPG Paragraph 010 Reference ID: 2a-010-20201216).

4.24 To inform this analysis the councils have provided details of relevant growth strategies and strategic infrastructure developments and any decisions to meet unmet need from neighbouring local authorities.

Alternative demographic evidence

4.25 The standard method need calculation of 1,283 is based on a 945 annual household increase plus an affordability uplift of 338. The 2018-based ONS household projections point to a higher level of household growth of 1,361 each year. However, PPG is clear that 2014-based projections should be used and therefore this is not considered to represent exceptional circumstances that would justify and alternative approach.

Regeneration Strategies and strategic infrastructure improvements

4.26 There are a range of regeneration and infrastructure improvements taking place across the SWDP area. These are to support planned development and therefore not resulting in a need to increase the number of homes built in excess of the standard method calculation.

Meeting unmet need from other local authorities

4.27 The SWDP local authorities have been asked to increase their housing requirement by 500 to help meet the needs of neighbouring Tewkesbury Borough.

Affordable housing need

4.28 A detailed analysis of affordable housing need in accordance with PPG is presented at Technical Appendix C. This establishes an overall gross affordable need of 2,518 each year and after taking into account affordable lettings and resales the net shortfall is 906 each year. This figure excludes newbuild activity which continues to provide much-needed affordable homes to reduce the level of need. The tenure split is 53% social rented, 16% affordable rented, 6% affordable home ownership and 25% First Homes.

4.29 However, Homes England have identified south Worcestershire councils as falling within high affordability pressure areas where the difference between the average social rents and private rents is £50 each week or more (https://www.gov.uk/government/publications/areas-of-high-affordability-pressure/list-areas-of-high-affordability-pressure).

4.30 Therefore, given the acute need for social rented accommodation across the SWDP area, it is recommended that 69% of new affordable housing is social rented, 6% affordable home ownership and 25% affordable home ownership through First Homes. This justifies the need for a robust affordable housing policy.

4.31 An affordable housing uplift is already included in the standard method calculation and PPG says, 'The total affordable housing need can then be considered in the context of its likely delivery as a proportion of mixed market and affordable housing developments, taking into account the probable percentage of affordable housing to be delivered by eligible market housing led developments. An increase in the total housing figures included in the plan may need to be considered where it could help deliver the required number of affordable homes' (Paragraph: 024 Reference ID: 2a-024-20190220).

4.32 The actual delivery of affordable homes is subject to economic viability testing and given the strong track record in affordable homes delivery over the recent past, the SWDP authorities are well-placed to continue to deliver a strong supply of affordable homes. A further uplift to the overall housing number is therefore not recommended.

Housing to support economic growth

4.33 A detailed examination of economic growth scenarios was carried out as part of the 2019 SHMA. This concluded that employment-led scenarios result in lower dwelling requirements than the MHCLG figures. No further adjustment to the housing need is therefore recommended at this time. However, the council should monitor and regularly review economic growth projections.

Older and specialist housing need

4.34 Chapter 5 evidences a need for around 4,836 additional units of older persons accommodation to 2041 which includes 3,198 C3 planning use class units such as Extra Care and sheltered/retirement housing and 1,638 C2 planning use which includes residential care. C3 need is part of residential dwelling need and translates to an annual need for around 160 units of older person accommodation. It is anticipated that this need will be delivered as part of the housing need figure and no further adjustments are necessary. There is also likely to be an ongoing need for a small number of specialist housing units for people with additional needs which is expected to be accommodated within the housing need figure.

Previous delivery levels

4.35 Table 2.5 set out annual net dwelling completions over the period 2006/07 to 2019/20 and compared this with SWDP targets. This indicates that the overall level of delivery has met the overall target. PPG notes that **'the affordability adjustment is applied to take account of past under-delivery. The standard method identifies the minimum uplift that will be required and therefore it is not a requirement to specifically address under-delivery separately.'** As the standard method is being followed, and overall targets have been met, no adjustment for previous delivery levels is required.

Alternative approaches to the standard method

4.36 Within PPG (Paragraph: 001 Reference ID: 2a-001-20190220) there is provision to use an alternative to the standard method where exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. There was no evidence that an alternative approach is necessary for the SWDP area.

Concluding comments

4.37 The 2020 standard method calculation establishes a baseline minimum annual need for 1,283 dwellings based on demographics and an adjustment to take account of affordability. A comprehensive analysis of alternative demographic scenarios confirms that this standard method baseline provides an appropriate base for the assessment of need.

4.38 No further upward adjustments to the minimum housing need figure of 1,283 figure are necessary as this provides sufficient housing to meet local demographic, affordable and specialist need and sufficiently supports future jobs growth. As part of the housing requirement, the council are providing land for 500 dwellings to address unmet need from neighbouring Tewkesbury Borough.

5. The needs of different groups

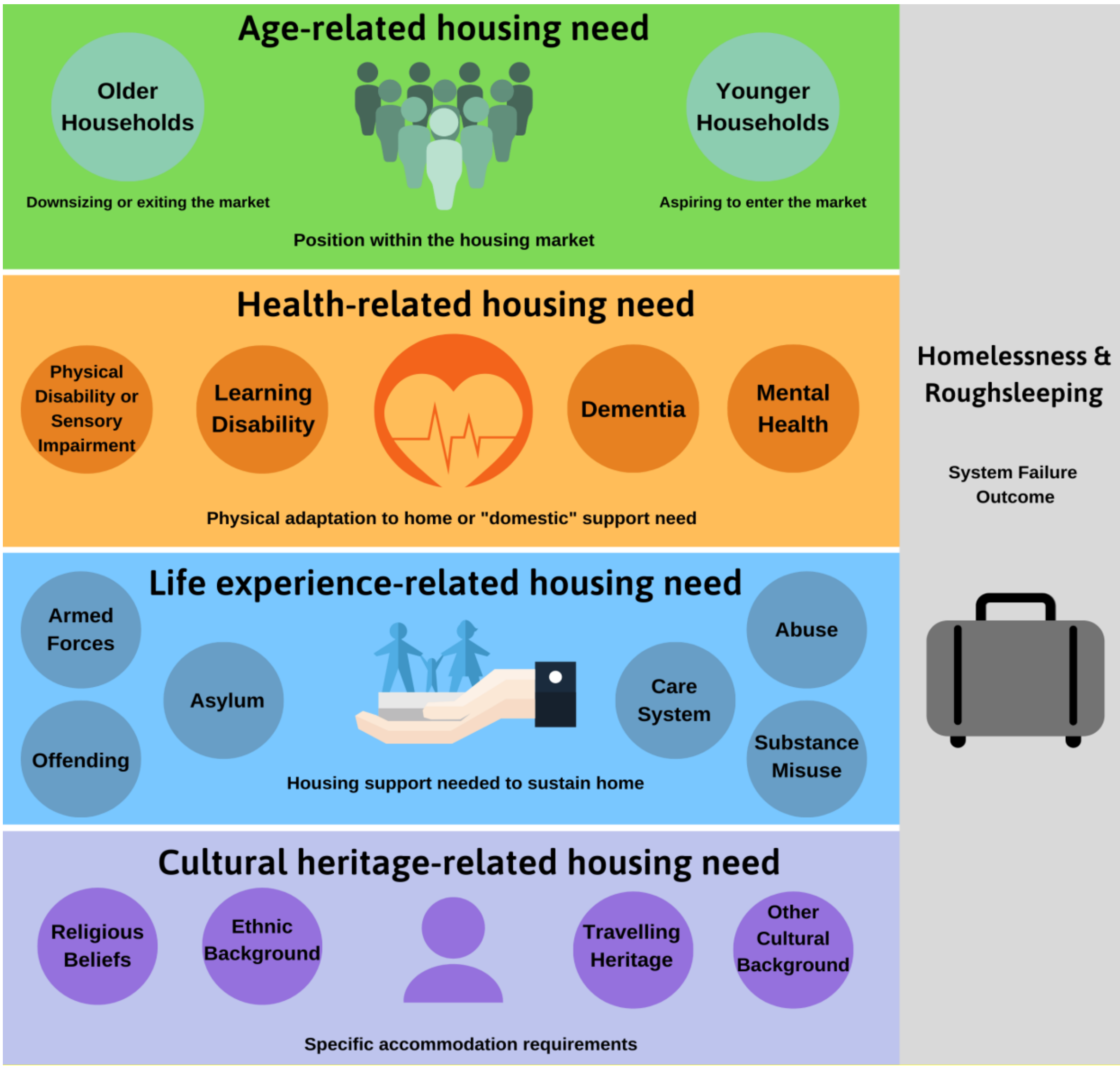
Introduction

5.1 Paragraph 62 of the 2021 NPPF refers to housing needs for different groups in the community and these fall into two broad groups: housing for people with additional needs and housing for specific household types.

Housing for people with additional needs

5.2 This group includes older people and accommodation for people with disabilities which are further sub-divided into those with health-related and life-experience related needs as summarised in Figure 4.1.

Figure 5.1 Establishing need associated with age, health and life experience



5.3 The evidence base has been established based around these broad principles:

- people with additional needs are generally accommodated in mainstream housing and provided with care and support when needed;
- some people will have complex and multiple needs and therefore may fall into several different categories of need;
- some people require long-term accommodation to provide support for ongoing needs; and some require short-term supported housing which aims to support people for a period of time before moving on/back into mainstream housing; and
- most people with additional needs will not need specialist supported housing but they may need adaptations to their homes and/or care and support provided in other ways.

5.4 Data from POPPI and PANSI (Projecting Older People Population Information/Projecting Adult Needs and Service Information, Oxford Brookes University/Institute of Public Care) provides data on the likely prevalence and incidence of illness/disability and relevant data for 2020 to 2040 are presented where relevant.

5.5 The Worcestershire County Council Adult Services Market Position Statement 2018 and Adult Services Business Plan 2018-22 provide a wealth of information on the needs of different groups and relevant information is presented in this chapter.

5.6 The key focus of the Adult Services team is to:

- **Reduce** the number of older and younger adults whose long-term support needs are met by admission to care homes.
- **Increase** the number of people whose short-term support services enable them to live independently for longer.
- **Increase** the number of older people who stay at home following reablement or rehabilitation.
- **Sustain** the current performance of delayed transfer of care from hospital.

5.7 There are four key areas where Worcestershire County Council has strategic commissioning oversight:

- Supporting people with a learning disability.
- Supporting older people and people with a physical disability or sensory impairment at home and in the community.
- Supporting older people and people with a physical disability in a care home.
- Supporting people with mental health issues.

Age-related housing need

5.8 Age-related housing need relates to the needs of specific age groups in the housing market due to life events and the impact this has on the need for dwellings of particular sizes/types and affordability. For older households this includes 'rightsizing' and adaptation of existing dwellings. For younger households, affordability is a particular concern and this has been considered elsewhere in the report. For this section we therefore focus upon the needs of older persons for particular unit types.

Housing for older people

5.9 The NPPF Annex 2 defines older people as **'people over or approaching retirement age, including the active, newly-retired through to the very frail elderly; and whose housing can encompass accessible, adaptable general needs housing through to the full range of retirement and specialist housing for those with care and support needs.'**

5.10 PPG recommends the following are considered in an assessment of older persons need:

- The future need for specialist accommodation (including but not restricted to age-restricted general market housing, retirement living or sheltered accommodation, Extra Care or housing with care), broken down by type and tenure.
- The need for care in residential care and nursing homes (C2).
- The need for co-housing communities.
- The role of general housing and in particular bungalows and homes that can be adapted to meet a change in needs.

5.11 PPG notes that **'plan-making authorities will need to count housing provided for older people against their housing requirement'** (source: PPG June 2019 Paragraph: 016 Reference ID: 63-016-20190626).

5.12 Over the period 2021 to 2041, across the SWDP area, the number of people aged 65 and over is expected to increase by 43.2% and by 2041 there will be an additional 32,500 residents aged 65 and over.

5.13 The arc4 national database indicates that the majority of older people (76.6%) want to remain in their current home with help and support when needed (Table 5.1). There is also interest in a range of options including sheltered, Extra Care, co-housing and open market accommodation.

Table 5.1 Older persons' housing preferences by age group				
Housing option	**65-74 (%)**	**75-84 (%)**	**85+ (%)**	**All 65+ (%)**
Continue to live in current home with support when needed e.g. home visits, 'call for help' alarm	71.3%	81.8%	84.3%	76.6%
Buying a dwelling on the open market	16.5%	6.8%	2.6%	11.3%
Rent a dwelling from a private landlord	3.5%	1.3%	0.5%	2.4%
Rent from housing association	11.6%	7.4%	4.5%	9.2%
Rent from the council	2.3%	1.4%	0.6%	1.7%
Sheltered accommodation: Renting	21.4%	20.3%	16.0%	20.3%
Sheltered accommodation: Buying	13.9%	10.5%	7.5%	11.9%
Sheltered accommodation: Part rent/buy (shared ownership)	5.1%	4.2%	3.3%	4.5%
Extra Care Housing: Renting	15.2%	16.4%	15.9%	15.7%
Extra Care Housing: Buying	10.1%	8.3%	6.7%	9.0%
Extra Care Housing: Part rent/buy (shared ownership)	3.9%	3.1%	2.9%	3.5%
Residential Nursing/Care home	5.0%	7.3%	18.3%	7.5%
Co-housing	10.2%	8.5%	6.8%	9.2%
Go to live with children or other relatives/friends	2.4%	2.1%	2.5%	2.3%
Other	1.4%	1.2%	1.3%	1.4%
Base (all households in age group)	201,944	131,846	49,535	383,325

Source: arc4 national database

5.14 The arc4 national database indicates 52.5% of older people planning to move would like to move to a property with fewer bedrooms but 35.2% would like to move to a property with the same number of bedrooms. More (65.3%) expect to more to a smaller property (Table 5.2). The general conclusion is that smaller dwellings are needed to accommodate older movers but there are households who would require the same or even an increase in the number of bedrooms in their properties.

Table 5.2 Future housing choices of older households (rightsizing)		
Housing choice	**Aspiration (%)**	**Expectation (%)**
Downsizing (moving to a smaller property)	52.5	65.3
Staying same	35.2	28.1
Upsizing (moving to larger property)	12.4	6.7
Total	100.0	100.0
Base (households responding)	9,277	8,833

Source: arc4 national database

Future need for specialist older person accommodation and residential care provision

5.15 Across the SWDP there are around 7,320 units of specialist older persons accommodation comprising 4,855 specialist older accommodation (C3 residential dwelling planning use class) and 2,465 units of residential care (C2 use class). Table 5.3. shows the current number of older person units of accommodation across the SWDP area using data provided by the Elderly Accommodation Counsel.

Table 5.3 Categories of older person accommodation

Category (and planning use category)	Current number of units				Description
	Malvern Hills	Worcester	Wychavon	SWDP Total	
Age-exclusive housing (C3)	523	142	112	777	**EAC definition:** Schemes or developments that cater exclusively for older people, usually incorporate design features helpful to older people and may have communal facilities such as a residents' lounge, guest suite and shared garden, but do not provide any regular on-site support to residents. **PPG definition:** This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens but does not include support or care services.
Care homes (C2)	331	345	377	1,053	**EAC definition:** A residential setting where a number of older people live, usually in single rooms, and have access to on-site care services. Since April 2002 all homes in England, Scotland and Wales are known as 'care homes', but are registered to provide different levels of care. A home registered simply as a **care home** will provide personal care only - help with washing, dressing and giving medication. **PPG definition:** These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.
Care home with nursing (C2)	509	358	545	1,412	A home registered as a **care home with nursing** will provide the same personal care but also have a qualified nurse on duty twenty-four hours a day to carry out nursing tasks. These homes are for people who are physically or mentally frail or people who need regular attention from a nurse.
Enhanced sheltered/close case (C3)	0	338	107	445	Sheltered housing that provides more in facilities and services than traditional sheltered housing but does not offer the full range of provision that is found in an Extra Care housing scheme.
Retirement/Sheltered housing (C3)	348 R 32 S	1,209 R 61 S	1,257 R	2,814 R 93 S	EAC definition: **Sheltered housing (S)** means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. **Retirement housing (R)** means housing developments of a similar type to sheltered housing, but built for sale, usually on a leasehold basis. The term sheltered housing is now largely superseded by retirement housing.

Table 5.3 Categories of older person accommodation

Category (and planning use category)	Current number of units				Description
	Malvern Hills	Worcester	Wychavon	SWDP Total	
					PPG definition: This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services but provides some support to enable residents to live independently. This can include 24-hour on-site assistance (alarm) and a warden or house manager.
Extra Care housing or housing with care (C3)	256	212	258	726	EAC definition: Extra Care Housing is housing designed with the needs of frailer older people in mind and with varying levels of care and support available on site. People who live in Extra Care Housing have their own self-contained homes, their own front doors and a legal right to occupy the property. Extra Care Housing is also known as very sheltered housing, assisted living, or simply as 'housing with care'. It comes in many built forms, including blocks of flats, bungalow estates and retirement villages. It is a popular choice among older people because it can sometimes provide an alternative to a care home. **PPG definition:** This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission (CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses. **Note** Extra Care can also provide accommodation for people with additional needs who are not older people
Grand Total	1,999	2,665	2,656	7,320	Total provision of older person accommodation in 2021

Source: EAC data 2021

5.16 Given the ageing of the population, the need for specialist older person accommodation is expected to increase. Based on population there is an additional need for 4,836 additional units of specialist older persons' accommodation by 2041 across the SWDP area. Tables 5.4 to 5.7 present need projections for each local authority and for SWDP as a whole.

5.17 The total additional need for specialist older person dwellings across the SWDP area is projected to be 3,198 C3 and 1,638 C2 by 2041 (Table 5.8).

Table 5.4 Analysis of future need for specialist older person accommodation 2021-2041: Malvern Hills

Current provision (and planning use class)	Number of units 2021	Number aged 75 and over 2021	Number aged 75 and over 2040 (projected)	Change in need
		11,447	**18,754**	
		Ratio of population to current provision	**Ratio applied to 2041 population**	
Specialist older person (C3)	1,159	0.10125	1,899	740
Residential Care (C2)	840	0.07338	1,376	536
Total	1,999		3,275	1,276

Source: EAC data, 2018-based population projections

Table 5.5 Analysis of future need for specialist older person accommodation 2021-2041: Worcester

Current provision (and planning use class)	Number of units 2021	Number aged 75 and over 2021	Number aged 75 and over 2040 (projected)	Change in need
		8,569	**13,733**	
		Ratio of population to current provision	**Ratio applied to 2041 population**	
Specialist older person (C3)	1,962	0.22896	3,144	1,182
Residential Care (C2)	703	0.08204	1,127	424
Total	2,665		4,271	1,606

Source: EAC data, 2018-based population projections

Table 5.6 Analysis of future need for specialist older person accommodation 2021-2041: Wychavon				
Current provision (and planning use class)	**Number of units 2021**	**Number aged 75 and over 2021**	**Number aged 75 and over 2040 (projected)**	**Change in need**
		15,891	**27,583**	
		Ratio of population to current provision	**Ratio applied to 2041 population**	
Specialist older person (C3)	1,734	0.10912	3,010	1,276
Residential Care (C2)	922	0.05802	1,600	678
Total	2,656		4,610	1,954

Source: EAC data, 2018-based population projections

Table 5.7 Analysis of future need for specialist older person accommodation 2021-2041: SWDP area summary based on individual district data				
Current provision (and planning use class)	**Number of units 2021**	**Number aged 75 and over 2021**	**Number aged 75 and over 2040 (projected)**	**Change in need**
		35,907	60,340	
Specialist older person (C3)	4,855		8,053	3,198
Residential Care (C2)	2,465		4,103	1,638
Total	7,320		12,156	4,836

Source: EAC data, 2018-based population projections

5.18 The total and annual additional need for specialist older person dwellings across the SWDP area is summarised in Table 5.8. Note that C3 need is part of the overall housing need figure.

Table 5.8 Summary of additional older person dwelling need 2021-2041						
Local Authority	**C3 need 2021-2041**		**C2 need 2021-2041**		**All need 2021-2041**	
	Total	**Annual**	**Total**	**Annual**	**Total**	**Annual**
Malvern Hills	740	37	536	27	1,276	64
Worcester	1,182	59	424	21	1,606	80
Wychavon	1,276	64	678	34	1,954	98
SWDP	3,198	160	1,638	82	4,836	242

5.19 The Worcestershire Market Position Statement (MPS) 2018 notes that the commissioning activity in Worcestershire to support older people with a physical disability at home and in the community includes:

- Care and support received within an individual's home e.g. reablement and domiciliary care.
- Community-based support at home e.g. voluntary sector services.
- Day opportunities/care.
- Housing-based care and support, for example Extra Care. A strategy has been prepared to make Extra Care housing and increasingly well-known and chosen form of specialist accommodation in every district of the county. It will be available for people who want to buy and rent. Local authorities will take a leading role in enabling Extra Care housing and work with providers from the social, charitable and private sectors to deliver the Extra Care housing required in Worcestershire.
- Home improvements, for instance Integrated Equipment Services and Home Improvement Agencies.
- Technology Enabled Lives programme, using technology to support people to remain at home.
- Supporting people with sensory impairment including awareness and prevention, support for independence, information and advice and engagement and participation.

Senior cohousing communities

5.20 Senior cohousing is specifically mentioned in PPG as a housing option for older people: 'Senior co-housing communities are created and run by residents, based on the intention to live with a group of people of a similar age. The sites often consist of self-contained private homes as well as shared community space. Some communities offer an additional option for informal care.

5.21 This option should be considered by the council as part of a diverse range of accommodation for older people.

People with dementia and early onset dementia

5.22 The PPG makes specific reference to dementia and that **'there should be a range of housing options and tenures available to people with dementia, including mainstream and specialist housing. Innovative and diverse housing models should be considered where appropriate'** (PPG Paragraph: 019 Reference ID: 63-019-20190626).

5.23 The PPG also outlines the characteristics of a dementia- friendly communities:

- easy to navigate physical environment;
- appropriate transport;
- communities shaped around the views of people with dementia and their carers;
- good orientation and familiarity;
- reduction in unnecessary clutter; and

- reduction in disorienting visual and auditory stimuli.

5.24 2020 POPPI/PANSI data estimates there are 89 people with early onset dementia and 5,281 people aged 65 and over with dementia (Table 5.9). By 2040, the number of people aged 65 and over with dementia is projected to increase by 69.2%, with an increase of 91.0% amongst the 85+ age group. The number with early onset dementia is expected to decrease slightly.

Table 5.9 People with dementia									
Disability (age group)	Malvern Hills		Worcester		Wychavon		SWDP		% Change
	2020	2040	2020	2040	2020	2040	2020	2040	2020-2040
Early onset dementia (30-64)	25	24	25	23	39	41	89	88	-1.1%
Dementia (65-74)	279	336	224	274	425	547	928	1,157	24.7%
Dementia (75-84)	616	969	472	738	872	1,479	1,960	3,186	62.6%
Dementia (85 and over)	791	1,506	576	1,023	1,026	2,063	2,393	4,592	91.9%
Dementia (total 65+)	1,686	2,811	1,272	2,035	2,323	4,089	5,281	8,935	69.2%

Source: POPPI/PANSI

5.25 A report by the All Party Parliamentary Group (APPT) on Housing and Care for Older People published a report on Housing for People with Dementia in July 2021 **https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HCOP_APPG_Dementia_Housing_and_Care_Inquiry-LowRes.pdf**

5.26 This set out 23 recommendations which included:

- Recognise potential future loneliness and how we can maintain our family connections and wider social networks in the communities we live in before or after diagnosis.
- Consider whether to move whilst we are able: rightsizing and moving to the right place and environment whilst able to still develop new routes and make new friends.
- Make preventive changes, incrementally, to the home environment; such as when upgrading property or installing new technology, or where we require additional personal care and support to help us to live independently.

5.27 Regarding housing and planning, the report recommended:

- Support increased provision of Extra Care housing / assisted living accommodation and retirement housing that is dementia-ready, with top-sliced grant-aid through Homes England.
- Strengthen MHCLG guidance to local planning authorities. LPAs should respond to demographic change and the need for more homes designed for older people, including those with dementia, through Local Plans specifying requirements for age-friendly housing.

The role of general housing and in particular bungalows and homes that can be adapted to meet a change in needs

5.28 The profile of dwellings occupied by households aged 65 and over by age group, using the arc4 national database, is summarised in Table 5.10. This shows that the majority (63%) live in houses, particularly those with 3 or more bedrooms; 22.2% live in bungalows, 13.8% in flats and 1.1% in other dwelling types.

Table 5.10 Dwellings occupied by households where the HRP is aged 65 and over

Dwelling type and size	65 to 74	75 to 84	85+	Total
1 or 2-bedroom house	13.1%	13.6%	12.8%	13.2%
3 or-more bedroom house	54.6%	46.0%	36.1%	49.7%
1-bedroom bungalow	3.4%	5.1%	6.6%	4.3%
2 or more-bedroom bungalow	15.2%	21.0%	22.4%	17.9%
1-bedroom flat	6.2%	6.1%	8.9%	6.5%
2 or more-bedroom flat	6.5%	7.2%	11.7%	7.3%
Other	1.0%	1.1%	1.5%	1.1%
Total	100.0%	100.0%	100.0%	100.0%
Base	349,050	200,566	69,218	618,834

Source: arc4 national database

5.29 The provision of appropriate adaptations to existing dwelling stock can help people lead independent lives. PPG also asks councils to consider the extent to which existing dwelling stock can help meet the needs of older people (source: PPG 2019 Paragraph: 017 Reference ID: 2a-017-20190220).

5.30 Given that the majority of older people want to remain in their own homes with help and support when needed, the arc4 national database provides a useful insight into the proportion of households who need care and support and the extent which properties are adapted (Table 5.11).

5.31 Table 5.11 shows that 7.6% of all households require care and support to enable them to stay in their home. This is highest amongst 75 and over age groups and from households living in affordable housing. Of households with a household reference person aged 85 and over, 31.2% require help and support to enable occupiers to stay in their own home.

5.32 62.8% of households have sufficient space for a carer to say overnight if needed – and this increases to 71% across 75 and over older age groups. Owner occupiers were most likely to have space available, but private and in particular social renters were less likely. Around 40% of respondents in affordable housing had sufficient space for a carer.

5.33 Around 7.5% of all dwellings had been adapted or purpose-built for a person with a long-term illness, health problem or disability. This was highest amongst affordable housing occupants (19%) and lowest amongst owner occupiers (4.7%). Older people were more likely to live in an adapted home, with 14.8% of households with a HRP aged 75-84 and 25.5% with a HRP aged 85+ living in adapted homes.

Table 5.11 Adaptations, support needs and space for carer by tenure and age group

	Is there sufficient space in your home for a carer to stay overnight, if this was needed?	Do you, or any other members of your household, require care or support to enable you/them to stay in this home?	Has your current home been adapted or purpose-built for a person with a long-term illness, health problem or disability?
Tenure	Yes (%)	Yes (%)	Yes (%)
Owner Occupied	73.6%	5.3%	4.7%
Private Rented	45.1%	7.9%	5.0%
Affordable	39.8%	15.6%	19.0%
All tenures	**62.8%**	**7.6%**	**7.5%**
Age of household reference person	Yes (%)	Yes (%)	Yes (%)
Under 65	59.6%	6.2%	5.8%
65 to 74	73.9%	7.4%	10.4%
75 to 84	71.2%	12.6%	14.8%
85 and over	71.2%	31.2%	25.5%
All age groups	**62.8%**	**7.6%**	**7.5%**

Source: arc4 database

Estimating future need for adaptations and home improvement

5.34 The arc4 national database provides evidence of the range of adaptations and home improvements needs based on the age group of the household reference person (Table 5.12).

5.35 Better heating, more insulation and double glazing were most frequently mentioned improvements needed, particularly amongst under 65 households. The need for a downstairs toilet was mentioned by older groups.

5.36 Regarding adaptations, these were mainly mentioned by older households and most frequently mentioned were bathroom adaptations, internal and external handrails/grabrails and kitchen adaptations. The need for adaptations was generally highest amongst the 75+ age group.

5.37 These requirements are self-determined by residents responding to the household survey and may not necessarily reflect actual requirements following an independent assessment in the home.

Table 5.12 Adaptations and home improvements required by age group

Adaptation/improvement required	Age group (% of households)				Total
	Under 45	45-64	65-74	75+	
Home improvement					
More insulation (loft, wall cavities)	26.7%	19.5%	12.2%	7.5%	19.2%
Community alarm service	3.2%	4.0%	6.1%	11.4%	4.9%
Better heating	24.1%	21.5%	15.9%	13.3%	20.5%
Double glazing	20.8%	17.5%	10.8%	7.8%	16.4%
Improved ventilation	8.6%	4.4%	2.5%	1.6%	5.0%
Downstairs WC	5.8%	8.1%	10.0%	11.0%	8.0%
Increase the size of property (e.g. extension, loft conversion)	17.8%	6.6%	2.8%	1.7%	8.8%
Adaptations					
Adaptations to bathroom	7.9%	13.6%	18.6%	21.8%	13.6%
Adaptations to kitchen	9.4%	8.3%	6.3%	7.2%	8.2%
External handrails /grab rails	4.0%	7.2%	10.5%	14.9%	7.6%
Internal handrails /grab rails	5.3%	9.4%	12.9%	18.0%	9.7%
Stair lift / vertical lift	3.1%	6.5%	10.3%	15.0%	7.0%
Adaptations relating to sensory needs	7.5%	5.2%	3.8%	2.6%	5.4%
Improvements to access (e.g. level access in and around home)	3.3%	4.4%	4.4%	6.5%	4.3%
Wheelchair adaptations (including door widening and ramps)	3.1%	4.2%	4.6%	7.0%	4.2%
Lever door handles	2.2%	2.9%	2.5%	2.7%	2.6%
Room for a carer	2.6%	3.2%	2.2%	3.6%	2.9%
Base (all households)	106,161	179,922	56,235	49,085	391,403

Source: arc4 national database

5.38 Resources for aids and adaptations remain limited, particularly for households in the private sector (owner occupation or privately rented accommodation). However, the provision of appropriate adaptations is essential to older households in maintaining independent living. Alternative sources of funding, such as equity loans, could be considered to finance remedial measures required by older person households. It should be pointed out that whilst local authorities will assess anyone's needs, assistance is currently means tested and some older person households will self-fund.

Assistance in the home

5.39 The arc4 national database also provides information on a range of practical assistance required from households by age group (Table 5.13). Overall, the highest level of need is for help with repair and maintenance of the home, help with gardening and help with cleaning the home. For all types of assistance, the level of need increases with age which includes the need for company/friendship, mentioned by one-third of people aged 75 and over.

Table 5.13 Type of assistance required age group

Type of help needed now or in next 5 years	% households needing help by age group of HRP				
	Under 45	45-64	65-74	75+	All
Help with repair and maintenance of home	30.4%	35.8%	45.3%	52.1%	38.2%
Help with gardening	17.1%	26.8%	46.1%	64.8%	32.6%
Help with cleaning home	11.6%	19.3%	30.5%	52.8%	23.7%
Help with other practical tasks	9.8%	16.6%	24.2%	44.2%	19.9%
Help with personal care	9.0%	14.3%	16.5%	26.7%	15.1%
Want company / friendship	9.7%	14.4%	17.7%	32.2%	16.2%
Base (all households)	323,285	650,785	213,315	183,844	1,371,229

Source: arc4 national database

Health-related housing need

5.40 A range of sources can be drawn upon to establish the overall scale of disability/support needs across the SWDP area. In summary:

- The 2011 Census reported that across the SWDP area 82.2% were in very good or good health, 13.2% were in fair health and 4.7% in bad/very bad health (particularly across older age groups). There was very little variation in proportions across each local authority area.
- A total of 50,780 residents (17.8%) were in fair/bad/very bad health which compares with 18.3% across England.
- 7.2% of residents reported that their daily activities were limited 'a lot' and 9.8% 'a little' which compares with 8.3% and 9.3% respectively across England. This is mainly associated with older age groups.

- The ONS Family Resources Survey 2018/19 estimates that around 23.7% of the population nationally has a disability. This translates to around 75,500 people across the SWDP area in 2021 and is projected to increase to around 92,600 or 25.8% of the population by 2041

Physical disability

5.41 POPPI and PANSI provide data on the likely prevalence in 2020 of a range of physical disabilities and how this is expected to change by 2040 (Table 5.14). In 2020, there were an estimated 24,160 people with mobility issues across all age groups which is projected to increase to 32,400 by 2040 mainly due to an increase in the number of people aged 65 with mobility issues.

Learning disability and autism

5.42 The number of people across all age groups with moderate or severe learning disabilities is estimated to be around 1,192 in 2020 rising to 1,335 by 2040 (Table 5.15). There is a notable growth in the number of people aged 65 and over with learning disabilities. Around 2,466 people have autistic spectrum disorders in 2020 and this is expected to increase to 2,867 by 2040.

Table 5.14 Physical disability prevalence									
Disability (age group)	**Malvern Hills**		**Worcester**		**Wychavon**		**SWDP**		**% Change**
	2020	**2040**	**2020**	**2040**	**2020**	**2040**	**2020**	**2040**	**2020-2040**
Impaired mobility (18-64)	2,780	2,823	3231	2995	4554	4920	10,565	10,738	1.6%
Mobility (unable to manage at least one activity on own) (65+)	4,276	6,728	3311	5,003	6,010	9,926	13,597	21,657	59.3%
Moderate or serious personal care disability (18-64)	2,400	2,441	2875	2674	3958	4286	9,233	9,401	1.8%
Serious visual impairment (18-64)	28	28	41	40	47	53	116	121	4.3%
Moderate or severe visual impairment (65+)	2,039	3,047	1561	2318	2899	4624	6,499	9,989	53.7%
Severe hearing loss (18-64)	300	305	347	324	494	553	1,141	1,182	3.6%
Severe hearing loss (65+)	1,873	3,069	1420	2216	2575	4429	5,868	9,714	65.5%
All with mobility issues (impaired mobility 18-64 and mobility 65+	7,056	9,551	6,542	7,998	10,564	14,846	24,162	32,395	34.1%

Source: POPPI/PANSI

Table 5.15 Learning disability and autism									
Learning disability (age group)	**Malvern Hills**		**Worcester**		**Wychavon**		**SWDP**		**% Change**
	2020	**2040**	**2020**	**2040**	**2020**	**2040**	**2020**	**2040**	**2020-2040**
Total (18-64)	1,023	1,060	1557	1528	1759	1974	4,339	4,562	5.1%
Total (65+)	476	679	372	526	695	1051	1,543	2,256	46.2%
Moderate or severe (18-64)	232	243	355	352	399	454	986	1,049	6.4%
Moderate or severe (65+)	63	85	50	67	93	134	206	286	38.8%
Moderate or severe (all ages)	295	328	405	419	492	588	1,192	1,335	12.0%
People with LD living with a parent (18-64)	74	79	138	141	133	154	345	374	8.4%
Downs syndrome (18+)	28	28	41	40	47	53	116	121	4.3%
Challenging behaviour (18-64)	19	20	29	28	33	36	81	84	3.7%
Autistic spectrum disorders (18-64)	419	430	634	621	715	797	1,768	1,848	4.5%
Autistic spectrum disorders (65+)	215	308	165	236	318	475	698	1,019	46.0%

Source: POPPI/PANS

5.43 Key current and future priorities for Worcestershire to support people with a learning disability set out in the Adult Services Market Position Statement 2018 include:

- To continue to work with providers to develop Supported Living provision, including provision which meets complex needs, in Worcestershire, in line with the Council's Supported Living Strategy.
- Development of additional provision in Worcestershire for 16-25 year olds, including options for developing residential college provision within Worcestershire.
- The continued development of a mixed market of day service and replacement care (overnight respite) support.

Mental health

5.44 2020 POPPI/PANSI data estimates there are around 33,900 residents with a common mental health disorder (Table 5.16). The number of people aged 18-64 with a common mental health disorder is expected to remain similar over the period to 2040. Depression, particularly amongst people aged 65 or over is expected to increase considerably.

5.45 Key current and future priorities for Worcestershire to support people with mental health needs set out in the Adult Services Market Position Statement 2018 include:

- To continue to work with providers to develop Supported Living provision, including provision which meets complex needs, in Worcestershire, in line with the Council's Supported Living Strategy.
- Development of additional residential care provision in Worcestershire for adults with long-term Mental Health issues, providing a recovery-focussed approach to enable people to continue their recovery within community settings.
- Optimise access to Direct Payments for people with mental health issues to enable them to choose and purchase their own support.

Table 5.16 Mental health prevalence

Mental health 18-64	Malvern Hills 2020	Malvern Hills 2040	Worcester 2020	Worcester 2040	Wychavon 2020	Wychavon 2040	SWDP 2020	SWDP 2040	% Change 2020-2040
Common mental disorder	8,062	8,297	12,006	11,687	13,850	15,399	33,918	35,383	4.3%
Borderline personality disorder	1,024	1,053	1,525	1,484	1,758	1,955	4,307	4,492	4.3%
Antisocial personality disorder	1,413	1,450	2,126	2,078	2,416	2,691	5,955	6,219	4.4%
Psychotic disorder	298	306	445	433	510	568	1,253	1,307	4.3%
Psychotic disorders (2 or more)	3,062	3,149	4,572	4,456	5,254	5,844	12,888	13,449	4.4%
Older people with depression	**2020**	**2040**	**2020**	**2040**	**2020**	**2040**	**2020**	**2040**	**% Change 2020-2040**
Depression 65+	1,946	2,785	1540	2,155	2,835	4,290	6,321	9,230	46.0%
Severe depression (65+)	625	924	484	706	896	1,406	2,005	3,036	51.4%

Source: POPPI/PANSI

Accessible and wheelchair standard housing

5.46 PPG states that **'where an identified need exists, plans are expected to make use of the optional technical housing standards (footnote 46 of the NPPF). To help bring forward an adequate supply of accessible housing. In doing so planning policies for housing can set out the proportion of new housing that will be delivered to the following standards:**

- **M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);**
- **M4(2) Category 2: Accessible and adaptable dwellings; and**
- **M4(3) Category 3: Wheelchair user dwellings**

'Planning policies for accessible housing need to be based on evidence of need, viability and a consideration of site-specific factors ' (source: PPG June 2019 Paragraph: 009 Reference ID: 63-009-20190626)

- **M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);**
- **M4(2) Category 2: Accessible and adaptable dwellings; and**
- **M4(3) Category 3: Wheelchair user dwellings**

'Planning policies for accessible housing need to be based on evidence of need, viability and a consideration of site-specific factors '
 (source: PPG Paragraphs: 008 Reference ID: 56-008-20160519 & 009 Reference ID: 56-009-20150327).

5.47 Regarding evidencing the need for accessible housing, PPG states:

'Based on their housing needs assessment and other available datasets it will be for local planning authorities to set out how they intend to approach demonstrating the need for Requirement M4(2) (accessible and adaptable dwellings), and/or M4(3) (wheelchair user dwellings), of the Building Regulations. There is a wide range of published official statistics and factors which local planning authorities can consider and take into account, including:

- **the likely future need for housing for older and disabled people (including wheelchair user dwellings).**
- **size, location, type and quality of dwellings needed to meet specifically evidenced needs (for example retirement homes, sheltered homes or care homes).**
- **the accessibility and adaptability of existing housing stock.**
- **how needs vary across different housing tenures.**

- **the overall impact on viability.’** (source: Para: 007 Reference ID: 56-007-20150327’

5.48 Optional accessibility standards for dwellings were introduced by the government in 2015 to provide a mechanism for improving accessibility of housing for those with additional needs. National standards have been established and contained within Part M Volume 1 of the Building Regulations (source: https://www.planningportal.co.uk/info/200135/approved_documents/80/part_m_-_access_to_and_use_of_buildings as set out in Table 5.17. Only one accessible housing standard can apply to any dwelling. The M4(2) accessible and adaptable dwelling standard is based on, and in 2015 effectively replaced, the ‘Lifetime Homes’ standard.

Table 5.17 Summary of accessible housing standards

Standard Label	Standard title	Level of accessibility provided	Mandatory or optional
M4(1)	Visitable dwellings	Level access not necessarily provided into the dwellings – few accessibility features	Mandatory
M4(2)	Accessible and adaptable dwellings	Level access is provided into the dwelling – easy to adapt to make more accessible – not suitable for most wheelchair users	Optional
M4(3)	Wheelchair user dwellings	Dwellings suitable for wheelchair users: either wheelchair adaptable (a) or wheelchair accessible (b)	Optional

5.49 It should be noted that Part M of the Building Regulations sets a distinction between wheelchair accessible (a home readily useable by a wheelchair user at the point of completion) and wheelchair adaptable (a home that can be easily adapted to meet the needs of a household including wheelchair users) dwellings (source: PPG Paragraph: 009 Reference ID: 56-009-20150327).

5.50 In order to establish an appropriate target for M4(3) dwellings, Table 5.18 sets out a series of assumptions regarding wheelchair use from the English Housing Survey and a report by Aspire Housing Association. Applying these assumptions would suggest a target of around 5% of newbuild to meet M4(3) wheelchair accessible standard is required.

5.51 According to PPG (source: PPG Paragraph: 009 Reference ID: 56-009-20150327), ‘Local Plan policies for wheelchair accessible homes should be applied only to those dwellings where the local authority is responsible for allocating or nominating a person to live in that dwelling.’ This would imply that the onus on wheelchair accessible housing delivery is with the local authority/registered providers, but private developers should also be encouraged to build to M4(3) wheelchair accessible or adaptable homes where appropriate. Any final targets should be set within the context of likely levels of delivery.

Table 5.18 Wheelchair use assumptions and resulting annual need		
Assumption	**% requirement**	**Number each year (based on net annual target of 1,283 new dwellings)**
Wheelchair use from the English Housing Survey 2018/19 – households using wheelchair all the time	0.6%	7
Wheelchair use from the English Housing Survey 2018/19 – households using wheelchair either indoors or outdoors	3.0%	38
Aspire report on wheelchair accessible housing **(*)**	10%	128
Average of indicators	4.5%	58

(*) Wheelchair Accessible Housing: Waiting for appropriate housing in England, Aspire October 2014 recommends that the national government should set a minimum requirement of 10% of all new build properties across all tenures to be wheelchair accessible.

5.52 Given the ageing demographic of the SWDP area and the identified levels of disability amongst the population, it is recommended that a policy to provide new homes built to accessibility standards is included in the Local Plan. On the basis of available evidence which takes into account the requirements of PPG, it is recommended that:

- 4.5% of new dwellings are built to M4(3) wheelchair accessible standard (this would imply an average target of around 58 each year); and
- all remaining new dwellings are built to M4(2) accessible and adaptable standards to take account of the ageing demographics of the borough. This will ensure that new dwellings can be occupied and also visited by people needing accessible/adaptable dwellings.

5.53 It should be noted however that any percentage requirements for accessible housing are subject to cumulative viability testing. It is also recommended that needs are monitored closely given the ageing population over the plan period.

Life experience-related housing need

Armed forces

5.54 The South Worcestershire local authorities are signatories to the Armed Forces Covenant which seeks to provide support in a range of areas including housing to in-service and ex-service personnel.

5.55 The Government's First Homes policy identifies people connected with the Armed Forces as an eligible group for First Homes.

Cultural heritage related housing need

5.56 For those from a minority ethnic background there may be cultural heritage or religion related determined needs which impact on the type of accommodation required. This would include the specific needs of particular Black, Asian and Minority ethnic (BAME – households not identifying as 'White British') households as well as those from Travelling communities.

BAME households

5.57 Census 2011 data reveals that the proportion of 'white' residents within the SWPD is 96.3%, with 93.5% of that category being white British. Asian/Asian British residents account for 2.2% of the SWDP area's population, 1% are of mixed/multiple ethnicity, 0.3% are Black/African/Caribbean/Black British and 0.1% are of other ethnic origin.

5.58 The main tenure category of the BME households in the SWDP area is owner occupation (around 58%, compared with 69.7% of all households). 27.2% live in the private rented sector (14.9% across all households) and around 13.9% in the social rented sector (15.4% of all households).

Gypsy, Traveller and Travelling Showperson need

5.59 The 2019 Gypsy and Traveller Accommodation Assessment identified an overall need over the period 2019 to 2041 for 167 pitches based on an ethnic identity definition and 104 based on the Planning Policy for Traveller Sites (PPTS) nomadic habit of life definition. There is also a need for 10 Travelling Showperson plots. The main drivers of need within the first five-year period are from overcrowding and new family formation. Regarding transit provision, the GTAA recommended that the South Worcestershire authorities continue with their negotiated stopping policy.

Self-build and custom housebuilding

5.60 The NPPF 2021 set out that the government wants to enable more people to build their own homes and wants to make this form of housing a mainstream housing option.

5.61 There are a total of 315 households currently on the self/custom build register (Malvern Hills 114, Worcester 46 and Wychavon 155) at August 2021. This compares with a figure of 118 in November 2018.

Conclusion

5.62 In accordance with PPG, this housing need assessment has considered the future need for specialist accommodation, the need for residential care and considered the role of general housing in meeting needs, in particular bungalows and homes that can be adapted to meet a change in needs.

5.63 The number of households headed by someone aged 65 or over is expected to increase by 21,013 (45.6%) by 2041. According to the arc4 national database, the majority of older people 65 and over (76.6%) want to continue to live in their current home with support when needed according to the household survey, with help with repair/maintenance, gardening, cleaning, and other practical tasks, which would help people remain in their own home. There is also a need to deliver a range of smaller dwellings (particularly level-access accommodation) for older people across all tenures and specialist older persons housing provision. This would also provide an opportunity to release family homes back onto the market.

5.64 Currently there are around 7,320 units of specialist older person accommodation across the SWDP area comprising 2,465 units of residential care (C2 use class) dwellings and 4,855 units of specialist older person dwellings (C3 use class) such as sheltered and Extra Care. Analysis of demographic change would suggest a need for an additional 4,836 units comprising 1,638 residential care (C2) units and 3,198 older person (C3) dwelling units by 2041.

5.65 The SHMA update does not specify the precise nature of specialist older person dwellings to be built. This is to allow flexibility in delivery and PPG states that 'any single development may contain a range of different types of specialist housing' (PPG Paragraph: 010 Reference ID: 63-010-20190626).

5.66 A key conclusion is that there needs to be a broader housing offer for older people across the SWDP area and the SHMA update has provided evidence of the scale and range of dwellings needed.

5.67 A wealth of information has been assembled from various sources which helps to scope out the likely level of disability across the borough's population. Although it is a challenge to quantify the precise accommodation and support requirements, the SHMA has helped to scope out where needs are arising and has provided indicators of specific needs across various needs groups.

5.68 It is estimated there are around 75,500 people with a disability across the SWDP area and is projected to increase to around 92,600 by. Regarding housing for people with disabilities, arc4 national data suggests around 7.5% of households live in properties which have either been purpose-built or adapted for someone with an illness or disability.

5.69 Given the ageing population of the borough and the identified levels of disability amongst the population, it is recommended that 4.5% of new dwellings are built to wheelchair accessible M4(3) standard. All remaining new dwellings are built to M4(2) accessible and adaptable standard, to take account of the ageing demographics of the SWDP area.

6. Overall housing need, dwelling type and mix

Introduction

6.1 This chapter considers overall housing need, affordable need and establishes an overall dwelling type, size and tenure mix for the SWDP local authorities.

Overall housing need

6.2 The standard method identifies a need for 1,283 dwellings each year across South Worcestershire (Malvern Hills 413, Worcester 368 and Wychavon 502)

Dwelling type and mix

6.3 How the overall housing need should be broken down by dwelling type, size and tenure is now considered. In summary, the analysis uses the following data sources:

- ONS 2018-based household projections;
- dwelling stock information;
- national estimates of the relationships between households and dwellings derived from the arc4 national survey; and
- data from the affordable housing need calculation.

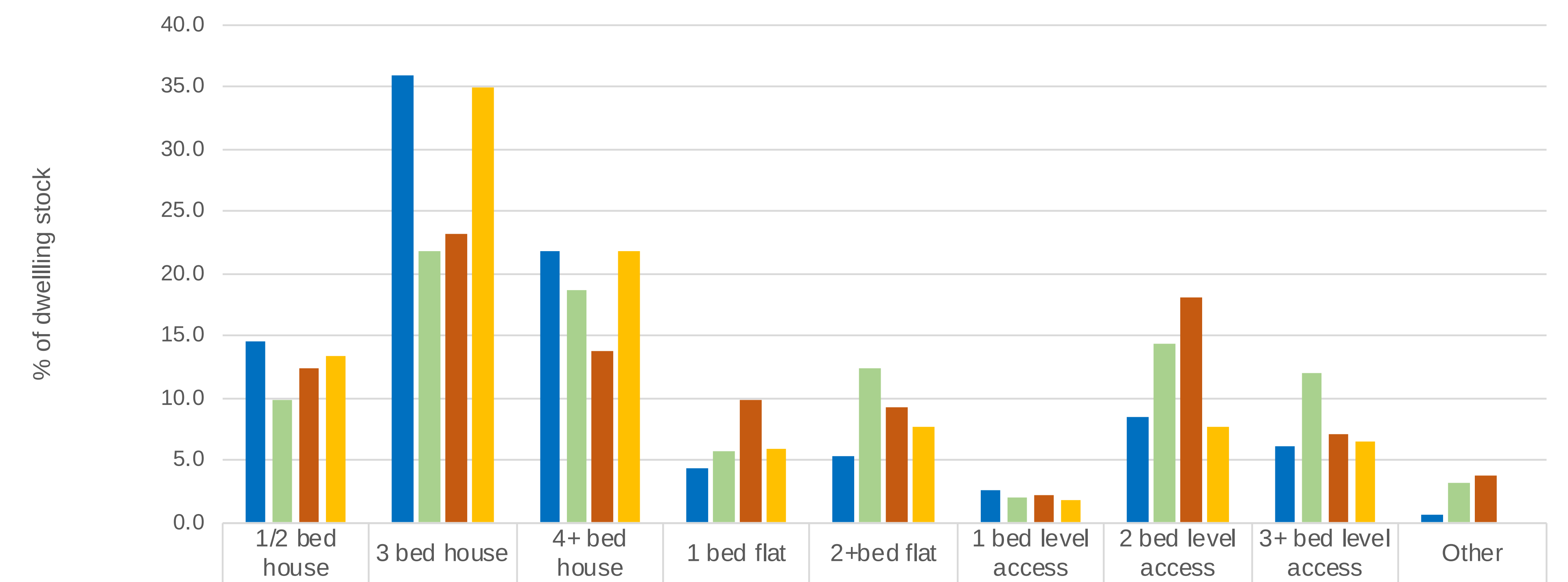
6.4 The analysis considers overall dwelling type and mix under three scenarios:

- A **baseline demographic** scenario which assumes the relationship between households and the dwellings they occupy remains the same over the plan period;
- An **aspirations** scenario which looks at the aspirations of households by age group and household type; and
- An **expectations** scenario which considers what households expect to move to by age group and household type.

6.5 The results of the scenarios are then compared with the current dwelling stock profile.

6.6 Figures 6.1 to 6.3 illustrates the variance between current stock and the alternative dwelling mix scenarios for each SWDP local authority. Under the baseline demographic scenario, the majority of newbuild should be houses (particularly 3-bedroom) and some flats and bungalows/level-access accommodation. Under the aspirations and expectations scenarios, there is a shift towards flats and bungalows/level-access.

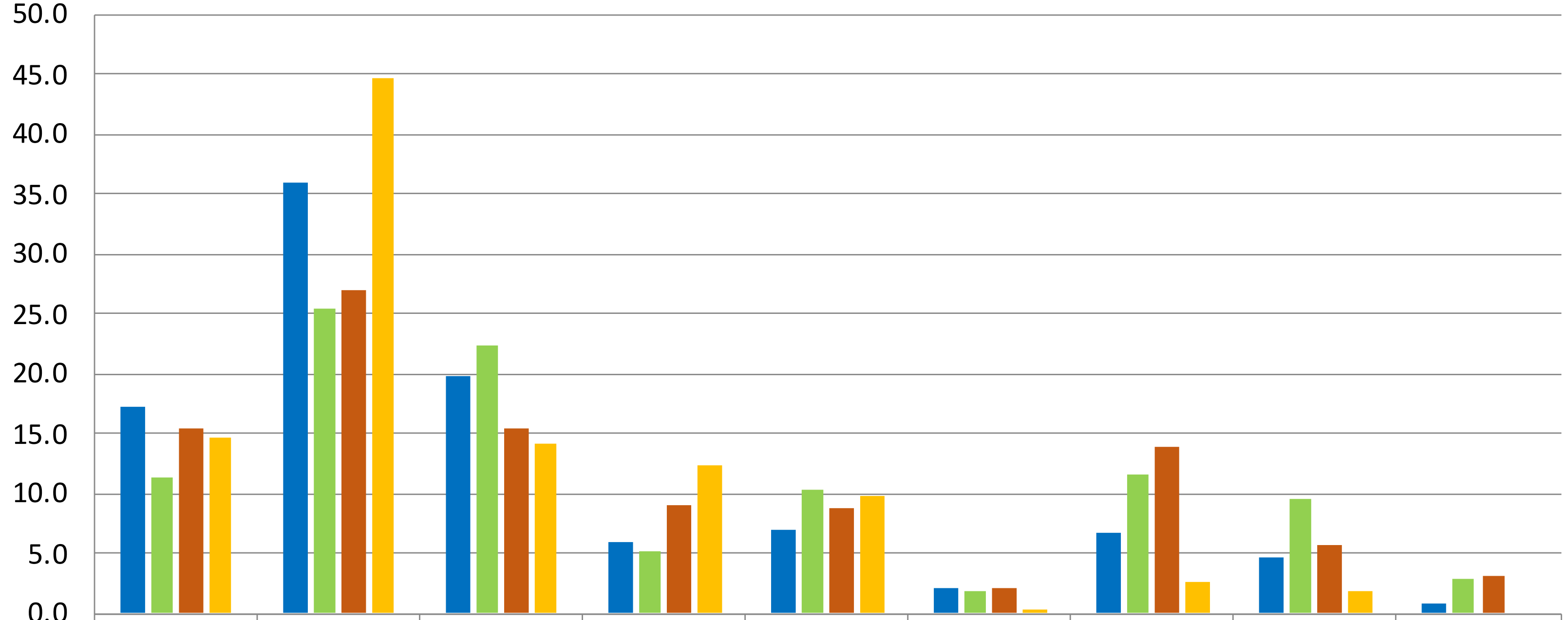
Figure 6.1 Summary of current dwelling stock and dwelling mix under baseline demographic, aspiration and expectation scenarios: Malvern Hills



	1/2 bed house	3 bed house	4+ bed house	1 bed flat	2+bed flat	1 bed level access	2 bed level access	3+ bed level access	Other
Demographic	14.6	35.8	21.9	4.4	5.4	2.6	8.5	6.1	0.8
Aspiration	9.8	21.8	18.7	5.8	12.3	2.1	14.3	12.1	3.1
Expectation	12.5	23.2	13.8	9.8	9.3	2.3	18.1	7.2	3.8
Current stock	13.4	34.9	21.8	5.9	7.8	1.8	7.8	6.6	

Source: 2018 ONS household projections, VOA data and arc4 national database

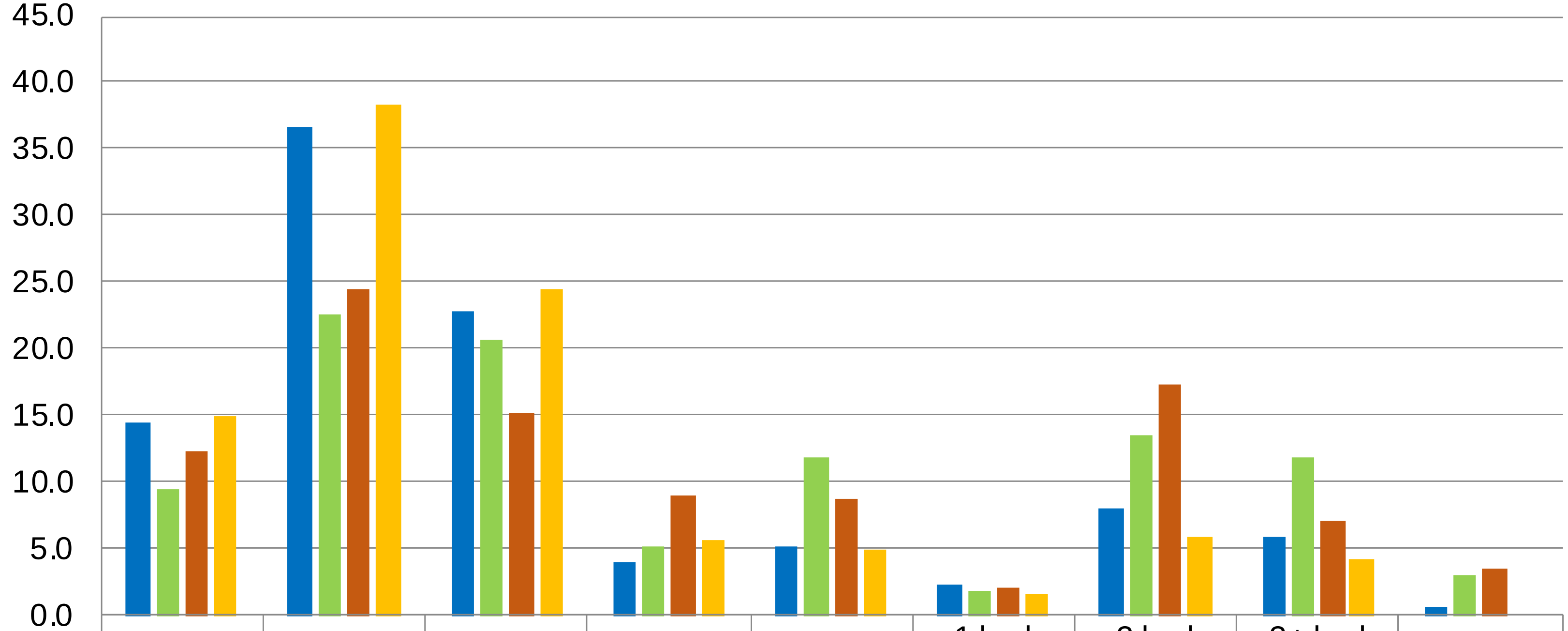
Figure 6.2 Summary of current dwelling stock and dwelling mix under baseline demographic, aspiration and expectation scenarios: Worcester



	1/2 bed house	3 bed house	4+ bed house	1 bed flat	2+bed flat	1 bed level access	2 bed level access	3+ bed level access	Other
Demographic	17.2	36.0	19.8	6.0	6.8	2.1	6.7	4.7	0.7
Aspiration	11.2	25.5	22.4	5.2	10.2	1.8	11.5	9.4	2.8
Expectation	15.5	26.9	15.4	8.9	8.7	2.1	13.8	5.6	3.2
Current stock	14.7	44.6	14.2	12.3	9.8	0.2	2.5	1.7	

Source: 2018 ONS household projections, VOA data and arc4 national database

Figure 6.3 Summary of current dwelling stock and dwelling mix under baseline demographic, aspiration and expectation scenarios: Wychavon



	1/2 bed house	3 bed house	4+ bed house	1 bed flat	2+bed flat	1 bed level access	2 bed level access	3+ bed level access	Other
Demographic	14.5	36.6	22.9	3.9	5.2	2.4	8.0	5.9	0.7
Aspiration	9.5	22.7	20.7	5.2	12.0	1.9	13.4	11.7	3.0
Expectation	12.3	24.6	15.1	9.1	8.9	2.1	17.3	7.1	3.5
Current stock	14.9	38.4	24.5	5.6	5	1.6	5.9	4.1	

Source: 2018 ONS household projections, VOA data and arc4 national database

Overall dwelling mix by tenure

6.7 Tables 6.1 to 6.4 set out the overall dwelling mix by tenure for each local authority and for the SWDP area. Appendix D sets out that actual figures which have been used to derive the data. The overall market mix is based on the overall demographic need and mix for affordable/social rented and affordable home ownership tenures is based on the analysis presented in Appendix C.

Table 6.1 Overall dwelling mix by tenure: Malvern Hills

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	10-15%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table 6.2 Overall dwelling mix by tenure: Worcester

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	15-20%	0-5%	15-20%
1-bedroom flat	5-10%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	0-5%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table 6.3 Overall dwelling mix by tenure: Wychavon

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	10-15%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Table 6.4 Overall dwelling mix by tenure: SWDP

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Conclusions

6.8 The standard method establishes a minimum affordable housing need of 1,283 each year across the SWDP area. The relationship between households, future household change and dwellings occupied has been considered to provide an indication of an appropriate dwelling mix for Malvern Hills, Worcester and Wychavon over the period 2021 to 2041. Having established future household change and the implications this has for dwelling type, size and tenure mix, the councils can make an informed strategic decision on the range and size of dwellings that will need to be built to meet need and aspiration over the period to 2041.

7. Conclusion: policy and strategic issues

7.1 This document has been prepared to update the SWDP Local Plan evidence base. It provides Malvern Hills, Worcester and Wychavon councils and their partners with robust, defensible and transparent information to help inform strategic decision-making and the formulation of appropriate housing and planning policies. The work also takes account of existing and emerging government policy and guidance.

7.2 The SWDP SHMA update will help the councils plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community. Specifically, the SHMA update identifies the size, type and tenure of housing required by considering current market demand relative to supply; and also identifies a continued affordable housing need across the SWDP area.

7.3 This concluding chapter summarises key messages from the research findings, structured around a commentary on the current and future housing markets and key local strategic issues.

Overall Housing need

7.4 Based on the ‘standard method; for calculating housing need, the minimum local housing need figure for the SWDP area is 1,283 dwellings each year. There are no further recommendations to adjust this figure other than to included 500 dwellings as part of unmet need from Tewkesbury Borough.

Dwelling type, tenure and mix

7.5 The relationship between household change and dwelling type/size and tenure requirements have been fully explored. The evidence will help the council deliver an appropriate range of dwelling stock for residents over the plan period. The overall mix by tenure for the SWDP is summarised in Table 7.1. This analysis provides a range of dwelling types and sizes appropriate to the SWDP area.

Table 7.1 Overall dwelling mix by tenure: SWDP

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

7.6 Regarding affordable need, there is an annual imbalance of 906 dwellings. An appropriate affordable tenure split for the SWDP area would be around 69% rented and 31% affordable home ownership tenures including First Homes. The full recommended tenure breakdown is 53% social rented, 16% affordable rented, 6% affordable home ownership and 25% First Homes.

7.7 However, Homes England have identified south Worcestershire councils as falling within high affordability pressure areas where the difference between the average social rents and private rents is £50 each week or more (https://www.gov.uk/government/publications/areas-of-high-affordability-pressure/list-areas-of-high-affordability-pressure).

7.8 Therefore, given the acute need for social rented accommodation across the SWDP area, it is recommended that 69% of new affordable housing is social rented, 6% affordable home ownership and 25% affordable home ownership through First Homes.

7.9 Recommended affordable dwelling profiles across the SWDP area are:

- For new social/affordable dwellings, 36.5% have one-bedroom, 35.4% two-bedrooms, 24% three-bedrooms and 4.2% four or more-bedrooms. This represents a change in the evidence from the 2019 SHMA as this takes into account actual delivery across SWDP.
- For affordable home ownership 10% to have one-bedroom, 40% two-bedrooms, 35% three-bedrooms and 15% four or more-bedrooms

7.10 Data from the housing register would indicate a higher proportion of one and two bedroom dwellings are needed but this needs to be balanced with a broader range of need from households who may not be able to afford market prices but cannot access social/affordable renting.

Meeting the needs of older people and those with disabilities

7.11 There is evidence to support a programme of accommodation delivery to help meet the needs of older people and those with disabilities. Although the vast majority of older people want to remain in their own home with support when needed, there is a need to diversify options available to older people wanting to move to more appropriate accommodation.

7.12 Currently there are around 7,320 units of specialist older person accommodation comprising 2,465 units of residential care (C2 use class) dwellings and 4,855 units of specialist older person dwellings (C3 use class) such as sheltered and Extra Care. Analysis of demographic change would suggest a need for an additional 4,836 units comprising 1,638 residential care (C2) units and 3,198 older person (C3) dwelling units by 2041. The C3 units should be included in the overall housing figure of 1,283 each year, so 160 or 12.4% of new dwellings built each year should be specialist older persons accommodation. Delivery of C2 units would be in addition to this figure.

7.13 A key conclusion is that there needs to be a broader housing offer for older people across the SWDP area and the SHMA has provided evidence of scale and range of dwellings needed.

7.14 A range of information has been assembled from various sources which helps to scope out the likely level of disability across the SWDP area's population. The strategic need for different types of accommodation has been evidenced using available information.

7.15 Although it is a challenge to quantify the precise accommodation and support requirements, the SHMA has helped to scope out where needs are arising.

7.16 Given the ageing population of the borough and the identified levels of disability amongst the population, it is recommended that 4.5% of new dwellings are built to M4(3) wheelchair accessible and adaptable standard and all remaining new dwellings are built to M4(2) accessible and adaptable standard to take account of the ageing demographics of the SWDP area.

7.17 It is expected that some of this need will be met through the development of C3 accommodation and there is overlap between affordable, specialist older person and M4(3) need. For instance the development of an older person's level access, wheelchair accessible affordable dwelling would help address three aspects of housing need.

7.18 It is also assumed that there will be ongoing adaptation of existing dwellings to support those with additional needs.

Final comments

7.19 The evidence presented in this SHMA update suggests that there are three main policy areas that require particular attention from both a planning policy and social policy perspective:

- the challenge of enabling the quantity and mix of housing that needs to be delivered, including an appropriate level of affordable housing;
- the challenge of ensuring that the housing and support needs of older people are met going forward; and
- the challenge of ensuring that the needs of people with disabilities is appropriately addressed.

Technical Appendix A: Research methodology

Overall approach

A.1 The 2021 SHMA update builds upon the work carried on for the 2019 SHMA. This involved a multi-method approach in order to prepare a robust and credible housing needs assessment for the SWDP area:

- a survey of key stakeholders including representatives from the council, neighbouring local authorities, housing associations, specialist housing providers, estate agents, adult social care and developers;
- interviews with estate and letting agents operating within the borough;
- a review of relevant secondary data including the 2011 Census, house price trends, CORE lettings data and MHCLG Statistics; and
- review of data from the arc4 national database.

A.2 The specific purpose of the 2021 SHMA was to update statistical data.

arc4 national database

A.3 The arc4 national database uses data from published reports which has been derived from household surveys carried out by arc4. The database draws upon data from 24 district-level household surveys across England and Wales. The data currently is based on around 84,000 household surveys which, when weighted and grossed, relates to 2.4m households.

A.4 Summaries of data have been presented within this LHNA report.

Technical Appendix B: Affordable housing definitions

Affordable housing definitions

Definitions relating to affordable housing are presented in the NPPF 2021 (Annex 2):

Affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

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

b) **Starter homes**: is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.

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

d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and Rent to Buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision or refunded to government or the relevant authority specified in the funding agreement.

Technical Appendix C: Housing need calculations

Introduction

C.1 Identifying the scale of affordable housing need is a key consideration of planning practice guidance. This is a separate calculation to the overall housing need figure derived using the standard model and set out in PPG paragraphs 18 (Reference ID: 2a-018-20190220) to 24 (Reference ID: 2a-024-20190220). The affordable housing need analysis helps to establish the overall scale of affordable housing need by location, type, size and tenure and whether the council should plan for more dwellings to help meet the need for affordable housing.

C.2 PPG states that 'all households whose needs are not met by the market can be considered in affordable housing need **(PPG Paragraph: 018 Reference ID: 2a-018-20190220)**. PPG then considers how affordable housing need should be calculated:

'Strategic policy-makers will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market. This should involve working with colleagues in their relevant authority (e.g. housing, health and social care departments).' **(PPG Paragraph: 019 Reference ID: 2a-019-20190220).**

C.3 The PPG focuses on the use of existing (secondary data).

C.4 There are four broad components to the needs assessment method. These have remained relatively unchanged through the different guidance issued by government and focus on:

- Step A. Existing household in need (current unmet gross need).
- Step B. Future households in need.
- Step C. Affordable supply.
- Step D. Annual need for affordable housing.

C.5 To be consistent with the standard method for calculating overall housing need, the affordable housing need is annualised over a ten-year period.

Affordability assumptions

C.6 As part of the affordable needs assessment, the extent to which households in need cannot afford open market prices or rents is considered. PPG does not specify what household income should be spent for a property to be affordable although does state the 'need to identify the minimum household income required to access lower quartile (entry level) market housing' **(PPG Paragraph 021 Reference ID 2a-021-20190220).** The last guidance to consider affordable prices/rents was published in the 2007 **DCLG Strategic Housing Market Assessments Practice Guidance Version 2 August 2007**, which stated that gross household incomes should be used to assess affordability and:

- a household can be considered able to afford to buy a home if it costs 3.5x the gross income of a single earner or 2.9x the gross income for dual-income households; and
- a household can be considered able to afford market renting where the rent payable was up to 25% of gross household income.

C.7 The former guidance did note that local circumstances could justify higher figures being used for affordable renting and that allowances should be made for access to capital that could be used towards the cost of home ownership.

C.8 Mortgage lending practices would suggest that 4.75x a single or joint income could be considered (This is the maximum single or joint household income multiple offered by First Direct July 2020)

C.9 Based on this data, the principle assumption considered by arc4 with reference to affordability is:

- for buying up to 3.5x gross household income ; and
- for renting up to 25% gross household income.

Step A: Current unmet gross need

C.10 **PPG Paragraph 020 Reference ID: 2a-021-20190220** states that 'strategic policy-making authorities can establish the unmet (gross) need for affordable housing by assessing past trends and current estimates of:

- the number of homeless households;
- the number of those in priority need who are currently housed in temporary accommodation;
- the number of households in over-crowded housing;
- the number of concealed households;
- the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
- the number of households from other tenures in need and those that cannot afford their own homes, either to rent or to own if that is their aspiration.'

C.11 PPG notes that care should be taken to avoid double-counting and to only include those households who cannot afford to access suitable housing in the market. Table C1. Sets out the overall scale of current need before affordability of market housing is considered.

Table C1	Current gross unmet need (before affordability testing)					
Reason for need	**Total in need**				**Comment**	**Source**
	Malvern Hills	**Worcester**	**Wychavon**	**SWDP**		
A1 Homeless households	127	403	278	808	Number of households identified as homeless 2019/20	MHCLG Live tables
A2 Priority need / temporary accommodation	95	443	206	744	Households identified as threatened with homelessness in 2019/20 plus households living in temporary accommodation (based on quarterly average) in 2019/20	MHCLG Live tables
A3 Overcrowded	1,476	1,245	1,100	3,821	2011 Census data households	2011 Census LC4108EW
A4 Concealed household	547	426	504	1,477	Census definition refers to couples and lone parents living within another family unit.	2011 Census LC1110EW
A5 Existing affordable tenants in need A6 Other tenures in need	1,522	3801	3,232	8,555	No breakdown by tenure in housing register	Housing register
A7 Sum of households in A3 to A6 with one or more needs	3,545	5,472	4,836	13,853	Sum of A3 to A6	
A8 Total in A7 adjusted to remove any double counting	3,545	5,472	4,836	13,853	This is the total number of households with one or more needs	
A9. All households in need (A1+A2+A8)	3,767	6,318	5,320	15,405		
% of all households in need	**10.7%**	**14.3%**	**9.4%**			

Note table subject to rounding

Further Notes to Table C1:

A3. Overcrowding

The extent to which households are overcrowded is measured using the 'bedroom standard'. This allocates a standard number of bedrooms to each household in accordance with its age/sex/marital status composition. A separate bedroom is allocated to each married couple, any other person aged 21 or over, each pair of adolescents aged 10-20 of the same sex and each pair of children under 10. Any unpaired person aged 10-20 is paired if possible, with a child under 10 of the same sex, or, if that is not possible, is given a separate bedroom, as is any unpaired child under 10. This standard is then compared with the actual number of bedrooms (including bedsits) available for the sole use of the household.

Note: the model has used overcrowding and concealed households data from the 2011 Census.

A4. Concealed households

The number of couples and lone parents living within a household.

A5. Existing affordable tenants in need and A6. Other tenures in need

Households in need based on the numbers who have one or more of the following needs: under notice, real threat of notice or lease coming to an end; too expensive; too difficult to maintain; sharing facilities; unsuitable due to age/mobility impairment; lacking facilities; major disrepair; harassment/threat of harassment from neighbours.

A7 and A8. Sum of households

A7 is the sum of households who are overcrowded, concealed, are existing tenants in need or other tenures in need. A8 adjusts this total to remove double counting to give a figure for the total number of households with one or more housing need. This final figure takes account of any duplicates (so if the household is overcrowded and has another need, it is only counted once as a household in need).

Affordability of open market options

C.12 Table C2 sets out ward-level lower quartile prices and rents which are used as a basis for testing the affordability of open market options.

Table C2	Lower quartile house prices and incomes required by district			
District	Lower Quartile Price 2020	Income needed (3.5x)	Lower Quartile private rent 2020	Income needed (25%)
Malvern Hills	£198,625	£51,075	£598	£28,704
Worcester	£169,963	£43,705	£524	£25,152
Wychavon	£207,000	£53,229	£650	£31,200
SWDP Average	**£191,863**	**£49,336**	**£591**	**£28,352**

Source: Data produced by Land Registry © Crown copyright 2020, Zoopla 2020

C.13 Table C3 sets out the proportion of households in need who could not afford open market prices or rents. The principal affordability analysis uses data on ward-level lower quartile prices and rents and assumes that a property is affordable if up to 25% of household income is spent on rent and buying costs up to 3.5x household income.

C.14 It is reasonably assumed that all households in A1 (homeless) and A2 (priority need/in temporary accommodation) cannot afford open market prices or rents given their housing circumstances (and income information is not available from secondary data source).

C.15 The affordability of open market options is tested on the remaining households in need (rows A3 to A6 in Table C1) based on 2021 housing register income data

C.16 Analysis concludes that **12,415** households across the SWDP area are in housing need and cannot afford to buy or rent at lower quartile market prices.

Table C3 Affordability of open market housing for households in need			
Malvern Hills			
Needs groups	**Number of households**	**% cannot afford to buy or rent**	**Number cannot afford to buy or rent**
Sum of A1 and A2 households	222	100%	222
Sum of households in A3 to A6 with one or more needs	3,545	92.9%	3,293
Total cannot afford to buy or rent			**3,515**
Worcester			
Needs groups	**Number of households**	**% cannot afford to buy or rent**	**Number cannot afford to buy or rent**
Sum of A1 and A2 households	846	100%	846
Sum of households in A3 to A6 with one or more needs	5,472	85.0%	4,651
Total cannot afford to buy or rent			**5,497**
Wychavon			
Needs groups	**Number of households**	**% cannot afford to buy or rent**	**Number cannot afford to buy or rent**
Sum of A1 and A2 households	484	100%	484
Sum of households in A3 to A6 with one or more needs	4,836	90.3%	4,367
Total cannot afford to buy or rent			**4,851**
Total cannot afford to buy or rent (SWDP Total)			**13,863**

Step B: Future households in need

C.17 **PPG Paragraph 021 Reference ID: 2a-021029190220** states that 'projections of affordable housing need will have to reflect new household formation, the proportion of newly-forming households unable to buy or rent in the market area, and an estimate of the number of existing households falling into need. The process will need to identify the minimum household income required to access lower quartile (entry level) market housing. It can then assess what proportion of newly-forming households will be unable to access market housing.'

New household formation

C.18 The most useful data sources for assessing the level of new household formation as referenced in PPG are:

- MHCLG/ONS household projections, from which an annual net increase in households can be derived; and
- the English Housing Survey, from which a national gross household formation rate can be derived.

C.19 Table C4 presents a summary of data used to establish a view on household formation along with the gross household formation rates by district for the standard method calculation period 2021 to 2031. These are derived from the 2014-based MHCLG household projections used in the standard method. Through the standard method of calculating need, allowance is made for increasing the level of housing delivery to support household formation through the affordability adjustment.

New households likely to be in affordable housing need

C.20 The arc4 national database derived from affordable housing needs analysis indicates that nationally 56.9% of newly-forming households could not afford buying or renting lower quartile (entry level) properties. This is applied to gross formation to estimate the likely number of new households in affordable housing need.

Existing households expected to fall into need

C.21 The housing register will include existing households falling into need each year. The actual number cannot be determined and the model assumes that these households have been included in an assessment of existing households in need.

Table C4 Net and gross household formation 2021-2031						
	Annual household formation					
	Malvern Hills	Worcester	Wychavon	SWDP	Notes	Source
A. MHCLG 2014-based household projections	278	301	366	945	Annual NET increase between 2021 and 2031	MHCLG 2014-based household projections
B. ONS 2018-based household projections	380	182	799	1,361	Annual NET increase between 2021 and 2031	ONS 2018-based household projections
C. Average gross household formation rate based on applying national rate to total households over the period 2021-2031 (2014-based projections)	**519**	**673**	**792**	**1,984**	**Gross household formation rate of 1.435%**	**English Housing Survey 3- year average 2017/18 to 2019/20**
D. Average gross household formation rate based on applying national rate to total households over the period 2020-2030 (2018-based projections)	537	646	865	2,048	Gross household formation rate of 1.439%	English Housing Survey 3 year average 2017/18 to 2019/120
G. Blended rate of gross household formation (C, D average)	528	660	828	2,016		

Total newly arising affordable housing need (gross per year)

C.22 Total newly arising need by district each year as summarised in Table C5.

Table C5 Total newly-arising affordable housing need				
	Malvern Hills	Worcester	Wychavon	SWDP
A. Number of newly-forming households	519	673	792	1,984
B. Proportion unable to afford market housing	296	384	451	1,131
C. Existing households falling into need	Included in Step A			
Total newly arising affordable need (B+C)	296	384	451	1,131

Step C: Affordable housing supply

C.23 PPG notes that 'there will be a current supply of housing stock that can be used to accommodate households in affordable housing need as well as future supply.' **(PPG Paragraph 022 Reference ID: 2a-022-20190220)** There are four aspects to affordable supply to be considered as set out in Table C6. Table C6 also considers the excellent progress made across the three local authorities in delivering new affordable housing, with 2,410 built over the three year period 2017/18 to 2019/20 across South Worcestershire. This demonstrates that affordable housing policies are highly effective in helping address affordable need and justifies the continuation of robust affordable housing policies in the Local Plan.

C.24 Note that stock losses through right to buy are not referenced in PPG and not included in Table C6. Any losses through right to buy would increase the shortfall.

C.25 Excluding newbuild, there is an annual supply of 1,602 affordable dwellings across South Worcestershire (307 Malvern Hills, 476 Worcester and 819 Wychavon).

Table C6 Affordable housing supply				
Source of supply/stock loss	**Data source**	**Malvern Hills**	**Worcester**	**Wychavon**
The number of affordable dwellings that are going to be vacated by occupiers that are fit for use by other households in need	RP lettings data over most recent 3-year period	Annual average of 297 general needs affordable dwellings have been let 2017/18 to 2019/20	Annual average of 452 general needs affordable dwellings have been let 2017/18 to 2019/20	Annual average of 787 general needs affordable dwellings have been let 2017/18 to 2019/20
Suitable surplus stock (vacant properties)	MHCLG vacant dwelling statistics	31 vacant affordable (council and housing association) dwellings reported as vacant in 2019 0.7% of total affordable stock. Below transactional rate of around 2% to allow movement in stock so no suitable surplus stock available	39 vacant affordable (council and housing association) dwellings reported as vacant in 2019 0.6% of total affordable stock. Below transactional rate of around 2% to allow movement in stock so no suitable surplus stock available	39 vacant affordable (council and housing association) dwellings reported as vacant in 2019 0.5% of total affordable stock. Below transactional rate of around 2% to allow movement in stock so no suitable surplus stock available
Supply of affordable home ownership through resale	Sales data	397 AHO dwellings in total (2020 SDR). Assuming 5% resale rate = 20 each year	481 AHO dwellings in total (2020 SDR). Assuming 5% resale rate = 24 each year	627 AHO dwellings in total (2020 SDR). Assuming 5% resale rate = 31 each year
Units taken out of management	Local authority data	None identified	None identified	None identified
Total annual supply used in needs calculation	**Calculation**	**297 lettings + 0 vacant newbuild – 0 units taken out of management + 20 AHO resales = 307**	**452 lettings + 0 vacant – 0 units taken out of management + 24 AHO resales = 476**	**787 lettings + 0 vacant – 0 units taken out of management + 31 AHO resales = 819**
The committed supply of new net affordable homes at the point of assessment (number and size)	MHCLG Live Table 1011C Affordable Housing Supply statistics	Total of 643 completions 2017/18 to 2019/20 (429 Rented and 214 AHO). Annual average of 214. 2020/21 completions 194 (138 Rented and 56 AHO)	Total of 499 completions 2017/18 to 2019/20 (455 Rented and 444 AHO). Annual average of 166.	Total of 1,168 completions 2017/18 to 2019/20 (883 Rented and 285 AHO). Annual average of 389. 2020/21 completions 224 (158 Rented and 66 AHO)

Step D: Total annual need and breakdown by size, type and tenure

C.26 Table C7 summarises the total annual need for affordable housing across South Worcestershire which establishes a gross annual need of 2,518 and after taking into account supply, a net need of 906 affordable dwellings each year.

Table C7 Gross and net annual affordable need

	Factor	Malvern Hills	Worcester	Wychavon	SWDP AREA	Data source/assumption
A1	Current gross unmet need (before affordability test)	3,767	6,318	5,320	15,405	Table C1 row A9
A2	Current gross unmet need (after affordability test)	3,515	5,497	4,851	13,863	Table C3
A3	Annualised need	352	550	485	1,387	Assume unmet need is cleared over a 10-year period for consistency with standard method calculation
B	Newly-arising annual need	296	384	451	1,131	Table C5
TGN	Total gross need	648	934	936	2,518	A3+B
C	Affordable annual housing supply	317	476	819	1,612	Table C6
	Total annual net need	**331**	**458**	**117**	**906**	**TGN – C**

Note: Table subject to rounding errors

C.27 Table C8 details the annual shortfall of affordable dwellings by number of bedrooms. It shows the percentage breakdown in affordable dwellings needed by local authority area. Table C9 summarises the data further.

Table C8 Affordable need by number of bedrooms from housing register

Age Group and number of bedrooms	**Local Authority (%)**			
	Malvern Hills	Worcester	Wychavon	SWDP
Under 65				
0	36.9	39.0	36.5	37.7
1	22.9	23.8	23.5	23.5
2	19.1	19.3	18.4	18.9
3	8.3	9.1	8.9	8.9
4	2.2	2.7	2.1	2.4
5	0.3	0.3	0.2	0.3
6	0.0	0.1	0.1	0.0
Sub-total	89.8	94.2	89.6	91.7
65 and over				
0	5.0	2.6	4.4	3.7
1	4.1	2.6	5.1	3.8
2	1.1	0.6	0.8	0.8
3	0.0	0.1	0.0	0.0
4	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0
Sub-total	10.2	5.8	10.4	8.3
Grand Total	100.0	100.0	100.0	100.0
All age groups				
0	41.9	41.6	40.9	41.4
1	27.0	26.3	28.6	27.3
2	20.2	19.9	19.2	19.7
3	8.3	9.1	8.9	8.9
4	2.2	2.7	2.1	2.4
5	0.3	0.3	0.2	0.3
6	0.0	0.1	0.1	0.0
	100.0	100.0	100.0	100.0
Base	1522	3801	3132	8455

Source: Housing Register

Table C9	Summary of bedroom need from housing register			
Age Group and number of bedrooms	**Local Authority (%)**			
	Malvern Hills	Worcester	Wychavon	SWDP
Studio /1	68.9	67.9	69.5	68.7
2	20.2	19.9	19.2	19.7
3	8.3	9.1	8.9	8.9
4 or more	2.6	3.0	2.4	2.7
Total	100.0	100.0	100.0	100.0
Base	1522	3801	3132	8455

C.28 Whilst the housing needs data shows apparent need for studio and one-bedroom accommodation, we do not consider that substantial proportions of such small housing will be sustainable in the longer term. National evidence from arc4 points to a broader mix of affordable dwellings are generally needed (Table C10). The most recent developments in Malvern Hills and Wychavon also confirm that a broader range of affordable dwellings are being built in South Worcestershire (Table C11).

Table C10	Indicative profile of affordable housing	
Number of bedrooms	**Affordable/social rented**	**Affordable Home Ownership**
1	20%	10%
2	35%	40%
3	40%	35%
4 or more	5%	15%

Source: arc4 national database

Table C11	Affordable housing completions 2020/21 by type and size			
Type	**Malvern Hills**	**Wychavon**	**Total**	**%**
1 Bed Flat	26	20	46	11.1
2 Bed Flat	2	1	3	0.7
3 Bed Flat	2		2	0.5
1 Bed Bungalow	3	10	13	3.1
2 Bed Bungalow	15	23	38	9.1
1 Bed House	9	18	27	6.5
2 Bed House	82	91	173	41.6
3 Bed House	48	46	94	22.6
4 Bed House	7	13	20	4.8
Total	194	222	416	100.0
Summary by number of bedrooms				
1	38	48	86	20.7
2	99	115	214	51.4
3	50	46	96	23.1
4	7	13	20	4.8
Total	194	222	416	100.0
Summary by dwelling type				
Flat	30	21	51	12.3
Bungalow	18	33	51	12.3
House	146	168	314	75.5
Total	194	222	416	100.0

Note: data for Worcester is not available

C.29 Table C12 provides a recommended profile of social/affordable rented dwellings which blends together the evidence of need from the housing register, the arc4 national database and the actual delivery of dwellings in Malvern Hills and Wychavon.

Table C12	Recommended profile of social/affordable rented dwellings			
Number of bedrooms	**Malvern Hills**	**Worcester**	**Wychavon**	**SWDP**
1	36.2	36.2	37.0	36.5
2	35.4	35.4	35.3	35.4
3	24.7	24.1	23.2	24.0
4	3.7	4.3	4.4	4.2
Total	100.0	100	100.0	100.0

C.30 Table C13 provides a recommended profile of affordable home ownership dwellings based on the arc4 national database

Table C13	Recommended profile of affordable home ownership dwellings			
Number of bedrooms	**Malvern Hills**	**Worcester**	**Wychavon**	**SWDP**
1	10%	10%	10%	10%
2	40%	40%	40%	40%
3	35%	35%	35%	35%
4	15%	15%	15%	15%
Total	100%	100%	100%	100%

Comparison of current housing stock and current/future needs

C.31 PPG states that 'strategic policy-making authorities will need to look at the current stock of houses of different sizes and assess whether these match current and future needs (PPG Paragraph 023 Reference ID: 2a-023-20190220, this is interpreted as all dwelling types and not just houses). Table C14 sets out this comparison and shows that overall there is a need to continue to develop a range of sizes of affordable dwellings. Whilst there continues to be a shortfall in the need for smaller one and two bedroom dwellings across all areas, there is also a shortfall of larger 4 or more bedroom dwellings in Worcester and Wychavon.

Table C14 Comparison between current supply and annual gross need

Malvern Hills				
Number of bedrooms	**Current supply estimate**	**%**	**Annual gross need %**	**Variance %**
1-bedroom	560	11.4	36.2	-24.8
2-bedroom	1169	23.7	35.4	-11.7
3-bedroom	1739	35.3	24.7	10.6
4 or more -bedroom	1460	29.6	3.7	25.9
Total	4928	100	100	
Worcester				
Number of bedrooms	**Current supply estimate**	**%**	**Annual gross need %**	**Variance %**
1-bedroom	2,473	33.4	36.2	-2.8
2-bedroom	2,343	31.7	35.4	-3.8
3-bedroom	2,384	32.2	24.1	8.2
4 or more -bedroom	196	2.7	4.3	-1.6
Total	7,396	100.0	100.0	
Wychavon				
Number of bedrooms	**Current supply estimate**	**%**	**Annual gross need %**	**Variance %**
1-bedroom	2,668	30.0	37.0	-7.1
2-bedroom	3,277	36.8	35.3	1.5
3-bedroom	2,738	30.8	23.2	7.5
4 or more -bedroom	220	2.5	4.4	-1.9
Total	8,903	100.0	100.0	
SWDP				
Number of bedrooms	**Current supply estimate**	**%**	**Annual gross need %**	**Variance %**
1-bedroom	5,701	26.9	36.5	-9.6
2-bedroom	6,789	32.0	35.4	-3.4
3-bedroom	6,861	32.3	24.0	8.3
4 or more -bedroom	1,876	8.8	4.2	4.7
Total	21,227	100.0	100.0	

Source: 2020 SDR

Tenure mix and First Homes

C.32 Analysis has carefully considered the range of affordable tenures that may be appropriate for existing households in need and newly-forming households. Table C15 summarises the overall tenure split between affordable rented options (social and affordable rent) and affordable home ownership solutions (including shared ownership, discounted for sale and other tenures as set out in Annex 2 of the NPPF).

C.33 The current Local Plan target is for 80% rented and 20% home ownership products. An updated affordable tenure mix has been carefully calculated by taking into account:

- recent trends in affordable housing delivery (Table C15);
- the relative affordability of social and affordable rents to households on the housing waiting list (Table C16); and
- the need to consider first homes as part of the affordable tenure mix.

C.34 As Table C15 shows, the delivery of affordable home ownership products has been increasing and accounts for around one-quarter of new affordable homes across the SWDP area.

Table C15 Trends in affordable housing delivery 2017/18 to 2019/20

Locality	Social/ affordable rented	Affordable Home Ownership (%)	Total	Base
Malvern Hills	66.7%	33.3%	100.0%	643
Worcester	91.2%	8.8%	100.0%	499
Wychavon	75.6%	24.4%	100.0%	1,158
SWDP	76.5%	23.5%	100.0%	2,310

Source: MHCLG Affordable Housing Statistics Dwelling Completions Table 1011C

C.35 Further analysis has been carried out to determine the relative affordability of social and affordable rents based on household income provided in the housing register (Table C.16).

Table C16 Social and affordable rented tenure split

Locality	% can afford social rent	% can afford affordable rent	Total	Base
Malvern Hills	65.3%	34.7%	100.0%	798
Worcester	66.8%	33.2%	100.0%	2,070
Wychavon	68.1%	31.2%	100.0%	1,636
SWDP	67.0%	33.0%	100.0%	4,504

C.36 PPG published in May 2021 recommends that a minimum of 25% of all affordable housing units secured through developer contributions should be First Homes **(Paragraph 013 Reference ID: 70-013-20210425)**. Then, PPG says 'once a minimum of 25% of First Homes has been accounted for, social rent should be delivered in the same percentage as set out in the Local Plan. The remainder of the affordable housing tenures should be delivered in line with the proportions set out in the Local Plan policy **(Paragraph 15 reference ID: 70-015-20210524).**

C.37 Further analysis takes into account the affordable tenure splits in Tables C15 and C16 and the First Home PPG requirement to establish the final tenure splits set out in Table C17. The recommended tenure split of affordable tenures is 53% social rented, 16% affordable rented, 6% affordable home ownership and 25% First Homes. The overall split is 69% rented and 31% affordable home ownership.

C.38 However, Homes England have identified south Worcestershire councils as falling within high affordability pressure areas where the difference between the average social rents and private rents is £50 each week or more (https://www.gov.uk/government/publications/areas-of-high-affordability-pressure/list-areas-of-high-affordability-pressure).

C.39 Therefore, given the acute need for social rented accommodation across the SWDP area, it is recommended that 69% of new affordable housing is social rented, 6% affordable home ownership and 25% affordable home ownership through First Homes.

Table C17 Affordable tenure split

Locality	Social rented (%)	Affordable Rented (%)	Affordable Home Ownership (%)	First Homes (%)	Total
Malvern Hills	52%	17%	6%	25%	100.0%
Worcester	54%	15%	6%	25%	100.0%
Wychavon	52%	17%	6%	25%	100.0%
SWDP	53%	16%	6%	25%	100.0%

Source: 2021 housing register

Technical Appendix D: Overall dwelling mix calculations

D.1 The following tables set out the data which has been used to derived the ranges in Table 6.1 to 6.4.

Table D1 Overall dwelling mix by tenure: Malvern Hills

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	14.6	10.7	18.0
3-bedroom house	35.8	24.7	35.0
4 or more -bedroom house	21.9	3.7	15.0
1-bedroom flat	4.4	21.7	7.0
2 or more bedroom flat	5.4	21.2	16.0
1-bedroom bungalow/level access	2.6	10.8	1.0
2-bedroom bungalow/level access	8.5	7.1	8.0
3 or more bungalow/level access	6.1	0.0	0.0
Other	0.8		
Total	100.0	100.0	100.0

Table D2 Overall dwelling mix by tenure: Worcester

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordabl e Rented	Affordable Home Ownership
1 and 2-bedroom house	17.2	10.7	18.0
3-bedroom house	36.0	24.1	35.0
4 or more -bedroom house	19.8	4.3	15.0
1-bedroom flat	6.0	21.7	7.0
2 or more bedroom flat	6.8	21.3	16.0
1-bedroom bungalow/level access	2.1	10.9	1.0
2-bedroom bungalow/level access	6.7	7.1	8.0
3 or more bungalow/level access	4.7	0.0	0.0
Other	0.7		
Total	100.0	100.0	100.0

Table D3	**Overall dwelling mix by tenure: Wychavon**		
	Tenure mix (range)		
Dwelling type and size	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	17.2	10.7	18.0
3-bedroom house	36.0	24.1	35.0
4 or more -bedroom house	19.8	4.3	15.0
1-bedroom flat	6.0	21.7	7.0
2 or more bedroom flat	6.8	21.3	16.0
1-bedroom bungalow/level access	2.1	10.9	1.0
2-bedroom bungalow/level access	6.7	7.1	8.0
3 or more bungalow/level access	4.7	0.0	0.0
Other	0.7		
Total	100.0	100.0	100.0

Table D4	**Overall dwelling mix by tenure: SWDP**		
	Tenure mix (range)		
Dwelling type and size	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15.4	10.7	18.0
3-bedroom house	36.2	24.0	35.0
4 or more -bedroom house	21.5	4.1	15.0
1-bedroom flat	4.7	21.9	7.0
2 or more bedroom flat	5.8	21.2	16.0
1-bedroom bungalow/level access	2.3	10.9	1.0
2-bedroom bungalow/level access	7.7	7.1	8.0
3 or more bungalow/level access	5.5	0.0	0.0
Other	0.7		
Total	100.0	100.0	100.0

Neighbourhood Plan Steering Group – Agenda Time Allocations
25th February 2026

The table below sets out planned time allocations aligned to the circulated agenda to support discussion flow and help make best use of meeting time.

Several items were carried forward from the previous meeting and are therefore included again to ensure they are addressed.

Item	Agenda Item	Start time	Time
1	Apologies	18:45	2 min
2	Declaration of Interest	18:47	1 min
3	Approval of Minutes	18:48	3 min
4	Clerk's Update (noting)	18:51	5 min
5	Outstanding Information (noting — two items remain outstanding)	18:56	5 min
6	Consultant Progress Update	19:01	26 min
7	Survey Launch (noting)	19:27	2 min
8	**Train Station Capacity and Policy**	19:29	12 min
9	**Housing Mix Requirements**	19:41	26 min
10	Programme and Timeline	20:07	6 min
11	Date of Next Meeting	20:13	2 min
	Total	**Close ~20:15**	**90 min**

HONEYBOURNE NEIGHBOURHOOD PLAN REVIEW

Steering Group Meeting – 25th February 2026

Member Briefing Note: Agenda Items 8, 9 and 10

These notes summarise the Planning Consultant's briefing papers for the three items deferred from the January meeting. Members are asked to read them in advance so that discussion at the meeting can focus on the decisions required.

Item 8 – Train Station Capacity and Policy

Background

The Consultant has confirmed that the railway station falls within the remit of the Neighbourhood Plan Review. It will form a core part of the plan's argument in relation to future housing proposals, and the plan can require developers to work with Network Rail and Wychavon District Council to deliver improvements.

National Policy Position

The draft new National Planning Policy Framework (NPPF) introduces a concept of 'well-connected' stations which would attract a presumption in favour of development on rail-connectivity grounds. Honeybourne Station does not meet this definition because:

- The Evesham Travel to Work Area falls well below the required economic threshold (top 60 areas by Gross Value Added).
- The station does not operate at the required service frequency (four services per hour overall, or two per hour per direction).

This is a useful and protective finding: national policy will not create pressure for significant growth to be directed to the village on the basis of the station's existence.

Existing Constraints

The principal operational problem is parking. Demand already exceeds supply, with regular overspill into residential streets. This is a long-standing documented issue. Land on the north side of the railway line has been identified for a new car park, but the expansion cannot function without a safe pedestrian crossing to the platform.

The most realistic solution is a new footbridge, which Network Rail has previously costed at approximately £2.5 million. Until that crossing is provided, the parking problem is unlikely to improve.

What the Neighbourhood Plan Can Do

The plan can legitimately:

- Identify the pedestrian access and parking constraints as known infrastructure issues.
- Require development proposals to avoid making these problems worse.
- Seek planning contributions (via Section 106 or similar) toward solutions, including the footbridge and additional parking capacity.
- Reference broader improvements such as cycling and pedestrian access, bus connectivity, waiting facilities and cycle parking.

Decision required: Members are asked to agree in principle that the plan should include a Train Station policy along these lines, and to confirm any additional matters they wish it to address.

Item 9 – Housing Mix Requirements

Background

The existing Neighbourhood Plan contains two housing mix policies: Policy H2 (housing mix for market and affordable homes) and Policy H3 (single-storey and adaptable homes). These were appropriate when adopted but are now measured against the 2021 Strategic Housing Market Assessment (SHMA) for the South Worcestershire area, which sets out updated mix requirements.

How the Current Policies Compare with the SHMA

The most significant differences between the current H2 policy and the SHMA are:

Dwelling type	Current H2/H3 policy	2021 SHMA (market dwellings)
1 or 2 bed homes	At least 40%	10–15%
3 bed homes	Around 30%	35–40%
4+ bed homes	Around 30%	20–25%
Single-storey homes (H3)	Min 20% of scheme	Less than 10% in theory

Three recent planning applications in Honeybourne were all found to be broadly compliant with the existing H2/H3 policies. This suggests the policies have been working in practice, but the significant difference from the SHMA (particularly on smaller homes) means any developer could challenge the existing requirements.

Options for the Steering Group

The Consultant has identified three options:

- Option 1 – Commission updated local evidence. If the group wishes to retain a Honeybourne-specific mix that differs from the SHMA (particularly the higher proportion of smaller homes), the Consultant can update the Housing Needs Survey using the 2021 census and local house price data. This provides the justification needed to maintain bespoke requirements.
- Option 2 – Adopt the SHMA figures and remove H2. If the group finds the SHMA mix broadly appropriate, Policy H2 could be removed and the plan would simply rely on the district-level evidence. This is simpler but gives the village less control over the type of homes delivered.
- Option 3 – Retain and update H3 (single-storey homes). Regardless of what is decided on H2, the single-storey homes requirement in H3 could be retained and updated with fresh local evidence. This reflects the ageing profile of many rural communities and could be supported alongside either of the above options.

Decision required: Members are asked to indicate a preferred direction of travel so that the Consultant can progress the housing mix policies accordingly.

Item 10 – Programme and Timeline

Overview

The Consultant has prepared a programme setting out the full timeline from the current stage through to referendum. The key stages are summarised below.

Stage	Approximate timing	Notes
Evidence gathering	Now – June 2026	Includes community survey (9–31 March)
Draft plan	May – July 2026	Under the steering group's control
Reg 14 public consultation	August – October 2026	Six weeks, run by the parish council
Regulation 15 – submission to WDC	Late 2026	Following Reg 14 amendments
Reg 16 WDC consultation	Early 2027	Six weeks, under WDC control

Examination	Spring/Summer 2027	Answering examiner's questions
Referendum	Late 2027	Organised by WDC

The programme has been carefully designed to meet the requirements of the Neighbourhood Plan Review, including the conditions attached to the parish council's grant funding of up to £10,000 from Wychavon District Council, agreed in November 2025. Members should be aware that under the terms of the funding agreement, Wychavon District Council may withhold or reclaim the grant if it considers that satisfactory progress is not being made. It is therefore essential that the programme is adhered to and that the review is progressed without unnecessary delay.

Members are reminded that the steering group's ability to influence the pace of the review is greatest now, during the evidence and drafting stages. Once the plan is submitted to Wychavon District Council, statutory timescales take over and the parish has very little control over the programme. Any slippage at this stage will have a direct knock-on effect on the overall timeline, could put the grant funding at risk, and will ultimately delay the referendum.

Members are therefore asked to ensure that any outstanding actions or information requests are completed promptly between meetings so that the Consultant can progress the work without interruption.

Members should also note that the NPPF consultation closes 10th March 2026 and the new framework is expected to be published in May 2026. The Consultant will keep the programme aligned with these developments.

Decision required: Members are asked to agree the programme and confirm their commitment to completing outstanding actions promptly to keep the review on track.

Train Station Policy

Purpose of the policy

To highlight Honeybourne Station's current constraints (particularly parking and access) to guide applicants toward delivering appropriate mitigation and improvements rather than worsening existing pressures.

National policy context

The Government's draft NPPF introduces support in principle for development around "well-connected" train stations. The draft definition requires stations to be located within a high-performing Travel to Work Area (Top 60 by GVA) and to benefit from frequent rail services (four services per hour overall, or two per hour per direction). Honeybourne does not currently meet this definition. The relevant Travel to Work Area (Evesham) sits far below the stated threshold, and timetable review indicates the station does not currently operate at the required service frequency.

Implication for Honeybourne

Because Honeybourne Station does not fall within the "well-connected" category, national policy does not create any presumption that significant growth should be directed here on rail-connectivity grounds. However, applicants may still argue the location is suitable and in such instances the policy could require applicants to have regard to current issues the station is facing, rather than assuming there is capacity.

Existing station constraints

The principal operational issue with the station is parking capacity. Demand already exceeds supply, leading to regular overspill parking within residential streets. This is a long-standing and documented concern. Wychavon District Council and Network Rail have explored solutions for several years, including land identified for a new car park on the north side of the railway line.

Why the issue remains unresolved

While land has been identified, the expansion cannot function without a safe pedestrian connection to the platform. The most realistic solution is a new footbridge. Network Rail has previously indicated costs in the region of £2.5 million for such infrastructure. Until a compliant crossing solution is delivered, parking pressure within the village is unlikely to improve.

Role of neighbourhood plan policy

A neighbourhood plan policy can legitimately:

- Identify existing infrastructure constraints (e.g. pedestrian access over the bridge, lack of coherent pedestrian/cycle route from south Honeybourne)

- Require development proposals to avoid exacerbating parking and access problems
- Support planning contributions toward solutions, including pedestrian connectivity and parking capacity

Potential supporting matters for the policy / evidence base

If the steering group wishes, the policy could also reference broader opportunities for improvement associated with the station environment:

- Pedestrian and cycle access quality
- Bus connectivity
- Waiting facilities and passenger comfort
- Cycle parking provision

Appendix D – Housing Mix Policy

Draft SWDP Policy for Housing Mix

SWDPR 16: Housing Mix and Standards

A. All new residential development of five or more units, having regard to location and site size, should contain a mix of types and sizes of market housing which will include the provision of housing suitable for the needs of older people. The mix will be informed by the latest Strategic Housing Market Assessment (SHMA) and, where available, by other local data; this could include SWC housing registers, Neighbourhood Plans, parish surveys, parish plans, the latest council position statements and developers' assessments.

B. Proposals for all new residential development (to include both market and affordable housing and, where practicable, conversions of existing buildings) should, as a minimum, meet the requirements of the Nationally Described Space Standard, as set out in Annex C.

C. All new dwellings should meet the requirements of Building Regulations Part M4(2) dwelling standard (Accessible and Adaptable Dwellings)[38].

D. On sites of 20 dwellings or more, 5%[39] of the dwellings (equally split between market and affordable where practicable) should also meet the requirements of Building Regulations Part M4(3)(2)(a) dwellings standard (Wheelchair Adaptable Dwellings)[40].

E. In addition, on sites of 20 dwellings or more[41], 5% of the dwellings should be for sale as serviced Self or Custom Build plots, unless demand identified on the LPA Self-Build and Custom Housebuilding Register, or other relevant evidence, demonstrates that there is a lower level of demand for plots.

Proposed mix for Wychavon area (from 2021 Strategic Housing Market Assessment)

Table ES3 Overall dwelling mix by tenure: Wychavon

Dwelling type and size	Tenure mix (range)		
	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	10-15%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Overall mix for SWDP (for comparison)

SWDP SHMA Update 2021 Page | 11

Table ES4 Overall dwelling mix by tenure: SWDP			
	Tenure mix (range)		
Dwelling type and size	Market dwellings	Social/Affordable Rented	Affordable Home Ownership
1 and 2-bedroom house	15-20%	10-15%	15-20%
3-bedroom house	35-40%	20-25%	35-40%
4 or more -bedroom house	20-25%	0-5%	15-20%
1-bedroom flat	0-5%	20-25%	5-10%
2 or more bedroom flat	5-10%	20-25%	15-20%
1-bedroom bungalow/level access	0-5%	10-15%	0-5%
2-bedroom bungalow/level access	5-10%	5-10%	5-10%
3 or more bungalow/level access	5-10%	0-5%	0-5%
Other	0-5%	0-5%	0-5%

Current Honeybourne Policy H2 Mix (now superseded by the 2021 SHMA)

Policy H2 Housing Mix

Residential development of five or more homes within the Development Boundary for Honeybourne defined in strategic policies or on sites allocated for residential development will be supported where the mix of housing reflects the local needs.

To be supported development proposals must include the following unless up to date evidence suggests otherwise:

a) at least 40% of market homes should be smaller homes of one and two bedrooms suitable for couples and individuals looking to downsize or as homes for first time buyers;
b) approximately 30% of market homes should be 3 bedroomed homes;
c) a maximum of 30% of market homes should be 4 or more bedrooms; and

Where development proposals include affordable homes:

d) the mix of affordable homes should be provided in accordance with the requirements of the up to date Local Plan and the latest evidenced housing need; and
e) priority should be given to those with a local connection to the parish.

Policy H3 House types to meet the needs of our community

Within the Development Boundary for Honeybourne defined in strategic policies or on sites allocated for residential development residential development will be supported where the type of housing reflects the local needs and where designs are capable of adaptation, allowing for easy internal alterations to meet any occupant's existing or future needs.

Schemes of five or more market or affordable homes must include single storey homes to cater for older residents and members of the community with special requirements. As a minimum 20% of the scheme should be single storey homes unless it can be demonstrated that there is no longer a need or that this would make the scheme unviable.

Homes without their own entrance from the outside will not be supported.

Honeybourne Policy H2 mix vs SHMA:

Size	HNP Policy H2 & H3	SWDP Review (2021 SHMA)
1 or 2 bed	At least 40%	10-15%
3 bed	Around 30%	35-40%
4+ bed	Around 30%	20-25%
1 bed flat	No requirement	0-5%
2 bed flat	No requirement	5-10%
1 bed bungalow	General 20% requirement	0-5%
2 bed bungalow		5-10%
3+ bed bungalow		0-5%

Comparing H2 & H3 Requirement with Housing Delivery:

Reserved Matters Application 21/00816/RM
(Owl Homes - Land off Stratford Road)

Size	HNP Policy H2 & H3	Provision	Total
1 or 2 bed	At least 40%	1 bed maisonettes - 12 no. affordable units 2 bed bungalows - 4 no. market and 5 no affordable units 2 bed houses - 12 no. market and 4 no affordable units	37 (56%)
3 bed	Around 30%	3 bed houses - 12 no. market and 5 no. affordable units	17 (26%)
4+ bed	Around 30%	4 bed houses – 11 no. market units	11 (16%)
1 bed flat	No requirement	None	0
2 bed flat	No requirement		
1 bed bungalow	General 20% requirement	9 bungalows (was argued that 12 maisonettes also contributed to the provision)	9 (13% - counted separately to above).
2 bed bungalow			
3+ bed bungalow			
	Total	**65**	**100%**

In summary, broadly compliant.

Full Application 18/02377/FUL
(Maple Close)

Size	HNP Policy H2 & H3	Provision	Total
1 or 2 bed	At least 40%	3	37.5%
3 bed	Around 30%	3	37.5%
4+ bed	Around 30%	2	25%

1 bed flat	No requirement	0	0
2 bed flat	No requirement		
1 bed bungalow	General 20% requirement	1	12.5% (not counted in above)
2 bed bungalow			
3+ bed bungalow			
	Total	**8**	**100%**

In summary, broadly compliant.

Reserved Matters Application 17/01045/RM
(Behind The Gate Inn)

Size	**HNP Policy H2 & H3**	**Provision**	**Total**
1 or 2 bed	At least 40%	2	40%
3 bed	Around 30%	3	60%
4+ bed	Around 30%	0	0%
1 bed flat	No requirement	0	0%
2 bed flat	No requirement		
1 bed bungalow	General 20% requirement	5	100%
2 bed bungalow			
3+ bed bungalow			
	Total	**5**	**100%**

In summary, broadly compliant.

Summary options for bespoke housing needs:

As shown in green, Policy SWDPR 16 allows deviation from the SHMA using newer local evidence. The above assessment has shown policy H2 and H3 to be broadly effective.

1. If HPC seeks to change mix requirements from 2021 SHMA (above), then AP can update Housing Needs Survey information from previous plan focussing on new census and house prices.
2. If HPC finds SHMA mix requirements for market housing broadly appropriate, then it could remove housing mix policy H2.
3. The SHMA also includes a small provision for bungalows, but in theory less than 10% could be delivered per scheme. Opportunity therefore to update Policy H3 (bungalows) to focus on a specific aspect of provision such as single storey homes, utilising similar evidence to option 1.

Stage	Task	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Apr-27	May-27	Jun-27	Jul-27	Aug-27	Sep-27
Initial engagement and Consultation	Review Current Plan effectiveness, identify priorities and decide on scope of the review																								
Initial data collection	To aid issue identification		engage with community																						
Vision and Objectives	An event to distil what's been said and to suggest Vision and Objectives						Hold event																		
Evidence Gathering	Further data gathering and evidence collection to support policies						New and updated evidence																		
Drafting Plan	Bring together area context, challenges and opportunities and policy chapters with policies								Draft Plan																
Request SEA Screening Opinion	Request to WDC to prepare assessment and consult EA, HE and NE agencies									**SEA Consultation**															
Informal review	Ask WDC for informal officer comments									WDC comments															
Modification Statmt	Prepare/submit Modification Statement									Mod State															
Finalise draft plan	Take on board comments and finalise plan																								
Reg 14	Consultation for six weeks run by the parish council												**R14 Consultation**												
Pre-Reg 15	Assess consultation responses and prepare consultation report														work towards R15										
	Make changes to plan																								
	Prepare a Basic Conditions Statement																								
Reg 15	Submit to WDC															submit									
Reg16	WDC Consultation for six weeks																**R16 Consultation**								
Reg17	Examination - answer questions as they arise																			**R17 Examination**					
	Changes to plan following examiner's instructions																								
Referendum	Organised by WDC																						**Referendum**		
		Flexible Period that can fit your needs								**You are in a process drive period but it remains under your control**							**The process is under the control of WDC**								

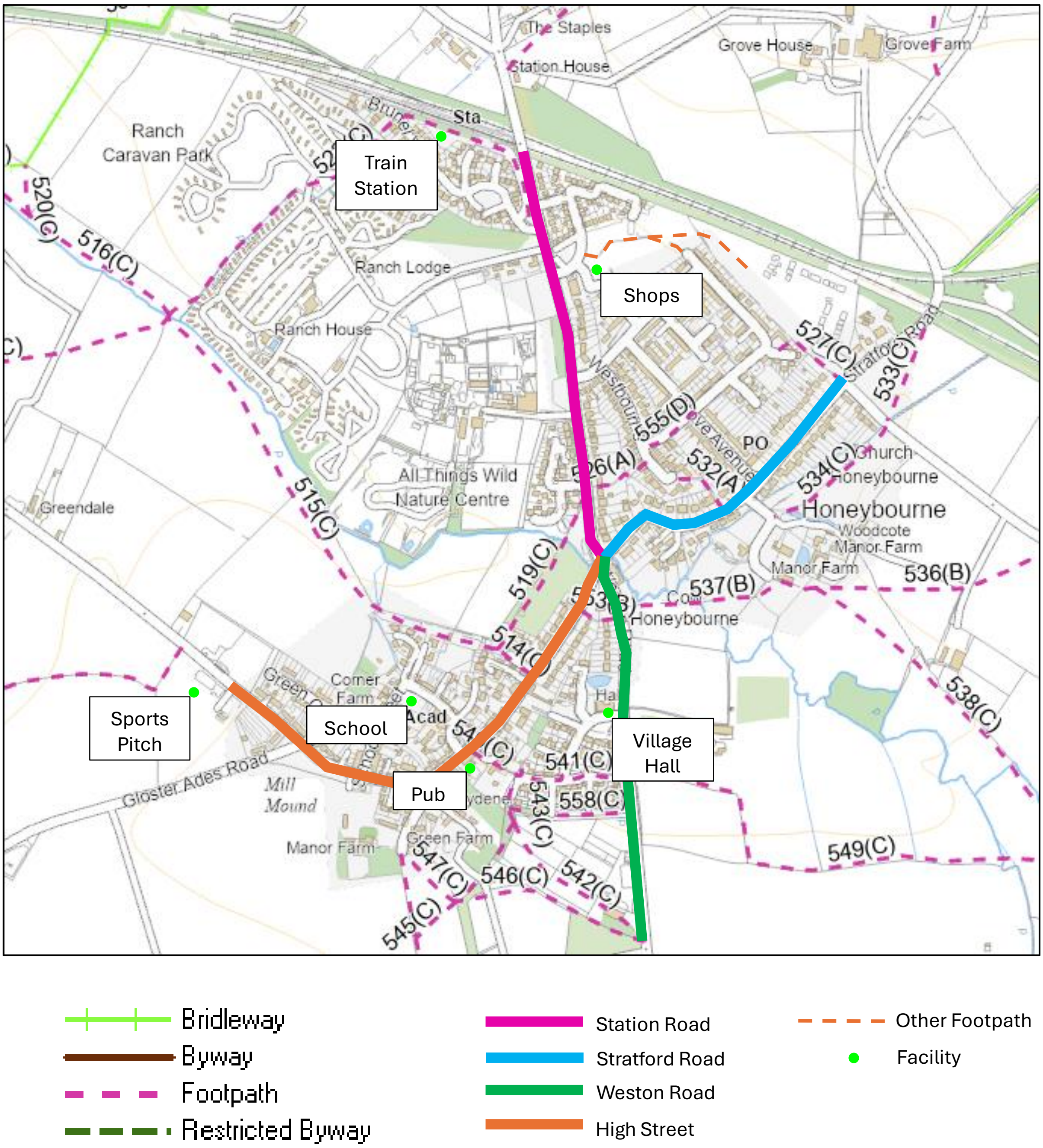
Honeybourne Active Travel Route Feasibility

Evidence Document

Strategic Context

Honeybourne's key community facilities are scattered across the village, including at its outskirts. Because of the village layout, limited permeability between the different areas of the village makes pedestrian travel across the village less tempting.

In contrast, services can be reached by bike in far quicker timeframes, but because there is limited infrastructure to support cycle travel, this creates a confusing and potentially unsafe experience which may deter some users.

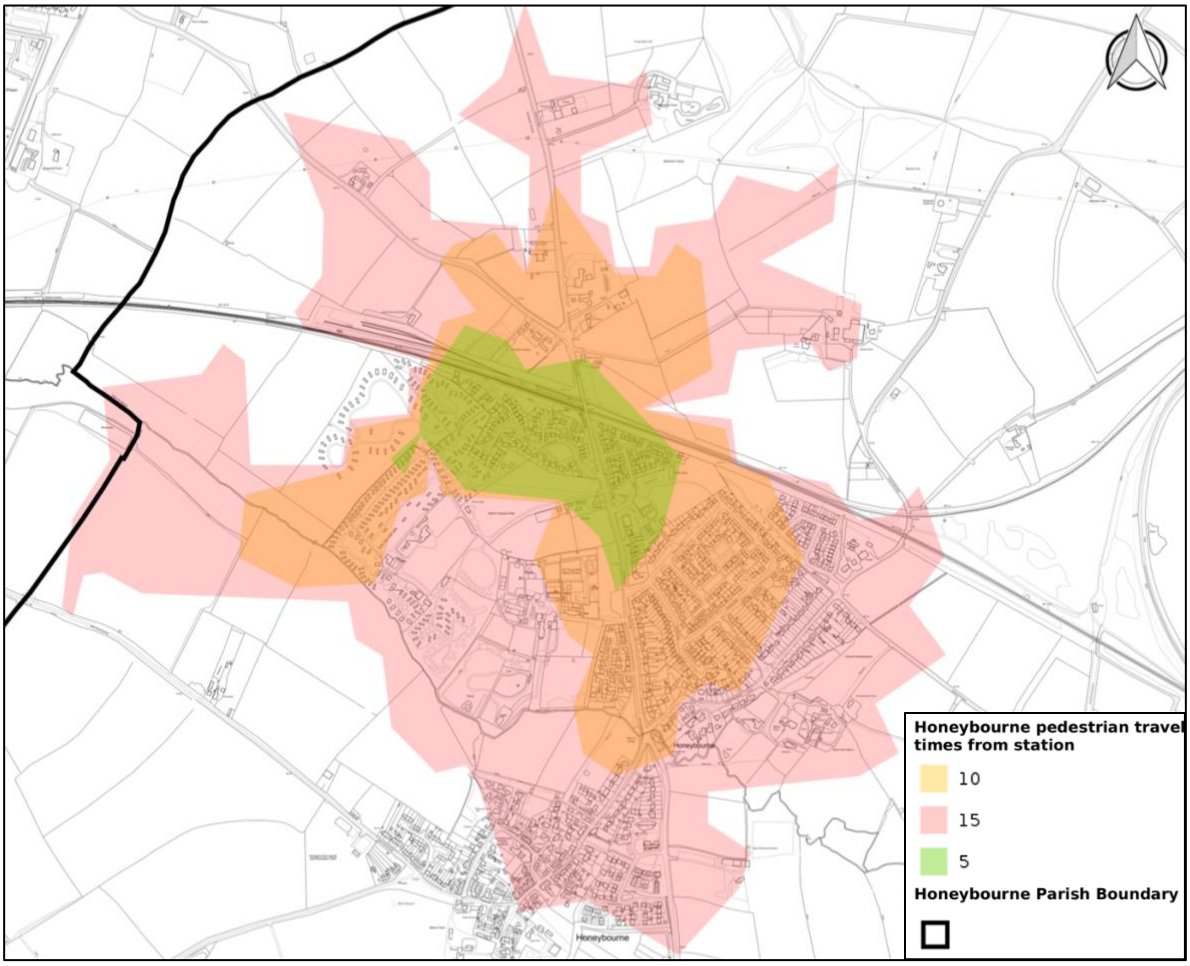


The logical north–south desire line is:

1. Station Road
2. Junction with High Street / Stratford Road
3. Residential streets

The principal constraints arise along Station Road (1) and at the Station Road / High Street / Stratford Road junction (2). Residential streets have generally lower traffic and are more suitable for mixed cycling.

Google Maps suggests that walking distance between Honeybourne Train Station and Honeybourne School is approximately 17 minutes, whereas the equivalent cycling journey is approximately 4 minutes.



Assessment of the roads have been undertaken with reference to the five core design principles set out in Local Transport Note 1/20. In short, the current environment does not provide a coherent, legible or continuous cycling route between the northern and southern parts of the village.

General issues identified

A. Coherence

- In general, no designated or signed cycle route exists.
- The route requires cyclists to improvise movements.
- No clear north–south active travel spine is identifiable.

B. Directness

- At the Station Road / High Street junction, cyclists must change sides or double back if sticking to the pavements. Informal crossing locations are not aligned with desire lines.
- Movements through the road parts of the Station Road / High Street junction are unsafe for cyclists, particularly in busy periods, as this requires crossing the opposite lane.

C. Safety

- Along Station Road and the junction with the high street in particular, narrow footways create pedestrian–cycle conflict risk.
- Driveway crossing pavement/cycle route present visibility and turning conflict.
- Informal crossing behaviour is likely along the route.

D. Comfort

- Shared-use sections are constrained in width.
- An iron gate and pinch points create passing difficulty.
- Verge provision is inconsistent between sides of Station Road.

E. Attractiveness

- The route lacks legibility and visual cues.
- Cyclists are not clearly accommodated within the streetscape.

See Appendix 1 below for images.

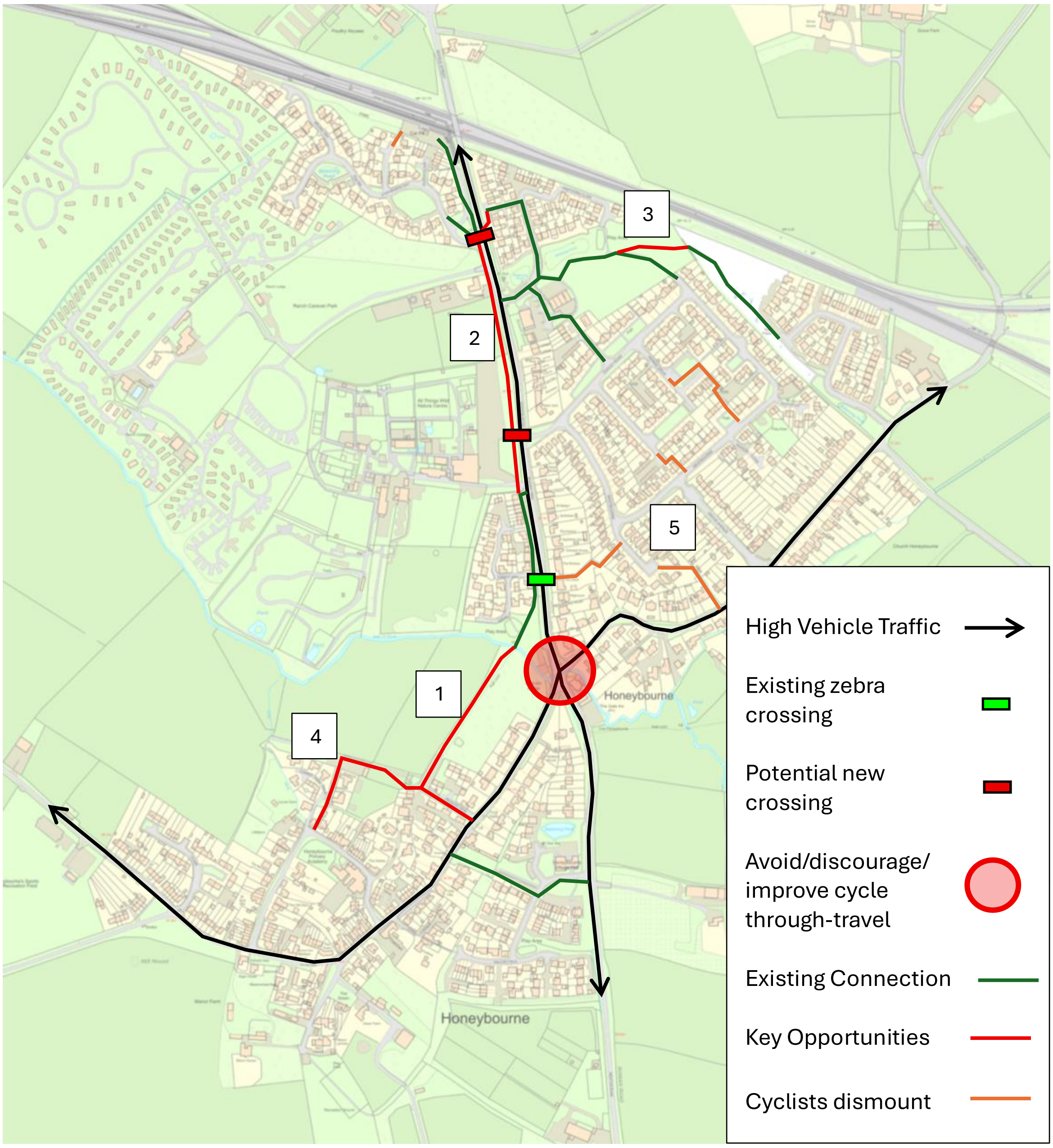
How can the cycling environment be improved?

Small carriageway widths throughout settlement limit the feasibility of on-road segregated lanes. It is unlikely that conventional painted cycle lanes on the side of roads would meet current national guidance standards. Additionally, encouraging cyclists to share pedestrian lanes with walkers will create conflicts due to narrow widths.

As such, the plan could seek to designate a formal Active Travel corridor in neighbourhood plan. Additionally, measures could be introduced to encourage wayfinding signage and increased provision of zebra or parallel crossings aligned with desire lines.

On the following page, a map shows key desire lines, existing cycle connections and key gaps. Where there are key gaps, cycle users are forced to use roads.

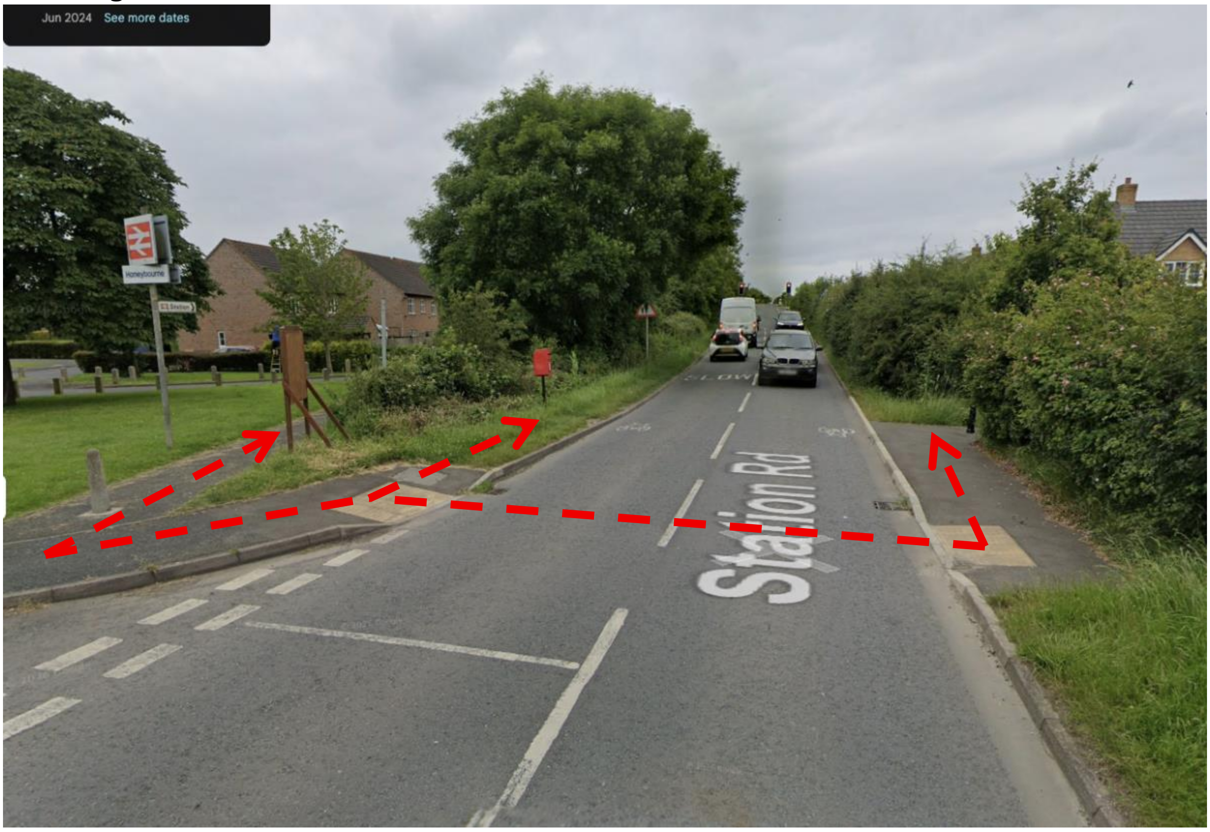
Cycle Route Opportunities



1. This stretch of the alternative route previously received planning permission which would have paved a route in the new residential areas; however, it appears that it failed to include suitable surfaces for the entire route connecting to High Street in the south and the foot bridge in the north. It appears that this permission has lapsed, and any future proposals should be encouraged to pave the entire route to create a coherent and continuous route avoiding the junction.
2. Whilst this should not be seen as an indication for future development, this location would be a logical and direct connection for pedestrians and cyclists to travelling north-south. As shown in the above assessment, Station Road is inadequate as a cycle route, and providing a separate corridor away from increasing vehicle travel will maximise sustainable travel opportunities.

3. This is a failed opportunity to connect two separate open spaces which are part of different residential development proposals. There is an existing access through, however, it is unsuitable for cyclists given that there is no paved route and this may lead to an informal desire path which may be considered unattractive and dangerous.
4. This part of the track currently has no surfacing and a stile which prevents cycle access.
5. In general, permeability for cyclists leaving from this location to the station is good enough that they can avoid traffic along main roads while maintaining a fairly direct route of travel to the station. However, these through routes are not designed for cycling which reduces comfort/coherence and also requires dismounting.

Crossing 1

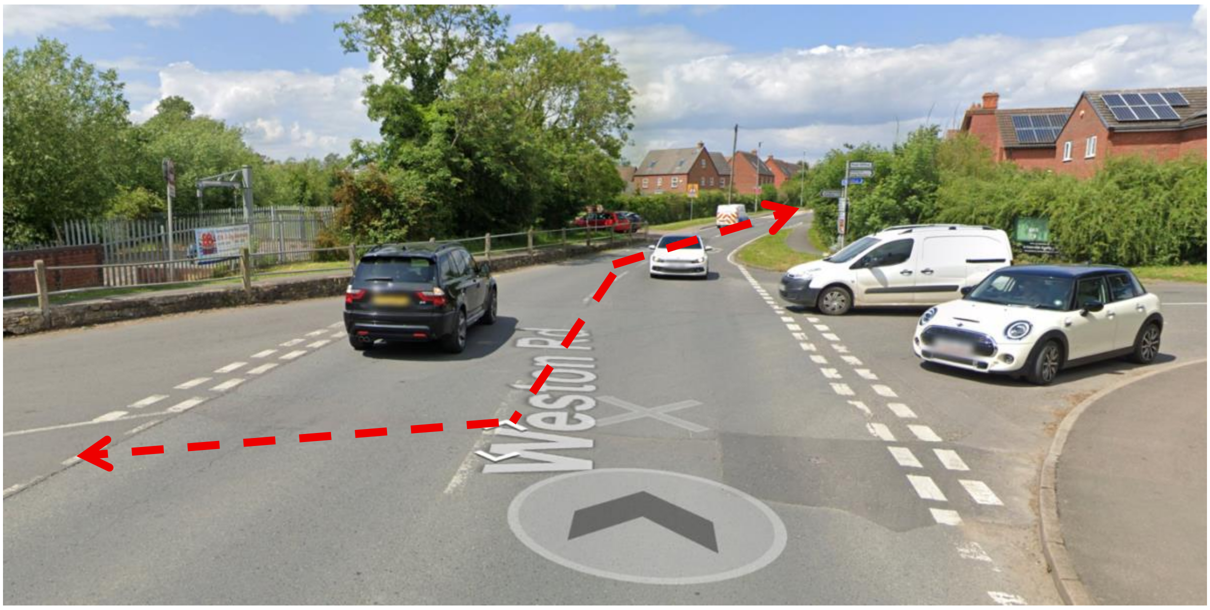


https://w3w.co/supposes.unveils.operated

Crossing 2

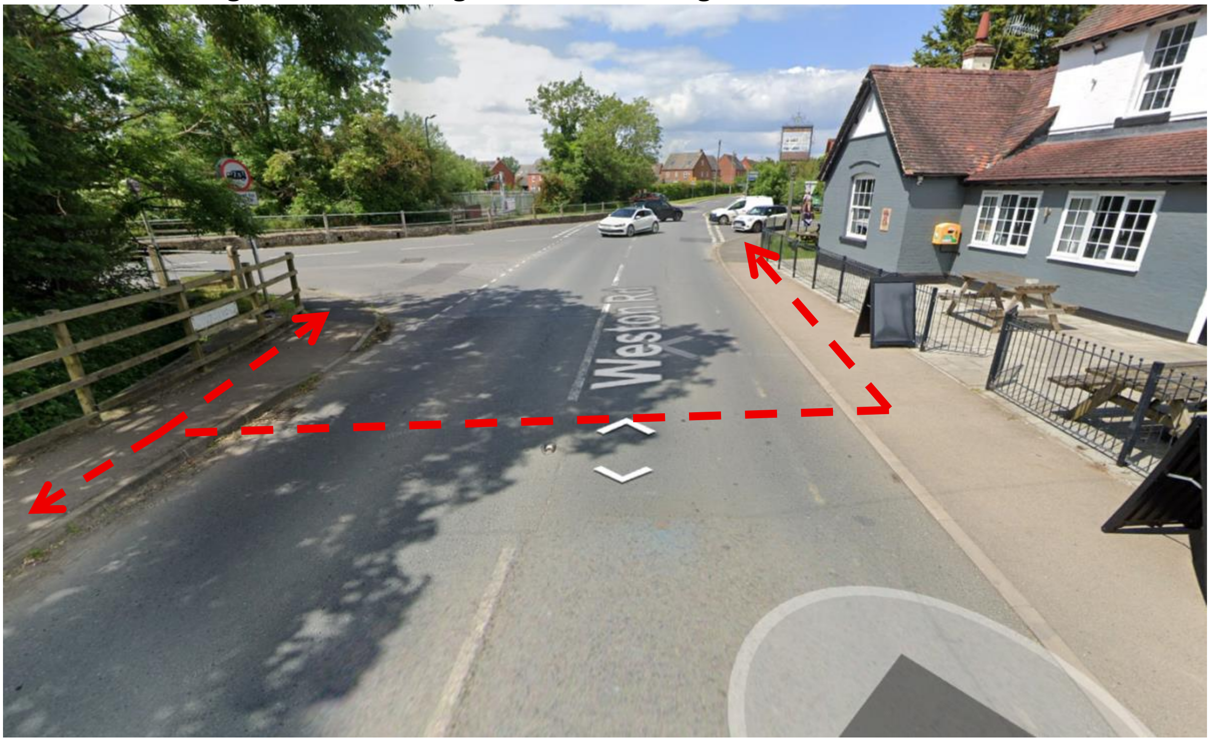
https://w3w.co/guides.resettle.trimmer

Junction crossing manoeuvre using road



https://w3w.co/winning.campfires.horseshoe

Junction crossing manovure using informal crossing



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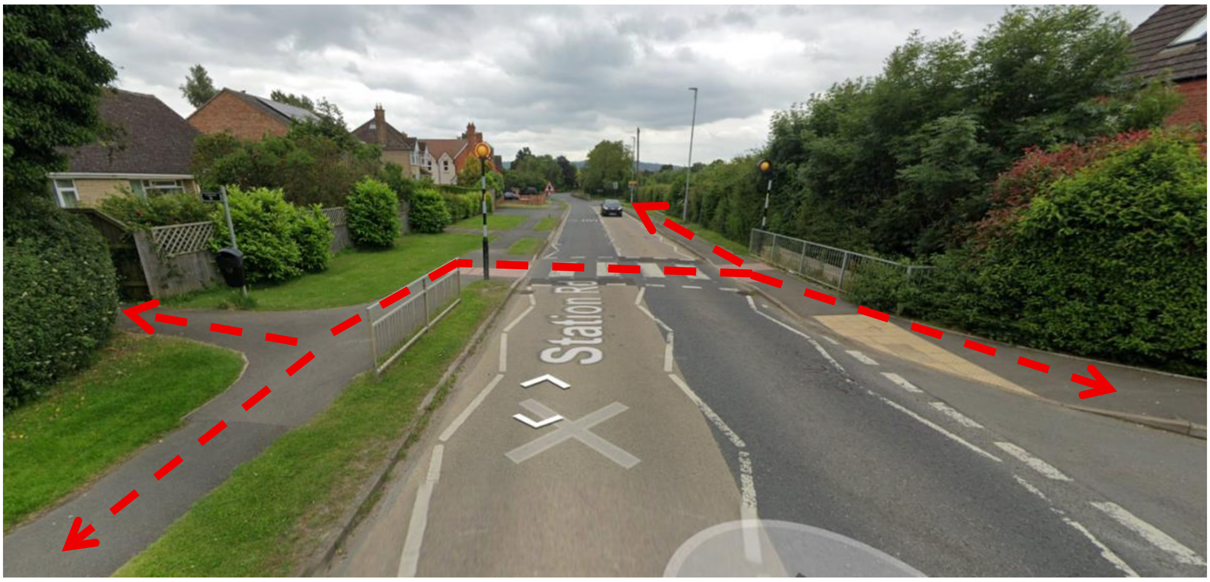
Junction crossing manoeuvre using pedestrian footway



https://w3w.co/ejects.telephone.herbs

https://w3w.co/blemishes.howler.create