



HOUSING VISION

Strategic Housing Market Assessment Update: Exmoor National Park in West Somerset

Final Report

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Strategic Housing Market Assessment Update: Exmoor National Park in West Somerset

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Acronyms & Abbreviations

APS	Annual Population Survey
ASHE	Annual Survey of Hours and Earnings
BIS	Business Information & Skills
BRMA	Broad Rental Market Area
CLG	Communities and Local Government
CORE	COntinuous REcording of lettings and sales of social housing
CPI	Consumer Price Index
CT	Council Tax
DC	District Council
DWP	Department for Work and Pensions
ESA	Employment and Support Allowance
ENP	Exmoor National Park
EU	European Union
EXDF	Exmoor and Downland Fringe and Exmoor National Park
GIS	Geographical Information System
GP	General Practitioner
HB	Housing Benefit
HESA	Higher Education Statistics Agency
HMO	House in Multiple Occupation
HSSA	Housing Strategy Statistical Appendix
IMD	Index of Multiple Deprivation
JSA	Job Seekers Allowance
LFS	Labour Force Survey
LHA	Local Housing Allowance
LPA	Local Planning Authority
NHS	National Health Service
NHSCR	National Health Service Central Register
NINO	National Insurance Number
NOMIS	National Online Manpower Information System
NP	Northern Peninsula
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
p.a.	Per Annum
PRDS	Patient Register Data Service
SHLAA	Strategic Housing Land Availability Assessment
SHMA	Strategic Housing Market Assessment
SMA	Sub-market Areas
UA	Unitary Authority
UC	Universal Credit
VOA	Valuation Office Agency
WS	West Somerset

1. Introduction

Context and approach

- 1.1 This chapter establishes the overall context for the SHMA and summarises the approach adopted to the Update.
- 1.2 This Strategic Housing Market Assessment Update has been prepared against a rapidly changing national background. The responsibility for assessing housing need and demand has moved from regional and sub-regional to local authority levels; the planning system has changed radically and the housing market remains at best uncertain.

The status of Exmoor as a National Park

- 1.3 A key starting point for this report is the area's status as a National Park. National Parks have two statutory purposes, as defined in the Environment Act 1995¹: primary legislation underpinning National Park designation:
 - 1 To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park; and to
 - 2 Promote opportunities for the understanding and enjoyment of its special qualities by the public.
- 1.4 In pursuing these purposes, Section 62 of the Act² places a duty on National Park Authorities to seek to foster the economic and social well-being of local communities within their National Park and it should, for that purpose, co-operate with local authorities and public bodies whose functions include the promotion of economic or social development within the area of the National Park. Section 62 also places a general duty on all relevant authorities, including the National Park Authorities, statutory undertakers and other public bodies, to have regard to these purposes³.

The economic context

- 1.5 The spin-off effects of the financial crises of 2007-8 continue to have a powerful effect on the economy. These effects include the 2010 government's adoption of an austerity programme and the banks' virtual strangulation of the mortgage market, despite interest rates being at a record low. Drastic cuts in public expenditure have had an effect on jobs in both the public and the private sector; on new house building; and on the ability of low income households to cover their housing costs.

¹ The National Parks and Access to the Countryside Act 1949, Section 5 as amended by Section 61 of the 1995 Environment Act

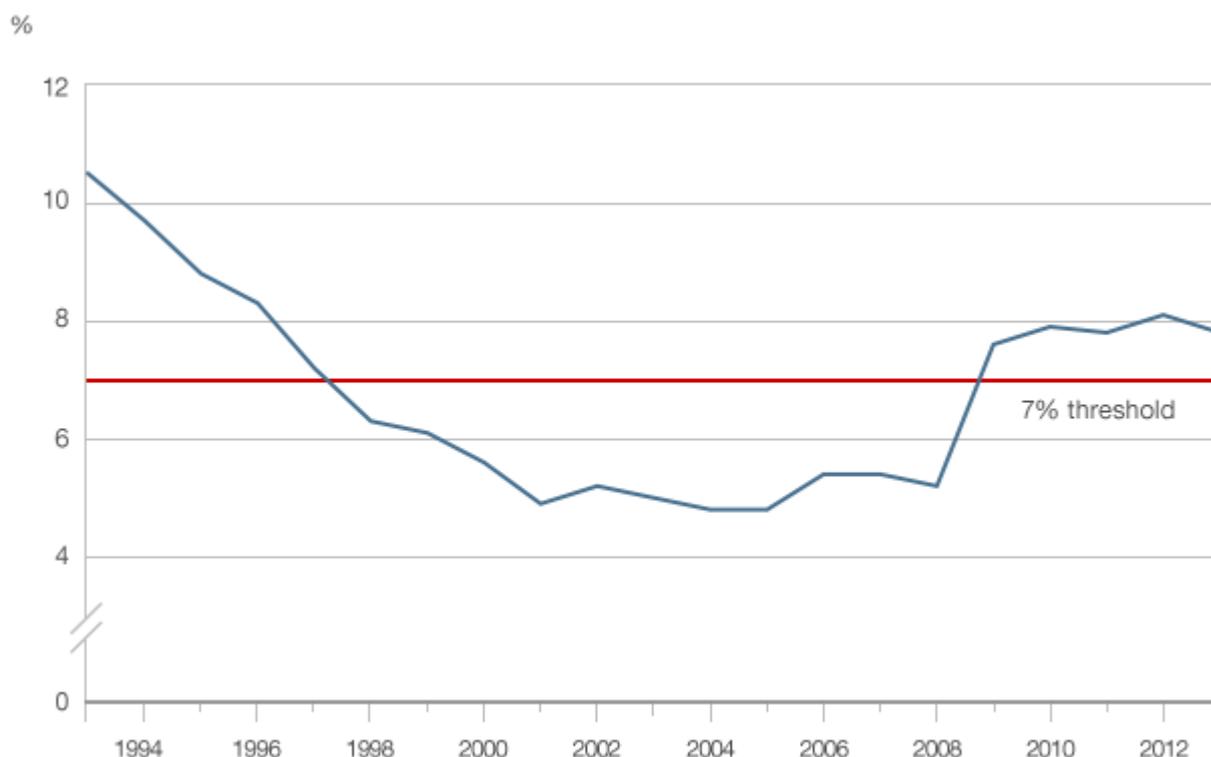
² National Parks and Access to the Countryside Act 1949 Section 11A as inserted by Section 62 of the Environment Act 1995

³ Ibid.

- 1.6 Economic indicators over the past 3 or 4 years have been somewhat disappointing and have failed to confirm whether or not the long recession has ended, despite interest rates remaining at a historic low of 0.5%.
- 1.7 The update on August 7th 2013 ⁴, when the new Governor of the Bank of England made his first official assessment of the UK economy as he set out a new strategy of “forward guidance” on interest rate policies. He indicated that Britain had suffered an unprecedented financial crisis but that “a renewed recovery” was under way. The most recent official figures showed manufacturing output surged in June, while surveys have also indicated gathering strength in the service sector and housing market. The Bank has raised its growth forecasts, predicting economic growth would reach an annual rate of at least 2% by the end of 2013 - a year sooner than previously predicted.
- 1.8 Under the forward guidance, the Bank will not consider raising interest rates until unemployment has fallen from its current rate of 7.8% to 7% or below. This is to avoid “unnecessary fears” that interest rates will rise in response to the improving economy. Although the improving economic news was welcome, the Governor indicated that the “legacy of the financial crisis means that the recovery remains weak by historical standards and there is still a significant margin of spare capacity in the economy, this is most clearly evident in the high rate of unemployment.”
- 1.9 Longer term certainty over interest rates means businesses intending to invest will be able to plan ahead with more confidence and may also give banks and mortgage lenders the ability to “lock-in” customers at lower rates for longer. With short-term interest rates already at historic lows, the aim is to reduce longer-term interest rates.
- 1.10 The Bank's guidance is subject to three provisos; breaching any of them would sever the link between interest rates and unemployment levels. These so-called 'knock-outs' are:
- CPI inflation is judged more likely than not to be at or above 2.5% over an 18-month to two-year horizon;
 - inflation getting out of control in the medium term; and
 - the Bank's Financial Policy Committee judges this stance poses a significant threat to financial stability.

⁴ Bank of England Inflation Report, August 2013

Unemployment rate in the UK since 1993



Source: ONS

- 1.11 The Bank's view is that current unemployment rates are the key indicator that the economy is still fragile; hence, its decision to tie low interest rates to an improvement in the jobs situation, estimating that around 750,000 jobs will need to be created to bring unemployment down to 7%.

The housing market context

- 1.12 There is inconsistent evidence on housing market performance nationally. The recently observed rise in house prices disguises considerable regional variation. Whilst the London area is seeing strong demand and consequent price rises, which spill over into places within commuting distance of the capital, the market in other parts of the country - lacking the confidence of buyers in the capital - remains flat.

The sales market

- 1.13 The second hand sales market is driven by the existence of first time buyers and buy to let investors; without them, residents who need to trade up cannot find purchasers for their property at a price which allows them to buy another home. There is a dilemma here in that 1st time buyers and investors are often competing for the same property but investors will only buy if they can obtain sufficient yield through rental income and 1st time buyers can only buy if they have sufficient deposit and can get a mortgage. These 2 factors seek to drive

down prices but the sellers may simply chose to wait, believing prices will rise to what they consider to be a fair price for their property. The result is stagnation.

- 1.14 The government is seeking to address the issues in the sales market by offering assistance to would-be purchasers. So far, these have been targeted on new build schemes – seeking primarily to stimulate the construction industry- but the latest initiative, Help to Buy⁵, will extend to the second hand market from January next year. It will cover buyers who have at least a 5% deposit and who can raise the remainder via a mortgage; the government will offer a mortgage guarantee of 15% of the value of the home, which can be up to £600,000. Whilst this should help to get the second hand market moving, some commentators have expressed concern that it may also fuel another housing “bubble” similar to that which burst in 2007.

The rental market

- 1.15 With mortgages still very hard to obtain for average earners looking to buy their first home and who lack the backing of the “bank of mum and dad”, there is a ready market for rented homes in many parts of the country, including in the Exmoor National Park area. In many places, demand exceeds supply of rented homes, meaning landlords can pick and choose their tenants. This, coupled with changes to welfare benefits (see below), means there is greater reluctance to house tenants dependant on Local Housing Allowance.

The strategic housing context

- 1.16 Under the previous administration, housing needs were assessed at regional and sub-regional level, with local authorities expected to provide the local detail in accordance with the regional assessment of housing need in their areas. With the abolition of Regional Planning Bodies and the scrapping of Regional Spatial Strategies under the Localism Act 2011, the duty of assessing future housing requirements has devolved to local planning authorities. Each authority is expected to undertake a Strategic Housing Market Assessment which will feed into their Local Plan (see below).
- 1.17 The power of the Secretary of State under the Local Government Act 2003 to require local housing authorities to prepare housing strategies and housing statements is to be repealed under the Deregulation Bill, currently in draft form and awaiting consideration by Parliament.

Housing supply

- 1.18 As indicated above, the major push from national government has been targeted on stimulating the supply of new homes. Measures include:

⁵ Help to Buy: Home ownership schemes – DCLG 2013

- Help to Buy and its predecessor schemes which assist the purchase of brand new properties – the scheme will extend to the second hand market in January 2014.
- Growing Places Fund⁶ to support infrastructure investment for housing and economic growth
- Reconsideration of Section 106 agreements⁷ on affordable housing where it can be shown these obligations have stalled new build schemes
- New Homes Bonus⁸, paid to local councils over a 5 year period following the delivery of new homes in their area

1.19 The social housing sector has seen investment cut back and housing associations required to build new homes at “affordable rents” - up to 80% of market rents - rather than social rents. On the positive side, the removal of the Housing Revenue Account regime for local authorities is leading to a number of stock owning councils planning to deliver the first new council homes for some years.

The ‘Right to Buy’⁹

1.20 Discounts available to tenants to purchase their council home have been increased dramatically to a maximum of £100,000 in London and £75,000 elsewhere. To avoid a constantly diminishing stock, this is coupled with a requirement to replace the home sold, but not necessarily in the same area. The draft Deregulation Bill proposes reducing the qualifying period for right to buy from 5 years to 3. Local authorities and housing associations are now permitted to sell existing affordable homes on to the open market in order to fund new affordable schemes, and a number of former council homes within the National Park have been sold by a housing association to fund a new scheme outside the National Park.

Tenancy and welfare changes

1.21 Tenancy changes affect social housing tenants only. The major change is the ability of social landlords to give fixed term, rather than on-going, tenancies, usually for a period of 5 years¹⁰. Another proposal, with details yet to be finalised, is the power for social landlords to charge a market rent to tenants with a household income of at least £60,000.

1.22 Welfare changes apply to tenants in both the social and private rented sector. Already implemented are:

⁶ Growing Places Fund – DCLG 2012

⁷ Renegotiation of Section 106 agreements, DCLG 2012

⁸ New Homes Bonus, DCLG 2011

⁹ Reinvigorating Right to Buy – DCLG 2012

¹⁰ Localism Act 2011

- Welfare benefit cap, limiting total welfare payments to £500 per week for couples and lone parents and £350 per week for single people.
- Local Housing Allowance¹¹ for private tenants is now calculated on the 30th percentile instead of the median average of local market rents. And weekly rates in any area cannot exceed £250 for a one-bed property, £290 for a two-bed property, £340 for a three-bed property, and £400 for a four-bed property. This will not cover rents in high cost areas and any problems this causes are further compounded by the fact that councils can discharge homelessness duties with an offer of private rented accommodation.
- LHA is generally paid direct to the tenant instead of the landlord, which has made some landlords even less inclined to take tenants on benefit.
- “Bedroom tax” for social rented tenants, who suffer housing benefit reductions if they are deemed to have one or more spare rooms¹²

1.23 Still to come is the roll-out of Universal Credit, whereby all welfare claimants receive a single monthly payment. This will probably not happen until the new financial year.

The national planning policy context

1.24 With the demise of the regional planning bodies and the Regional Spatial Strategy, planning experienced a brief period of limbo. The local authority Local Plan is now the sole development plan. The government introduced its National Planning Policy Framework (NPPF) in March 2012¹³ which sets out policy relevant to the work of all planning authorities.

1.25 The development plan remains the starting point for determining planning applications; planning law requires that planning applications for development must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF constitutes guidance for local planning authorities in drawing up plans and as a material consideration in determining applications.

1.26 As such, its content must be balanced against the content of other relevant policy and Acts of Parliament. In the National Park’s case the purposes of National Parks and duties of relevant bodies set out in the Environment Act 1995 (sections 61 and 62) in themselves provide the context for interpreting policy.

1.27 At the heart of the NPPF is the concept of a presumption in favour of “sustainable development”. It states that for plan-making, Local Plans should meet objectively assessed needs unless specific policies in this Framework

¹¹ Housing Benefit: Changes to the Local Housing Allowance arrangements – DCLG 2011

¹² Housing Benefit: under-occupation of social housing – DCLG 2012

¹³ National Planning Policy Framework – DCLG 2012

indicate development should be restricted¹⁴. Footnote 9 applies to this paragraph of the NPPF, it states: “*For example, those policies relating to sites.... Within a National Park ...*”, the local authority, when preparing or updating its Local Plan, should objectively assess and indicate how it will meet the need for housing **in the housing market area** as far as is consistent with the policies set out in the Framework¹⁵. The NPPF makes clear that “*great weight should be given to conserving landscape and scenic beauty in National Parks ..., which have the highest status of protection in relation to landscape and scenic beauty*”¹⁶.”

- 1.28 The NPPF states that Local Plans should set out the strategic priorities for the area. These should include strategic policies to deliver the homes and jobs needed in the area and conservation and enhancement of the environment, including landscape¹⁷. Plans should be based on co-operation with neighbouring authorities and public bodies on planning issues that cross administrative boundaries particularly those which relate to the strategic priorities. This is to ensure that they are co-ordinated and reflected in individual Local Plans to meet development requirements which cannot wholly be met within their own areas because of a lack of physical capacity or because to do so would cause significant harm to the principles and policies of the Framework¹⁸.
- 1.29 The Strategic Housing Market Assessment is key to assessing the need for housing in a housing market area; without it, the Local Plan is unlikely to be approved. It should assess the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period for both market and affordable housing. Allied to the SHMA is a Strategic Housing Land Availability Assessment.
- 1.30 The NPPF includes the exceptions approach in rural areas - to provide for the delivery of local needs housing where it would not normally be allowed - “local planning authorities should be responsive to local circumstances and plan housing development to reflect local needs, particularly for affordable housing, including through rural exception sites where appropriate
- 1.31 Other relevant planning changes include
- The NPPF has dropped national targets for development on brownfield sites.

¹⁴ Para 14 NPPF

¹⁵ Para 47 NPPF

¹⁶ Para 115 NPPF

¹⁷ Para 156 NPPF

¹⁸ Paras 157, 178 and 179 NPPF

- Change of use from commercial to residential should normally be approved where there is a demonstrable need for housing and there are no strong economic reasons for retaining it as commercial.
- Allowing for some open market housing sales on rural exception sites, if the local planning authority considers doing so would facilitate the provision of significant additional affordable housing *to meet local needs*¹⁹.

The National Parks and the Broads Vision and Circular

- 1.32 The National Park Circular provides policy guidance specifically for the English National Parks for all those whose decisions or actions might affect them. It identifies a number of priorities including, to foster and maintain thriving living and working communities supporting the delivery of affordable housing. It notes the importance of affordable housing in rural areas, including for the sustainability of National Parks and their communities²⁰.
- 1.33 The Circular recognises that high external demand for housing in National Parks has driven up house prices and that this, combined with relatively low wages means that much of the stock is now beyond the reach of many local households. This can affect the social and economic diversity of rural communities and may, undermine social support networks and the viability of rural businesses, which are key components of sustainable rural communities²¹.
- 1.34 It states the Authorities have an important role to play as planning authorities in the delivery of affordable housing though they are neither housing authorities nor housing providers Plans should:

‘include policies that pro-actively respond to local housing needs. The Government recognises that the Parks are not suitable locations for unrestricted housing and does not therefore provide general housing targets for them. The expectation is that new housing will be focused upon meeting affordable housing requirements, supporting local employment opportunities and key services’ (para 78).

- 1.35 The Government expects the Authorities to maintain a focus on affordable housing and to work with local authorities and other agencies to ensure that the needs of local communities in the Parks are met and that affordable housing remains so in the longer term (para 79).

¹⁹ Para 54 NPPF

²⁰ Para 76 National Park Circular

²¹ Para 77, National Park Circular

The local planning context

- 1.36 The National Planning Policy Framework (NPPF), Paragraph 159 establishes that Local Planning Authorities should have a clear understanding of housing requirements in their area. This should be achieved by means of a Strategic Housing Market Assessment (SHMA) which should identify over the plan period the scale and mix of housing and the range of tenures the local population is likely to require. The Assessment should:
- meet household and population projections, taking into account migration and demographic change;
 - address the need for all types of housing, including affordable housing and the needs of different groups in the community;
 - and cater for all types of housing demand.
- 1.37 The Northern Peninsula (NP) Strategic Housing Market Assessment, which included the Exmoor National Park area in West Somerset, was published in December 2008. The SHMA identified a series of Sub Market Areas (SMA) based on the following detailed process:
- An agenda setting survey providing an initial view of SMAs based on local and professional knowledge;
 - Mapping of home moves from the largest 150 local settlements applying a 75% self containment threshold;
 - Detailed mapping of property sales recorded by the Land Registry;
 - Detailed analysis and mapping of currently advertised new-build sales;
 - 38 wide ranging interviews with property agents across the area to provide a 'reality check' against emerging desk top analysis; and
 - consultation with planning policy and housing strategy officers in the four districts, the three counties and the Exmoor National Park Authority area.
- 1.38 As a result of this exercise, 5 types of Sub Market Area were identified, the most distinctive of which in terms of housing market characteristics, especially its very high values and attraction to incomers and second home owners, was the 'Exmoor Core and Fringe SMA', a rural and dispersed area centred on the Exmoor National Park. This report provides, for the same area, an Update to the NP SHMA and applies the same methodology as Updates already provided for North Devon, Torridge and West Somerset District Council areas.
- 1.39 With the removal of the regional tier of planning and the revocation of Regional Spatial Strategies, and under the auspices of Localism, a key change has been the opportunity for local planning authorities to establish the appropriate level of future housing to be delivered in their area. Additionally, the NPPF has reshaped the face of national planning policy. This has consequently altered the scope of what might need to be covered in the development plan. Significantly, it has also altered the approach to development plan preparation, moving to the preparation of a Local Plan

rather than a Local Development Framework. In doing so, it has changed the expectations of what should be contained within, and covered by, the development plan; in particular intimating that authorities prepare a more comprehensive strategic Local Plan document.

- 1.40 The Exmoor National Park Authority's adopted Local Plan is the current development plan for the National Park. Decisions on planning applications are made in accordance with the development plan unless material considerations indicate otherwise. The policies within this plan will eventually be superseded by the emerging Local Plan (formerly entitled as Core Strategy and Development Management Policies development plan document).
- 1.41 The preparation of the Local Plan needs to be supported by robust and credible evidence to demonstrate that the policies and proposals within it are 'sound'. To this end, the setting of any locally derived housing policies will need to be supported by up-to-date and proportionate evidence to demonstrate that the selected approach is sound. The Exmoor National Park in West Somerset Update to the Strategic Housing Market Assessment together with the West Somerset and North Devon/Torridge SHMA Updates will form a key piece of evidence to facilitate this.
- 1.42 In accordance with government guidance on Housing Market Assessment, the approach adopted makes maximum use of existing and available demographic, social and housing data to identify the dynamics of the local housing market; the 'choices' available to local people; the imbalances between need, demand and supply which constrain those choices and the projected future requirement for housing.
- 1.43 The following table summarises the Core Outputs, which are drawn from CLG SHMA Practice Guidance, and the associated Key Questions, which inform the structure of the Update.

Table 1.1: key research questions and CLG core outputs of the update

Chapter	Key Research Questions	CLG Core Outputs
2	Who lives in the area, how might this change over the next 20 years? What other key influences and drivers are at work in relation to the housing market?	Estimates of current and future population and household size and profile by age and type. Description of key drivers underpinning the housing market.
3	What choices do consumers have in the housing market?	Analysis of past and current housing market trends, including the balance between supply and demand in different sectors.
4	What is the current pattern of housing need and demand for housing? How affordable is housing?	Estimates of current number of households in housing need.
6	What is the future need and demand for affordable and market housing by type and tenure, and for those with different requirements?	Estimates of future households that will require affordable housing and the size they will require. Estimates of household groups who have particular requirements, for example, families, young people, older people, key workers, black and minority ethnic groups, disabled people, etc.

1.44 Housing Market Assessments have typically provided static outputs, which are incapable of being amended as circumstances change. Completion of the Update has involved the development of a version of Housing Vision’s dynamic and interactive Housing Market Assessment and Housing Requirements Toolkit, which is capable of assessing the requirement for housing arising from household change and growth. The application of the Toolkit is fully described in Chapter 5. This dynamic approach to housing market assessment provides the opportunity for affordability modelling and bespoke affordability testing of any housing option by type, bed space and tenure.

Data sources

1.45 The approach adopted in undertaking this Update places a primary reliance on secondary data. The benefit of such an approach is the opportunity it offers for continual updating, enabling the monitoring of housing markets directly in the future by housing and planning officers. The many data sources used are listed below accompanied by appropriate weblinks:

Table 1.2: data sources consulted in order of use

Name of source	Origin	Web address
Census data 2001 and 2011	NOMIS	https://www.nomisweb.co.uk/Default.asp
ONS mid-year population estimates 2010, including components of population change	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-231847
ONS 2010-based subnational population projections	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-246448
Annual Population Survey for 2008 (commuting)	NOMIS	https://www.nomisweb.co.uk/articles/554.aspx
CLG 2008-based subnational population projections	CLG	http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates/
English Indices of Multiple Deprivation 2010	CLG	http://www.communities.gov.uk/publications/corporate/statistics/indices2010
English Indices of Multiple Deprivation 2010	CLG	http://www.communities.gov.uk/publications/corporate/statistics/indices2010
Annual Survey of Hours and Earnings (ASHE)	NOMIS	https://www.nomisweb.co.uk/Default.asp
CACI PayCheck Profile data for gross household incomes by district and postcode	CACI	http://www.caci.co.uk/
Housing Benefit and Council Tax recipients	DWP	http://statistics.dwp.gov.uk/asd/asd1/hb_ctb/hbctb_release_aug12.xls
Patient Register Data Service (PRDS), the National Health Service Central Register (NHSCR) and Higher Education Statistics Agency (HESA)	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-218545
Labour Force Survey (LFS) 2001	Business Information & Skills (BIS)	http://www.education.gov.uk/rsgateway/DB/VOL/v000303/index.shtml
Land Registry property price post-coded data	Land Registry	http://epsiplatform.eu/content/uk-land-registry-releases-data-free-charge
Valuation Office Agency (VOA) data on private rents	VOA	http://www.voa.gov.uk/corporate/statisticalReleases/120126_PrivateRentalMarket.html
Private rental data	findaproerty.com	http://www.findaproerty.com/search-tools/
	rightmove.co.uk	http://www.yourrightmove.co.uk/
Housing Strategy Statistical Appendix (HSSA) data on affordable lettings, sales and completions	CLG	http://www.communities.gov.uk/publications/corporate/statistics/lahousing201011
COntinuous REcording of lettings and sales of social housing in England (CORE)	CLG	https://core.communities.gov.uk/

Name of source	Origin	Web address
Rough Sleeping Statistics	CLG	http://www.communities.gov.uk/publications/corporate/statistics/roughsleeping/autumn2011
Homefinder Somerset affordable housing stock, applications and lettings data	Homefinder Somerset	http://www.devonhomechoice.com/Data/ASPPages/1/2.aspx
Registered provider housing stock, applications and lettings data	Affordable Housing UK Devon and Cornwall Housing Association Falcon Rural Housing Association Hastoe Housing Association Magna Housing Association West Somerset Homes Sanctuary Housing Tarka Housing West Country Housing Association	
Rural housing needs data	Exmoor, West Somerset and North Devon Rural Housing Project	
Housing completions and empty and second homes data	West Somerset Councils	

Accuracy and rounding

- 1.46 Please note that where percentages have been rounded this is indicated in the text, and where applied, cumulative totals may slightly exceed or fall below 100%.

Boundaries

- 1.47 The Exmoor National Park Authority is responsible for spatial and land-use planning within the Exmoor National Park (ENP). In order to identify with accuracy the demographic profile of the ENP area in West Somerset, including the population and household numbers and projections on which housing projections are based, it has been necessary to undertake an exercise which splits Census data for Census Output Areas which intersect the boundaries between the Exmoor National Park area and the West Somerset LPA area as follows.
- 1.48 The boundaries between the ENP and LPA have been drawn in a Geographical Information System (GIS) using the West Somerset Council boundary from Ordnance Survey's Boundary Line and the Exmoor National Park boundary downloaded from the Natural England website. GIS 'queries' were run to establish which Census Output Areas intersect each area. These were exported to Excel to enable calculations to ascertain which Census Output Areas intersect both areas.
- 1.49 The result was that 28 Census Output Areas intersect both areas. The number of households was recorded for each of these Census Output Areas from the 2011 Census data. A map was created for each of the 28 intersecting Census Output Areas and a number of households and/or a percentage - usually for the least populated side of the Census output area was calculated. This was undertaken by counting the number of buildings in the least populated side using the 1:10,000 raster map 'Streetview' from Ordnance Survey Open Data. The number of buildings was counted for both sides of the Census Output Area where it was more equally distributed and an estimate made for the percentage that falls on each side.
- 1.50 12 of the 28 Census Output Areas were estimated to have 100% of their households in only one of the areas. This is either because the Census Output Area only touches or slightly intersects with the boundaries or because the part of the Census Output Area that is in another area appears not to contain any buildings according to the 1:10,000 Streetview Ordnance survey raster map. The splits of population and households for the remaining 16 Census Output Areas were then confirmed or amended on the basis of local knowledge provided by the Council's Principal Planning Officer (Policy).

- 1.51 The Update states where data has been presented to the ENP, DC or LPA areas as appropriate, the term 'West Somerset' has been used to apply to the DC area only.
- 1.52 Data is collected and collated according to a range of boundaries, which seldom conform to each other. The requirement is to achieve the best-fit possible and the boundaries applied in this Update are summarised in the table below by data used.

Table 1.3: boundaries used by data in the SHMA Update

Boundary	Data	Source
West Somerset District Council, Local Planning Authority and Exmoor National Park in West Somerset areas	Age structure Ethnic origin Household composition Occupation Year of arrival UK Accommodation type Tenure type Number of rooms Rooms, average household size and Occupancy Rating (Overcrowding) Number of bedrooms Under-occupation (Occupancy Rating) Vacant homes	ONS Census 2011
West Somerset Council and Exmoor National Park in West Somerset areas area	Internal migration, international migration and travel to work	ONS
	Incomes data	CACI
	Property price data	Land Registry
	Private rental data	VOA, rightmove.com and, findaproperty.com
	Household deprivation Affordable lettings, sales and completions data	CLG
	Affordable housing stock, applications and lettings data	Homefinder Somerset

- 1.53 Maps 1.1, 1.2 and 1.3 below identify the Exmoor National Park and West Somerset Council boundaries. The West Somerset Local Planning Authority area excludes the District Council area which falls within the National Park area.

Map 1.1

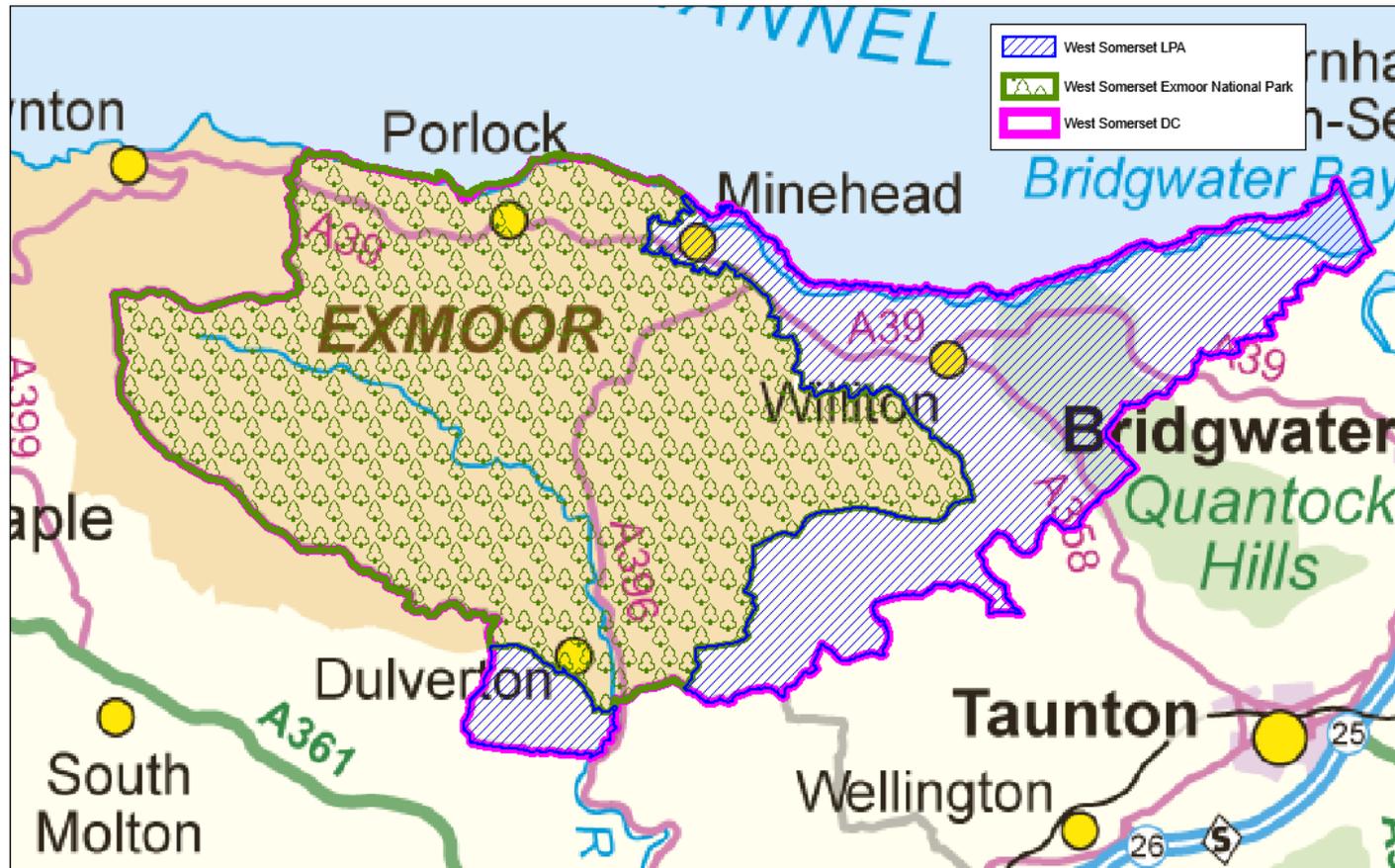
West Somerset



Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Map 1.2

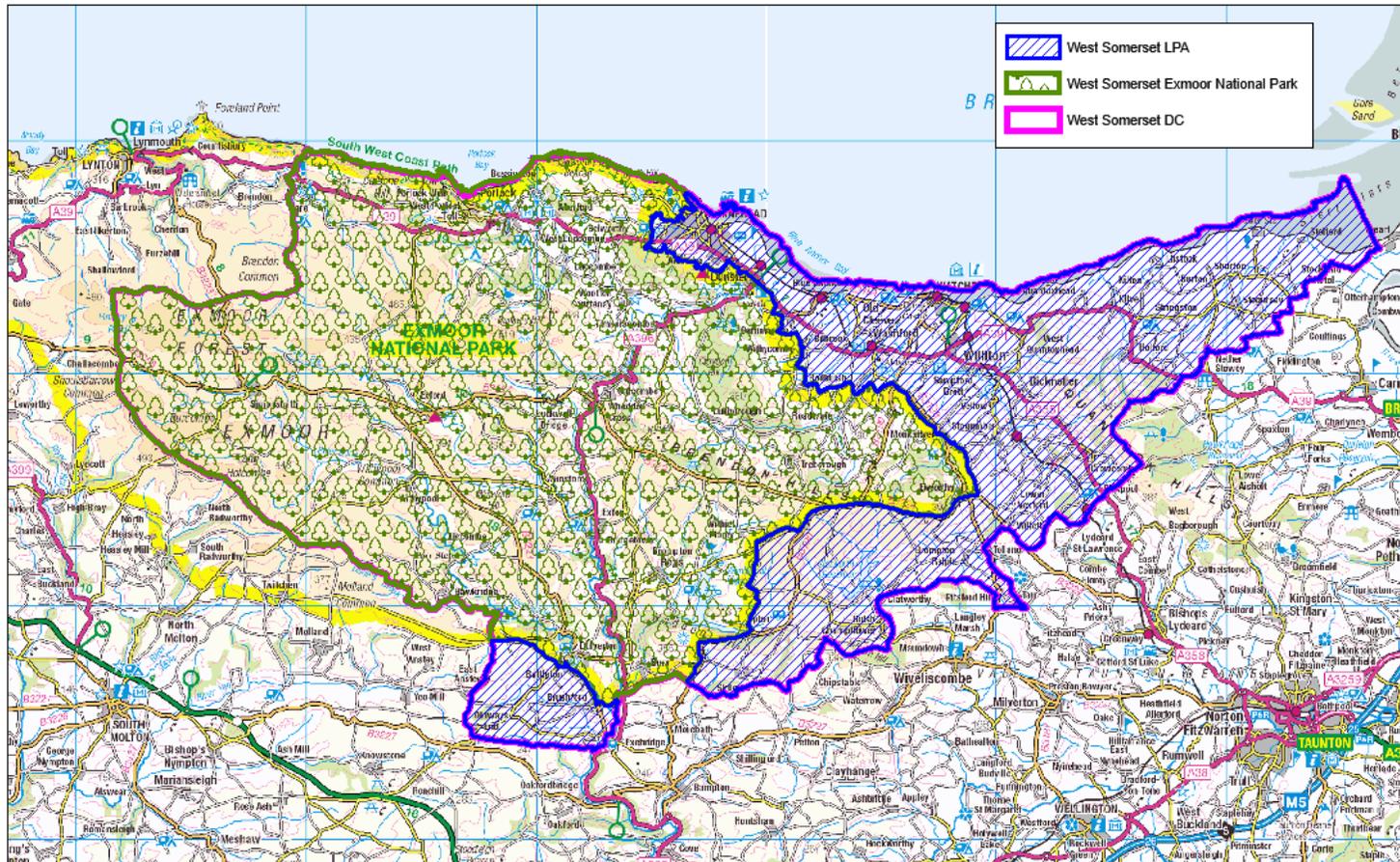
West Somerset Administrative Boundaries



Source: (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>. Contains Ordnance Survey data (c) Crown copyright and database right 2013. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>).

Map 1.3

West Somerset Administrative Boundaries



Source: (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>. Contains Ordnance Survey data (c) Crown copyright and database right 2013. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>).

2. Key Influences and Drivers

Introduction

- 2.1 This section reviews the key influences and drivers underpinning the housing market. It progresses from a demographic profile to a review of population and household projections and the factors influencing them including trends in international and internal migration and patterns of commuting. Most data has been drawn from the 2011 Census; however where this is not yet available data from the 2001 Census has been used.

Demographic profile

Population by age band

- 2.2 Initial estimates from the 2011 Census identify a population of 7,800 in the Exmoor National Park in West Somerset and 3,661 households at an average household size of 2.13.
- 2.3 The area's population by age will influence household formation which in turn determines housing requirements. The following table summarises age structure by age band for the 2011 Census.

Table 2.1: age structure, West Somerset ENP DC and LPA, 2011

Age Bands	West Somerset ENP		West Somerset LPA		West Somerset DC		South West		England	
	No	%	No	%	No	%	No	%	No	%
Age 0 to 15	958	12.3	3,873	14.4	4,831	13.9	929,678	17.6	10,022,836	18.9
Age 16 to 17	163	2.1	578	2.2	741	2.1	128,935	2.4	1,314,124	2.5
Aged 18 to 24	452	5.8	1,984	7.4	2,436	7.0	468,305	8.9	4,970,636	9.4
Aged 25 to 44	1,162	14.9	5,003	18.6	6,165	17.8	1,301,852	24.6	14,595,152	27.5
Age 45 to 64	2,705	34.7	7,717	28.7	10,422	30.1	1,424,721	26.9	13,449,179	25.4
Age 65 plus	2,360	30.3	7,720	28.7	10,080	29.1	1,035,444	19.6	8,660,529	16.3
All Categories: Age Structure	7,800	100.0	26,875	100.0	34,675	100.0	5,288,935	100.0	53,012,456	100.0
Mean Age					47.7		41.6		39.3	
Mean Age Rank					1					
Median Age					51		42		39	
Median Age Rank					1					

(Source: KS102EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk> Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>)

Key findings:

- Compared with the region and nationally, the population in the West Somerset ENP, West Somerset LPA and West Somerset DC areas is older, especially at 65 plus. The mean age of 47.7 and median age of 51 for West Somerset DC rank first out of the 348 local authorities in England and Wales.
- The proportion of those aged 45-64 (34.7%) significantly higher than the average for the South West (26.9%) and England (25.4%) which indicates that the National Park area will continue to have a well above average older population in the next 10 years.

Household total, composition and size

- 2.4 The following tables below identify the composition and size of households in both West Somerset areas in the context of the South West and England

Table 2.2: household total and composition, West Somerset ENP, LPA and DC, 2011

Household Composition	West Somerset ENP		West Somerset LPA		West Somerset DC			South West		England	
	No	%	No	%	No	%	Rank	No	%	No	%
One Person Household											
Aged 65 and over	696	19.0	2,345	19.6	3,041	19.5	3	313,490	13.8	2,725,596	12.4
Other	483	13.2	1,688	14.1	2,171	13.9	289	373,143	16.5	3,940,897	17.9
One family only											
All aged 65 and over	573	15.6	1,708	14.3	2,281	14.6	5	229,116	10.1	1,789,465	8.1
Married or same-sex civil partnership couple: No children	670	18.3	1,852	15.5	2,522	16.1	39	319,560	14.1	2,719,210	12.3
Married or same-sex civil partnership couple: Dependent children	349	9.5	1,283	10.7	1,632	10.4	340	332,616	14.7	3,375,890	15.3
Married or same-sex civil partnership couple: All children non-dependent	195	5.3	517	4.3	712	4.6	311	117,430	5.2	1,234,355	5.6
Cohabiting couple: No children	163	4.5	550	4.6	713	4.6	276	126,196	5.6	1,173,172	5.3
Cohabiting couple: Dependent children	106	2.9	421	3.5	527	3.4	289	89,087	3.9	890,780	4.0
Cohabiting couple: All children non-dependent	17	0.5	52	0.4	69	0.4	248	9,921	0.4	108,486	0.5
Lone parent: Dependent children	135	3.7	515	4.3	650	4.2	341	134,123	5.9	1,573,255	7.1
Lone parent: All children non-dependent	87	2.4	332	2.8	419	2.7	318	66,564	2.9	766,569	3.5
Other household types											
With dependent children	51	1.4	189	1.6	240	1.5	318	42,708	1.9	584,016	2.6
All full-time students	0	0.0	0	0.0	0	0.0	337	12,747	0.6	124,285	0.6
All aged 65 and over	18	0.5	89	0.7	107	0.7	2	7,752	0.3	61,715	0.3
Other	117	3.2	422	3.5	539	3.5	153	90,188	4.0	995,677	4.5
All Categories: Household Composition	3,661	100.0	11,962	100.0	15,623	100.0		2,264,641	100.0	22,063,368	100.0

(Source: Table KS105EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk> Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>)

Key Findings

- More than one third of households consisted of over 65s in the West Somerset ENP area (35.1%), similar to West Somerset overall (34.8%) and much higher than in the South West (24.2%) or nationally (20.8%).
- West Somerset DC ranked 3rd out of the 348 local authorities in England and Wales for Single households over 65 with almost one fifth (19.0%) of this type. There was a slightly higher level in the West Somerset ENP area (19.6%) and both compared with 13.8% in the South West and 12.4% nationally.
- West Somerset DC ranked 5th out of the 348 local authorities in England and Wales for One family only households with all people aged over 65, 14.6% were of this type in the West Somerset DC area and 14.3% in the West Somerset LPA area. This compares with 10.1% in the South West and 8.1% nationally.
- West Somerset DC ranked thirty ninth out of 348 local authorities in England and Wales for One family only: married or same-sex civil partnership couple: no children. 18.3% were of this type in the West Somerset ENP area and 16.1% in West Somerset compared with 14.1% in the South West and 12.3% nationally.
- Almost all other types of household had lower percentages in the ENP and West Somerset areas than in the South West and nationally

2.5 The following table profiles household size for the West Somerset ENP and other areas).

Table 2.3: household size, West Somerset ENP, LPA and DC, 2011

Household Size	West Somerset ENP		West Somerset LPA		West Somerset DC		South West		England	
	No	%	No	%	No	%	No	%	No	%
1 person in household	1,179	32.2	4,033	33.7	5,212	33.4	686,633	30.3	6,666,493	30.2
2 people in household	1,599	43.7	4,833	40.4	6,432	41.2	840,794	37.1	7,544,404	34.2
3 people in household	436	11.9	1,388	11.6	1,824	11.7	327,767	14.5	3,437,917	15.6
4 people in household	307	8.4	1,097	9.2	1,404	9.0	277,873	12.3	2,866,800	13.0
5 people in household	94	2.6	419	3.5	513	3.3	93,106	4.1	1,028,477	4.7
6 people in household	36	1.0	129	1.1	165	1.1	28,798	1.3	369,186	1.7
7 people in household	7	0.2	47	0.4	54	0.3	6,187	0.3	88,823	0.4
8 or more people in household	2	0.1	17	0.1	19	0.1	3,483	0.2	61,268	0.3
All categories: Household size	3,661	100.0	11,962	100.0	15,623	100.0	2,264,641	100.0	22,063,368	100.0

(Source: Table KS 105 EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk> Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>)

Key findings

- Almost one third (32.2%) in the West Somerset ENP area were 1 person households compared with just over one third in the West Somerset DC area (33.4%). This was higher than in the South West (30.3%) and nationally (30.2%).
- Over 40% (43.7%) in the ENP area were 2 person households, slightly higher than just over two fifths in the DC area (41.2%) and higher than in the South West (37.1%) and nationally (34.2%).
- There were lower percentages of 3, 4 and 5 person households in the ENP (22.9%) and DC areas (23.9%) than in the South West (30.9%) and nationally (33.2%).
- Households with 6 or more persons were slightly lower in the ENP area (1.3%) than the DC area (1.5%; the South West (1.7%) than nationally (2.4%).

Ethnicity

2.6 The following table provides 2011 Census data for ethnic origin.

Table 2.4: ethnic origin, West Somerset ENP, LPA and DC, 2011

Ethnic Origin	West Somerset ENP		West Somerset LPA		West Somerset DC			%	
	No	%	No	%	No	%	Rank	SW	England
White: English/Welsh/Scottish/ Northern Irish/British	7594	97.4	25,635	95.4	33,229	95.8	53	91.8	79.8
White: Irish	23	0.3	130	0.5	153	0.4	262	0.5	1.0
White: Gypsy or Irish Traveller	2	0.0	12	0.0	14	0.0	281	0.1	0.1
White: Other White	108	1.4	724	2.7	832	2.4	201	3.0	4.6
Mixed/multiple ethnic group: White and Black Caribbean	18	0.2	60	0.2	78	0.2	298	0.5	0.8
Mixed/multiple ethnic group: White and Black African	2	0.0	25	0.1	27	0.1	305	0.2	0.3
Mixed/multiple ethnic group: White and Asian	11	0.1	60	0.2	71	0.2	321	0.4	0.6
Mixed/multiple ethnic group: Other Mixed	8	0.1	24	0.1	32	0.1	346	0.3	0.5
Asian/Asian British: Indian	4	0.0	28	0.1	32	0.1	342	0.6	2.6
Asian/Asian British: Pakistani	0	0.0	2	0.0	2	0.0	344	0.2	2.1
Asian/Asian British: Bangladeshi	1	0.0	24	0.1	25	0.1	263	0.2	0.8
Asian/Asian British: Chinese	3	0.0	23	0.1	26	0.1	347	0.4	0.7
Asian/Asian British: Other Asian	19	0.2	88	0.3	107	0.3	260	0.5	1.5
Black/African/Caribbean/Black British: African	1	0.0	9	0.0	10	0.0	346	0.5	1.8
Black/African/Caribbean/Black British: Caribbean	1	0.0	6	0.0	7	0.0	341	0.3	1.1
Black/African/Caribbean/Black British: Other Black	0	0.0	3	0.0	3	0.0	340	0.2	0.5

Other ethnic group: Arab	2	0.0	7	0.0	9	0.0	308	0.1	0.4
Any other ethnic group	2	0.0	16	0.1	18	0.1	339	0.2	0.6
All Categories: Ethnic Origin	7800	100.0	26,875	100.0	34,675	100.0		100.0	100.0

(Source: Table KS201EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk> Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>)

Key findings:

- The West Somerset ENP, LPA and DC areas have very small non-white ethnic populations, these being, 0.9%, 1.4% and 1.3% respectively, compared with 4.6% in the South West and 14.3% in England.
- The West Somerset ENP, LPA and DC areas have small White Other ethnic populations, 1.4%, 2.7% and 2.4% respectively, lower than in the South West (3.0%) and the national figure (4.6%).
- In circumstances of very low ethnic populations, their social, economic and housing circumstances can only be understood through detailed and localised analysis; it is not possible to generalise from studies undertaken with concentrated ethnic populations.
- The 2011 Census identified only 14 households that were White Gypsies or Irish Travellers in West Somerset.

Occupational profile

2.7 Profiling Occupation Groups is useful as it indicates from a hierarchy of skills and qualifications, the likely associated income levels of the employed population. Incomes are dealt with specifically in subsequent sections. The following tables use Census data profile the occupation of usual residents aged 16 to 74.

Table 2.5: occupation: usual residents aged 16 to 74, West Somerset ENP, LPA and DC, 2011

Occupation	West Somerset ENP		West Somerset LPA		West Somerset DC			%	
	No	%	No	%	No	%	Rank	South West	England
1. Managers, directors and senior officials	567	15.6	1362	11.6	1,929	12.6	82	11.1	10.9
2. Professional occupations	471	13.0	1330	11.3	1,801	11.7	321	16.5	17.5
3. Associate professional and technical occupations	320	8.8	1041	8.9	1,361	8.9	341	12.1	12.8
4. Administrative and secretarial occupations	273	7.5	1027	8.8	1,300	8.5	341	11.0	11.5
5. Skilled trades occupations	823	22.7	1970	16.8	2,793	18.2	8	13.4	11.4
6. Caring, leisure and other service occupations	365	10.1	1531	13.1	1,896	12.3	9	9.8	9.3
7. Sales and customer service occupations	210	5.8	904	7.7	1,114	7.3	252	8.4	8.4
8. Process, plant and machine operatives	169	4.7	767	6.5	936	6.1	233	6.7	7.2
9. Elementary occupations	426	11.8	1799	15.3	2,225	14.5	34	11.0	11.1
All Categories: Occupation	3,623	100.0	11732	100.0	15,355	100.0		100.0	100.0

(Source: KS608EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>
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Key findings:

- The 2011 Census shows that more than one fifth (22.7%) of usual residents aged 16 to 74 years was in the Skilled trades occupation category in the ENP area of West Somerset and this was the highest category in this area. The next highest categories were Managers, Directors and Senior Officials (15.6%) and Professional occupations (13.0%). This was followed by Elementary occupations (11.8%) and Caring, Leisure and Service occupations (10.1%). The remainder of categories had less than 10% with the lowest one being Process, plant and machine operatives with 4.7%.
- No data is provided on incomes in these tables but, as the groups are presented as a hierarchy from higher to lower skills and qualifications, it can be assumed that income from earnings follows a similar pattern. In that case, West Somerset DC has lower proportions of higher skilled, qualified and salaried groups 1 to 3 (33.2%) than regionally (39.7%) or nationally (41.2%); and more in groups 4 to 9 (66.9%) compared with 60.3% in the South West and 58.9% nationally according to the 2011 Census data. This implies that local people are likely to be at a disadvantage in terms of their incomes in a high value housing market.

Car and van availability

- 2.8 Car and van availability can provide a proxy indicator for income levels within an area, the following table show the availability of cars or vans and the sum of all cars/vans.

Table 2.6: car or van availability, West Somerset ENP, LPA and DC, 2011

Cars or vans	West Somerset ENP		West Somerset LPA		West Somerset DC		%	
	No	%	No	%	No	%	South West	England
No cars or vans in household	432	11.8	2,322	19.4	2,754	17.6	18.9	25.8
1 car or van in household	1,579	43.1	5,455	45.6	7,034	45.0	43.5	42.2
2 cars or vans in household	1,148	31.4	3,051	25.5	4,199	26.9	28.3	24.7
3 cars or vans in household	350	9.6	792	6.6	1,142	7.3	6.7	5.5
4 or more cars or vans in household	152	4.1	342	2.9	494	3.2	2.6	1.9
All categories: car or van availability	3,661	100.0	11,962	100.0	15,623	100.0	100.0	100.0
sum of All cars or vans in the area	5,630		15,497		21,127			

(Source: KS416EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>
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Key findings

- There is a high level of car and van use in the Exmoor National Park area in West Somerset. Only one in 8 households (11.8%) had no cars or vans in their household compared with almost one in 6 (17.6%) in the West Somerset DC area; one in 5 (18.9%) in the South West and just over one quarter (25.4%) nationally.
- There was an average of 1.5 cars or vans per household in the West Somerset ENP area; 1.4 in the West Somerset DC area; 1.3 in the South West and 1.1 nationally.
- There was a higher percentage of households with two cars in the West Somerset ENP (31.4%) than in the West Somerset DC area (26.9%); regionally (28.3%) or nationally (24.7%).
- At the extreme of high availability, 13.7% of households in the West Somerset ENP area had 3 or more cars compared with 10.5% in the West Somerset DC area; 9.3% in the South West and 7.4% nationally.

Household incomes from all sources

2.9 Household income is the most important factor in determining access to housing. The following table profiles the proportion of households receiving gross incomes across a range of income bands. It is important to emphasise that this profile includes income from all sources, including social security benefits and pensions, and is for all household types. This data has been applied in the HMA and Housing Requirements Toolkit.

Table 2.7: gross household income bands and measures, Exmoor National Park in West Somerset, percentages, September 2013

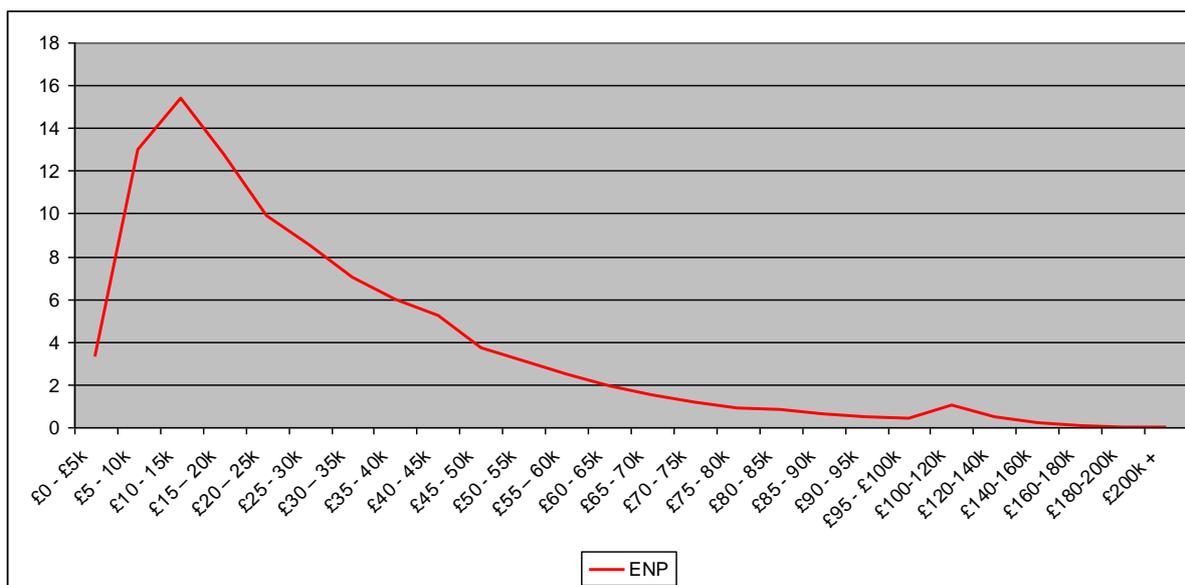
Income band or measure	Exmoor National Park in West Somerset %	West Somerset %
£0 - £5k	3.4%	3.7%
£5 – 10k	13.5%	15.8%
£10 - 15k	15.7%	15.2%
£15 – 20k	12.8%	11.9%
£20 – 25k	9.9%	9.3%
£25 - 30k	8.5%	7.7%
£30 – 35k	7.0%	6.5%
£35 - 40k	5.9%	6.0%
£40 - 45k	5.1%	4.9%
£45 - 50k	3.6%	3.7%
£50 - 55k	3.1%	3.3%
£55 – 60k	2.4%	2.6%
£60 - 65k	1.8%	2.0%
£65 - 70k	1.5%	1.5%
£70 - 75k	1.1%	1.3%
£75 - 80k	0.8%	1.0%
£80 - 85k	0.7%	0.7%
£85 - 90k	0.6%	0.5%
£90 - 95k	0.5%	0.4%
£95 - £100k	0.4%	0.4%
£100-120k	0.9%	0.9%
£120-140k	0.5%	0.4%
£140-160k	0.2%	0.2%
£160-180k	0.1%	0.1%
£180-200k	0.0%	0.0%
£200k +	0.0%	0.0%
Mean income	£29,394	£28,820
Median income	£22,777	£22,294
Lower quartile	£12,826	£12,567

(Source: PayCheck data, CACI, September 2013)

Key findings:

- The National Park area has slightly higher household incomes than West Somerset as a whole but 45% of households are dependent on incomes of £20,000 or less. The concentration of incomes at the lower end of the range is most clearly seen in the following chart.

Fig 2.1: gross household income, Exmoor National Park in West Somerset, income bands by percentages, September 2013



(Source: PayCheck Data, CACI, September 2013)

Personal incomes from employment

2.10 The Annual Survey of Hours and Earnings (ASHE) identifies the gross weekly pay of full-time workers at mean and median levels and for each 10th percentile of the income range and is produced annually. However, this data is only available at local authority area and in the case of this Update, for West Somerset District Council.

2.11 West Somerset has a significant proportion of its work-force which is self-employed. Using the equation; Employee Employment (EE) + Self-Employment (SE) = Total Employment (TE) and the data in the 2011 Census Table KS601EW (Key Statistics: Economic Activity) this equates to 27.15% for the district as a whole which compares with 18.81%, 17.56% and, 15.71% for Somerset, the South West and England respectively. The following table summarises gross median weekly incomes for residents in West Somerset in 2012, the most recent year for which data is available, and includes an estimate adjusted for the self-employed

Table 2.8: gross median weekly incomes for residents in West Somerset, 2012

Category of employee	West Somerset	South West	England
Full-time	£393.7	£473.4	£507.6
Self-employed	£338.58	£407.12	£436.54

(Source: ONS Annual Survey of Hours and Earnings – resident analysis, NOMIS website, <http://www.nomisweb.co.uk/>.)

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Key findings:

- Data on gross median incomes from employment show substantially lower incomes in West Somerset than the regional averages or national averages.
- Full-time incomes in West Somerset are only 83% of the regional and 78% of the national average.
- These findings suggest high levels of dependence on low incomes in West Somerset.

2.11 West Somerset has a significant proportion of its work-force which is self-employed. Using the equation; Employee Employment (EE) + Self-Employment (SE) = Total Employment (TE) and the data in the 2011 Census Table KS601EW (Key Statistics: Economic Activity) this equates to 27.15% for the district as a whole which compares with 18.81%, 17.56% and, 15.71% for Somerset, the South West and England respectively.

2.12 ASHE data is confined to employee-employment sources only. A recent report suggested that in 2012, average self-employed earnings were 14% lower than their employee-employment equivalents.²² Applied on a uniform basis, and with no local variations, the average gross weekly earnings data for the self-employed in Table 2.8 would equate to £338.58, £407.12 and, £436.54 for West Somerset, South-West and England respectively.

Personal incomes from benefits

2.13 The following tables summarise the number and proportion of key working age benefit claimants, working age refers to the age group 16-64, Key Findings are provided after the second table. Once again, this data is only available at local authority area and in the case of this Update, for West Somerset District Council.

²² Centre for Economic and Business Research; Step Change Consumer Debt and Money Report Q3 2012; Step Change; 2012; pp.9 – 10 (Self-employed face highest debt burden). See:- <http://www.stepchange.org/Portals/0/Documents/media/reports/cebr%20q3%202012.pdf>

Table 2.9: residents in receipt of working age benefits, West Somerset, February 2012

Type of Benefit	West Somerset		%	
	No	%	South West	Great Britain
Total claimants	2,670	13.8	12.2	14.3
Job Seeker	460	2.4	2.7	3.8
Employment Support Allowance (ESA) and Incapacity Benefits	1,350	7.0	5.7	6.2
Lone Parent	150	0.8	1.0	1.3
Carer	280	1.5	1.1	1.3
Others on income related benefit	110	0.6	0.4	0.4
Disabled	270	1.4	1.2	1.1
Bereaved	50	0.3	0.2	0.2
Key Out of Work Benefits	2,070	10.7	9.7	11.7

(Source: DWP benefit claimants - working age client group, NOMIS website, <http://www.nomisweb.co.uk/>.)

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Key findings

- DWP data shows that there were 2,670 working age people claiming benefits representing 13.8% of the working age population, a higher percentage than in the South West but lower than nationally.
- ONS Claimant counts for February 2013 show a lower percentage of JSA claimants in West Somerset (2.4%) than in the South West (2.7%) and Great Britain (3.8%).
- There were larger proportions receiving ESA, Incapacity Benefits; careers or the Disabled than regionally or nationally.

Relative levels of deprivation

2.14 The **English Indices of Deprivation 2010** are a relative measure of deprivation showing whether one small area is more or less deprived than another small area in England but not by how much. It is based on ONS Lower Super Output Areas of which there are 32,482 in England. The National Rank is used in the maps throughout this section and ranks all the Domains of deprivation from 1 (most deprived) to 32,482 (least deprived). The English Indices of Deprivation are able to show where there are pockets of high relative deprivation within a local authority compared to other small areas in England. The English Indices of Deprivation 2010 is made up as follows:

- Index of Multiple Deprivation (IMD)

Domains

- Income Domain
- Employment Domain
- Health & Disability Domain
- Education, Skills and Training Domain
- Crime Domain
- Living Environment Domain
- Housing and Barriers to Services Domain

Sub-Domains

- Indoors Living Sub Domain
- Outdoors Living Sub Domain
- Wider Barriers Sub Domain
- Geographical Barriers Sub Domain
- Skills Sub Domain
- Children and Young People Sub Domain

Supplementary Income Indexes

- Income Deprivation for Older People Index
- Income Deprivation for Children Index

2.15 Although there is no single measure that enables England’s 326 district local authorities to be compared, local authority District Summaries provide an indication of comparative deprivation. The following table provides the rank and scores of the LSOAs for each District and is population weighted.

Table 2.10: extract from local authority district summaries ID2010

District	Rank of Average Rank	Rank of Average Score
West Somerset	45	90

(Source: ID2010 District Summaries, CLG website,

<http://www.communities.gov.uk/corporate/>.

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Key findings:

- West Somerset is in the 14% most deprived local authorities for Rank of Average Rank and the 28% most deprived for Rank of Average Score.

2.16 The **Index of Multiple Deprivation** is a measure of multiple deprivation at the small area level and is based on the idea of distinct dimensions of deprivation which can be recognised and measured separately. People may be counted as deprived in one or more of the dimensions depending on the number of types of deprivation that they experience. The overall Index of Multiple

Deprivation is a weighted area-level aggregation of these specific dimensions of deprivation (i.e. the seven Domains of Deprivation).

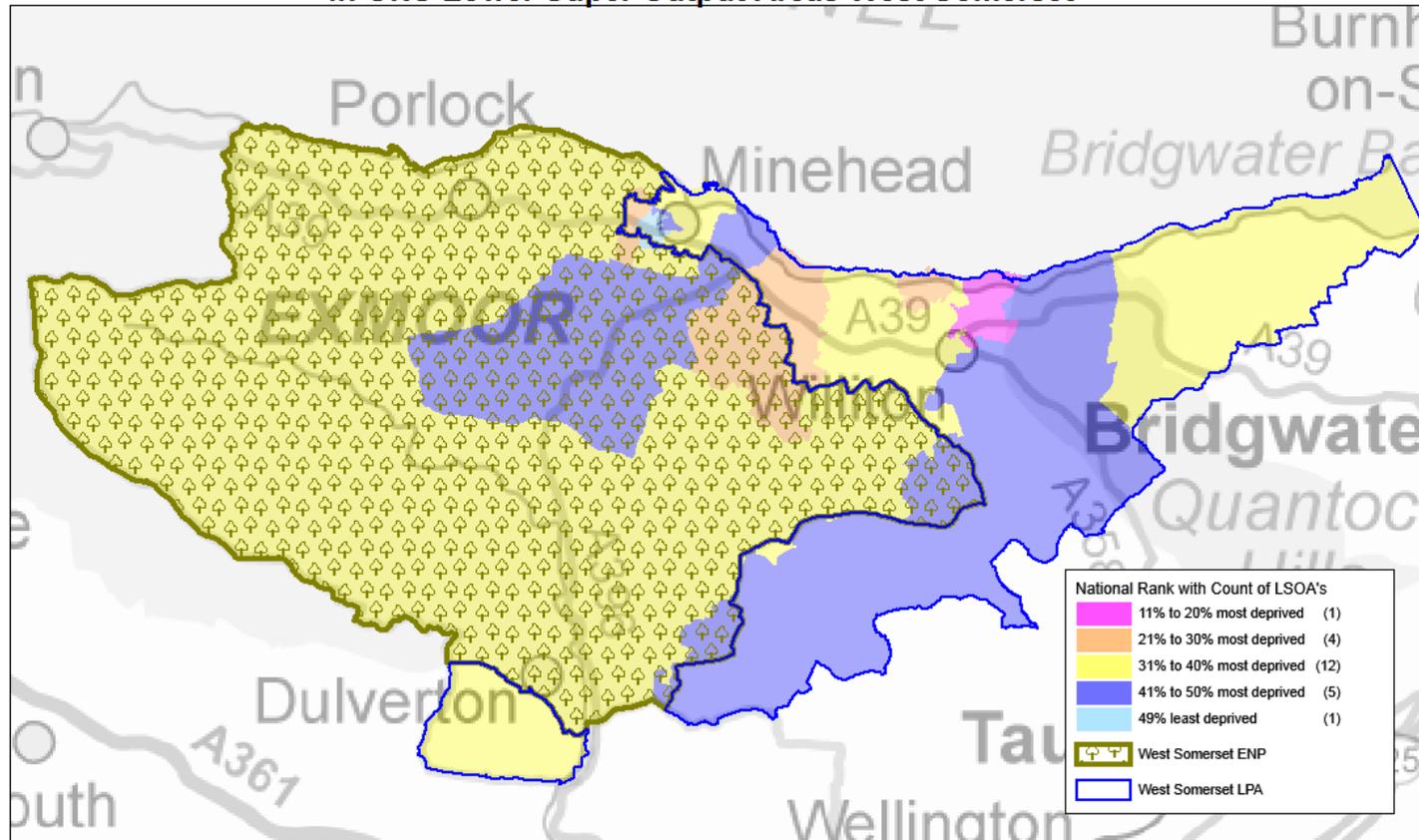
2.17 The following maps and tables examine patterns for those Domains and sub-Domains of most relevance to understanding the need and demand for housing, they are accompanied by maps highlighting specific locations of concern as appropriate in relation to the following:

- the overall Index of Multiple Deprivation;
- Income Domain and the supplementary Income Deprivation Affecting Older People Index (affecting affordability issues for housing) ;
- Living Environment Domain and Indoors Living Sub Domain which is concerned with measuring the quality of housing (stock condition and lack of central heating); and
- Barriers to Housing and Services Domain, and associated Geographical Barriers Sub-Domain, which shows access to services and the Wider Barriers Sub-Domain which includes housing indicators (overcrowding, homelessness and access to owner occupation)

2.18 The following maps show levels of relative deprivation for the Index of Multiple Deprivation using national rank in small areas in West Somerset.

Map 2.1

**National Rank Index of Multiple Deprivation
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries.

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Key findings:

- There were no small areas in West Somerset in the 10% most nationally deprived for the Index of Multiple Deprivation, and only one small area in the 11% to 20% most nationally deprived showing relatively high deprivation.
- There were 4 small areas within the 21% to 30% most deprived nationally.
- There was only 1 small area in the 49% least deprived nationally for the Index of Multiple Deprivation therefore the majority of West Somerset was in the 50% most deprived nationally for the overall Index of Multiple deprivation.

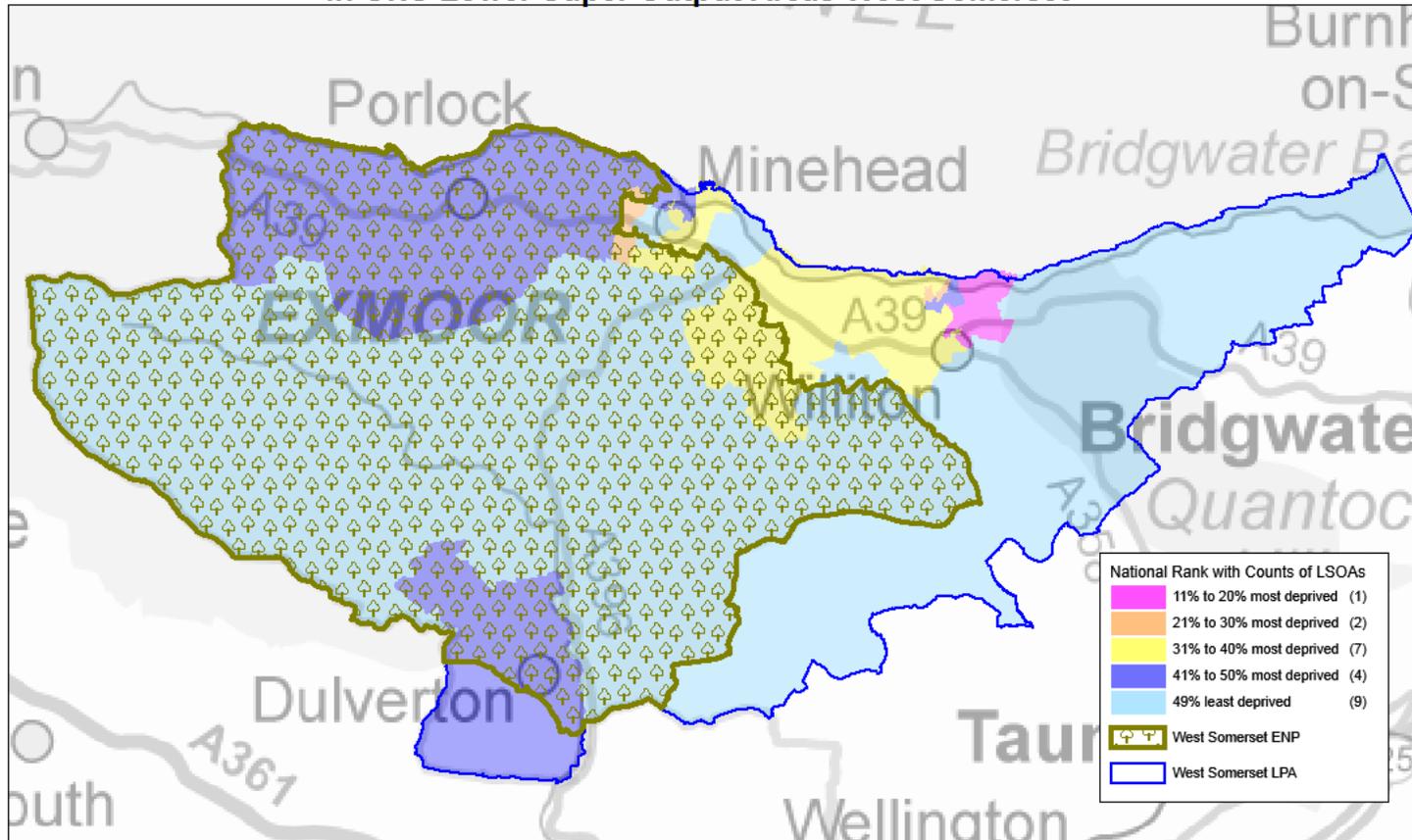
2.19 The income Domain measures the proportion of people within each LSOA that are income deprived using the following measures:

- Adults and children in Income Support families;
- Adults and children in income-based Jobseeker's Allowance families;
- Adults and children in Pension Credit (Guarantee) families;
- Adults and children in Child Tax Credit families (who are not claiming Income Support, income-based Jobseeker's Allowance or Pension Credit) whose equivalised income (excluding housing benefits) is below 60% of the median before housing costs; and
- Asylum seekers in England in receipt of subsistence support, accommodation support, or both.

2.20 There are two supplementary indexes for income; these being Income Deprivation Affecting Older People Index and the Income Deprivation Affecting Children Index. The Income Deprivation Affecting Older People Index (IDAOP) is included in this report due to the high percentage of older people in the population of West Somerset and its potential to show housing affordability issues. This index represents income deprivation affecting older people as a proportion of living in income support or income based Job Seekers Allowance or Pension Credit Guarantee families. The following maps show relative deprivation for national rank for income deprivation and the income deprivation affecting older people index.

Map 2.2

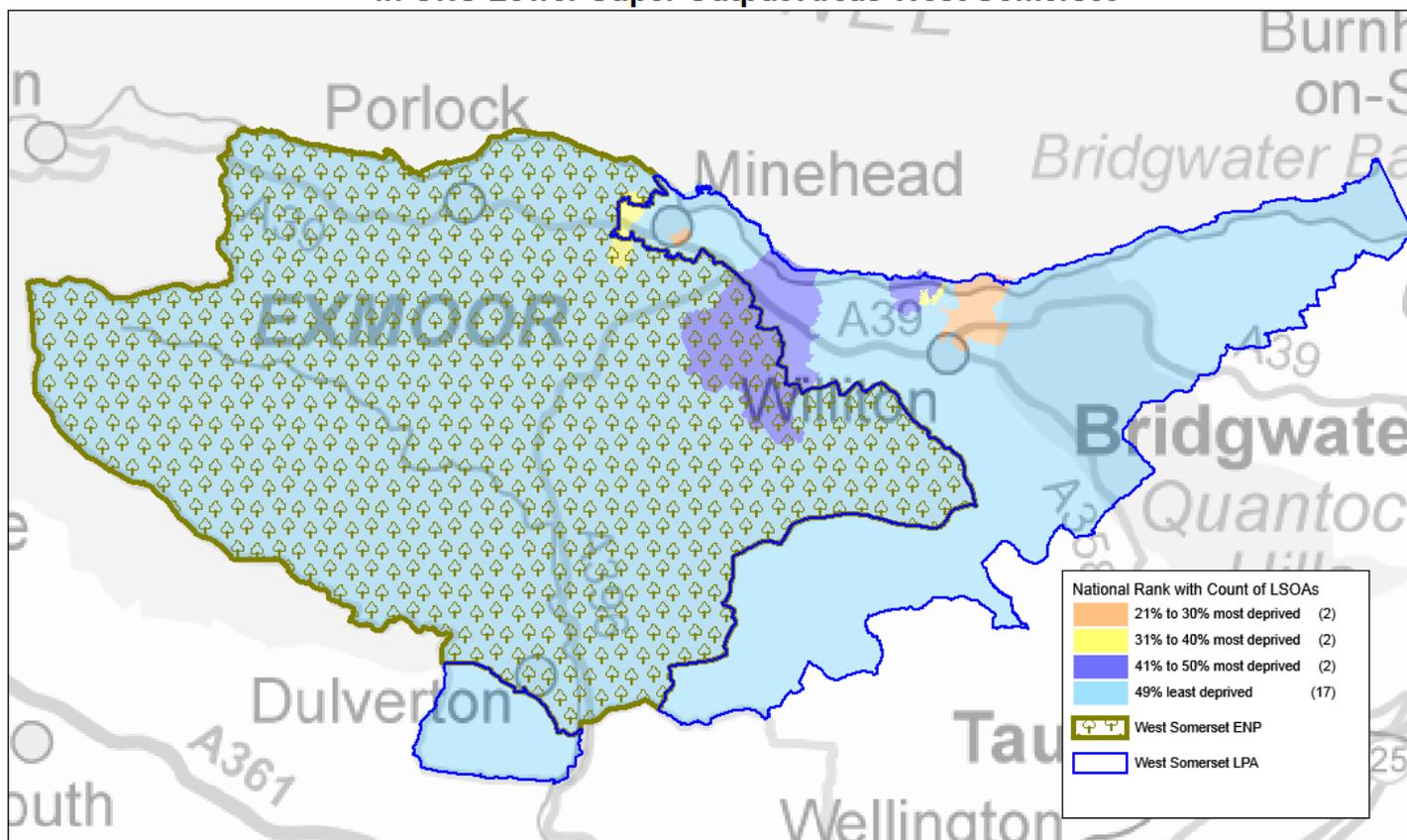
**National Rank Income Domain
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Map 2.3

**National Rank Income Deprivation Affecting Older People Index
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Key findings:

- There were no small areas in West Somerset in the 10% most nationally deprived for income deprivation and only one small area in the 11% to 20% most deprived nationally showing relatively high deprivation.
- There were two small areas in the 21% to 30% most deprived nationally for the Income domain.
- There were 9 small areas in the 49% least deprived nationally not showing much relative income deprivation, although more than half of all the small areas (14) were in the 50% most relatively deprived nationally.
- There were no small areas with very high relative deprivation for the Index of Deprivation Affecting Older People Index being none in the top 20%, and there were only two small areas in the 21% to 30% most nationally deprived.
- Nearly three quarters of the small areas (17) in West Somerset were in the 49% least deprived for the Index of Deprivation Affecting Older People Index therefore there was not a really high level of relative deprivation for the IDAOP in West Somerset.

2.21 The Living Environment Domain combines the Indoors Living Sub Domain and the Outdoors Living Sub Domain. The sub Domains are combined so that the Indoors Living Sub Domain has two thirds of the weighting and the Outdoors Living Sub Domain has one third of the weighting. The sub domains are as follows:

- Sub-domain: The ‘indoors’ living environment:
 - Housing in poor condition: The proportion of social and private homes that fail to meet the decent homes standard.
 - Houses without central heating: The proportion of houses that do not have central heating.
- Sub-domain: The ‘outdoors’ living environment
 - Air quality: A measure of air quality based on emissions rates for four pollutants.
 - Road traffic accidents: A measure of road traffic accidents involving injury to pedestrians and cyclists among the resident and workplace population.

2.22 The Indoors Living Sub Domain contains housing indicators, and has been included in this analysis partly to see where there may be sub-standard housing and in how many areas, and also to see whether the deprivation in

the Living Environment Domain may be caused by housing indicators. It should be borne in mind that the data is based on the 2001 Census 'lack of central heating' and the 2005 English House Condition Survey for 'poor condition of housing.' The following tables identify small areas which are in the 10% most deprived nationally for Living Environment and the Indoors Living Sub Domain, including in the ENP area.

Table 2.11: small areas in West Somerset in the 10% most nationally deprived for Living Environment Domain, 2010

ONS Lower Super Output Area	Local Authority	Sub Area	Score	Rank
E01029338	West Somerset 005C	ENP (majority)	47.60	3,060

(Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk/corporate/>.)

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Table 2.12: Small Areas in West Somerset in the 10% most nationally deprived for Indoors Living Sub Domain 2010

ONS Lower Super Output Area	Local Authority	Sub Area	Score	Rank
E01029338	West Somerset 005C	ENP (majority)	70.85	1,087
E01029327	West Somerset 004A	Both	64.05	1,607
E01029337	West Somerset 004C	LPA all	56.51	2,395
E01029335	West Somerset 004B	Both	54.77	2,617
E01029336	West Somerset 002D	ENP all	54.10	2,707

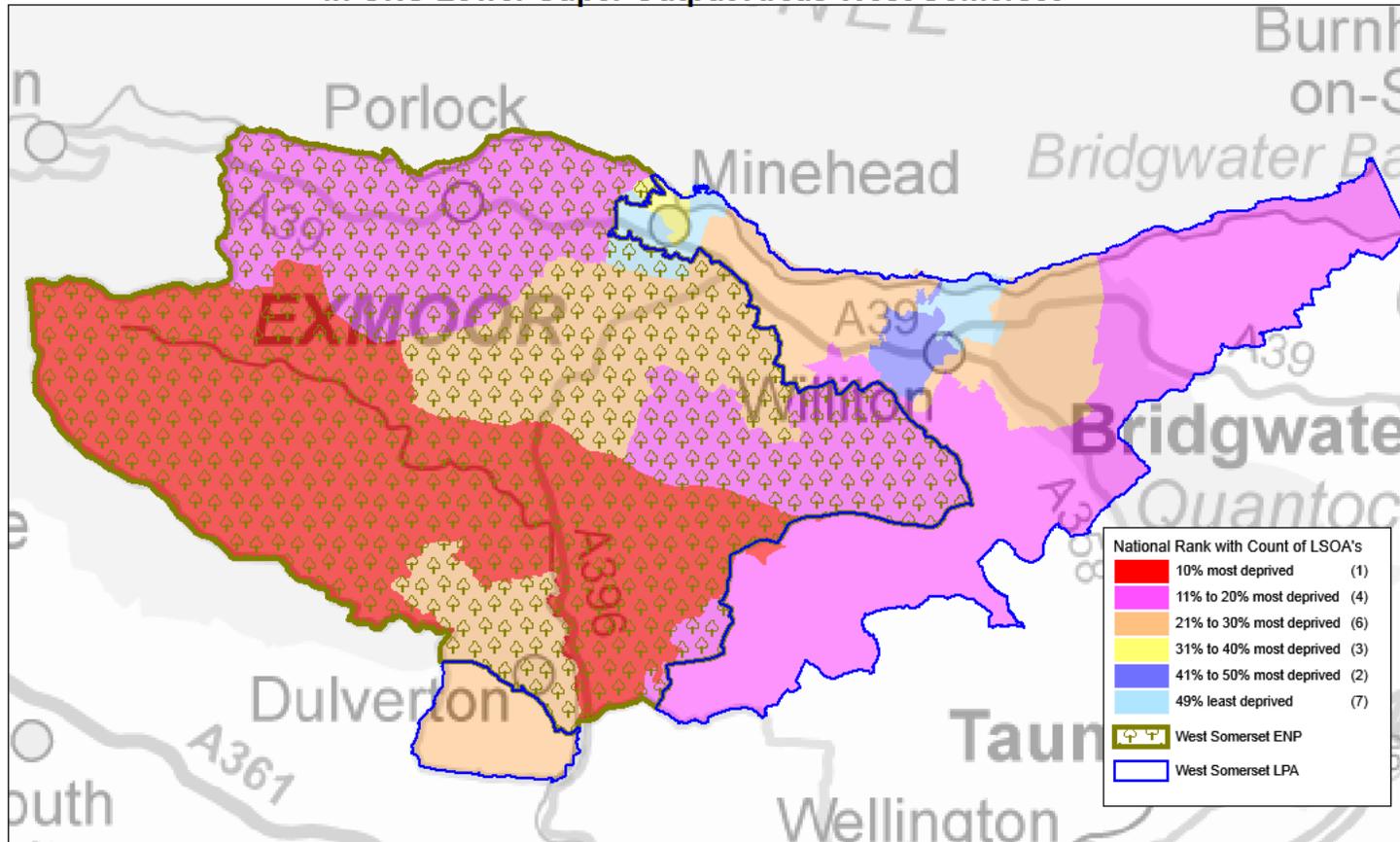
(Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk/corporate/>.)

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2.23 The following maps identify small areas which are in the 10% most deprived nationally for the Living Environment Domain and the Indoors Living Environment Sub Domain.

Map 2.4

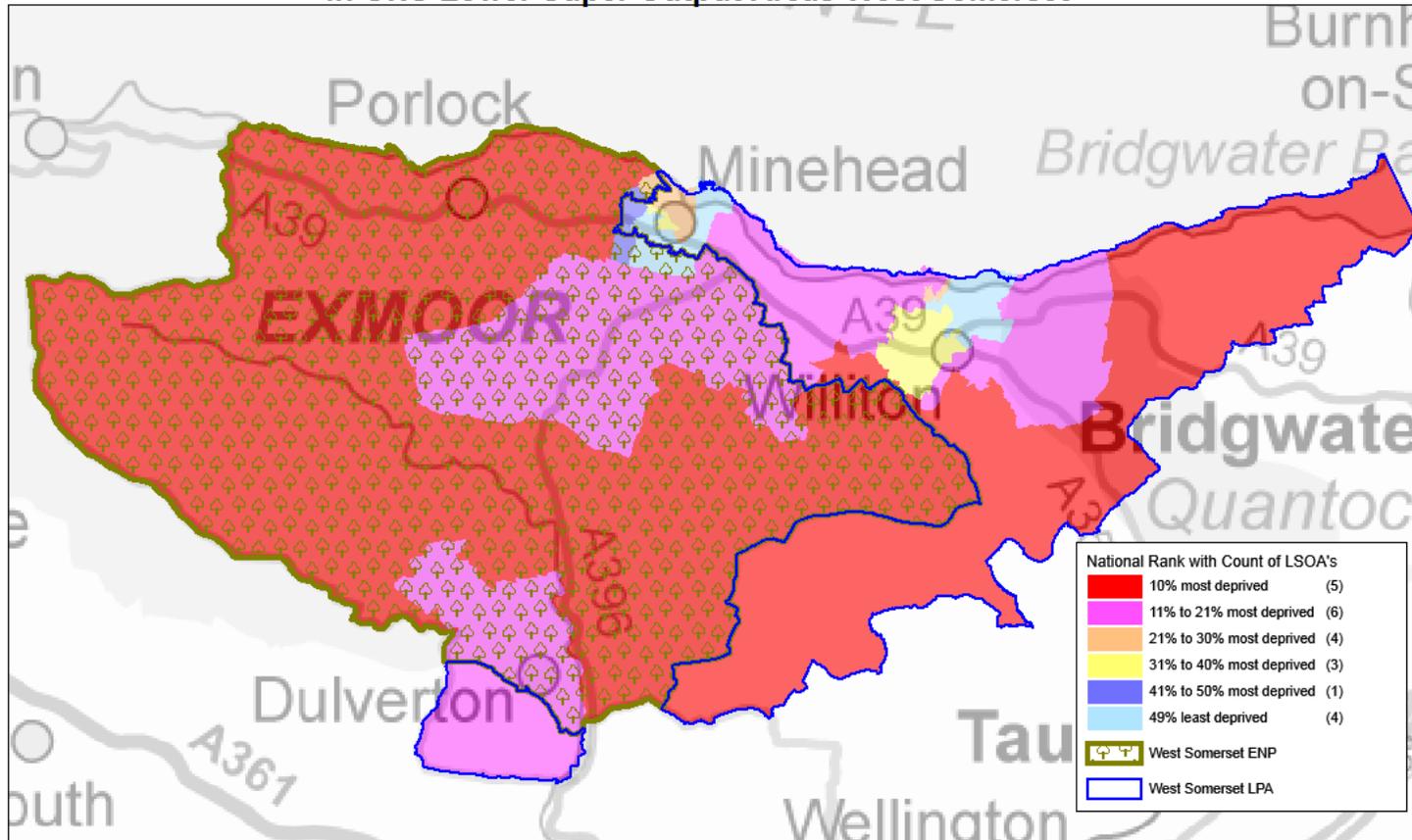
**National Rank Living Environment Domain
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Map 2.5

**National Rank Indoors Living Sub Domain
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Key findings:

- West Somerset had one small area in the 10% most relatively deprived nationally for the Living Environment domain. This area, which is mainly within the ENP sub area, was a quite large and mainly rural area.
- There were 5 small pockets of very high relative deprivation, being in the 10% most deprived nationally for the Indoors Living Sub Domain, indicating either sub standard housing conditions or lack of central heating or both. One of these small areas was entirely within the ENP sub area, one was mainly within the ENP area, 1 was entirely within the LPA sub area and two were partly within both sub areas.

2.24 The Housing and Services Domain is made up of two sub Domains:

- Sub-Domain: Wider Barriers
 - Household overcrowding: the proportion of all households in an LSOA which are judged to have insufficient space to meet the household's needs.
 - Homelessness: the rate of acceptances for housing assistance under the homelessness provisions of housing legislation.
 - Housing affordability: the difficulty of access to owner-occupation, expressed as a proportion of households aged under 35 whose income means that they are unable to afford to enter owner occupation.
- Sub-Domain: Geographical Barriers
 - Road distance to a GP surgery: A measure of the mean distance to the closest GP surgery for people living in the LSOA.
 - Road distance to a food shop: A measure of the mean distance to the closest supermarket or general store for people living in the LSOA.
 - Road distance to a primary school: A measure of the mean distance to the closest primary school for people living in the LSOA.
 - Road distance to a Post Office: A measure of the mean distance to the closest post office or sub post office for people living in the LSOA.

2.25 The following tables show areas in West Somerset within the 10% most deprived nationally for the Barriers to Housing and Services Domain and its sub domains.

Table 2.13: Small Areas in West Somerset in the 10% most nationally deprived for Barriers to Housing and Services Domain 2010

ONS Lower Super Output Area	Local Authority	Sub Area	Score	Rank
E01029338	West Somerset 005C	ENP (majority)	67.52	3
E01029327	West Somerset 004A	Both	67.36	4
E01029335	West Somerset 004B	Both	65.10	6
E01029326	West Somerset 003A	Both	54.23	95
E01029337	West Somerset 004C	LPA all	53.53	111
E01029328	West Somerset 005B	Both	49.21	444
E01029333	West Somerset 002C	Both	48.55	540
E01029336	West Somerset 002D	ENP all	47.91	625
E01029342	West Somerset 004D	LPA all	47.66	662
E01029340	West Somerset 003D	LPA all	45.98	945
E01029334	West Somerset 003B	LPA all	45.96	950
E01029322	West Somerset 002A	Both	43.56	1,425
E01029339	West Somerset 003C	LPA all	39.40	2,471

(Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk/corporate/>.)

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Table 2.14: Small Areas in West Somerset in the 10% most nationally deprived for Wider Barriers Sub Domain 2010

ONS Lower Super Output Area	Local Authority	Sub Area	Score	Rank
E01029329	West Somerset 001C	LPA all	52.72	2900
E01029322	West Somerset 002A	Both	52.10	2992
E01029330	West Somerset 001D	Both	50.88	3177

(Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk/corporate/>.)

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Table 2.15: Small Areas in West Somerset in the 10% most nationally deprived for Geographical Barriers Sub Domain 2010

ONS Lower Super Output Area	Local Authority	Sub Area	Score	Rank
E01029338	West Somerset 005C	ENP (majority)	98.64	27
E01029327	West Somerset 004A	Both	96.18	78
E01029335	West Somerset 004B	Both	92.47	166
E01029326	West Somerset 003A	Both	69.67	1,167
E01029337	West Somerset 004C	LPA all	68.51	1,249
E01029328	West Somerset 005B	Both	57.76	2,246
E01029342	West Somerset 004D	LPA all	56.94	2,343
E01029336	West Somerset 002D	ENP all	55.68	2,499
E01029340	West Somerset 003D	LPA all	53.12	2,843
E01029333	West Somerset 002C	Both	51.00	3,159

(Source: English Indices of Deprivation 2010, CLG website,

<http://www.communities.gov.uk/corporate/>.

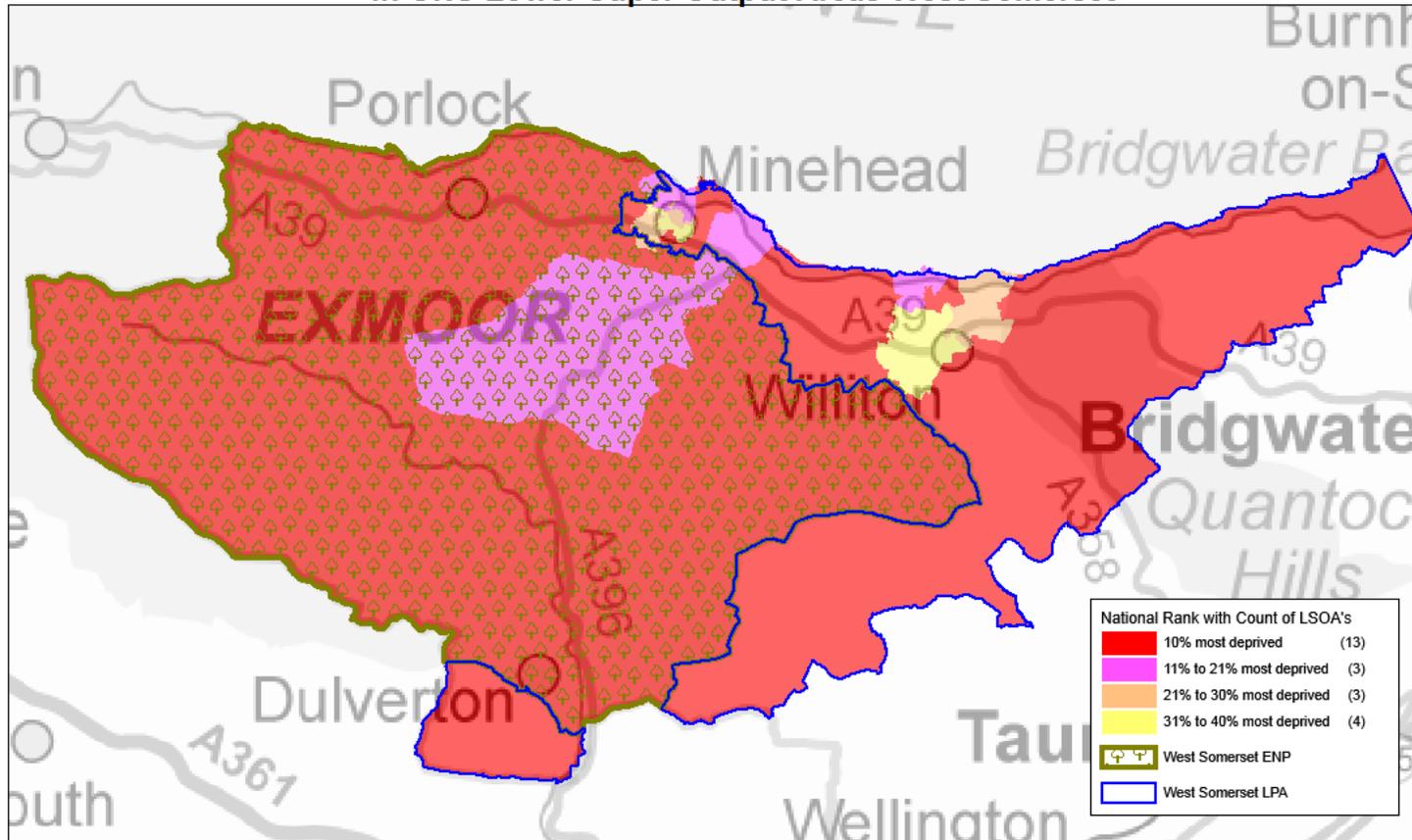
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<http://www.nationalarchives.gov.uk/doc/open-government-licence/>

2.26 The following maps identify where there is relative deprivation for the overall Barriers to Housing and Services Domain and for the wider Barriers and geographical Barriers Sub-Domains.

Map 2.6

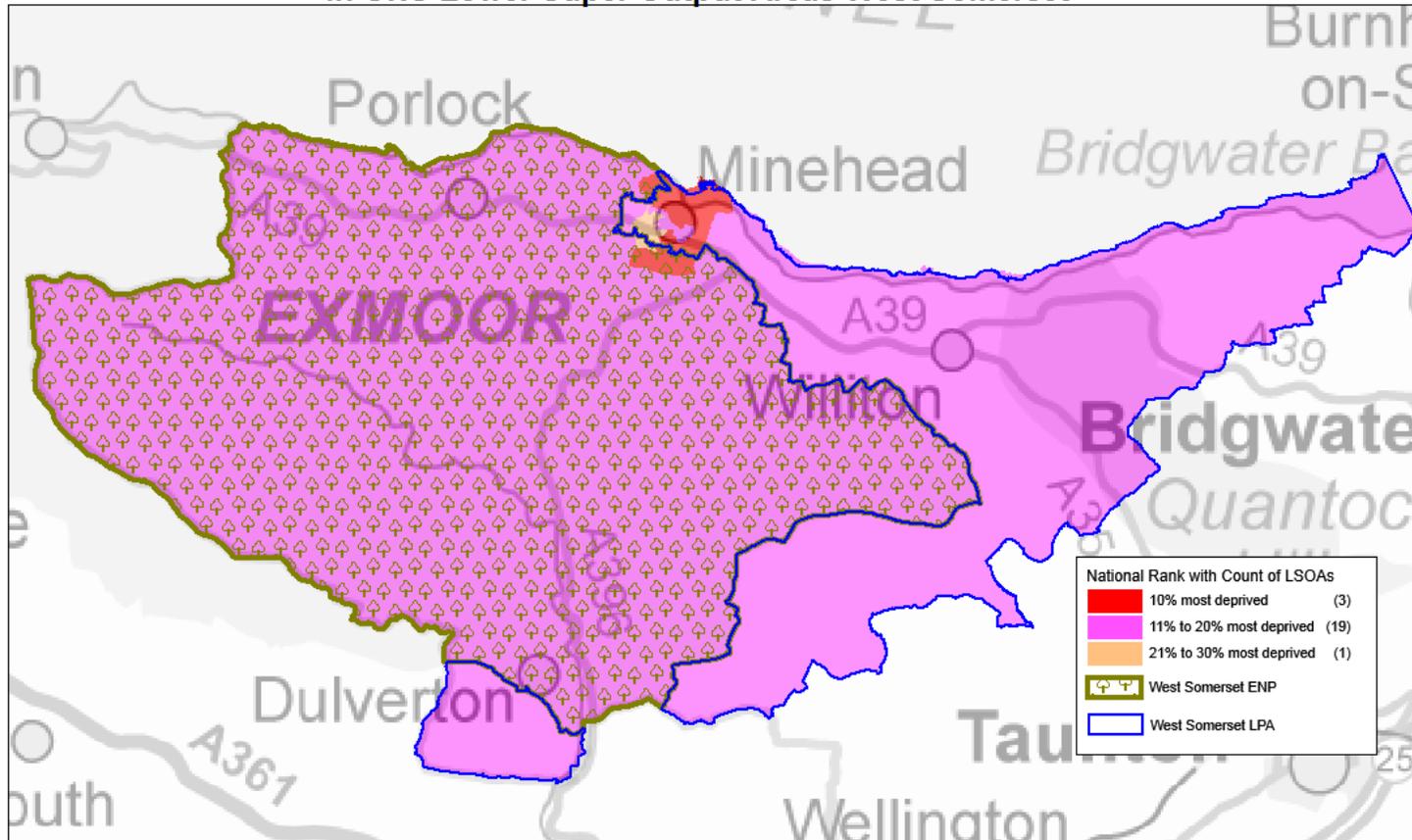
**National Rank Barriers to Housing and Services Domain
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Map 2.7

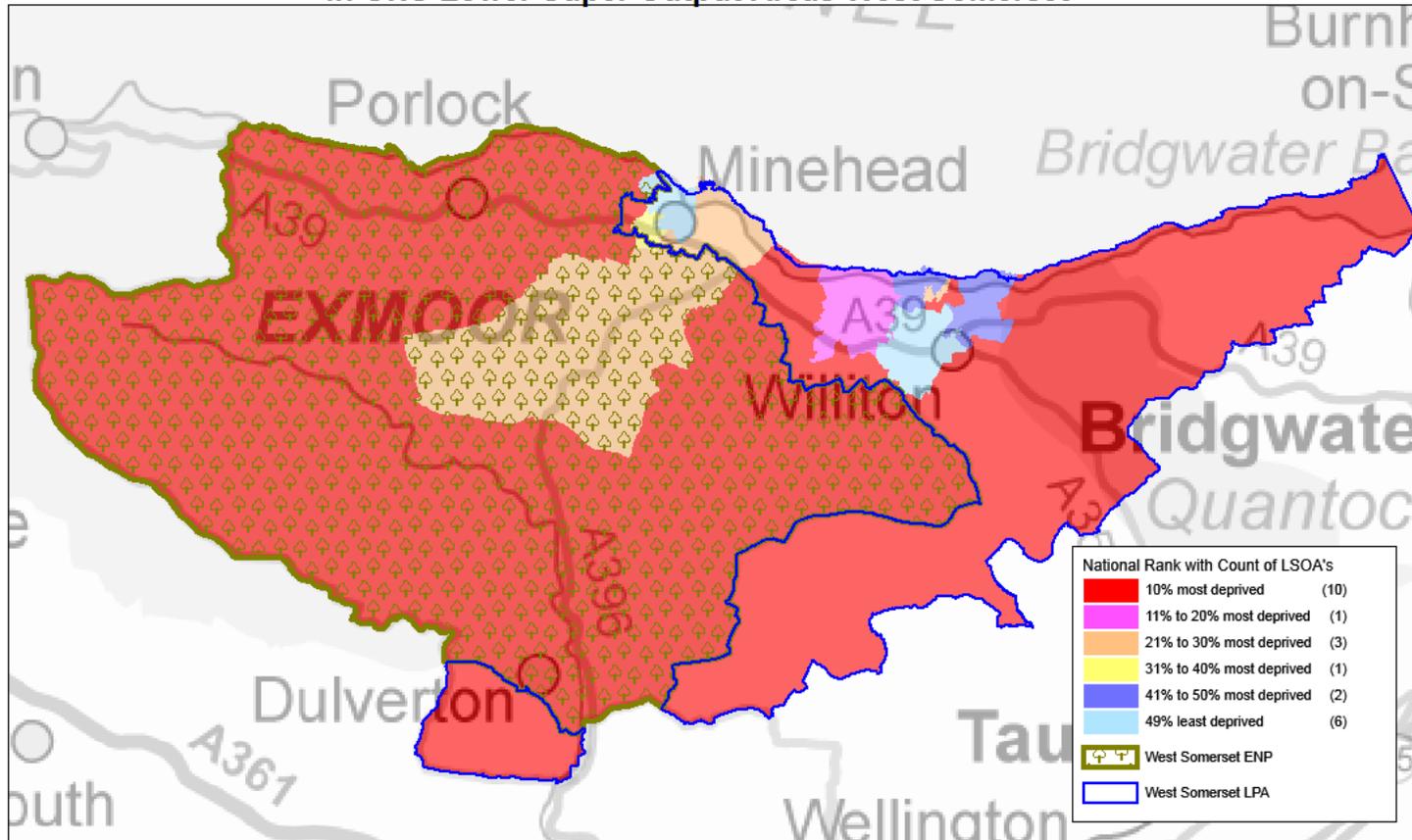
**National Rank Wider Barriers Sub Domain
in ONS Lower Super Output Areas West Somerset**



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Map 2.8

National Rank Geographical Barriers Sub Domain
in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, <http://www.communities.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Office for National Statistics Lower Super Output Area Boundaries. Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Key findings:

- There were 13 small areas in West Somerset with very high relative deprivation being in the 10% most nationally deprived for the Barriers to Housing and Services Domain. 5 of these small areas were entirely within the LPA sub area, one was entirely within the ENP sub area, one was mainly in the ENP sub area and the remaining 6 sub areas were partly within both sub areas.
- There were 3 small areas with very high relative deprivation being in the 10% most nationally deprived for the Wider Barriers Sub Domain. This sub domain contains housing indicators relating to overcrowding, homelessness and affordability in terms of access to owner occupation. These 3 areas were based in or around Minehead, therefore most likely to be urban areas. One of these small areas was entirely within the LPA sub area and the other two were partly within both sub areas.
- There were 10 small areas with very high relative deprivation for the Geographical Barriers Sub Domain being in the 10% most nationally deprived. Three of these small areas were entirely within the LPA area, one was entirely within the ENP area, one was mainly in the ENP area, and the remaining 5 small areas were partly within both sub areas.

2.27 Pulling together data and information that has been collated on deprivation, it is possible to draw the following conclusions:

- West Somerset is in the 14% most deprived local authorities for Rank of Average Rank and the 28% most deprived for Rank of Average Score, therefore there is some degree of relative deprivation within small areas in the local authority.
- The combined Index of Multiple Deprivation does not show many pockets of very high relative deprivation there being none in the top 10% nationally and only one in the top quintile. The majority of small areas (all but one) were in the 50% most deprived nationally therefore there is some degree of relative multiple deprivation in most small areas of West Somerset.
- The Income Domain does not show many pockets of very high relative deprivation, there being no small areas in the 10% most nationally deprived and only one small area in the top quintile. There were 9 small areas falling in the least deprived half of the country in terms of national ranking therefore showing that there are some small areas in West Somerset with relatively low income deprivation. This would suggest there are some small areas where there are not a high number of benefits claimants. 14 small areas fell in the most deprived 50% in

terms of national ranking, therefore there would be some degree of benefit dependency within these areas.

- The Index of Deprivation Affecting Older People Index showed no pockets of very high relative deprivation. Nearly three quarters (17 areas) were in the least deprived half of the country in terms of national ranking therefore these areas of West Somerset are not likely to have a high degree of older persons who are benefit dependent. There were only 6 areas falling with the most deprived half of the country in terms of national ranking and these areas are more likely to have a higher level of benefit dependency among older persons. These areas appear to be smaller and are therefore likely to be more urban in nature.
- The Indoors Living Sub Domain (for the Living Environment domain) indicates that there are 11 small areas in the top quintile for relative national deprivation, therefore having a high or very high level of either sub standard housing or lack of central heating. There were only 4 small areas that fell in the least deprived half of the country for this Sub Domain, therefore, it shows the majority of small areas to have relative deprivation for this sub domain. It should be borne in mind that central heating data was from the 2001 Census and that the stock condition data is based on 2005 data and that conditions may have changed since this time.
- The majority of small areas (22) were in the top quintile for the national rank of deprivation for the Wider Barriers sub domain and none were in the half of the country that were least deprived. This sub domain contains housing indicators for overcrowding, homelessness and access to owner occupation for under 35s. The overcrowding data is based on 2001 Census data, the homelessness data is from 2008 to 2009 and the affordability data is based on modelled 2008 data with each LSOA being given the same local authority estimate.
- Small areas with higher deprivation consist of:
 - E01029344, a small area just above Williton (entirely within the LPA sub area) has highest multiple deprivation in West Somerset, but not for indoors living which is one of the main housing indicators;
 - E01029338, a very large rural area mainly in the Exmoor National Park area, has the highest deprivation for Indoors Living; has quite high deprivation for Wider Barriers and has very high deprivation for geographical barriers i.e. access to amenities; and
 - E01029329, a small urban area in Minehead, has the highest deprivation rank for Wider Barriers; it has fairly high Indoors Living Deprivation (in the top 30%) and fairly high employment deprivation (also in the top 30%). This small area is entirely within the LPA sub area.

Population and household changes and projections

- 2.28 ONS provide data enabling an analysis of the Components of Population Change but this is only available at District Council level. Consequently, data identifying population change/projection has only been presented at this level. Household projections data has been presented at the ENP area level as this informs housing projections.
- 2.29 DCLG's 2008-based household projections have been applied in this SHMA for the following reasons:
1. to provide continuity and comparability with the North Devon and West Somerset District Council SHMA Updates which adjoin or overlap with the Exmoor National Park area;
 2. 2008-based household projections are based on long term trends identified between the 1971 and 2001 Censuses, also updated with reference to the 2008 Labour Force Survey.
 3. 2011-based household projections have only a 10 year span to 2021 when 20 year projections are required. No clear guidance is available in relation to the subsequent 10-year period to 2031 and 10 years is too short a period to have confidence in any variations from long term trends.
 4. The 2011 Census identified 'out of trend' population and household changes, most significantly:
 - Lower than anticipated increases in lone parent households;
 - Lower than anticipated increases in one person households;
 - Lower than anticipated increases in couple households;
 - Large increases in couples with one or more adults compared with projected decline; and
 - Large increases in other multi-person households compared with projected decline.
 5. The question is, to what extent do these changes reflect short-term shifts from longer term trends? And to what extent are they the result of the extreme economic conditions prevailing between 2001 and 2011, a period which might be characterised as progressing from economic 'boom' to 'bust'?
 6. In such circumstances, problems of affordability; constrained access to housing finance then economic uncertainty have depressed household formation resulting in less single and couple households and more families with older children and adults sharing housing.

7. Whilst plausible, such explanations are currently little more than conjecture and It may well be that, once economic conditions improve, patterns of household formation return to longer term trends.
8. However, until evidence confirms the persistence of such 'out of trend' changes, it is our strongest recommendation to apply the long term trend-based 2008-based household projections.

Projected population by age

- 2.30 This section uses ONS 2010-based subnational population projections to identify trends from 2011-2031. These estimates are released by ONS every 2 years and reflect changes to birth and mortality rates and to net migration. 'Interim 2011-based Subnational population projections for England' were produced following completion of this SHMA but variations are minimal as the same assumptions were applied concerning birth and mortality rates. However, it should be noted that the release of 2011 Census estimates has called the accuracy of these projections into question. 2010-based population projections estimated a total population of 35,900 in West Somerset compared with a Census estimate of 34,675. Consequently the projections presented below should be considered a slight overestimate. 2011-based population projections have since been released and but these only cover the 10 year period 2011-2021. The potential effect of these new projections can be seen in a subsequent comparative table. Population projections data has been expressed as both a table and bar chart which identifies the change in the area's and each districts population by age. They clearly demonstrate the real and proportionate increase in the oldest age groups.

Table 2.16: projected change in the population of the West Somerset District Council area by age band, 2011-2035, 000s

Age Band	2011	2016	2021	2026	2031	2035	Population Change	% Change 2011 to 2035
0-14	4.6	4.6	4.8	4.9	4.7	4.6	0.0	0.0
15-24	3.8	3.5	3.3	3.3	3.6	3.7	-0.1	-2.6
25-34	2.4	2.7	2.7	2.5	2.5	2.5	0.1	4.2
35-44	3.3	2.7	2.8	3.1	3.1	2.9	-0.4	-12.1
45-54	4.9	4.9	4.2	3.6	3.7	3.9	-1.0	-20.4
55-64	5.9	5.6	6.0	6.1	5.5	4.9	-1.0	-16.9
65-74	5.5	6.3	6.3	6.1	6.8	7.0	1.5	27.3
75-84	3.6	3.9	4.5	5.3	5.4	5.3	1.7	47.2
85+	1.8	2.1	2.4	2.9	3.5	4.3	2.5	138.9
All ages	35.9	36.3	37.0	37.9	38.8	39.4	3.5	9.7

(Source: Sub-National Population Projections ONS 2010, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.)

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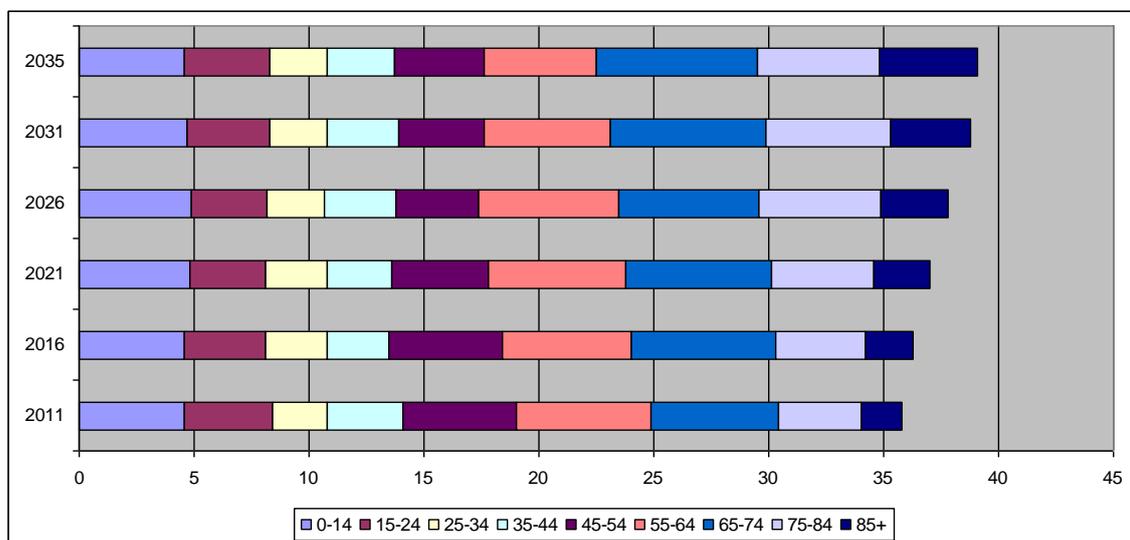
Key findings:

- Using 2010-based population projections, the population in West Somerset is projected to increase by 3,500 (almost 10%) between 2011 and 2035.
- The age profile of the population is expected to change in West Somerset;
 - No growth is projected in those aged under 15;
 - Limited growth is projected in those aged 25-34;
 - Slight decline is projected in those aged 15-24, and for those age bands between 35 and 64;
 - A higher level of growth is projected in all those of pensionable age with those aged between 65 and 74 increasing by 27%, those aged between 75 and 84 increasing by 47.2% and those aged 85+ by 138.9% (+2,500). This latter group has the greatest need for housing with care.
- The high projected growth in the older population will result in:
 - a proportionately higher level of the under-occupation of family housing unless options to downsize are available; and

- a proportionately greater requirement for housing which meets the requirements of older households, including housing with care.

2.31 The following chart demonstrates graphically the changing age profile of the District Council area's population between 2011 and 2035 as detailed above.

Fig 2.2: the effect of change in the population of the West Somerset District Council area by age band, 2011-2035, (000's)



(Source: Sub-National Population Projections ONS 2010, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

2.32 As mentioned above, 2011-based population projections have been released for the 10 year period to 2021 and the following table compares 2010 and 2011-based projections for this period.

Table 2.17: projected change in the population of the West Somerset District Council area by age band, 2011-2021, 000s

Age band	2011			2016			2021		
	2010	2011	Effect	2010	2011	Effect	2010	2011	Effect
0-14	4.6	4.5	-0.1	4.6	4.7	0.1	4.8	5	0.2
15-24	3.8	3.5	0.3	3.5	3.5	-	3.3	3.3	-
25-34	2.4	2.8	0.4	2.7	2.8	0.1	2.7	2.8	0.1
35-44	3.3	3.3	-	2.7	3.0	0.3	2.8	3.0	0.2
45-54	4.9	4.8	-0.1	4.9	4.7	-0.2	4.2	4.2	-
55-64	5.9	5.6	0.3	5.6	5.5	0.1	6.0	5.9	-0.1
65-74	5.5	5.2	0.3	6.3	6.1	-0.2	6.3	6.2	-0.1
75-84	3.6	3.4	-0.2	3.9	3.7	-0.2	4.5	4.4	-0.1
85+	1.8	1.5	-0.3	2.1	1.9	-0.2	2.4	2.3	-0.1
Totals	35.8	34.6	0.6	36.3	35.9	-0.2	37.0	37.1	0.1

(Source: Sub-National Population Projections ONS 2010, and 2011 Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

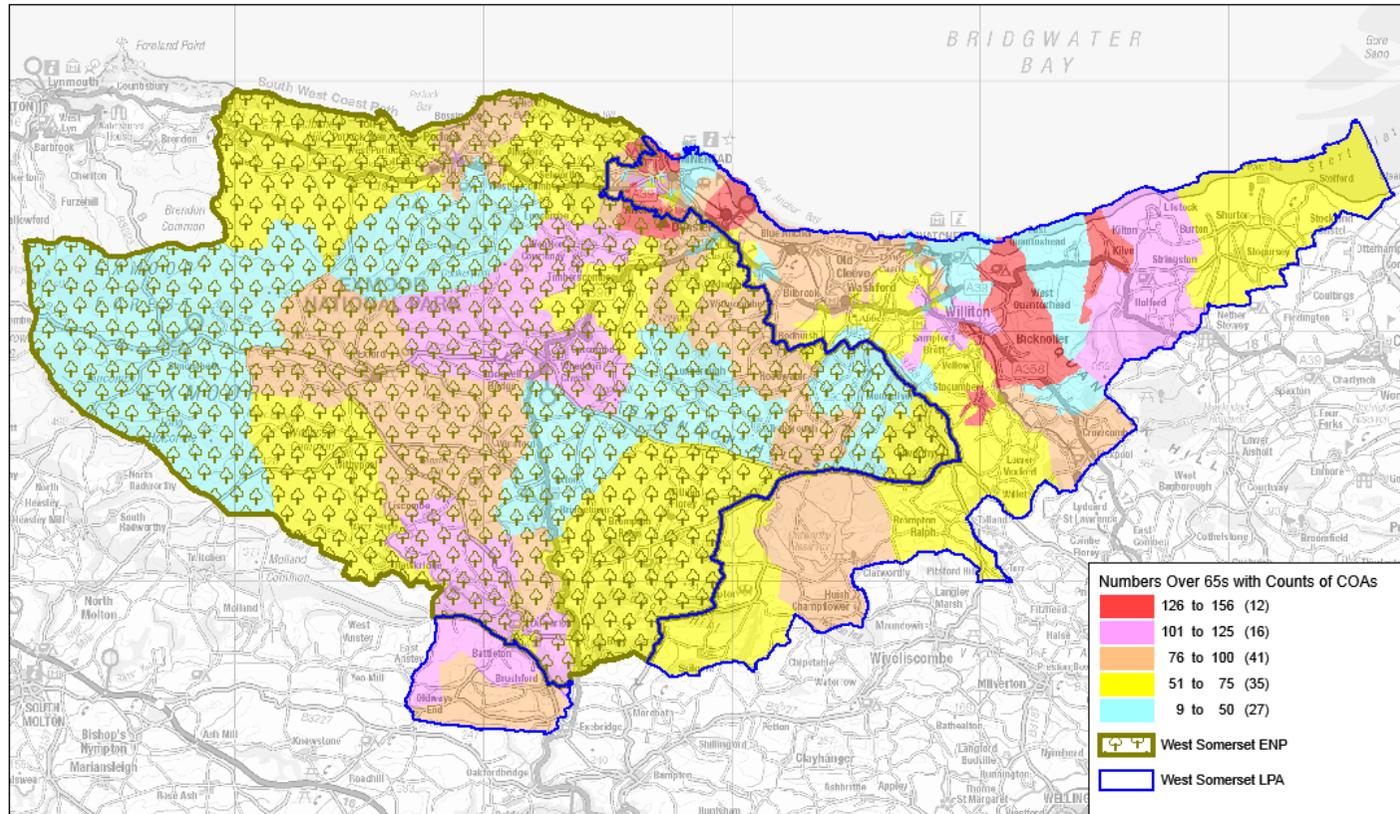
- Comparing the 2010 and 2011-based projections, there are only minor differences, the net effect of which for the period 2016-2021 is a decline of 100 people.
- However, there are differences in the distribution of population growth or decline with an increase of 1,000 in those aged under 45 and a decline of 900 in those aged 65+. In terms of housing requirements, the implication is of a slight increase in demand for family housing and decrease in demand for smaller housing for older people.

2.33 A district-wide profile of population projections by age is unable to identify the extent to which change is likely to affect different locations, for example, the growth in the older population living in smaller and more remote settlements isolated from facilities and services. The following maps identify the number of people aged 65+ in Census Output Areas across the district then those aged 45-64 (the 'approaching elderly') group. They clearly demonstrate that:

- whilst there are concentrations of older people around Minehead and within the Exmoor National Park area; and
- there are potentially increased concentrations of older people in deeper rural locations which is of concern in relation to social care and support and the sustainability of communities.

Map 2.9

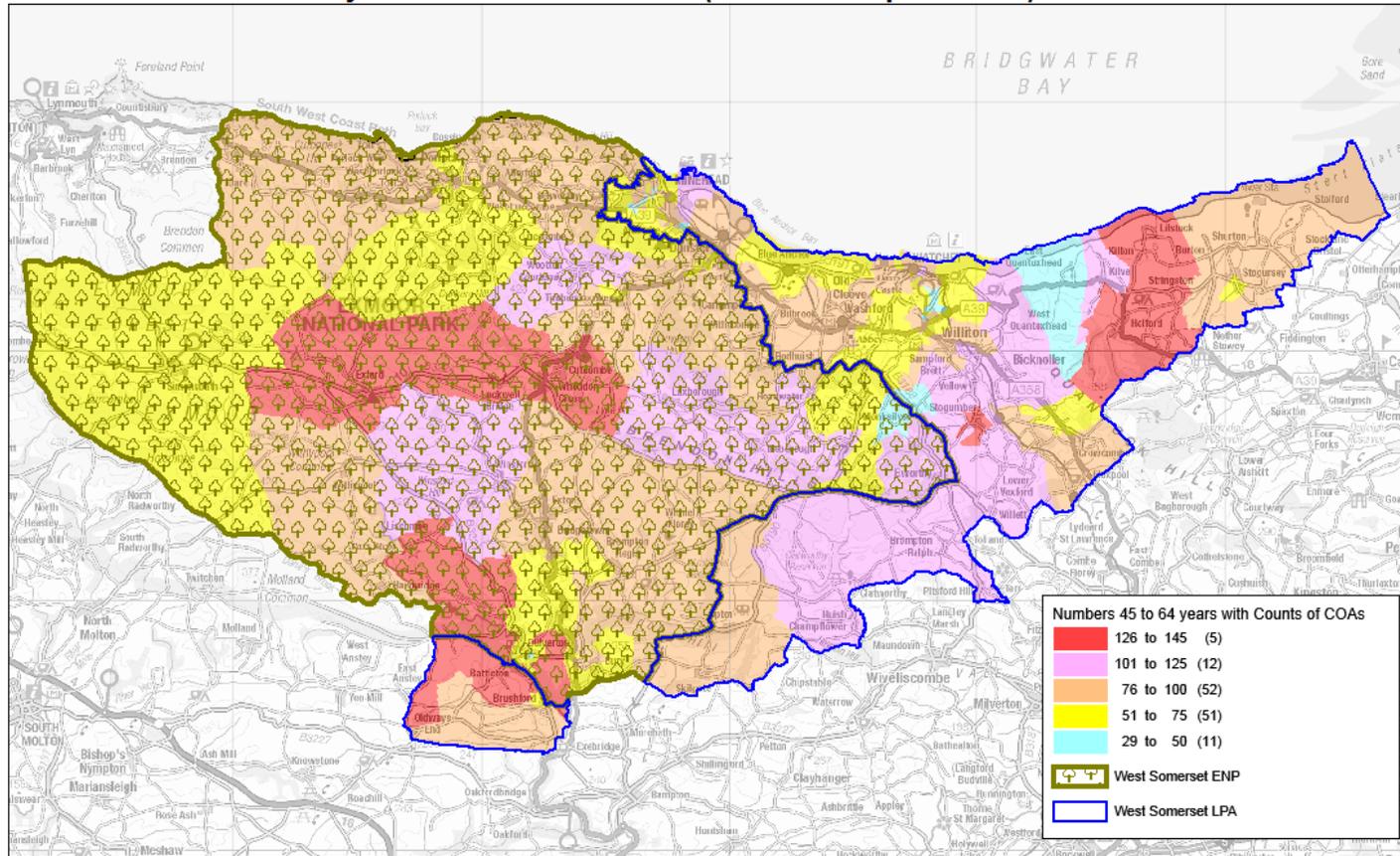
**Numbers of Over 65s in small areas (Census Output Areas)
in the Exmoor National Park Area within West Somerset**



Source: Table KS102EW, Age Structure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website, <http://www.neighbourhood.statistics.gov.uk/dissemination/>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.co.uk>.

Map 2.10

Numbers of 45 to 64 year olds in small areas (Census Output Areas) in West Somerset



Source: Table KS102EW, Age Structure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website, <http://www.neighbourhood.statistics.gov.uk/dissemination/>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

Understanding components of population change

2.34 In a National Park, population considerations flow from National Park purposes rather than specifically driving policy. To this end, National Park purposes will support a justifiable and transparent deviation away from the ONS (and other) projections. In this context, it is important for ENPA to have clear evidence that will support the identification of its vision and will help it plan for future change. Population projections form the basis of household projections which, in turn, inform the requirement for housing. The following tables summarise components of population change for the period 2011-2031, in particular, the extent to which population change is driven by natural change, internal or international migration. This data is only available at local authority level.

Table 2.18: 2008-based components of population change for West Somerset District Council, 2011-2031, (000's)

	2011	2012-2016	2017-2021	2022-2026	2027-2031	Total 2012-2031
Natural Change	-0.2	-1.0	-0.8	-0.8	-1.7	-4.5
Births	0.3	1.5	1.2	1.2	1.8	6.0
Deaths	0.5	2.5	2.0	2.0	3.1	10.1
All Migration Net	0.3	1.7	1.7	2.0	3.0	8.7
Internal Migration In	2.2	11.2	9.2	9.4	14.6	46.6
Internal Migration Out	1.9	9.5	7.3	7.2	11.3	37.2
International Migration In	0.1	0.5	0.4	0.4	0.6	2.0
International Migration Out	0.1	0.5	0.4	0.4	0.6	2.0
Cross Border Migration In	0.1	0.5	0.4	0.4	0.6	2.0
Cross Border Migration Out	0.1	0.5	0.4	0.4	0.6	2.0

(Source: components of population change, 2008-based Sub-National population projections ONS, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.)

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Key findings:

- There is a projected net increase of 8,700 people through migration in the period 2012-2031 which contrasts with a net loss due to Natural Change of 4,500 people. The net effect is a projected gain of 3,200 people over this period, almost all of which can be accounted for by internal migration. The average net gain from this component is 470 people per annum.

Household projections

- 2.35 As explained above, this section uses CLG 2008-based household projections to identify trends for the West Somerset ENP area from 2011-2031. As the projected total of households in the West Somerset Council area at 2011 (16,538) was substantially above the 2011 Census estimate (15,623), household projections have been reduced by 5.53%.to match the lower base level. These projections have then been applied to the smaller Exmoor National Park in West Somerset area.

Methodology

- 2.36 The following extracts explain the methodology underpinning household projections.

“Household projections are based on the population projections produced by the Office for National Statistics (ONS). The number of people living in private households is estimated by taking the population projections for each year and subtracting the number of people living in communal establishments, such as student halls of residence, care homes or prisons.

Household representative rates are projected using logistics time series trends from Census data, by age, marital status and gender. Household representative rates combined with the private household population provides the basic household projections.

To estimate the number of households of each type, information on household type and age group is projected forward from the 1991 and 2001 Censuses, for each household type, age group and local authority area. This is constrained to the total number of households.

Because the overall projections for England are believed to be more accurate than those for individual local authorities, the local authority figures are constrained to the England total”²³.

Population projections

- 2.38 The first main input into the household projections is population projections for England produced by the ONS. These are produced for England by local authority, sex and single year of age, using assumptions about births, deaths and migration. The relevant population for household formation is taken to be the adult population, aged 16 or over.

²³ Technical Report, Households Across the United Kingdom, 30/8/2011, Published by Statistical Directorate Welsh Government January 2011 and Updated August 2011, page 3

2.39 Projected household representative rates are applied to a projection of the private household population disaggregated by age, sex and marital/cohabitational status and summing the resulting projections of household representatives. The key data sources and methodological stages are:

- Population projections are taken from the latest release by the Office for National Statistics (ONS) at the national and subnational level.
- Marital status projections (de jure and de facto) at the national level are taken from the latest ONS release. Projections at subnational levels are assumed to follow the national pattern.
- The institutional population is deducted from the total population to give the private household population. The institutional population is assumed to stay at a constant level for younger age groups and at a constant share of the population for older age groups (as given in the 2001 Census).
- Household representative rates are extrapolated from Census data (1971, 1981, 1991, 2001), disaggregated by age, sex and marital status. Labour Force Survey (LFS) data are used to inform inter-Censual interpolations, post-Census estimates and future trends of household representative rates. The LFS and Census data are weighted together with the LFS data being given a lower weight than the Census.
- The resultant household representative rates are applied to the projected private household population and summed across the age/sex/marital status groups to give total household numbers.
- Projections are initially undertaken independently at the national, regional and sub-regional levels with regional projections then being constrained to the national projections and sub-regional projections being constrained to regional projections²⁴.
- A detailed description of the current methodology and data sources used is available at

<http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates>

²⁴ Consultation on Proposed Changes to the National Statistics on Household Projections, CLG 2010, page 6

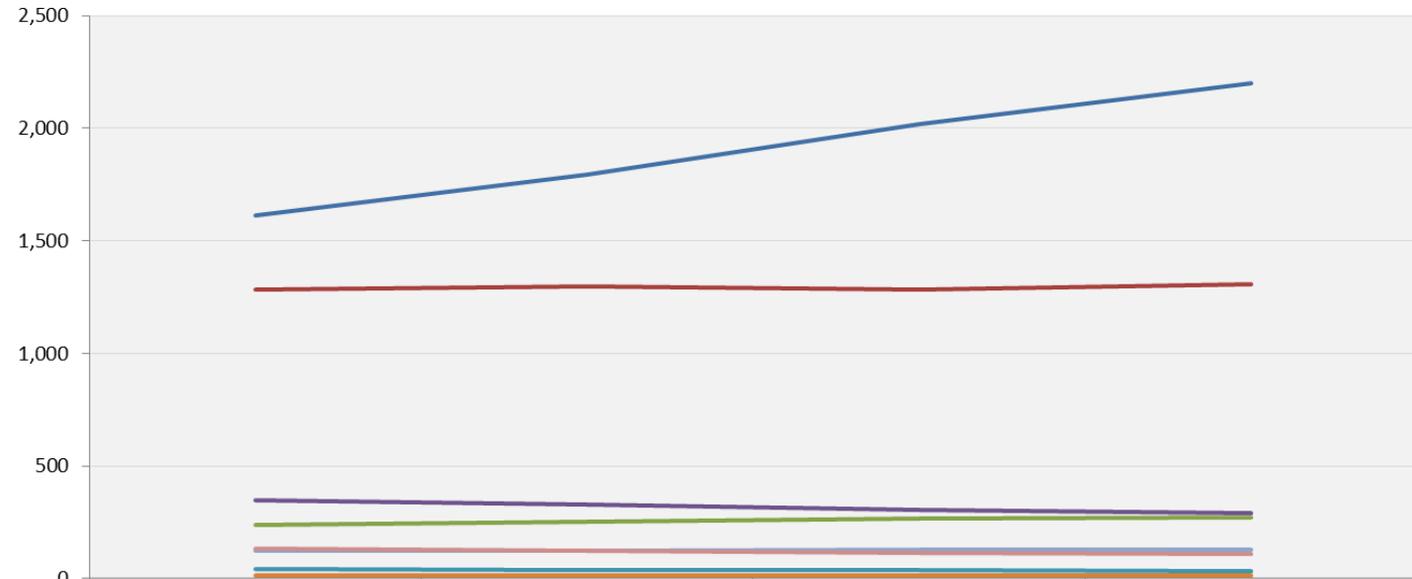
2.40 Resulting household projections data can be broken down into different household types as follows:

- One person household
- Couple: no dependent children
- A couple and one or more other adults: no dependent children
- Couple + dependent child(ren)
- Lone parent + dependent child(ren)
- Couple + adult(s) +dependent child(ren)
- Lone parent + adult(s) +dependent child(ren)
- Other households: a multi person household that is neither a couple household nor a lone parent household. Examples include, lone parents with only non-dependent children, brothers and sisters and unrelated (and non-cohabiting) adults sharing a house or flat. This category does not include households with dependent children

2.41 The following table and chart present the projections for the Exmoor National Park area within West Somerset between 2011 and 2031. They identify the dramatic growth in single person households and reduction in family households with the exception of lone parent families. The detailed findings are as follows:

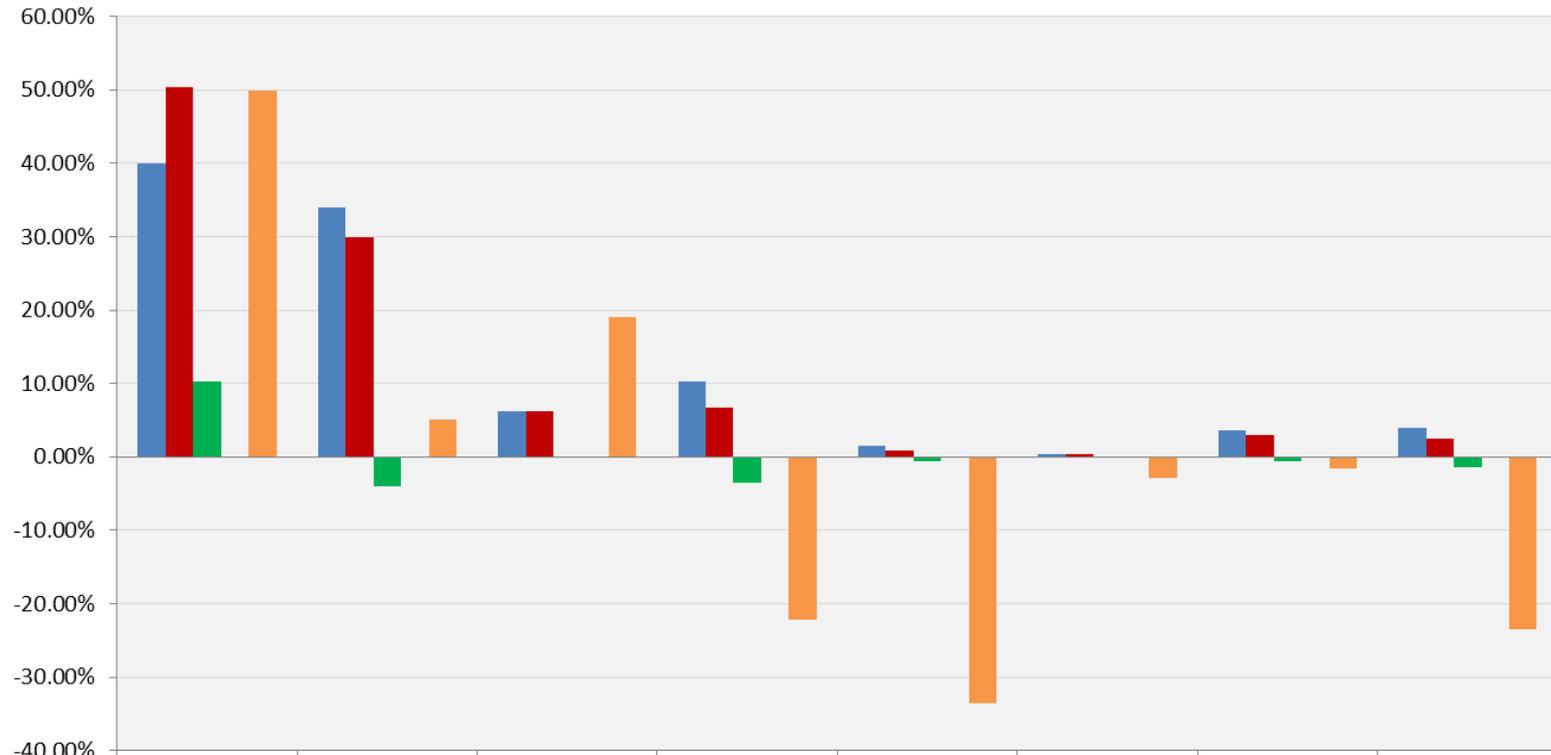
- One person: growth of almost 50%, most of which can be attributed to the growth in those aged 45 to 64 and 65 plus.
- Couple no children: 5% growth
- Couple/lone parent and 1 child: 19% growth
- Couple/lone parent and 2 children/couple and 1 or more adults no children: 22% decline
- Couple/lone parent and 1 or more adults and 1 child: 34% decline
- Couple/lone parent and 3+ children/ couple/lone parent and 1 or more adults and 2 children: 3% decline
- Couple/lone parent and 1 or more adults 3+ children: 24% decline

Household Projections by household type: 2011 - 2031 - 5 year tranches
Exmoor National Park Authority Area



	2011-16	2016-21	2021-26	2026-31
One person	1,613	1,795	2,017	2,198
Couple (CPL) no children	1,285	1,296	1,282	1,308
Couple/Lone Parent (LP) 1 child	240	254	266	274
CPL/LP 2child'n-CPL 1+adult no child	346	327	306	292
CPL/LP 1+ adults 1 child	44	39	37	35
Lone parent/+ 1 or more adults 2 children	16	15	15	15
CPL/LP 1+ adults 3+ children	123	126	130	130
Other households	133	122	113	109

Household Projections by household type: 2011 - 2031 - percentages
Exmoor National Park Authority Area



	One person	Couple (CPL) no children	Couple/Lone Parent (LP) 1 child	CPL/LP 2child'n-CPL 1+adult no child	CPL/LP 1+ adults 1 child	Lone parent/+ 1 or more adults 2 children	CPL/LP 1+ adults 3+ children	Other households
■ % of total 2011	40.06%	34.01%	6.28%	10.27%	1.44%	0.43%	3.61%	3.90%
■ % of total 2031	50.39%	29.99%	6.27%	6.71%	0.80%	0.35%	2.98%	2.50%
■ % change 2011 to 2031	10.33%	-4.02%	-0.01%	-3.57%	-0.64%	-0.08%	-0.63%	-1.40%
■ Change in total	49.86%	5.05%	18.96%	-22.25%	-33.61%	-2.82%	-1.51%	-23.57%

International migration

2.42 A potentially important component of population change is international immigration for employment. The registration of UK non-nationals for National Insurance (NINO) provides an invaluable source of data but is only available at local authority level. Data identifies the local authority in which people first registered and they may have gone on to work anywhere in the country. Numbers are only recorded for ten or more migrant workers and therefore, the recorded total may be more than the sum of the entries. The following table summarises the extent of migration for the ten years since 2002.

Table 2.19: National Insurance Registration by Non-UK Nationals, 2002-2011, 000s

Year	West Somerset	South West	England
2002/03	0.03	15.42	309.97
2003/04	0.04	16.07	331.98
2004/05	0.06	22.57	388.03
2005/06	0.25	34.06	579.52
2006/07	0.18	41.23	607.95
2007/08	0.27	38.90	636.88
2008/09	0.27	33.11	607.88
2009/10	0.15	23.67	515.12
2010/2011	0.18	30.88	636.45
Total	1.43	256	4,614
Change	0.15	15	326
% Change	500.0	100.3	105.3

(Source: National Insurance Recording and Pay as You Earn System, Summary Tables, DWP website, <http://www.dwp.gov.uk/>.)

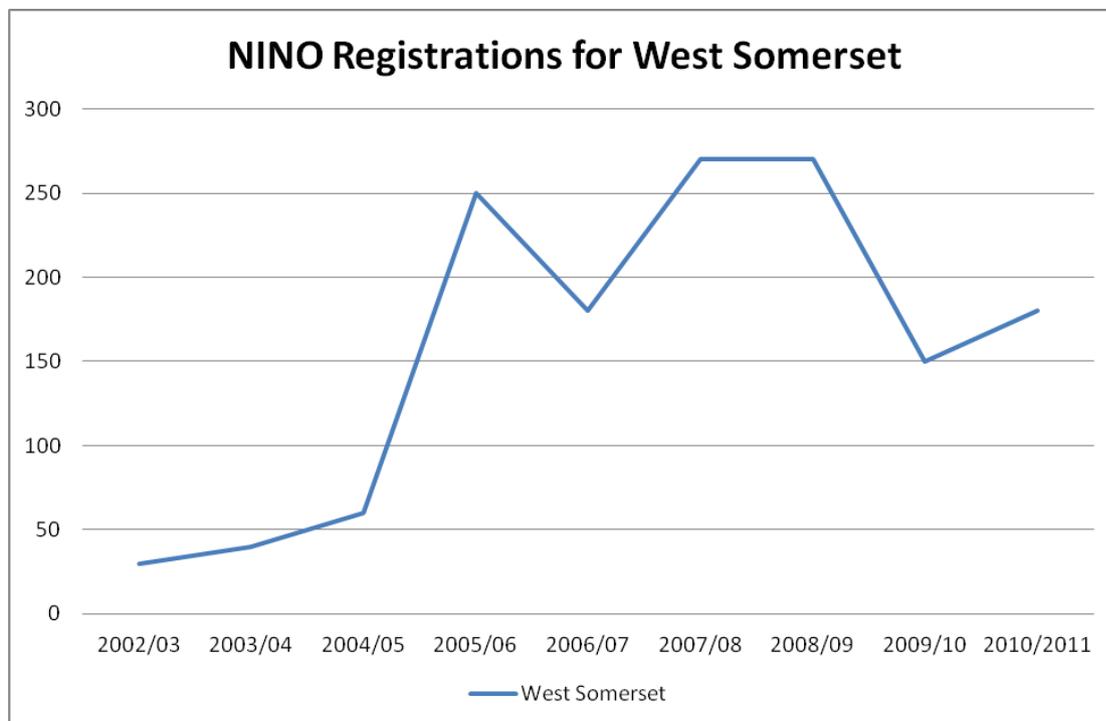
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Key findings:

- In relative terms, and comparing 2002/03 with 2010/11, registrations increased by five times during the period. This was a much higher percentage increase than in the South West and England where registrations had doubled during the period.
- The total number of registrations was low in West Somerset during the period from 2002 to 2011 at 1,430
- Registrations peaked in between 2007 and 2009 before a decline in new registrations which may well reflect a fall from the surge in migration following the 2004 EU accession and the worsening economy; or
- It is important to note that 'returning home' is not measured so net gain may be much lower.

2.43 The following graph demonstrates the patterns of registrations more clearly.

Fig 2.3



(Source: National Insurance Recording and Pay as You Earn System, Summary Tables, DWP website, <http://www.dwp.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

2.44 The following table identifies, from a total of 29 countries of origin, the main countries from which people have migrated. Total numbers for the main countries are small, the main change over time is the increase in migration from the A8 central/east European countries which acceded to the EU in 2004 especially Poland and Hungary.

Table 2.20: NINO Registrations of 50 people or more in West Somerset from 1st January 2002 to September 2011

Total	Poland	Hungary	Slovak Republic	Philippines	Czech Republic	Rep of Lithuania
1,510	570	270	80	60	50	50

(Source: DWP Tabulation Tool, DWP website, <http://www.dwp.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Poland was the largest single source of migrants and Hungary the second largest source, but migration was most significant from A8 countries which joined the EU in 2004 and from the A2 countries in 2007.

2.45 The following table uses Census data to identify the proportion of the population born in the UK and the year of arrival for those who were not born in the UK including for the National Park area in West Somerset.

Table 2.21: year of arrival in the UK, West Somerset DC, ENP and LPA, 2011

Year	West Somerset ENP		West Somerset LPA		West Somerset DC			%	
	No	%	No	%	No	%	Rank	South West	England
Born in the UK	7,480	95.9	25,424	94.6	32,904	94.9	101	92.3	86.2
Arrived before 1941	19	0.2	66	0.2	85	0.2	8	0.1	0.1
Arrived 1941-1950	35	0.4	89	0.3	124	0.4	37	0.3	0.2
Arrived 1951-1960	43	0.5	138	0.5	181	0.5	159	0.5	0.7
Arrived 1961-1970	42	0.5	133	0.5	175	0.5	254	0.7	1.2
Arrived 1971-1980	31	0.4	99	0.4	130	0.4	285	0.6	1.2
Arrived 1981-1990	37	0.5	78	0.3	115	0.3	297	0.6	1.2
Arrived 1991-2000	37	0.5	112	0.4	149	0.4	318	1.0	2.3
Arrived 2001-2003	14	0.2	66	0.2	80	0.2	326	0.7	1.5
Arrived 2004-2006	21	0.3	207	0.8	228	0.7	264	1.3	2.1
Arrived 2007-2009	30	0.4	296	1.1	326	0.9	208	1.3	2.3
Arrived 2010-2011	13	0.2	165	0.6	178	0.5	184	0.6	1.1
All Categories: Year of Arrival in the UK	7,800	100.0	26,875	100.0	34,675	100.0		100.0	100.0

(Source: QS801EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk>)

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Key findings

- The 2011 Census table Year of Arrival in the UK shows that the majority of the population of the West Somerset ENP (95.9%), West Somerset LPA (94.6%) and West Somerset DC (94.9%) were born in the UK. This was higher than in the South West (92.3%) and nationally (86.2%).
 - The remaining 4.1% arrived in the UK at different times but with 1.1% arriving between 2001 and 2011, double the rate for any other 10 year period and almost certainly reflecting recent high levels of migration from EU Accession countries.
- 2.46 The important question raised by such migration is the impact on the housing market. It is historically the case that migrants to the UK, especially the first wave of single people or those arriving without their family have, through their household composition and short residence, found difficulty in accessing social housing and home ownership has been too expensive. As a result, their initial housing requirements have been met by a combination of the 'informal market' of renting through family or friends and most significantly by the private rented sector. It is anticipated that migrants from EU accession countries would have followed this pattern, but further research would be required to confirm it.

Internal migration

- 2.47 Internal migration refers to population movement within England and can be an important factor in determining housing requirements but data is only available at local authority level. As identified in the 2008 SHMA, West Somerset has long experienced net in-migration and which places additional pressure on the housing market.
- 2.48 Trends can be monitored using estimates of internal migration prepared using a combination of three administrative data sources, the Patient Register Data Service (PRDS), the National Health Service Central Register (NHSCR) and Higher Education Statistics Agency (HESA) data. Referred to as NHSCR data, it is reliant on people registering with a GP and those groups who are recognised to register at lower rates include students, especially male students and young men. Conversely, families and older people are more likely to register. Please note that figures are rounded to the nearest 10 or 100 by ONS and therefore, totals may vary from the sum. The following tables show 10 year trend in net migration to 2010/11 for as follows.

Table 2.22: net effect of internal migration - West Somerset, years ending June 2002-12, (000s)

2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 12	Total	Average
0.4	0.3	0.1	0.1	0.3	0.3	0.1	0.2	-0.2	0.2	1.9	0.19

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.)

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Key findings:

- A 10 year trend identifies an annual average net gain of 190 people through internal migration with gains in all years except 2010/11.

2.49 The remainder of this section focuses on detailed and recent patterns and trends affecting the West Somerset District Council area. Subsequent maps show internal migration in and out of West Somerset for the year ending 2011 and net migration for the three year period ending June 2011. The table below shows internal migration in and out of West Somerset for each of the three years up to June 2011 and Net Migration for the three year period ending June 2011.

Table 2.23: net migration into and out of West Somerset from/to regions for three years ending June 2011

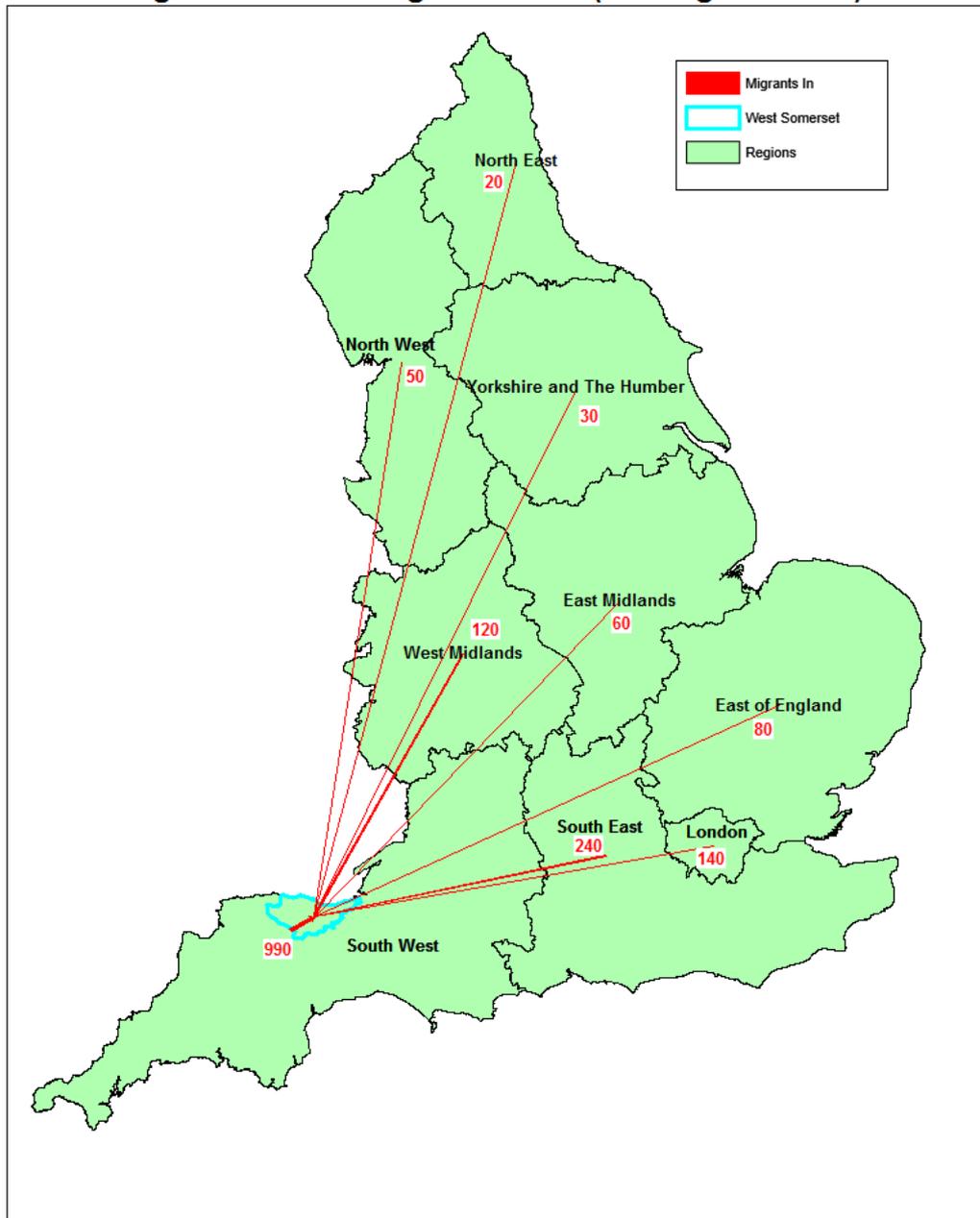
Regions	In Migration			Out Migration			Net Migration
	2009	2010	2011	2009	2010	2011	
South East	330	330	240	200	220	240	240
London	120	150	140	90	80	90	150
East	110	110	80	80	90	50	80
West Midlands	160	180	120	150	110	140	60
East Midlands	70	70	60	40	50	60	50
North East	20	20	20	10	10	20	20
North West	50	70	50	60	50	50	10
Yorkshire and the Humber	40	50	30	50	40	40	-10
South West	930	1,010	990	1,080	1,190	1,190	-530

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.)

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Map 2.11

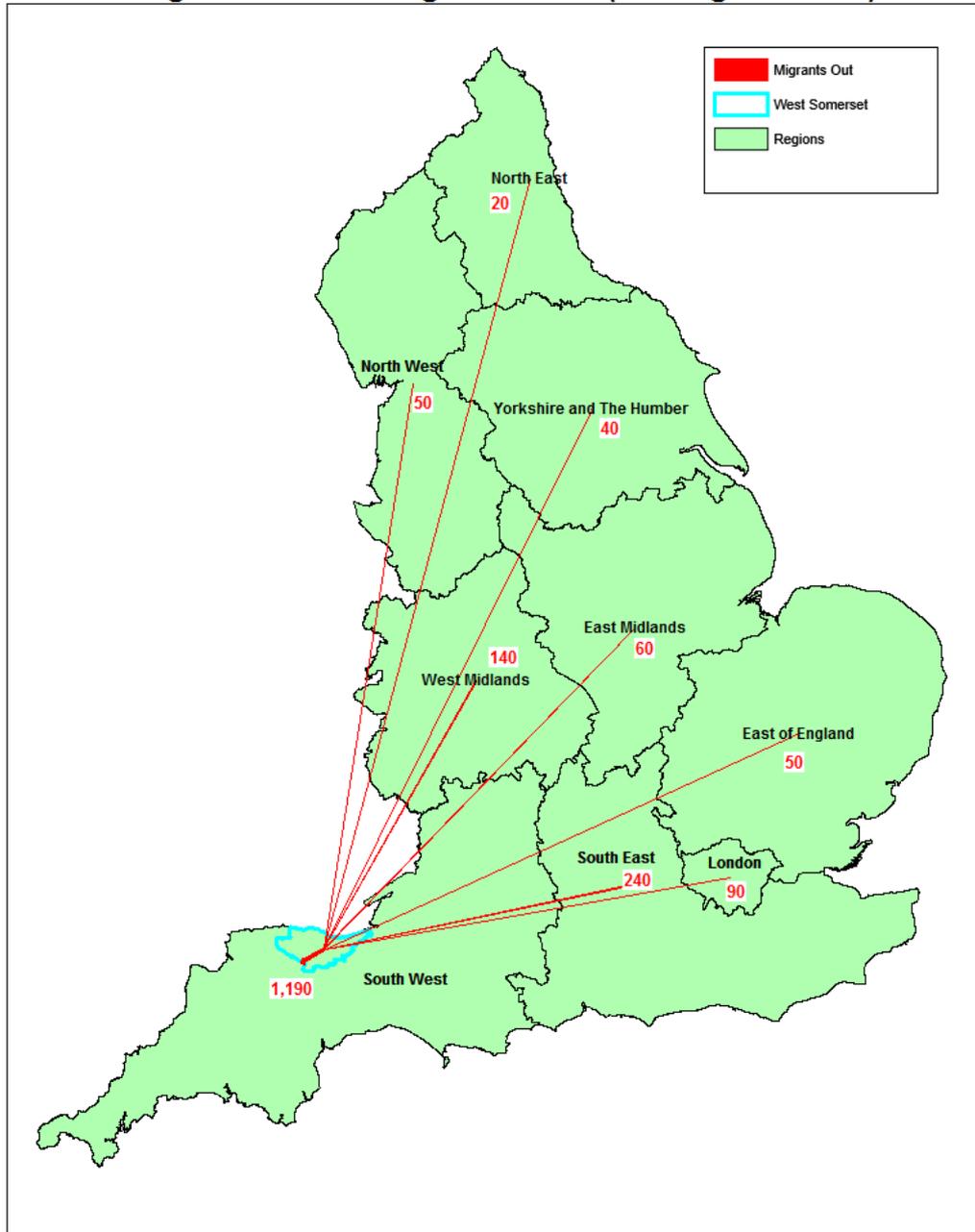
Migration Into West Somerset from Regions in England Year Ending June 2011 (GP Registrations)



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Map 2.12

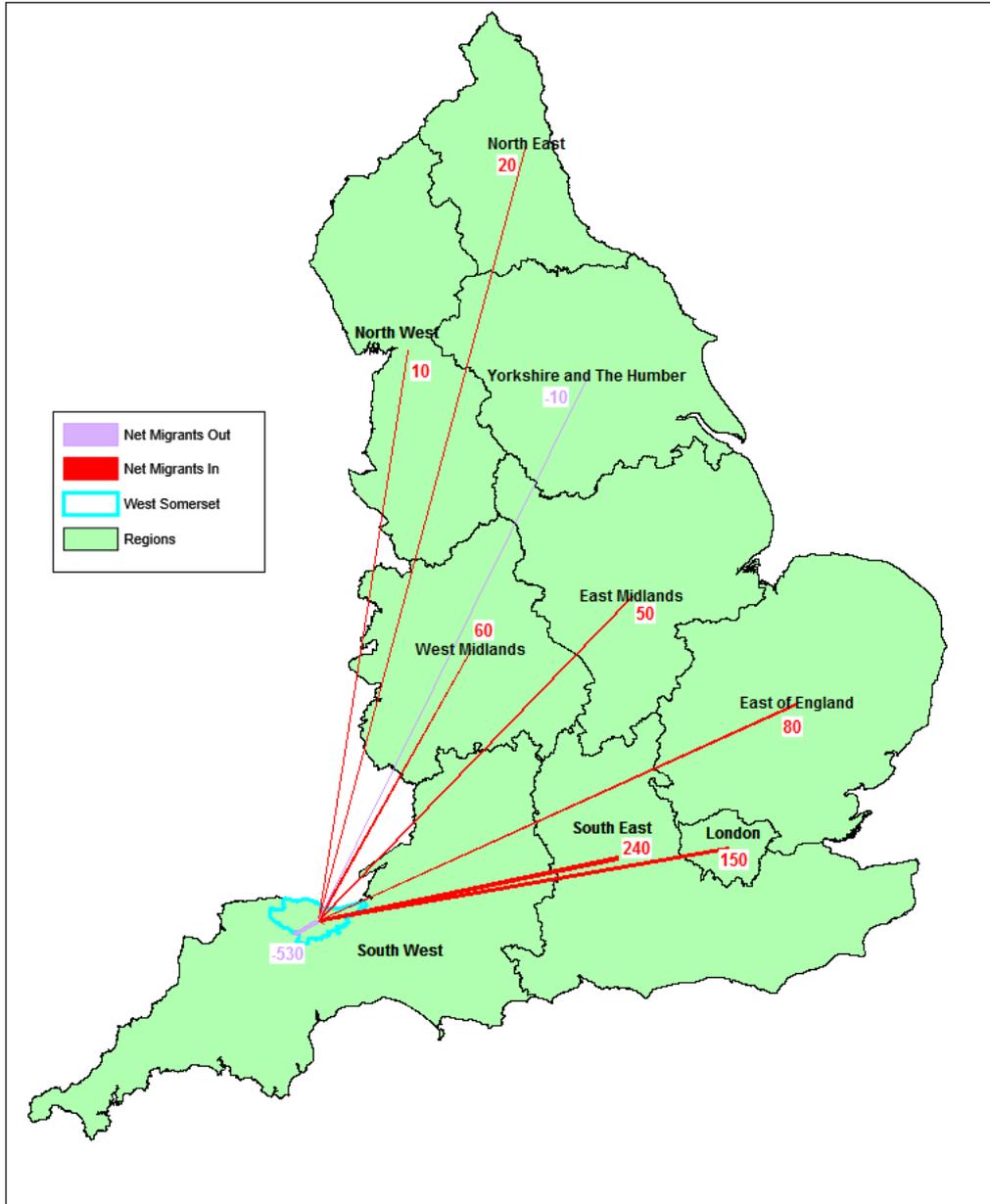
Migration out of West Somerset to Regions in England Year Ending June 2011 (GP Registrations)



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Map 2.13

Net Migration Into/Out of West Somerset from/to Regions in England in the Three Year Period Ending June 2011 (GP Registrations)



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Key findings:

- During the 3 year period ending June 2011 there were more in migrants than out migrants from all the regions except the South West and Yorkshire & Humber. There was only a small number more out migrants than in migrants in Yorkshire & Humber but the numbers were larger in the South West at Minus 530 Net Migration.
- The largest number of in migrants was 240 from the South East in the 3 year period ending June 2011. The second largest number of In Migrants was from London at Plus 150. These patterns can be seen in more clearly in the Net Migration Regional [Map 2.13](#).
- The net effect of 3 years migration to June 2011 was a gain of only 70 people.
- During the most recent year ending June 2011 the largest number of in-migrants were from the South West; however, there were an even larger number of Out Migrants to the South West. This is shown in Maps 2.11 and 2.10 and Table 2.30.
- The second largest numbers of in migrants were from the South East; however, there were the same number migrating out to the South East as there were migrating in from the South East to West Somerset during the year ending June 2011. This was a change from the previous two years when more were going in than out from the South East.
- The third largest number of in migrants were from London with less people migrating out to London than into West Somerset during the year ending June 2011. This pattern was the same in the previous two years.
- The largest number of out migrants were to the South West, the second largest to the South East and the third largest to the West Midlands in the latest year to June 2011. There were more people going out to the West Midlands than coming in from the West Midlands to West Somerset. This was also a change from previous years where more came in from the West Midlands than those going out.
- It must be remembered that this is a measure of the movement of people and not households. Applying the most reliable average household size from the 2011 Census of 2.1 across the area implies a net gain in the region of 33 households over the 3 year period ending June 2011, or 11 households per annum and an equivalent demand on the housing market.

2.50 The following table considers internal migration at the local authority level and the net effect for West Somerset for the three years ending June 2011.

Please note that anomalies in the balancing figures are due to rounding.

Table: 2.24: Internal Migration, West Somerset, year ending June 2009 to year ending June 2011

Area	2009			2010			2011		
	Persons (Thousands)			Persons (Thousands)			Persons (Thousands)		
	Inflow	Outflow	Balance	Inflow	Outflow	Balance	Inflow	Outflow	Balance
West Somerset	2.0	1.9	0.1	2.1	1.9	0.2	1.8	2.0	-0.2
South West	136.3	116.9	19.4	136.4	117.5	18.9	136.8	117.6	19.2

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- West Somerset gained 100 people in 2008/09 and 200 people in 2009/10 but lost 200 people in 2010/11 therefore the overall gain during the 3 years was 100 people according to the data in Tables 2.31 and 2.32 (Figures in the Regional tables may be different due to rounding). This may well reflect the impact of the economic recession.

2.51 Data on internal migration by age enables limited profiling of the types of people and households moving in and out of West Somerset for example, those aged 0-15 can be associated with parents aged 25-44 to indicate families with children; those aged 16-24 will include students and those aged 65+ are pensioner households. The following table summarises patterns for the three years ending June 2011.

Table 2.25: internal migration by broad ages for three years ending June 2011

Area	Ages	2009			2010			2011		
		Persons			Persons			Persons		
		Inflow	Outflow	Balance	Inflow	Outflow	Balance	Inflow	Outflow	Balance
West Somerset	All ages	2.0	1.9	0.1	2.1	1.9	0.2	1.8	2.0	-0.2
	0-15	0.3	0.2	0.1	0.3	0.3	0.0	0.2	0.3	-0.1
	16-24	0.5	0.6	-0.1	0.5	0.5	0.0	0.4	0.6	-0.2
	25-44	0.5	0.5	0.0	0.5	0.5	0.0	0.4	0.5	-0.1
	45-64	0.4	0.3	0.1	0.5	0.4	0.1	0.5	0.4	0.1
	65+	0.2	0.2	-0.1	0.2	0.2	0.0	0.2	0.3	0.0
South West	All ages	136.3	116.9	19.4	136.4	117.5	18.9	136.8	117.6	19.2
	0-15	18.2	12.2	6.0	18.2	12.5	5.7	18.1	12.3	5.9
	16-24	48.1	48.7	-0.6	46.8	47.5	-0.7	46.3	48.4	-2.1
	25-44	43.8	38.0	5.8	42.1	36.8	5.3	42.4	36.9	5.5
	45-64	18.6	12.3	6.3	20.1	13.4	6.7	20.5	13.0	7.5
	65+	7.7	5.7	2.0	9.2	7.3	1.8	9.5	7.0	2.5

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

The main patterns for West Somerset can be summarised as follows:

- A gain of 300 people in the 45 to 64 year age band during the 3 years ending June 2011, and losses of 300 people in the 16 to 24 year age band, 100 people in the 25 to 44 year age band and 100 people in the 65 plus year age band. Neither a gain nor a loss in the 0 to 15 year age band. It appears that many of those who are leaving are younger people. This may well be for economic reasons in search of employment and/or also students.
- A gain of 100 people in the 45 to 64 year age band during the year ending June 2011 and losses of small numbers of people in all the other age bands, except 65 plus where there was neither a gain or a loss.

2.52 The following table takes the analysis further by identifying those local authorities from which 200 or more people moved into the area in any year over a 3 year period from 2007-2010. Local government reorganisation and the creation of unitary authorities have made direct comparisons difficult.

Table 2.26: internal migration into West Somerset from local authorities where 30 or more moved, for the 3 years ending June 2011 with totals of 100+ highlighted

Local Authority	In Migrants		
	2009	2010	2011
Taunton Deane	220	260	250
Sedgemoor	170	150	160
North Devon	30	60	50
Plymouth UAP	30	50	30
Mid Devon	50	50	70
South Somerset	50	50	50
Birmingham	30	40	30
Cornwall UA	40	40	30
Wiltshire UA	40	40	40
City of Bristol UA	40	30	40
North Somerset UA	30	30	40
Teignbridge	30	10	10
South Gloucestershire UA	20	20	30

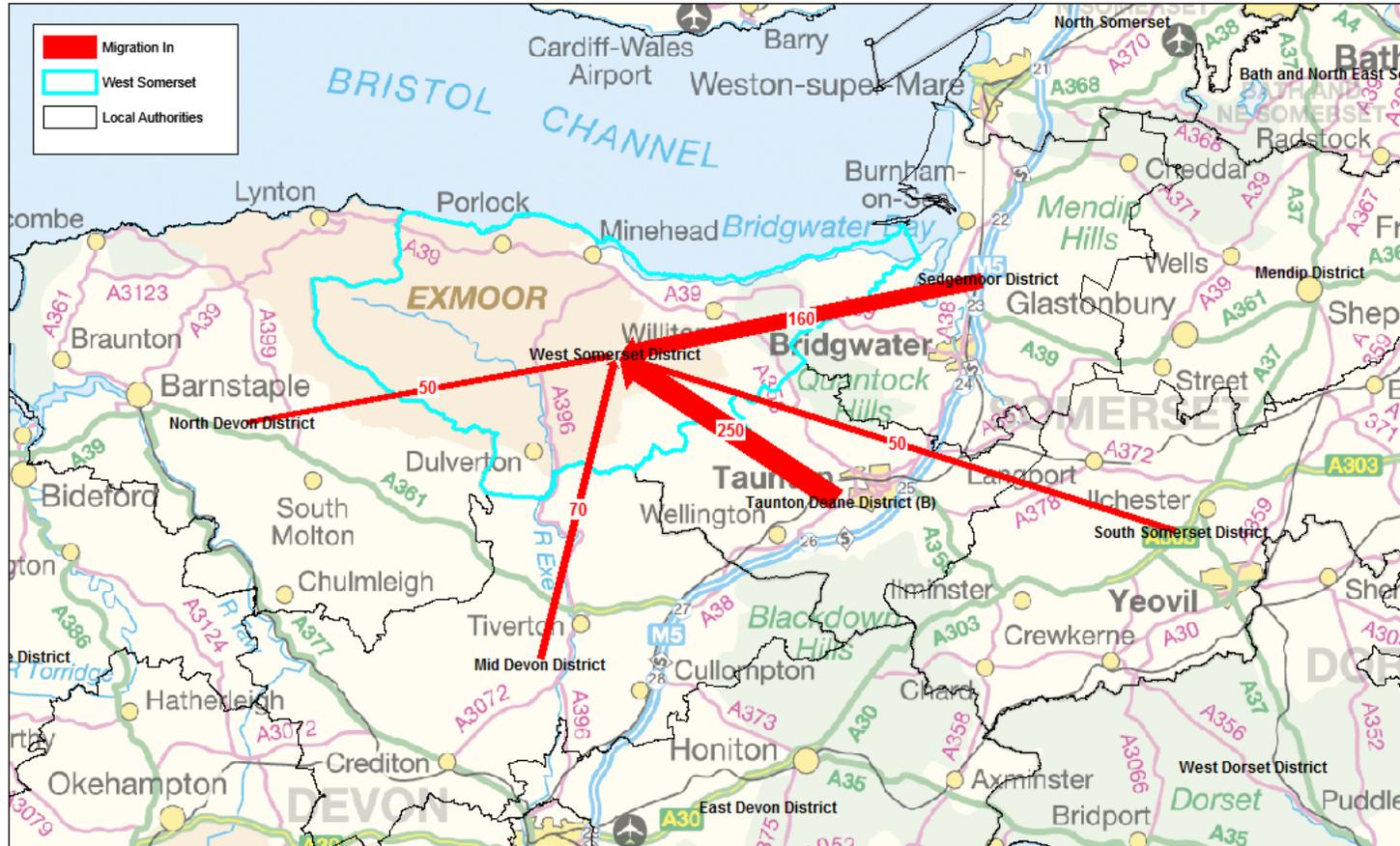
(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Taunton Deane and Sedgemoor provided the largest number of migrants into West Somerset, followed by North Devon, Plymouth, Mid Devon and South Somerset during the 3 year period ending June 2011.
- The following map shows that in the most recent year ending June 2011 the largest numbers of in migrants were from Taunton Deane, followed by Sedgemoor, then Mid Devon and then by both North Devon and South Somerset all of these being local authorities with more than 50 in migrants to West Somerset.

Map 2.14

Migration into West Somerset from local authorities with more than 50 People Registering with a GP Year Ending June 2011



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.53 The following table identifies those local authorities from which 30 or more people moved out of the area in any one year over a 3 year period ending June 2011

Table 2.27: internal migration out of West Somerset to local authorities where 30 or more moved, for the 3 years ending June 2011 with totals of 100+ highlighted

Local Authority	Out Migrants		
	2009	2010	2011
Taunton Deane	330	380	330
Sedgemoor	130	190	230
Mid Devon	60	50	40
North Devon	70	50	50
South Somerset	40	50	80
Bristol, City of UA	70	40	60
Plymouth UA	50	40	50
Cornwall UA	30	40	40
Mendip	20	40	20
Wiltshire UA	30	40	50
North Somerset UA	30	30	40
Exeter	20	20	30
Birmingham	20	20	30

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.

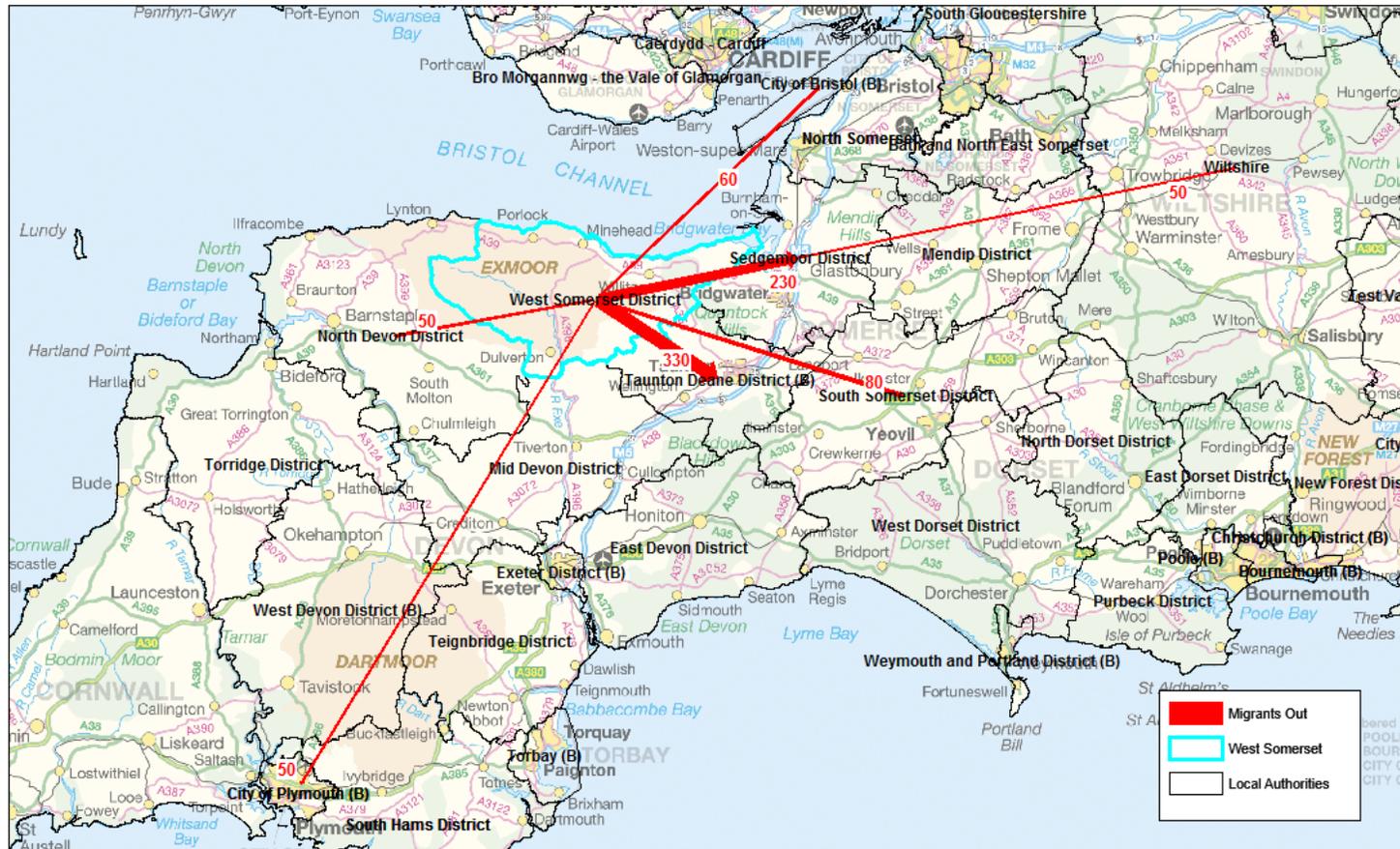
Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Taunton Deane and Sedgemoor were the main destinations for people leaving West Somerset followed by North Devon, South Somerset and Bristol City during the 3 year period ending June 2011.
- Taunton Deane and Sedgemoor were the main destinations for people leaving West Somerset in the one year ending June 2011 followed by South Somerset and Bristol City. These patterns are shown clearly in the following map showing local authorities to which there were 50 or more out migrants.

Map 2.15

Migration Out of West Somerset to local authorities with more than 50 People Registering with a GP Year Ending June 2011



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.54 The following table examines the net effect of movement in and out of the area by local authority for the three years ending June 2011

Table 2.28: net effect of internal migration in and out of West Somerset where net migration is greater than plus or minus 30 in the three years ending June 2011 by main local authority areas

Local authority	In			Out			Net Migration
	2009	2010	2011	2009	2010	2011	
South Gloucestershire UA	20	20	30	10	10	10	40
Birmingham	30	40	30	20	20	30	30
Walsall	20	10	10	10	0	0	30
Brighton and Hove UA	10	10	10	0	0	0	30
Isle of Wight UA	0	20	20	0	0	10	30
Basingstoke and Deane	10	10	10	0	0	0	30
Herefordshire UA	0	0	0	10	10	10	-30
Plymouth UA	30	50	30	50	40	50	-30
West Somerset	30	60	50	70	50	50	-30
Torridge	10	10	0	20	10	20	-30
Cheltenham	10	10	0	10	20	20	-30
Forest of Dean	0	0	10	10	20	10	-30
Mendip	10	20	20	20	40	20	-30
Bristol, City of UA	40	30	40	70	40	60	-60
Sedgemoor	170	150	160	130	190	230	-70
Taunton Deane	220	260	250	330	380	330	-310

(Source: Estimates from NHS Patient Registration with GPs data, ONS Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>.

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Please note: some data not available due to boundary changes

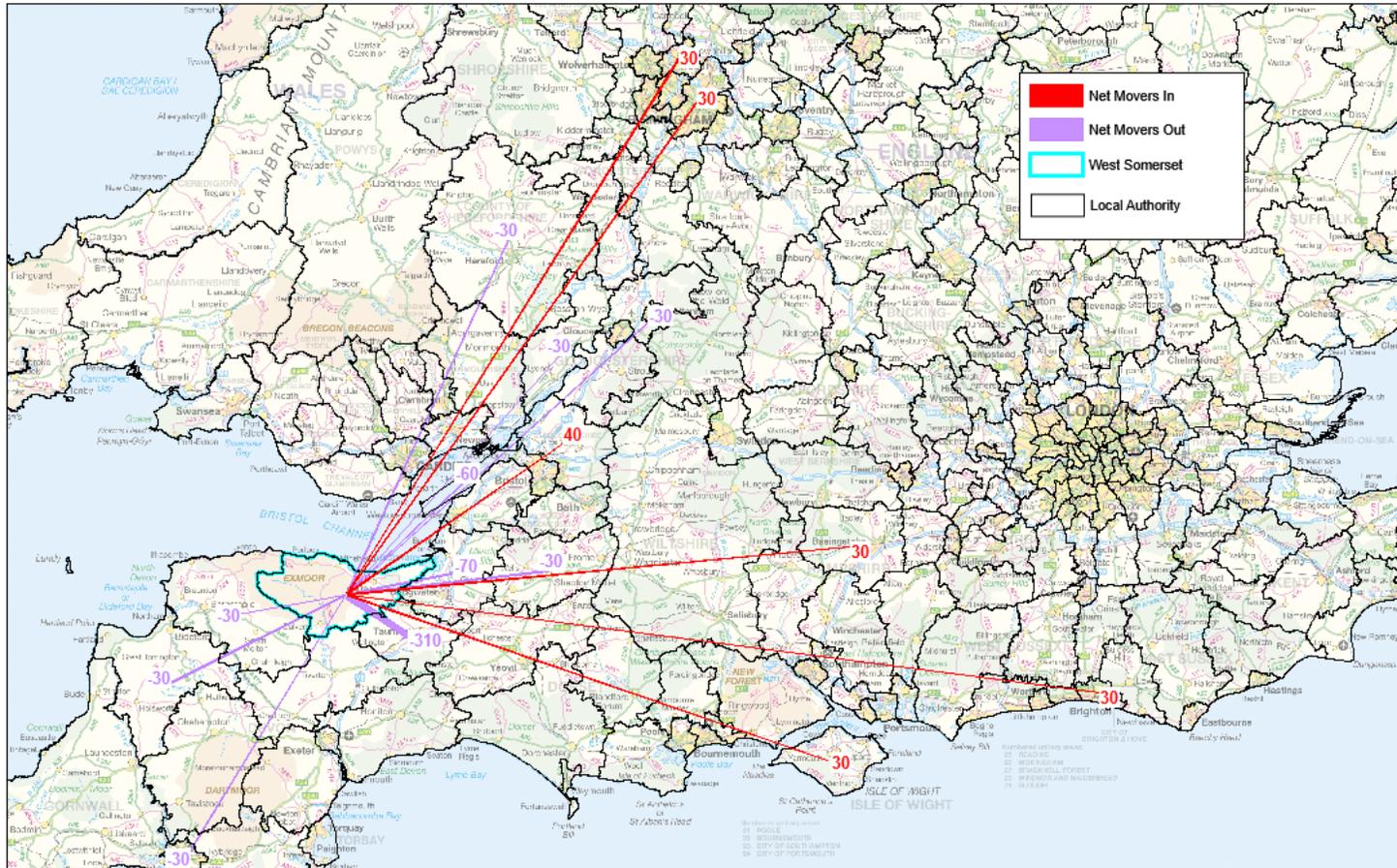
Key findings:

- It is not surprising that that the main flows are in relation to local authorities in the south west, the effect is mainly one of net loss during the 3 year period ending June 2011. The largest net loss is to the neighbouring local authority of Taunton Deane, and the next largest to Sedgemoor.

2.55 The following map (Map 2.16) highlights net migration of 50 or more people for the 3 years to June 2011 and clearly shows the longer moves of in-migrants and the more local moves of out-migrants.

Map 2.16

Net Migration 30 or more to/from West Somerset for three year period ending June 2011



Source: Internal Migration Statistics, Office for National Statistics, ONS website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Commuting to work

2.56 Travel to work patterns can have an important impact on housing markets, especially where locations which are attractive to commuters as places to live. The following table summarises the extent of commuting in and out of West Somerset in 2001. **Please note** that the following table includes 11,399 people who both live and work in West Somerset, this data is only available at local authority level.

Table 2.29: travel into and out of West Somerset to work, 2001

Movement	Numbers
Travel In	13,349
Travel Out	14,318
Net Effect	-969

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, <http://www.nomisweb.co.uk/>.)

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Key findings:

- In 2001, just over 969 more people travelled to work outside the area than travelled in.

2.57 The following table and addresses the question, ‘*where do people live who work in West Somerset?*’ and identifies the principal flows. **Please note** that Travel to work data from the more recent 2011 Census was not available at the time of completion of this Update. This will be available some time after October 2013 along with other specialist products from the 2011 Census. It should be borne in mind that commuting patterns may well have changed in the context of the economic recession. The following table **excludes** 11,399 people who both live and work in West Somerset.

Table 2.30: travel into work to West Somerset from local authorities where 20 or more travel, 2001

Local Authority	Numbers
Sedgemoor	829
Taunton Deane	514
North Devon	93
Mid Devon	85
South Somerset	68
Mendip	31
North Somerset	26

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, <http://www.nomisweb.co.uk/>.)

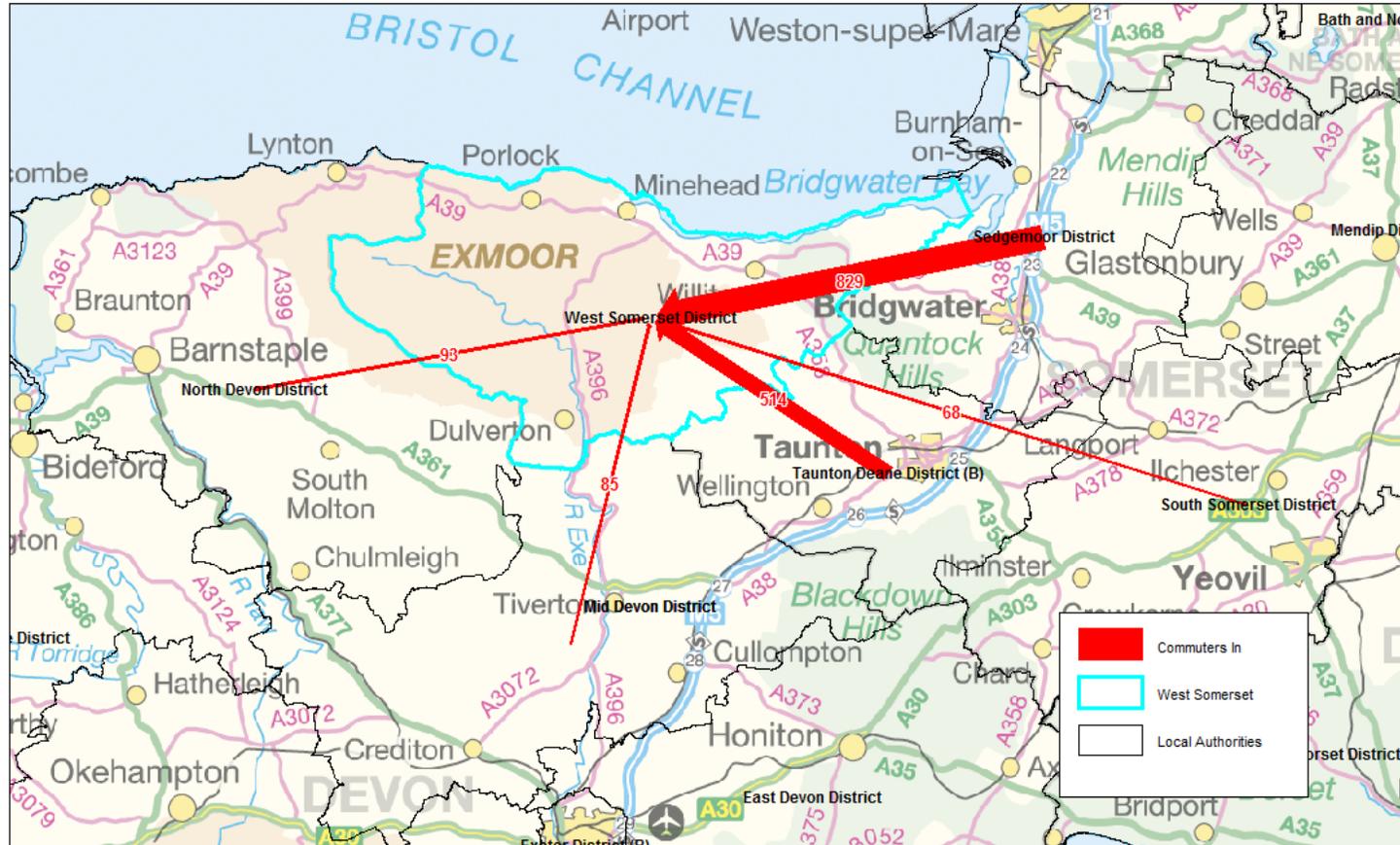
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[http://www.nationalarchives.gov.uk/doc/open-government-licence/.](http://www.nationalarchives.gov.uk/doc/open-government-licence/))

Key findings:

- The main local authorities from which people travelled to work in West Somerset in 2001 are Taunton Deane and Sedgemoor. Other local authorities from which more than 50 people travelled to work in West Somerset are immediately adjacent with the exception of South Somerset. These flows are most clearly seen on the following map ([Map 2.17](#)).

Map 2.17

Commuters from Local Authorities with more than 50 People Travelling to Work into West Somerset, 2001



Source: Travel to Work, 2001 Census Data, Office for National Statistics, NOMIS website, <http://nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.58 The following table and map address the question, ‘*where do people work who live in West Somerset?*’ and identify the principal flows. **Please note** that Travel to Work data from the more recent 2011 Census will be available some time after October 2013 along with other specialist products from the 2011 Census. It should be borne in mind that commuting patterns may well have changed during the economic recession. The following table **excludes** 11,399 people who both live and work in West Somerset.

Table 2.31: travel to work from West Somerset to local authorities where 20 or more travelled out, 2001

Local Authority	Numbers
Taunton Deane	1,360
Sedgemoor	599
Mid Devon	140
South Somerset	100
North Devon	96
Bristol, City of	62
North Somerset	54
Exeter	51
South Gloucestershire	45
Mendip	41
Westminster	28

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, <http://www.nomisweb.co.uk/>.)

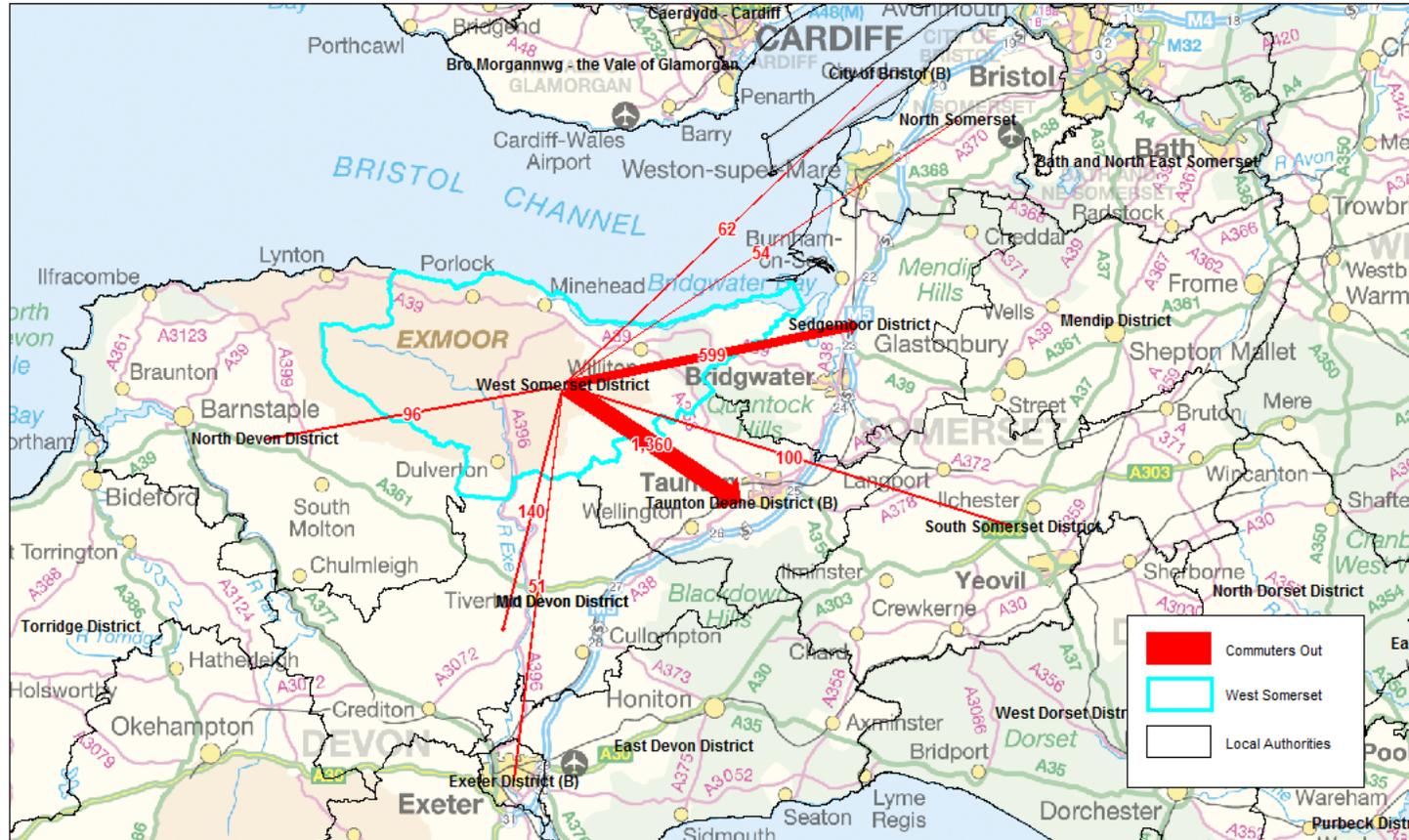
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Key findings:

- Commuting out is more widely dispersed than commuting in. The main local authorities to which people travelled to work outside West Somerset in 2001 were Taunton Deane and Sedgemoor followed by Mid Devon and South Somerset. The following map (Map 2.18) shows the local authorities from where 50 or more persons travelled into work in 2001.

Map 2.18

Commuters to Local Authorities with more than 50 People Travelling to Work from West Somerset, 2001



Source: Travel to Work, 2001 Census Data, Office for National Statistics, NOMIS website, <http://nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 (<http://www.nationalarchives.gov.uk/doc/open-government-licence>). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.59 The Neighbourhood Statistics website provides an Annual Population Survey (APS) Commuting Tool which can sometimes provide more up to date information on commuting than is available from the 2001 Census. The tool incorporates a significance test to identify the extent of change in commuting patterns between the 2001 Labour Force Survey and 2008 APS. The final two tables consider this data but comparisons must be treated with caution as both rely on limited sample surveys. Whilst not statistically significant, they indicate slight increases in commuting from West Somerset to Taunton Deane, and slightly less workers both living and working in West Somerset in 2008 than in 2001.

Table 2.32: place of residence commuter flows: where do workers live? (commuters in), 2001 and 2008

Workplace	West Somerset		
	2001	2008	Change Significant at 5% level
Residence	%	%	
West Somerset	88.8	83.9	No

(Source: 2001 Labour Force Survey and 2008 Annual Population Survey, APS Commuter Flow, Neighbourhood Statistics Website <http://www.neighbourhood.statistics.gov.uk/>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Table 2.33: workplace commuter flows: where do residents work? (commuters out), 2001 and 2008

Residence	West Somerset		
	2001	2008	Change Significant at 5% level
Workplace	%	%	
West Somerset	77.3	72.6	No
Taunton Deane	8.6	11.7	No

(Source: 2001 Labour Force Survey and 2008 Annual Population Survey, APS Commuter Flow, Neighbourhood Statistics Website. <http://www.neighbourhood.statistics.gov.uk/>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Executive summary

Population and household profile

- 2.60 The Exmoor National Park area in West Somerset houses an even greater concentration of older people than the district as a whole which in turn has the highest mean and median ages in England and Wales.
- 2.61 The above average proportion of older residents is reflected in both household size and composition. Over one third are single person households, especially single older households, and over one third of households consist only of people aged 65+. As a corollary, there are lower proportions of family households of all types. The significance of these patterns is threefold:
1. there will be a proportionately higher level of the under-occupation of family housing which will continue unless options to downsize are available;
 2. there will be a proportionately greater requirement for housing which meets the requirements of older households, including housing with care; and
 3. there will be a future increase in housing supply through turnover as older people downsize, transfer to housing with care or reach the end of their lives. This will have a particular impact on the supply of family housing.

Ethnic composition

- 2.62 In common with most predominantly rural areas, the district has not experienced high levels of international migration, and this is reflected in a district non-White ethnic population amounting to 1.3-1.4% of the total, compared with 2.6% for the south west. This pattern is even more extreme in the ENP area in West Somerset in which the non-White ethnic population is less than 1%.
- 2.63 There has been growth in Other White residents who are most likely to consist of migrants from the A8 central/east European countries which acceded to the EU in 2004 especially Poland and Hungary.
- 2.64 It is likely from experience elsewhere that their requirements have been met mainly by the private rented sector and from renting from family or friends. It is also likely that small communities have now been established accompanied by a shift in demand from single or shared accommodation towards larger family homes. Research is required to confirm such patterns and their impact on the housing market.

Occupational, income differences and deprivation

- 2.65 West Somerset is characterised by lower incomes than regionally or nationally and by a polarisation between lower and higher income groups. However, incomes from all sources including pensions and benefits are higher in the ENP area than in West Somerset. This may in part be associated with the higher proportion of people employed in better paid Occupational Groups 1 to 2 but other incomes sources may well be relevant.
- 2.66 There are very high levels of car/van availability in the ENP area in West Somerset. Only one in 8 of households had no car or van in their household and one in 7 had three cars or more. These patterns can be indicative of both lack of public transport and higher income levels.
- 2.67 There are higher levels of relative and multiple deprivation in only a few small areas in the ENP area, in two areas around Williton and Minehead and in a very large rural area in the Exmoor National Park. These areas are characterised by the highest deprivation for Indoors Living which is associated with substandard housing and lack of central heating, quite high deprivation for Wider Barriers and very high deprivation for geographical barriers to accessing amenities.
- 2.68 For low income households in a high value housing market, market housing will be unaffordable without support and there will be higher levels of need for affordable housing.

Population and household change

- 2.69 The principal drivers at work across the area now and in the future are the 10% projected growth in the number of households and the very large projected increase in the oldest populations and households.
- 2.70 Those aged 65+ are projected to increase by over 50% between 2001 and 2035, which represents almost 6,000 older people. The increases are much greater for older age groups including 139% growth in those aged 85+ the need for housing with care is the greatest. The same pattern is being experienced throughout the country as 'baby boomers' born immediately after the Second World War reach retirement age and older. The scale of the projected growth in the older population is dramatic, and coincides with improvements in health and well being which extend life expectancy.
- 2.71 There are three main implications for housing systems of this growth in the older population:
1. older people are increasingly likely to be home owners, to own their home outright and to occupy family housing. The growth in the older population is associated with a growth in owner occupation amongst the retirement

population. Such home owners have the potential either to release equity or to move to a smaller dwelling as appropriate.

2. older people are least likely to move home. The 2009-10 Survey of English Housing recorded that only 1.7% of people aged 65+ moved home. Most older people continue to live in family housing and one of the central principles of social care is to support older people to live in their existing homes. The effect of low moving rates combined with support to live in existing homes is that many older people will be under-occupying homes which are too large to meet their requirements, and which may be difficult to manage. The end result will be a 'log jam' in the supply of family housing and a dramatic increase in the need for home-based care.
3. alternatives to conventional housing will be both desirable and necessary and the supply of designated, sheltered and extra-care housing will need to increase. There is no benchmark for the proportion of older people willing and able to 'downsize' though work undertaken by Housing Vision identifies that only 10% are willing to downsize, a figure which may increase as the choice of aspirational options improves. However, the proportion of older people requiring designated, sheltered and extra-care housing is much clearer. The level of requirement is dealt with in Chapter 5 below.

2.72 The growth in the older population partly explains the projected growth in households, and especially smaller households. However, there are a number of other factors at work which include:

- people living independently for longer;
- a major shift from marriage to co-habitation resulting in earlier but less stable relationships;
- women delaying childbirth; and
- relationship breakdown which results in the requirement for 2 homes.

2.73 As can be seen, many factors underpin the projected increase in households, but other trends may have the reverse effect, including:

- the growth in multi-generational or other shared households through economic necessity or to provide care and support for those in need; and
- the growth in forms of communal or collaborative living among older people also to provide care and support.

2.74 It is too early to determine the scale of these trends but it is essential to monitor evidence of lifestyle change and its impact on housing requirements.

2.75 Between 2011 and 2031, the number of households is projected to increase by 21% with much larger increases for certain household types, including in relation to:

- single person households: a growth of 50% most of whom will be older people;
- couple households: a growth of only 5%, most of whom will be older people;
- family households: a 19% growth in lone parent households. This is less certain than for single or couple households as it is dependent on the continuation of recent trends of relationship breakdown.
- The areas of projected decline concern other families and couples with one or more adults. Ironically, the latter is the most uncertain projection as recent trends may reverse if more younger people live with parents for economic reasons.

2.76 Each of these trends has distinct implications for the housing system:

- for singles and couples: an increase in the requirement for smaller 2 bed properties; and
- for families: the small increase in the requirement for family housing is complicated by the projected large increase in lone parent households who have incomes typically around one third of the average. The implication of a substantial increase in the requirement for family housing affordable to lone parents is clear.

Internal migration and mobility

2.77 A key component of demographic change is internal migration which is included in population projections using trend-based analysis, and is measurable through ONS 'Components of Population Change' tables. Although 2011 data will be required to confirm this, internal migration is the most significant single component of projected population change for West Somerset. Data is only available at local authority level for internal migration.

2.78 West Somerset has continued to gain population through migration internal to England, and between 2001 and 2011, the district gained 2,100 people in this way

2.79 Not surprisingly, most internal and cross-regional migration takes place within the South West but there are population exchanges with the London, South East, East and West Midlands regions.

2.80 The net effect has been population gain from the London and the South East regions in particular, and the main losses to elsewhere in the South West, especially to Taunton Deane and Sedgemoor.

2.81 The limited data by age identifies that the main losses are of those aged 16-24 and 25-44 which will include families with younger children and those leaving for educational or employment opportunities. Interestingly, there was

also a small net loss of those aged 65+. The only group which saw net gain was those aged those aged 45-64 which may be indicative of early retirement.

- 2.82 In terms of the implications for the housing market, the loss of families with children reduces pressure on the demand for family housing.

Commuting

- 2.83 Understanding such patterns is constrained by the limited data which is only available at local authority level. In 2001, 969 more people travelled to work outside the area than travelled in. The main local authorities to which people travelled to work were Taunton Deane and Sedgemoor. Data from the 2008 Annual Population Survey suggests some limited change in commuting patterns with a slight increase in commuting to Taunton Deane.

3. Housing Stock and Supply

Introduction

3.1 Using a wide variety of authoritative secondary sources, this section reviews patterns and trends in the housing market across the area since 2001 as the basis for understanding the balance between supply and demand and the future requirement for housing. A distinction is made between:

- housing stock - the number of dwellings; and
- housing supply - the number of dwellings available annually to rent or purchase due to turnover from the existing stock and from new supply resulting from construction, conversions and bringing empty homes back into use.

Setting the baseline: patterns and trends in the housing stock

Property type

3.2 The following table summarises the baseline position by accommodation type in the ENP area in West Somerset in 2011 and the sub-section closes with a detailed estimate of stock by tenure.

Table 3.1: accommodation type, West Somerset ENP, LPA and DC, 2011

Property Type	West Somerset ENP		West Somerset LPA		West Somerset DC			South West		England	
	No	%	No	%	No	%	Rank	No	%	No	%
Whole House or Bungalow											
Detached	2,098	47.8	4,256	32.2	6,354	36.1	95	716,955	29.8	5,128,552	22.3
Semi-detached	1,218	27.8	3,961	30.0	5,179	29.4	206	656,137	27.2	7,076,395	30.7
Terraced (including end terrace)	701	16.0	2,515	19.0	3,216	18.3	246	559,150	23.2	5,642,969	24.5
Flat, maisonette or apartment											
Purpose Built block of flats or tenement	108	2.5	1,396	10.6	1,504	8.5	247	308,081	12.8	3,854,451	16.7
Part of a converted or shared house (including bed-sits)	145	3.3	686	5.2	831	4.7	66	120,358	5.0	984,284	4.3
In commercial building	100	2.3	229	1.7	329	1.9	19	28,819	1.2	257,218	1.1
Other											
Caravan or other mobile or temporary structure	14	0.3	167	1.3	181	1.0	47	18,937	0.8	100,228	0.4
All Categories: Household Spaces	4,385	100.0	13,209	100.0	17,594	100.0		2,408,437	100.0	23,044,097	100.0

(Source: Table KS401EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Compared with the national pattern, the main differences are the much higher proportion of detached houses and the lower proportions of terraced houses and flats. Semi-detached houses are only slightly lower than the national percentage.
- Almost half (47.8%) of homes in the West Somerset ENP area are detached which is a much higher percentage than in the LPA, DC, South West and nationally. The percentage of flats was much lower than in all the other areas.
- Care must be taken in assuming that detached houses in rural areas are necessarily large, as many may be cottages with a small number of bedrooms. Properties by number of room and bedrooms are reviewed below.

Tenure

3.3 The following table summarises the baseline position in 2011.

Table 3.2: tenure type, West Somerset ENP, LPA and DC, 2011

Tenure	West Somerset ENP		West Somerset LPA		West Somerset DC			South West		England	
	No	%	No	%	No	%	Rank	No	%	No	%
Owned: Owned Outright	1,713	46.8	5,311	44.4	7,024	45.0	6	801,786	35.4	6,745,584	30.6
Owned: Owned with a mortgage or loan	642	17.5	2,755	23.0	3,397	21.7	336	725,172	32.0	7,229,440	32.8
Shared ownership (part owned and part rented)	9	0.3	63	0.5	72	0.5	262	17,116	0.8	173,760	0.8
Social Rented: Council	34	0.9	147	1.2	181	1.2	327	130,652	5.8	2,079,778	9.4
Social Rented: Other	552	15.1	1,555	13.0	2,107	13.5	27	170,868	7.5	1,823,772	8.3
Rented from: Private landlord or letting agency	481	13.1	1,708	14.3	2,189	14.0	127	345,229	15.2	3,401,675	15.4
Private Rented Other	106	2.9	215	1.8	321	2.1	33	41,905	1.9	314,249	1.4
Living Rent Free	123	3.4	209	1.7	332	2.1	16	31,913	1.4	295,110	1.3
All Categories: Tenure	3,661	100.0	11,962	100.0	15,623	100.0		2,264,641	100.0	22,063,368	100.0

(Source: Table KS402EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Care must be taken in accepting the proportions of Council housing where stock transfer has rendered this type non-existent.
- The tenure pattern in the ENP area is similar to that in West Somerset, 16.0% was estimated to be social housing, a slightly higher percentage than in the West Somerset DC area and owner occupation was slightly lower (64.5%). However, outright owner occupation was slightly higher in the ENP area (46.8%) was higher than across West Somerset, the South West or nationally (30.6%). This may well reflect the high percentage of older people living in West Somerset.

Number of rooms and bedrooms

- 3.4 A key indicator when profiling the supply of housing is the number of bedrooms. The 2011 Census data in the table below shows only the number of habitable rooms i.e. excluding bathrooms, toilets, halls or landings.

Table 3.3: household spaces by number of rooms, West Somerset ENP, LPA and DC, 2011

Rooms	West Somerset ENP		West Somerset LPA		West Somerset DC		%	
	No	%	No	%	No	%	South West	England
1 Room	14	0.4	59	0.5	73	0.5	0.6	0.8
2 Rooms	40	1.1	186	1.6	226	1.4	2.6	2.9
3 Rooms	176	4.8	935	7.8	1,111	7.1	8.9	10.3
4 Rooms	549	15.0	2,324	19.4	2,873	18.4	18.4	19.2
5 Rooms	739	20.2	2,853	23.9	3,592	23.0	23.3	24.7
6 Rooms	767	20.9	2,324	19.4	3,091	19.8	19.5	19.4
7 Rooms	486	13.3	1,383	11.6	1,869	12.0	11.4	10.1
8 Rooms	363	9.9	885	7.4	1,248	8.0	7.5	6.3
9 or more Rooms	528	14.4	1,012	8.5	1,540	9.9	7.9	6.4
All Household Spaces With At Least One Usual Resident	3,661	100.0	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table QS407EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- There was a lower percentage of homes with 1, 2, or 3 rooms in the West Somerset ENP area (6.3%) than across West Somerset, the South West or nationally
- The percentage of homes with 4, 5 and 6 rooms was lower in the West Somerset ENP area (56.1%) than across West Somerset, the South West or nationally.
- As a result, there was the highest percentage of homes with 7 or more rooms in the ENP area (37.6%) than across West Somerset, the South West or nationally.

3.5 The following table shows the number of bedrooms according to the 2011 Census.

Table 3.4: household spaces by number of bedrooms, West Somerset ENP, LPA and DC, 2011

Bedrooms	West Somerset ENP		West Somerset LPA		West Somerset DC		%	
	No	%	No	%	No	%	South West	England
None	4	0.1	17	0.1	21	0.1	0.2	0.2
1 Bedroom	216	5.9	1,102	9.2	1,318	8.4	10.7	11.8
2 Bedrooms	951	26.0	3,595	30.1	4,546	29.1	27.3	27.9
3 Bedrooms	1,497	40.9	4,994	41.7	6,491	41.5	40.4	41.2
4 Bedrooms	607	16.6	1,631	13.6	2,238	14.3	16.1	14.4
5 or More Bedrooms	385	10.5	624	5.2	1,009	6.5	5.3	4.6
All Household Spaces with at least one usual resident	3,661	100.0	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table QS411 EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- In conformity with the findings in the previous table, the West Somerset ENP area is estimated to have a higher percentage of both 4 and 5 plus bed homes than the LPA, DC, regional and national figures, and lower percentage of 1 and 2 bed homes. It has a similar percentage of 3 bed homes to the South West (slightly higher) and slightly lower percentage than the national figure and the LPA and DC percentages.
- The lower proportion of 1 and 2 bed properties is a concern in terms of access to the housing market in a high value: lower income area.

3.6 The table below shows the average household size and the average number of rooms and bedrooms in the West Somerset ENP area compared with West Somerset DC, the South West and England.

Table 3.5: average household size and average number of rooms and bedrooms in West Somerset, 2011

Indicator	West Somerset ENP	West Somerset DC	South West	England
	No.	No.	No.	No.
Average household size	2.1	2.1	2.3	2.4
Average number of rooms per household	6.1	5.8	5.6	5.4
Average number of bedrooms per household	3.0	2.8	2.8	2.7

(Source: Table QS403 EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- The average number of rooms per household is higher in the ENP area than in West Somerset which was in turn higher than in the South West and England in 2011.
- The average number of bedrooms per household is higher in the ENP area than in West Somerset which was the same as in the South West and only very slightly higher than for England in 2011.

Dwellings by Council Tax band

3.7 The following table summarises dwellings by Council Tax band in 2011, this data is only available at local authority level.

Table 3.6: dwellings by Council Tax band in West Somerset, 2011

Council Tax Band	West Somerset		South West		England	
	No	%	No	%	No	%
Band A	2,760	15.8	419,924	17.6	5,701,030	24.8
Band B	3,818	21.9	584,185	24.5	4,494,194	19.6
Band C	3,716	21.3	549,671	23.0	4,992,524	21.8
Band D	3,372	19.3	376,998	15.8	3,513,171	15.3
Band E	1,804	10.3	251,019	10.5	2,166,533	9.4
Band F	1,272	7.3	127,235	5.3	1,144,117	5.0
Band G	677	3.9	72,975	3.1	805,748	3.5
Band H	47	0.3	7,239	0.3	130,183	0.6
Total	17,466	100.0	2,389,246	100.0	22,947,500	100.0

(Source: *Dwellings by Council Tax Band*; *Neighbourhood Statistics Website* <http://www.neighbourhood.statistics.gov.uk/>.)

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Key findings

- There was a higher percentage of higher Council Tax Band (F-H) homes in West Somerset (11.5%) than in the South West (8.7%) and England (9.1%).
- Conversely, there was a lower percentage of low Council Tax band (A and B) homes in West Somerset (37.7%) than in the South West (42.1%) and England (44.4%).
- However, it must be remembered that as the property values on which these bandings have been based have not been updated since 1st April 1991, they may no longer be a valid indication of current market values.

Under-occupation and overcrowding

3.8 Under-occupation and overcrowding are likely to be experienced at different stages of the life cycle. Under-occupation is more likely to affect older people living in family housing from which children have moved on. Overcrowding is more likely to affect younger people with dependent children who are in need of more bedrooms. Under-occupation and overcrowding can therefore, be two sides of the same coin, where a reduction in under-occupation by older people can increase the supply of family housing for younger households.

- 3.9 The Occupancy Rating provides a measure of whether a household's accommodation is overcrowded or under-occupied. There are two measures of occupancy rating, one based on the number of rooms in a household's accommodation, and one based on the number of bedrooms. Based on a standard formula which assesses the relationship between household members according to their ages and gender, it relates the actual number of rooms or bedrooms in a property to the number of rooms or bedrooms 'required' by the members of that household. The number of rooms/bedrooms required is subtracted from the number of rooms/bedrooms in the household's accommodation to obtain the occupancy rating. An occupancy rating of -1 implies that a household has one fewer room/bedroom than required (overcrowded), whereas +1 implies that they have one more room/bedroom than the standard requirement (under-occupying).
- 3.10 A bedroom is defined as any room that was intended to be used as a bedroom when the property was built, or any room that has been permanently converted for use as a bedroom. It also includes all rooms intended for use as a bedroom even if not being used as a bedroom at the time of the Census. Bedsits and studio flats are counted as having one bedroom. Set out below is a description of how the number of bedrooms/rooms required is calculated as follows:
- A one-person household requires three rooms and one bedroom.
- 3.11 The **room** requirements for a multi-person household are calculated as follows:
1. One room per couple or lone parent;
 2. One room per person aged 16 and above who is not a lone parent or in a couple;
 3. One room for every two males aged 10-15, rounded **down**;
 4. One room for every pair of males of whom one is aged 10-15 and one is aged 0-9, if there are an odd number of males aged 10-15;
 5. One room for a remaining unpaired male aged 10-15 if there are no males aged 0-9 to pair him with;
 6. Repeat steps 3-5 for females;
 7. One room for every two remaining children aged 0-9 (regardless of gender), rounded **up**;
 8. Add two rooms to this total.
- 3.12 The **bedroom** requirements for a multi-person household are as follows:

1. One bedroom per couple;
2. One bedroom per person aged 21 or over not in a couple;
3. One bedroom for every two males aged 10-20, rounded **down**;
4. One bedroom for every pair of males of whom one is aged 10-20 and one is aged 0-9, if there are an odd number of males aged 10-20;
5. One bedroom for a remaining unpaired male aged 10-20 if there are no males aged 0-9 to pair him with;
6. Repeat steps 3-5 for females;
7. One bedroom for every two remaining children aged 0-9 (regardless of gender), rounded **up**.

3.13 Applying the Occupancy Rating:

- An occupancy rating of +2 or more suggests there are 2 or more rooms more than are 'required' according to the definition, i.e. there is more than one spare room and there is under-occupation; and
- An occupancy rating of -1 suggests there is one less room than is 'required' according to the definition, i.e. there are not enough rooms for the number of people and there is overcrowding.

3.14 Using the Occupancy Rating, the following table summarises the level of under-occupation and overcrowding for all households at the time of the 2011 Census.

Table 3.7: under-occupation and overcrowding, West Somerset ENP, LPA and DC, 2011

Occupancy Rating	West Somerset ENP		West Somerset LPA		West Somerset DC		South West		England	
	No	%	No	%	No	%	No	%	No	%
Under-occupation: occupancy rating 2+ all households (rooms)	2,534	69.2	7,002	58.5	9,536	61.0	1,246,815	55.1	10,970,550	49.7
Overcrowding: occupancy rating (rooms) of -1 or less	106	2.9	534	4.5	639	4.1	144,657	6.4	1,928,596	8.7
Under-occupation: occupancy rating 2+ all households (bedrooms)	1,927	52.6	4,916	41.1	6,843	43.8	875,297	38.7	7,558,815	34.3
Overcrowding: occupancy rating (bedrooms) of -1 or less	53	1.4	286	2.4	339	2.2	65,518	2.9	1,060,967	4.8
All Households	3,661	100.0	11,962	100.0	15,623	100.0	2,264,641	100.0	22,063,368	100.0

(Source: Table QS408 and 411 EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>.)

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Key findings:

- Overcrowding is less of a problem in West Somerset including in the National Park area:
 - Using the bedroom occupancy rating, 1.4% of households in the West Somerset ENP area, 2.4% of households in the West Somerset LPA area and 2.1% in West Somerset DC area were overcrowded compared with 2.9% in the South West and 4.8% nationally.
 - Using the room occupancy measure, 2.9% of households in the ENP area, 4.5% of households in the LPA area and 4.1% in the DC area were overcrowded compared with 6.4% in the South West and 8.7% nationally.
- There is a very high level of underoccupation in the National Park area and across West Somerset:
 - Using the bedroom occupancy measure, more than half (52.6%) of households in the ENP area, 41.1% of households in the LPA area and 43.8% in the DC area were under-occupied compared with 38.7% in the South West and 34.3% nationally.
 - Using the room occupancy measure, 69.2% of households in the ENP area, 58.5% of households in the LPA area and 61.0% in the DC area were under-occupied compared with 55.1% in the South West and 49.7% nationally.

Vacant, second and holiday homes

- 3.15 It is difficult to determine the current rate of second and holiday homes from 2011 Census data as outputs relate to either people or homes. The following table estimates the **number of people** with second and holiday homes in West Somerset, the number of homes or households is not provided and cannot be estimated with accuracy until further Census data is released. This data is only available at local authority level.

Table 3.8: the number of people resident outside West Somerset with second homes in the district, 2011

All usual residents	Usual residents elsewhere with a second address in this area	Type of second address			
		All second address types	All second address types	Second address: working	Second address: holiday
34,675	2,387	-	-	-	-
100%	6.9%	6.9%	0.6%	3.3%	3.0%

(Source: Table 1a Second Addresses, 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key Findings

- In 2011, 2,387 people who were usually resident in another local authority had second addresses in West Somerset, equivalent to 6.9% of the usual resident population; 3.3% used their second homes as holiday homes which compares with a second home rate of 4.44% in 2001.
- Census Table QS106 'Second addresses' also identifies 1,431 people usually resident in West Somerset who had a second address elsewhere in the UK.

3.16 The following table estimates the **number of vacant homes** in the National Park area in West Somerset at 2011, and which also includes second addresses.

Table 3.9: vacant homes in West Somerset ENP, LPA and DC, 2011

Household spaces	West Somerset ENP		West Somerset DC		South West	England
	No	%	No	%	%	%
Household spaces with at least one usual resident	3,661	83.5	15,623	88.8	94.0	95.7
Household spaces with no usual residents	724	16.5	1,971	11.2	6.0	4.3
All categories: Household spaces	4,385	100.0	17,594	100.0	100.0	100.0

(Source: Table KS401EW 2011 Census data, Office for National Statistics website, <http://www.ons.gov.uk> and NOMIS website, <http://www.nomisweb.co.uk>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- It is estimated that the West Somerset ENP area has a very high percentage of vacant homes (16.5%) compared with West Somerset, the region or nationally.
- However, this total will include second and holiday homes most of which were likely to be vacant on the Census enumeration day. Therefore, the number of vacant or second/holiday homes cannot be estimated with accuracy until further Census data is released.

Trends in residential completions

Overall completions

3.17 Completions increase the supply of market and affordable housing, an essential contribution given the recent and projected increases in household numbers. This section reviews trends in residential completions in general, by sector and bedsize, no private sector demolitions were recorded over this period. The following table summarises trends between 2002 and 2012.

Table 3.10: all residential completions in the West Somerset LPA area, 2002-2012

2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012	Total
117	198	123	213	265	141	122	71	48	109	1,407

(Source: WSC residential completions data)

Key findings:

- 1,407 properties have been completed since 2002, the annual total had declined after 2006-07 but revived in 2011-12.

Completions by tenure

3.18 The following table summarises trends in all and affordable housing completions between 2006 and 2012 in the context of affordable housing completion rates for the south west and England.

Table 3.11: all and affordable residential completions in the West Somerset LPA area, 2006-2012

Area	Type	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012	Total No.	Total %
West Somerset	All	80	100	40	30	20	60	330	84.62%
	Afford.	0	0	0	20	10	30	60	-
	% affordable	0	0	0	40	33.33	50.00	-	15.38%
South West	% affordable	20.93	32.42	33.39	38.73	32.45	25.55	-	30.58%
England	% affordable	23.76	28.16	36.55	43.25	37.71	24.60	-	32.34%

(Source: CLG Live Table 253 Housebuilding: permanent dwellings completed by tenure and district. CLG website <http://www.communities.gov.uk/corporate/>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- Of 390 dwelling completions between 2006 and 2012, 15% were affordable, ratios which were substantially below the regional and national averages of 30.6% and 32%.

Affordable housing completions by sector

3.19 The following table uses local authority data to examine output by affordable housing sector for the period 2006-2012.

Table 3.12: affordable residential completions by type in the West Somerset area of the National Park, 2006-2012

Year	Rent (including intermediate rent)	Low cost home ownership (including intermediate self-build)	All Affordable
2006/07	3	0	3
2007/08	6	2	8
2008/09	0	1	1
2009/10	9	2	11
2010/11	0	0	0
2011/12	23	2	25
Total no.	41	7	48
% of affordable	85.4%	14.6%	100%

(Source: Exmoor National Park Authority housing completions data)

Key findings:

- Of 48 affordable completions:

- 85% were rented; and
- 15% were for low cost home ownership.

The private rented sector

Introduction

3.20 The private rented sector has grown in size and significance since 2001 and this section profiles the sector by type of stock, the level of supply through turnover and rental levels. The following data sources have been consulted:

- the property websites ‘rightmove’ and ‘findaproperty’; and
- the Valuation Office Agency database. The Valuation Office Agency (VOA) database holds lettings information collected as part of the VOA’s responsibility to administer the rent officer functions related to Housing Benefit (Local Housing Allowance and Local Reference Rents) on behalf of the Department for Work and Pensions (DWP). VOA data is useful in profiling the private rented housing available to lower income households.

Stock and supply profile

3.21 The 2011 Census identified a total of 589 privately rented homes in the West Somerset ENP area, representing 16% of the total and 123 households living rent free (3.4% of the total), similar proportions to the south west and England.

3.22 The following table provides a ‘snapshot profile’ of the supply of private rented properties available for letting on a calendar month basis in August/September 2013.

Table 3.13: the private rented sector in the West Somerset ENP area by property type and bedsize, average number of properties advertised in August/September 2013 (rounded to 5)

Type of accommodation	Average	
	Number	%
Detached	15	37.5
Semi-detached	5	12.5
Terraced	10	25.0
Flats/apartments	5	12.5
Bungalows	5	12.5
Total advertised	40	100%
1	5	12.5
2	15	37.5
3	15	37.5
4/5	5	12.5
Total advertised	40	100%

(Source: rightmove.co.uk)

Key findings:

- An average of only 40 properties was advertised between August and September 2013.
- The main property types advertised were detached houses (over one third) followed by terraced houses (one quarter). 50% were 3 bed or larger and 50% 2 bed or smaller. This suggests quite a balanced supply in the private rented sector but based on small numbers of advertised properties.

3.23 Useful data on rent levels and the profile of the rental stock by bedsize is recorded by the Valuation Office Agency in the course of determining Local Housing Allowances by Broad Rental Market Areas (BRMA). West Somerset falls into 2 BRMAs, North Devon and Taunton and West Somerset: Mid and East Devon; West Somerset; Taunton and West Somerset. Maps of the relevant BRMAs for West Somerset are available at:

<https://lha-direct.voa.gov.uk/SearchResults.aspx?LocalAuthorityId=360&LHACategory=999&Month=8&Year=2012&SearchPageParameters=true>

3.24 The following table provides a range of monthly rentals for 476 properties assessed for LHA in the West Somerset DC area from 1st October 2011 to 30th September 2012.

Table 3.14: the number, average, lower quartile, median and upper quartile market rents recorded by the VOA in West Somerset, 2011-12

Area	Number of Rents	Average Rent	Lower Quartile Rent	Median rent	Upper Quartile Rent
West Somerset	476	£598	£450	£575	£675

(Source: VOA Residential Rental Market Statistics)

Key findings:

- Based on 476 decisions in 2011-12, the average rent recorded was £598, ranging from a lower quartile figure of £450 to an upper quartile rent of £675.
- 476 properties implies an annual turnover of 22% of the 2,189 properties rented from a private landlord or lettings agency recorded by the 2011 Census.

3.25 The following table provides more detailed information concerning the number of rents and average rents by bedsize for properties assessed by the VOA for

LHA from 1st October 2011 to 30th September 2012. Rooms refers to rooms in shared properties.

Table 3.15: the number of market rents and averages by property type and bedsize, assessments for LHA in West Somerset, VOA, 2011-12

	Number of rents	% of rents	Average rent	Lower Quartile Rent	Median rent	Upper Quartile Rent
Rooms	20	4.23	£343	£303	£338	£390
Studio	0	0	0	0	0	0
1 bed	68	14.38	£474	£450	£475	£499
2 bed	169	35.73	£575	£525	£575	£600
3 bed	172	36.36	£647	£600	£650	£700
4 bed	44	9.30	£871	£750	£842	£998
All	473	100%	-	-	-	-

(Source: VOA Residential Rental Market Statistics)

Key findings:

- The LHA market is skewed towards smaller properties, 54% were 2 bed or less in West Somerset. This profile suggests that smaller households are at an advantage and families at a disadvantage in accessing the private rented sector.
- However, no studio properties were recorded which is of particular concern in view of changes in LHA eligibility with the effect that single people under 35 can only gain support for shared housing.

The home ownership sector

3.26 This section uses Land Registry data to profile the supply of housing from the home ownership sector. The following table summarises the number of sales and average property prices between 2008 and 2012.

Table 3.16: the annual volume of sales and average property prices in West Somerset, 01.04.08-30.04.12

Year	West Somerset	
	No. of Sales	Average Price
1/4/2008 to 30/4/2009	419	£236,470.66
1/4/2009 to 30/4/2010	525	£224,625.53
1/4/2010 to 30/4/2011	488	£229,488.70
1/4/2011 to 30/4/2012	550	£223,459.98
Total	1,982	-
Annual average	496	£228,003.57

(Source: Land Registry)

Key findings:

- The average number of transactions over the 4 year period was 496, increasing from 419 in 2008/09 to 550 in 2011/12 with some fluctuation in the two years in between. This is in contrast to the national picture of decline and is obviously indicative of continuing demand.
- The average price at £223.5k has fallen by 5.5% since 2008-09

3.27 The following table summarises the number of sales and average price by property type by local authority area between January 2011 and 2012.

Table 3.17: average property price by type of dwelling in the West Somerset ENP and DC areas, 01.01.11 to 30.04.12

Property type	ENP			West Somerset		
	No Sales	% Sales	Average Price £	No Sales	% Sales	Average Price £
Detached	80	51.3	£413,856.60	232	34.6	£339,227.22
Semi Detached	32	20.5	£254,703.13	173	25.8	£204,182.34
Terraced	35	22.4	£193,991.43	166	24.7	£160,455.83
Flats and Apartments	9	5.8	£127,666.67	100	14.9	£118,046.79
Overall	156	100.0	£315,370.05	671	100.0	£227,008.35

(Source: Land Registry)

Key findings:

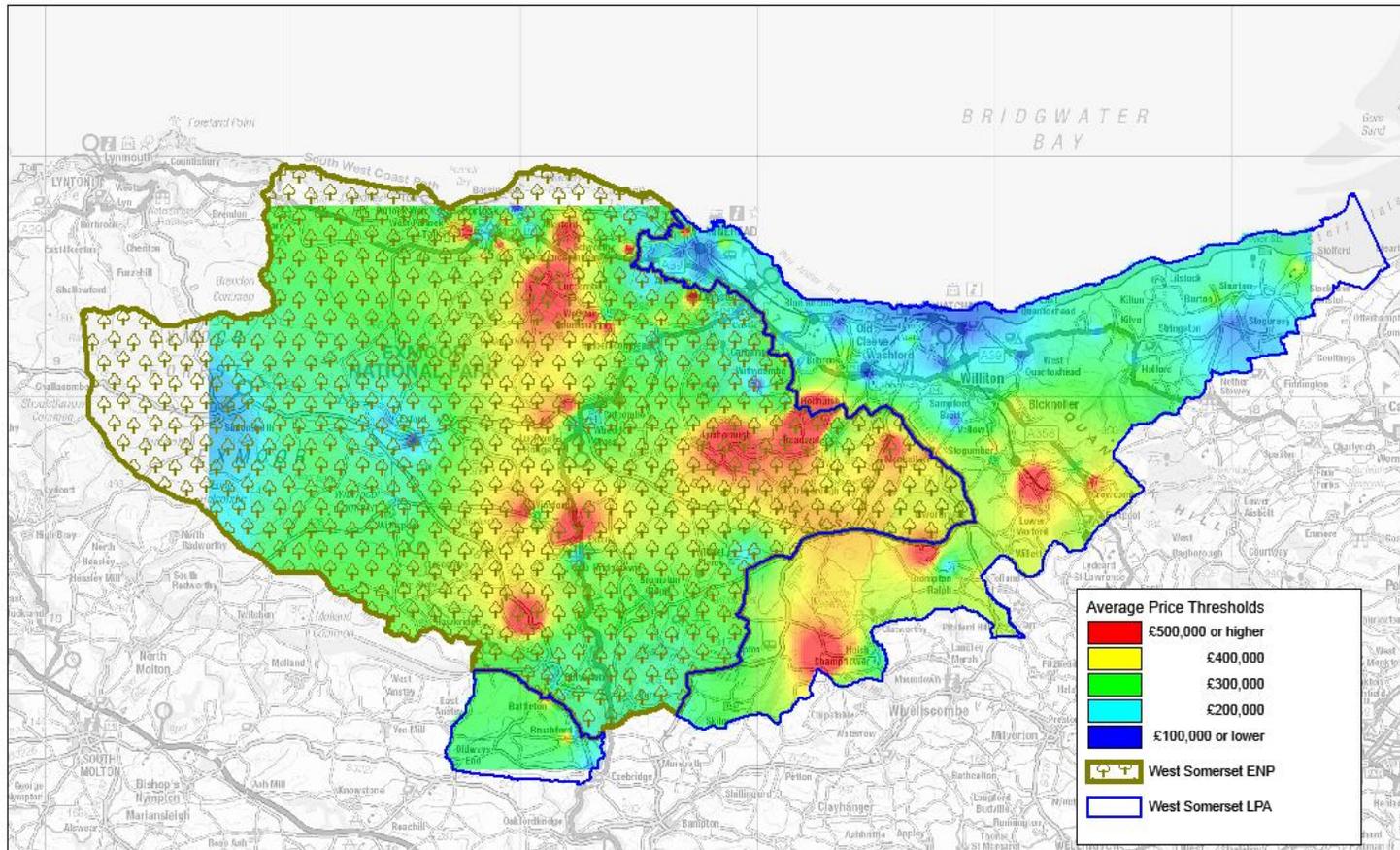
- As a proportion of total stock of 2,355 owner occupied homes (see Table 3.1), 156 annual sales is equivalent to a turnover rate of 6.6%.
- Average house prices were higher in the ENP sub area for all types of housing during the period since January 2011, the overall higher was almost 30% higher.
- Sales were heavily skewed towards detached properties which made up over 50% of sales compared with about one third in West Somerset and a 2011 stock of 48%.
- Sales of semi-detached houses made up 21% and 26% in West Somerset, compared with a 2011 stock of 28%.
- Terraced houses made up 22% which was close to the West Somerset average of 25% and a 2011 stock total of 16%.
- Flats and apartments made up only 6% compared with 15% in West Somerset and a 2011 stock of 8%.

3.28 The following map identifies the spectrum of average sales prices and enables lower and higher prices hot spots to be identified for the 550 properties sold in West Somerset between 1st January 2011 and 30th April 2012. Please note that the maps are constructed around price thresholds as indicated then shade colours applied according to the averages between them; the white fringe areas are a product of the software. The maps have been created using the inverse distance weighting method of interpolation in MapInfo thematic mapping options. This method is used for data values that produce arbitrary values over the grid and is especially suited to sparse data. Two strong patterns are evident:

- towns are generally cheaper than rural areas; and
- the house price hotspots are in deep rural locations, especially in the Exmoor National Park.

Map 3.1

Average House Prices in West Somerset from 1/1/2011 to 30/4/2012



Source: Land Registry Sales, Land Registry. Contains Ordnance Survey data (c) Crown copyright and database Right 2012. Contains Royal Mail data (c) Royal Mail copyright and database right 2012. Contains National Statistics (c) Crown copyright and database right 2012. (c) Natural England copyright 2013. <http://www.naturalengland.org.uk>

The intermediate housing sector

3.29 The government definition of intermediate housing is that it consists of:

'homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing. Homes that do not meet the above definition of affordable housing, such as 'low cost market' housing, may not be considered as affordable housing for planning purposes'. (<https://www.gov.uk/definitions-of-general-housing-terms>)

Details of current schemes to help home owners are available at:

<https://www.gov.uk/affordable-home-ownership-schemes>

3.30 The 2011 Census recorded only 9 shared ownership properties in the overall West Somerset ENP area, the turnover of which is notoriously low. If a 5% turnover rate is applied which is close to the full cost sector, this implies a negligible supply of no more than 1 property every 2 years.

The social rented sector

3.31 This section uses data provided by the choice based lettings scheme, Homefinder Somerset to profile the supply of social rented homes in the West Somerset ENP area.

3.32 The following table identifies the number of social rented properties advertised by type and bed size between December 2008 and September 2013.

Table 3.18: number of social rented properties advertised by type and bed size in the Exmoor National Park area in West Somerset, 5th December 2008-10th September 2013 (45 months)

Type & Bedsize	Supply	Proportion
Bedsit/ Studio	0	-
<i>Sub-total</i>	0	0.0%
1 bed		
Bungalow	20	-
Flat/maisonette	22	-
House	0	-
<i>Sub-total</i>	42	19.0%
2 bed		
Bungalow	93	-
Flat/maisonette	6	-
House	30	-
<i>Sub-total</i>	129	58.4%

3 bed		
House	50	-
<i>Sub-total</i>	50	22.6%
4 bed		
House	0	-
<i>Sub-total</i>	0	0.0%
Total no.	221	100%

(Source: Homefinder Somerset)

Key findings:

- The table identifies that of 221 social rented properties advertised:
 - 19% were 1 bed;
 - 58.4% were 2 bed; and
 - 22.6% were 3 bed.
- The average number of properties advertised over 45 months was equivalent to an annual average of 59.

3.33 Introduced in 1980, the Right to Buy resulted in a contraction in the stock of local authority social rented housing, especially of houses. The scheme was extended to housing association tenants under the Right to Acquire in 1997. However, limitations on eligibility and reductions in purchase discounts introduced in 2005 have reduced the number of sales dramatically. CORE sales data records 5 Right to Buy and Right to Acquire sales across West Somerset between 2007-08 and 2010-11.

3.34 The following table identifies the average rents charged for social rented properties in 2010-11.

Table 3.19: average social rents by type and bed size in West Somerset, 2011-12

Type & Bedsize	West Somerset
1 bed	£67.48
2 bed	£82.84
3+ bed	£96.18

(Source: CORE)

Housing supply profile

3.35 The following table summarises the current annual supply of housing through turnover by sector as follows.

Table 3.20: the current annual supply of housing through turnover in the West Somerset ENP area, September 2013

Indicator	Owner occupied	Private rent	Social rent	Intermediate	Total
Total stock at 2011	2,355	587	586	9	3,537
% of stock	66.6	16.6	16.6	0.3	
Turnover: annual supply as % of stock by tenure	6.6%	30.0%	10.1%	5.0%	-
Annual supply	156	176	59	0	1,602
% of all supply of housing	40.0%	45.0%	15.0%	0%	100%

Note: living rent free is excluded

(Source: 2011 Census and Housing Vision estimates)

Key findings:

- The home ownership sector provides 40% of housing supply although it represents 69% of total stock.
- The private rented sector is estimated to play the main role in the supply of housing, currently providing 45% of available properties, although it constitutes only 17% of all housing stock;
- The social sector provides 15% of available homes and represents almost 17% of total stock.
- The intermediate sector has a very marginal role providing none of available annual supply and 0.3% of total stock.

Executive summary

Overall patterns and trends

- 3.36 The area's housing stock is distinctive in the much higher proportion of detached houses and the resultant lower proportions of housing of other types, especially flats. Outright owner occupation was especially high which may well reflect the high proportion of older residents.
- 3.37 As a direct reflection of the stock profile, the area has a lower percentage of homes with 1, 2, or 3 rooms but a higher percentage with 6 or more rooms. There are slightly lower percentages of 1 and 3 bed homes and slightly higher percentages of 2, 4 and 5 plus bed homes. The lower proportion of 1 and 2

bed properties is of concern in terms of access to the housing market for low income households.

- 3.38 Based on the 'occupancy rating' which identifies that there are 2 or more rooms or bedrooms than are 'required' by households, 69% of all households are under-occupying by rooms and 53% by bedrooms. Whilst this data is not yet available from the 2011 Census, 63% of pensioner households were underoccupying in relation to bedrooms in 2001. These rates are well above the regional and national averages which is unsurprising in view of the proportionately larger older population in the area.
- 3.39 It is estimated that 3% of all households are overcrowded, a much lower rate than regional or national averages, which implies a good supply of family housing.
- 3.40 Second and holiday homes can be sensitive issues. Currently 2,387 people have second homes in the district as whole, 6.9% of the total, and an increase from 4.44% in 2001.
- 3.41 The area had a very high vacancy rate of 17% of household spaces at the time of the 2011 Census although many are likely to be second or holiday homes and further Census data is required to confirm discreet second and holiday home and vacancy rates.
- 3.42 Across the district, 760 new homes were completed between 2002 and 2012 at an average of 76 per annum. This compares closely with an estimated requirement from the 2008 NP SHMA for an average of 194 new homes annually.
- 3.43 Additions to the affordable housing stock between 2006 and 2012 amounted to 15% of new homes in West Somerset. Data on affordable completions across the area since 2001-02 indicates that 53% were social rented and the remainder were intermediate housing, including intermediate rent and shared ownership.

The private rented sector

- 3.44 The private rented sector now provides 16% of homes in the area, slightly less than across the district. Applying a typical turnover rate of 30%, it now provides an estimated supply in the region of 175 lettings per year, three times the contribution of the social rented sector.
- 3.45 Monitoring over a 'snapshot' two month period identified an average of 40 properties advertised at any one time, whose profile is mainly very different from the overall stock. One in 8 were flats or apartments which is much higher than a total stock of 8%; over one third were detached homes which is lower than a stock of 48%; one in four were terraced, which is below the stock

average of 16%; over one third were semi-detached compared with a stock of 28% and one in 8 were bungalows.

- 3.46 The growth of the private rented sector has good and bad points. It has been important in extending flexibility and choice, and in maintaining a supply of housing when turnover has reduced in the home ownership and social rented sectors. However, homes purchased by investors are likely to be those accessible to first time buyers which has the effect of further excluding them from the market and placing an upward pressure on lower value prices.
- 3.47 Valuation Office Agency data for the district 2012-13 identified that 2 bed properties or smaller made up over half of properties on which a rent determination was made; 36% were 3 bed and 9% were 4 bed. Such a breakdown mirrors the breakdown of rented homes advertised by property type. In the context of the application of the Local Housing Allowance shared accommodation rate to all single people under 35 years old, only 4% of properties were shared or bedsit accommodation.
- 3.48 Overall, the private rented sector is more able to meet the requirements of both single people and couples - whose numbers will continue to increase - and smaller family households.

The home ownership sector

- 3.49 Annual average prices fell after April 2009 and have still not recovered to that level. Detached properties made up almost 51% of sales in 2011-12 which is close to the stock average; semi-detached homes 21% which is below the stock average; terraced houses made up 22% which is above the stock average, and flats and apartments only 6% - which is below the stock average. The figure for flats and apartments reflects the difficulty first time buyers are experiencing in entering the housing market. Towns are generally cheaper than rural areas but there are major house price hotspots in deep rural locations especially in the Exmoor National Park area.
- 3.51 Overall, as most sales are of houses, the home ownership sector is currently more effective in meeting the requirements of families and is less effective for singles and couples, demand from whom will continue to increase.

The intermediate housing sector

- 3.52 The intermediate housing sector makes a negligible contribution to the housing stock and supply and, despite the emphasis placed on its development in recent years, it has failed to take root in the housing system. Only 9 properties or 0.3% of the total stock were recorded as shared ownership in 2011 and even if a 5% turnover rate is applied, no more than one home would become available every other year.

The social rented sector

- 3.53 There are currently 586 social rented properties recorded across the area, 16% of all stock.
- 3.54 As a result of turnover, an average of 59 social rented properties are available across the area each year, typically 19% are 1 bed; 59% are 2 bed, 23% are 3 bed and none are 4 bed or larger.
- 3..55 In common with the private rented sector, the requirements of singles, couples and smaller family households are more likely to be met by the social rented sector.

The supply of housing

- 3.56 By considering turnover by tenure, the pre-eminent role of the private rented sector becomes apparent. It is estimated that it now supplies 45% of all supply compared with 40% from home ownership and 15% from the social sector.

4. The Need and Demand for Housing

Introduction

4.1 This chapter reviews evidence of the need and demand for housing with the emphasis on affordable housing. Whilst it is recognised that Homefinder Somerset data may underestimate the underlying level of housing need, it provides the only comprehensive and consistent data identifying patterns of need. It is further recognised that in a high demand area, many people may be deterred from applying. The primary data sources used in this section are:

- Homefinder Somerset in relation to social housing applications, advertisements and lettings; and
- Core in relation to social housing lettings and intermediate housing sales.

4.2 Since December 2008, affordable housing providers in the district have participated in Homefinder Somerset, a choice based lettings scheme. The following 5 Priority Bands are applied to applicants as follows:

Emergency Priority Housing Need

The following are examples of the type of situations that would qualify:

- urgent medical assessment;
- urgent housing defect; and
- to escape violence or threat of violence, serious harassment or a traumatic.

Gold Band: High Housing Need

The following are examples of the type of situations that would qualify:

- statutorily homeless households;
- overcrowded lacking 2 or more bedrooms;
- under-occupying by 2 or more bedrooms;
- a high medical priority; and
- a Category 1 housing defect.

Silver Band: Medium Housing Need

The following are examples of the type of situations that would qualify:

- overcrowded lacking 1 bedroom;
- medium medical priority; and
- moves for work.

Bronze Band: Low or No Housing Need

This will normally include applicants who live in a property that is adequate to meet their housing needs, the following are examples of the type of situations that would qualify:

- low medical priority;
- applicants awaiting a move on confirmation.

Full details of the scheme can be found at:

<http://www.homefindersomerset.co.uk/Data/ASPPages/1/30.aspx>

The need for affordable housing

- 4.3 It is normal practice, and now a government requirement for eligibility for Housing Benefit, to 'fully occupy' properties, i.e. to allocate properties by bedsize according to applicants' household size and composition with no spare bedroom available. In general, this will mean that a 1 bed property will be allocated to a single person or a couple; a two bedroom property to a lone parent/couple and 1 or 2 children dependent on age and sex; a three bedroom property to a lone parent/couple and 2 or 3 children dependent on age and sex and a four bedroom property to a lone parent/couple and 3-5 children dependent on age and sex. The following table shows the distribution of applicants for social housing in the West Somerset ENP area according to priority band, and by the number of bedrooms required.

Table 4.1: applicants in the West Somerset ENP by priority band and number of bedrooms required, September 2013

Priority Band	No. of bedrooms required	No. of applicants	%
Gold	1	22	-
	2	5	-
	3	1	-
	4	1	-
	<i>Sub-total</i>	29	16.9
Silver	1	39	-
	2	13	-
	3	5	-
	4	1	-
	<i>Sub-total</i>	58	33.7
Bronze	1	46	-
	2	29	-
	3	9	-
	4	1	-
	<i>Sub-total</i>	85	49.4
All	Total	172	100.0

(Source: Homefinder Somerset)

Key findings:

- Just over 1 in 6, 16.9%, applicants are categorised as ‘gold’ (in high housing need); a third, 33.7%, are ‘silver’ (medium housing need); and almost half, 49.4%, are ‘bronze’ (low housing need).
- It is interesting to note that, based on data collected from the Rural Housing project, the Rural housing Enabler has estimated that, at October 2013, there were 90 households in housing need across parishes in the area Rural Housing Project. This compares closely with 87 households recorded as in the Gold or Silver priority bands at September 2013.
- From a total of 172 applicants:
 - 107 are registered as requiring a 1 bedroom property, representing 62.2% of all applicants;
 - 47 applicants, 27.3%, require 2 bedrooms; and
 - the remaining 18 applicants require 3 or 4 bedrooms.

4.4 The table below profiles all registered applicants by age of the lead applicant.

Table 4.2: applicants in the West Somerset ENP area by age of lead household member, September 2013

Age of lead household member	No. of applicants	%
17-21	8	4.7
21-29	24	14.0
30-39	25	14.5
40-59	56	32.5
60+	59	34.3
Total	172	100.0

(Source: Homefinder Somerset)

Key findings:

- Just over a third of all applicants (34.3%) were aged 60 and over; those aged 40-59 were the next largest age group, representing 32.5% of all applicants.

4.5 In the following table, analysis by bedsize required of the number of applicants and the annual supply of properties gives a ratio which denotes the average number of years to house all applicants (that is, the time taken to obtain a tenancy according to the number of bedrooms required).

Table 4.3: number of years to house all applicants registered for social housing in the West Somerset ENP area by bedsize required, September 2013

Bedsize	No. of applicants	Annual supply	Years to house all applicants (no. of applicants/annual supply)
1	107	11	9.7
2	47	34	1.4
3	15	13	1.6
4	3	0	Infinite
5+	0	0	-
Total	172	58	3.0 (average)

(Source: Homefinder Somerset)

Key findings:

- Although there are only very low numbers of applicants, no annual supply of 4 bedroom properties means that the ratio of applicants to bedsize was effectively infinite.
- The next highest number of years to house all registered applicants was for 1 bed properties (almost 10 years); and
- With the exceptions of those requiring 4 bedroom properties, it would take a minimum of 3 years to clear all the backlog of demand in the Exmoor National Park area.

4.6 Information was not available relating to the numbers of bids per property advertised within the Exmoor National Park area. As a useful substitute for this measure, the following table shows all accepted offers through Homefinder Somerset in the ENP area according to size of household and priority band. In conjunction with the table above, this allows a picture to begin to emerge of the match =- or mismatch - between supply and demand.

Table 4.4: accepted offers in the Exmoor National Park area by priority band and household size of applicant, 5th December 2008-10th September 2013

No. of people in household	Priority Band			Total
	Gold	Silver	Bronze	
1	17	18	5	40
2	11	29	8	48
3	3	22	6	31
4	3	18	3	24
5	3	6	2	11
6	0	1	1	2
Total	37	94	25	156

(Source: Homefinder Somerset)

Key findings:

- From 5th December 2008 to 10th September 2013, a total of 156 offers of housing were accepted by applicants through Homefinder Somerset.
- The most common household size in terms of offers accepted over the period is 2 people, which accounted for 30.8% of all accepted offers; the next most common household size was 1 person households, making up 25.6% of all offers accepted
- 3 and 4 person households, when combined, accounted for 35.3% of all accepted offers, whilst just 13 (8.3%) of accepted offers were by households with 5 or more people.
- It is interesting to note that 1 and 2 person households made up over half of all accepted offers, yet only 19% of advertised properties had 1 bedroom.

Homelessness and rough sleeping

4.7 The following table identifies the pattern of households accepted as homeless and in Priority Need since 2001-02 across the West Somerset DC area.

Table 4.5: homeless accepted and in Priority Need, 2001-2011

2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
102	129	83	108	62	29	43	18	34	31

(Source: HSSA Returns, Table 784 and Table 627 Local Authorities Actions under Homeless Provisions of the Housing Acts CLG website <http://www.communities.gov.uk/corporate/>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- From a peak of 129 households in 2002-03, acceptances have fallen steadily to 2008-09 but have shown an increase to 31 in 2010-11 which is likely to be associated with economic recession and associated increases in repossessions and redundancy, etc.

4.8 The most recent rough sleeping count undertaken in autumn 2011 identified no rough sleepers across West Somerset.

The need for specialised housing

4.9 This data was only available at west Somerset DC level, the following table profiles applicants requiring special accommodation, categories are not mutually exclusive.

Table 4.6: applicants requiring adapted housing or housing with support, 30th June 2012

Requirement	Type of accommodation	Number
Housing with support	Extra care housing	3
	Housing with a support worker	10
	Sheltered housing	59
Adapted housing	Housing adapted for a physical disability	63
	Housing adapted for wheelchair use	11

(Source: Homefinder Somerset data)

Key findings:

- Just over 70 applicants identified special requirements, mostly for sheltered or adapted housing. The availability of appropriate accommodation could well free up other housing stock, especially larger family dwellings, to meet wider needs

Who is being housed in the intermediate housing sector?

4.10 This section considers who is being housed in the intermediate housing sector in the West Somerset DC area, data is only available at local authority level. There were 10 sales, typically of shared ownership or HomeBuy properties in 2006-07, 2009-10 and 2011-12. The first dimension considered is the type of households being housed then their net weekly incomes.

Table 4.7: sales by type of household, April-March, 2006-07, 2009-10 and 2011-12

Household type	Numbers
Single adult	3
Multi-adult no children (typically couples)	3
Multi-adult + children (families)	4
Lone parents	0
Older people (not included above)	0
Total	10

(Source: Core)

Key findings:

- The data available is limited but identifies that shared ownership housing is working more effectively for single adults, couples and multi-adult households with. This almost certainly reflects the type of housing provided.

- Despite the potential for ‘downsizing’ and the existence of a designated scheme, no older people were housed in this way.

Incomes of purchasers

4.11 Incomes data is recorded for single income purchasers (Person 1) or joint purchasers (Person 1 and Person 2) as appropriate. The following table reviews average gross annual income by type of households, and includes joint income purchasers. This may be all or partly from benefits/pensions but not including child benefit, housing benefit, council tax benefit or interest from savings. The incomes distribution is compared with median gross annual incomes from full-time employment recorded in 2011 by the Annual Survey of Hours and Employment.

Table 4.8: sales by average gross annual income of Person 1 and 2 combined, April-March, 2006-07, 2009-10 and 2011-12, and median gross annual incomes from full-time employment, 2012

Income band	Numbers
Under £7.5k	0
£7.5-9,999	1
£10-13,999	1
£14-17,999	1
£18-21,999	3
£22-29,999	3
£30-39,999	1
£40k+	0
Total	10
Median full-time gross earnings 2012	£17,612

(Source: Core and ASHE 2012)

Key findings:

- 60% of purchasers earned £18-29,999 which is in excess of median gross incomes from full-time work of £17,612 in West Somerset. However, as explained at paragraph 2.11-2.12 above, ASHE data relates to earnings from employment only and the relatively high proportion of self-employed people (estimated to be in the region of 27%) are likely to have lower earnings in the region of £12,830 per annum.

4.12 The following table reviews sales by previous tenure, data is provided for person 1 only.

Table 4.9: sales by previous tenure of Person 1, April-March, 2006-07, 2009-10 and 2011-12

Previous tenure	Numbers
Social rented	2
Private rented	4
Tied home/renting with job	0
Owning/buying	0
Family/friends	3
Temporary	0
Other	1
Total	10

(Source: Core)

Key findings:

- 40% of purchasers were previously renting privately and 30% living with family or friends. It can be assumed that such households were renting whilst saving money for their first purchase; and
- only 2 people were previously renting from a local authority/housing association which implies that generally such households are unable to make the step to affording shared ownership. This is unsurprising in view of the low incomes recorded for social tenants.

Determining the affordability of housing

4.13 There are two main approaches to determining the affordability of housing:

1. The residual income approach which calculates how much income is left over for housing after relevant living expenses have been taken into account for different household types. If there is insufficient income left for housing costs, a household has an affordability problem. This approach requires calculations to be made for a very wide variety of household types and income levels and is more appropriate for middle to higher income groups.
2. The second approach involves setting an affordability threshold or benchmark which identifies the maximum proportion of a household's gross or net income which should be spent on housing costs. This is a straightforward approach which is considered more appropriate for lower to middle income groups.

4.14 In both cases, particular mention should be made of the disadvantaged position of families with children as their additional living expenses constrain what they can afford to spend on housing, including their ability to borrow to purchase market housing. An assessment of this can be obtained by

consulting Equivalence Scales, see Table 2, University of York, Social Policy Research Unit's Minimum Income Standards paper:

http://www.crsp.ac.uk/MIS/downloads/launch/equivalence_WP3_20june08.pdf

4.15 In view of the complexity of developing a generic model capable of calculating residual incomes, an affordability threshold approach has been applied but there is no consensus over the affordability level to be adopted. For example:

- The National Housing Federation (NHF), the representative body for housing associations, had previously recommended rent levels were affordable when they were 25% or less of gross household income for new tenant households in work, equivalent to 34% of net income.
- The Homes and Communities Agency (HCA), the funding body for new affordable housing, recommended that 30 - 45% of net income is the acceptable range for housing costs. (Capital Funding Guide, HCA, 2011), please see: <http://cfg.homesandcommunities.co.uk/>
- The CLG whose assessment of affordability for intermediate housing is that a household should use a maximum of 25% of gross income to pay for their mortgage and rent (Strategic Housing Market Assessment Practice Guide, 2007), please see: http://www.communities.gov.uk/publications/planningandbuilding/strategic_housingmarket
- The Mayor of London: the London Plan states that for products where a rent is paid, the annual housing costs, including rent and service charge, should be no greater than 40% of net household income (London Plan Annual Monitoring Report, February 2011), please see: <http://www.london.gov.uk/priorities/planning/research-reports/annual-monitoring-reports>
- Tenant referencing agencies provide affordability checks for private landlords. Based on experience and historic levels of rent defaults the standard level of rent to gross income acceptable to private landlords is 40%.
- A major review of data sources undertaken in 2010 concluded that a household can be considered able to afford market renting where the rent payable is up to 25 per cent of their gross household income. The 'rent payable' figure is defined as the entire rent due, even if it is partially or entirely met by housing benefit. Other housing-related costs, such as council tax and utility bills should not be included (Measuring Housing Affordability: A Review of Data Sources, CCHPR, 2010), please see: <http://www.communities.gov.uk/documents/507390/pdf/1098230.pdf>

- Finally, ‘the 30/40 rule’ has been developed in Australia which takes 30% of gross income committed to housing costs as the benchmark and applies this either to all households or to the lower 40% of households by income.

4.16 Based on the above, and Housing Vision’s experience in housing market and affordability assessment, a baseline affordability threshold has been applied that the percentage of household income that can sustainably be spent on housing costs should be no more than 25% of gross household income which is equivalent to 34% of net household income where net income is assumed to constitute 74% of gross.

4.17 The secondary incomes data available to enable affordability modelling is extremely limited and consists of the following:

1. Data from the Annual Survey of Hours and Earnings (ASHE)

This data identifies the gross weekly pay of full-time workers at mean and median levels and for each 10th percentile of the income range by local authority area and is produced annually.

2. Published data for social rentals from CORE

This data identifies the net weekly income of tenants/purchasers or tenant/purchaser and partner, excluding child benefit, housing benefit, council tax benefit or interest from savings, for lettings/sales by bedsize and household type by local authority area, and is produced annually.

3. Published data for intermediate sales from CORE

This data identifies the net weekly income of tenants/purchasers or tenant/purchaser and partner, excluding child benefit, housing benefit, council tax benefit or interest from savings, for lettings/sales by bedsize and household type by local authority area, and is produced annually.

4. Data from CACI PayCheck Profiles

This data source identifies gross household incomes across 21 income bands to £100k+ and the mean and median income band and is produced annually. The data needs to be commissioned commercially but is especially useful for bespoke sub-areas below local authority level.

4.18 Each secondary data source has different characteristics as summarised in the following table. Almost all have serious limitations

Table 4.10: characteristics of secondary incomes data sources

<i>Characteristics</i>	<i>ASHE</i>	<i>CORE rental</i>	<i>CORE sales</i>	<i>CACI PayCheck</i>
Application/limitation	Only for those in paid employment (by gender)	Only for tenants and partners (if applicable)	Only for purchasers (persons 1 - and 2 if applicable)	For all households
Household type	Individual earners only	Single adult/multi-adult with/without children/ lone parent/older people	Single adult/multi-adult with/without children/ lone parent/older people	Yes
Geography	Local authority	Local authority	Local authority	Local authority/postcode sector/bespoke area
Sources of income	Earned only	All or partly from benefits/pensions for local authority and/or housing association tenants as appropriate *1	Earned and includes benefits, except housing and council tax, excludes income through investments	All
Gross/net	Gross weekly	Net weekly	Gross annual	Gross annual
Incomes structure	Mean, median and number of workers for every 10 th percentile	Mean	Mean	Mean, median, number and percentage of households for each of 21 income bands to £100k+
Full/part-time	Full and part-time	Not specified	Not specified	Not known
Cost	Free of charge	Free of charge	Free of charge	Commercial rates
Source (see below)	NOMIS web-based	CORE web-based	CORE web-based	By commission

Notes: *1 but not including child benefit, housing benefit, council tax benefit or interest from savings

Relevant web links

ASHE/NOMIS: Available through 'Advanced Query' at: <https://www.nomisweb.co.uk/Default.asp>
 CORE: Available through 'Analyse CORE data/Interactive reports - Advanced analysis' (see Appendix 1) at: <https://core.tenantservicesauthority.org/AnalyseCOREdataMain.asp>
 CACI: Further information available at: <http://www.caci.co.uk/paycheck.aspx>

4.19 The 'HMA and Housing Requirements' Toolkit has been used to assess affordability using the following secondary data sources:

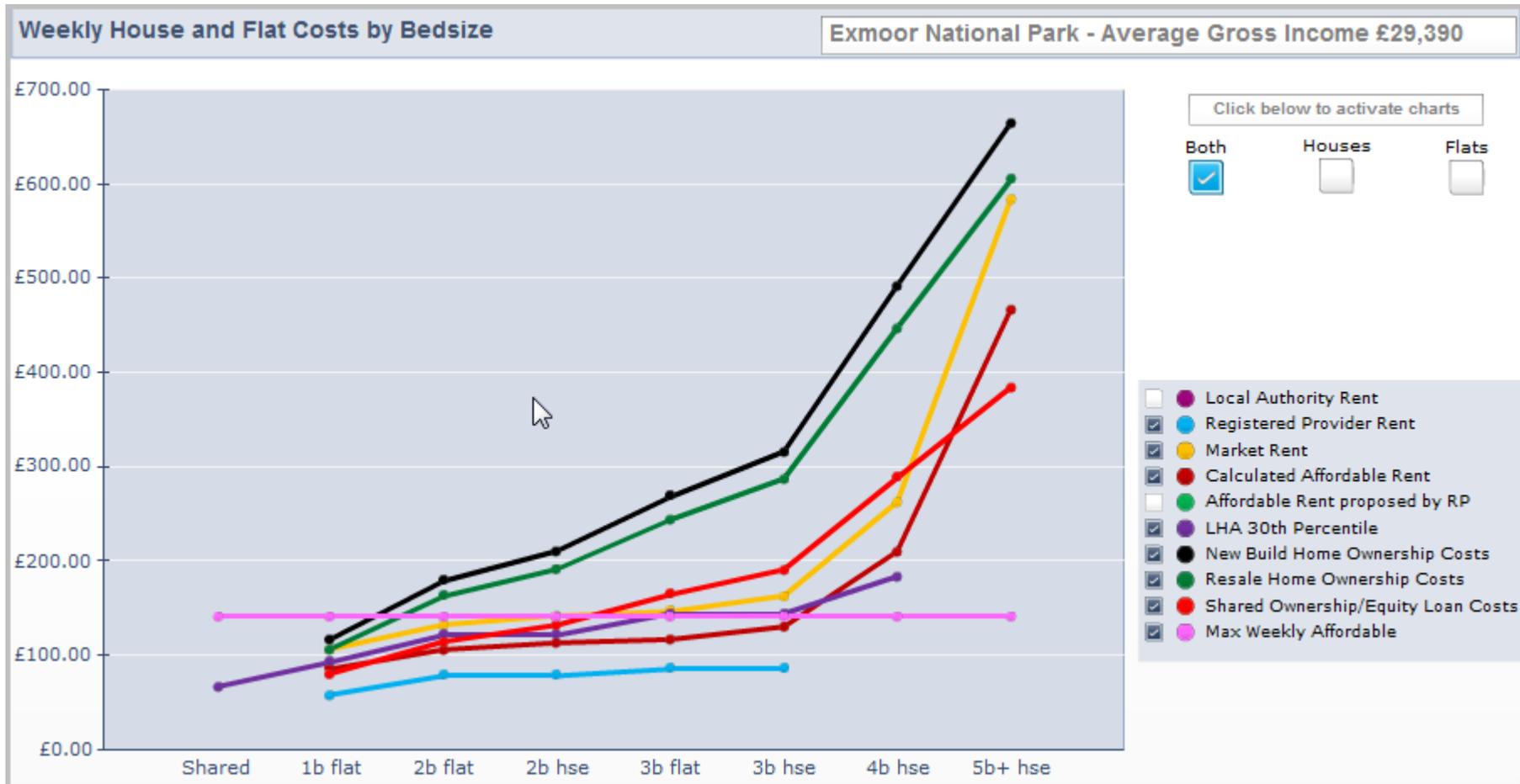
- gross household income levels determined by CACI PayCheck profiles;
- rents and sales prices by property type and bed size;
- for shared ownership/equity loan, the share purchased, deposit, interest rate and period, the rental element and service charge; and
- for home ownership, the deposit, loan interest rate and period.

4.20 The process applied is as follows.

1. The Toolkit applies a 25% gross/34% net affordability threshold to a profile of gross household incomes to identify the proportion of households that can afford the same entry level property for all tenures from social renting to new build home ownership, and including Affordable Rented properties.
2. The entry level property type applied is a 2 bed house which is suitable to meeting the typical requirements of new or additional households, the majority of which are small.
3. The cost of accessing this property for all tenures is compared against the maximum housing costs available to households using the affordability threshold. The output is a hierarchy of affordability from those who can only afford social rented housing to the additional percentages who can afford other options.
4. All tenures are included and Affordable Rent has been treated as a full cost market product though access to Housing Benefit may make it more accessible to lower income groups.
5. It is not possible to assess with any accuracy how many households on the incomes profile will be in receipt of sufficient Housing Benefit to be able to afford Affordable Rent but it does indicate the level of household income required to access an Affordable Rented product.
6. Private rent has been separately identified as it now constitutes a major element of housing supply, though in terms of new housing required, this is likely to be provided by the home ownership sector then transferred to the private rental sector.

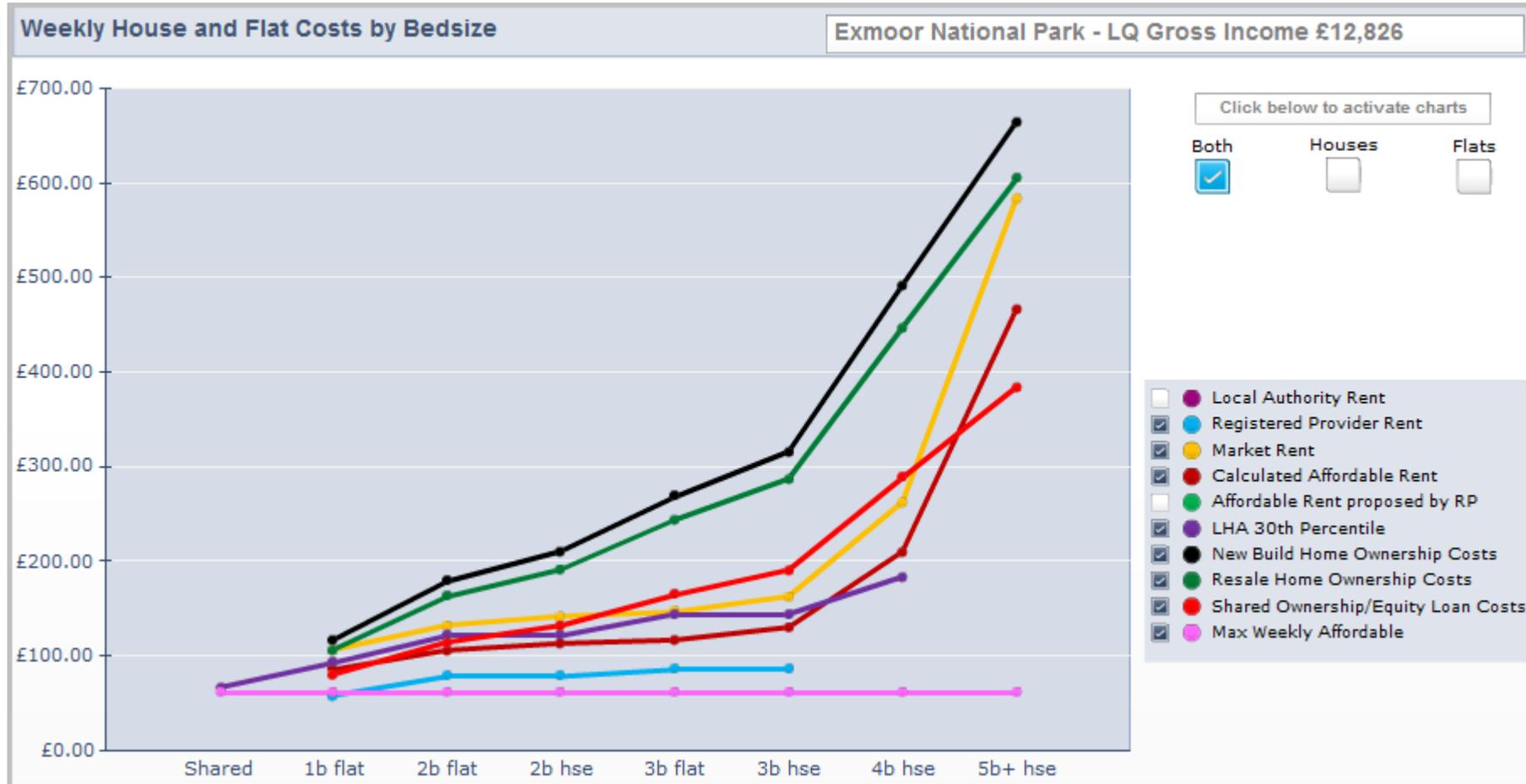
4.21 The following charts are taken from the Toolkit and demonstrate the extent to which housing options in the ENP area of West Somerset are affordable to those in receipt of either average or lower quartile gross incomes applying an affordability threshold of 25% of gross or 34% of net household income. Only those properties below the maximum weekly affordable threshold shown (in pink) are affordable, no account has been taken of Housing Benefit support.

Fig 4.1: the affordability of housing in the Exmoor National Park in West Somerset for households in receipt of the average gross household income of £29,390



(Source: Exmoor National Park in West Somerset Affordability and Housing Options Toolkit)

Fig 4.2: the affordability of housing in the Exmoor National Park in West Somerset for households in receipt of lower quartile gross household incomes of £12,826





SHMA: ENP in West Somerset Update

(Source: Exmoor National Park in West Somerset Affordability and Housing Options Toolkit)

Key findings:

- For those in receipt of average incomes without housing support, only the following properties are affordable:
 - social rent: all flats and houses;
 - Affordable Rent: 1 to 3 bed flats and houses;
 - market rent: 1 to 2 bed flats;
 - shared ownership: 1 to 2 bed flats and 2 bed houses;
 - re-sale home ownership: 1 bed flats; and
 - new-build home ownership: 1 bed flats.
- For those in receipt of lower quartile incomes only 1 bed social rented flats properties are affordable without housing support.

The impact of housing and welfare reforms

- 4.22 The government's housing and welfare reform will have a profound effect on access to housing in the affordable and private rented sectors. Assessments are currently underway in both districts, including by registered providers, to assess their precise impact but their potential extent can be determined on the basis of the numbers of claimants in receipt of relevant benefits. The subsequent table summarises the main reforms of relevance and identifies the sector, the type of people affected and their likely impact.
- 4.23 In relation to Housing Benefit, at February 2013 DWP local authority-based Statistics recorded that:
- there were 2,971 claimants across West Somerset or 19% of all households, 1,699 in the social rented sector and 1,270 in the private rented sector; and
 - over the year 2011-2012, Core recorded that 54% of all new tenants were eligible for Housing Benefit.
- 4.24 In relation to Council Tax Benefit:
- there were 3,600 claimants or 23% of all households.
- 4.25 There were 2,600 claimants in receipt of both Housing Benefit and Council Tax benefits or 17% of all households.

Table 4.11: the impact of current and proposed housing and welfare reforms

Date	Change	Housing sector	People affected	Impact
01.04.11	Reduction in Local Housing Allowance (LHA) rates from 50 th to the 30 th percentile. Abolition of the higher rate for 5 bed or larger properties.	Private rented	All in receipt of LHA	Reduction in the number of eligible properties – increased demand for lower cost properties.
01.01.12	LHA shared room rate for under 25s extended to 25-34 year olds	Private rented	Under 35s	Reduction in the size of eligible properties – greater demand for shared housing.
01.04.13	Council Tax (CT) Benefit abolished and replaced with a localised scheme funded from a fixed non-ring fenced grant payment.	All	Working age applicants	Unknown. The replacement scheme will be at the discretion of local authorities. Overall, CT benefit expenditure is to be reduced by 10%.
01.04.13	LHA rates to be uplifted on the basis of Consumer Price Index (CPI) rather than by reference to local rents.	Private rented	All in receipt of LHA	If rents increase at a rate above CPI then there will be a reduction in the number of eligible properties.
2012-13	LHA rates will be frozen (rates will be based on March 2012 figures)	Private rented	All in receipt of LHA	If rents increase at all, then there will be a reduction in the number of eligible properties.
01.04.13	Housing Benefit (HB) restrictions - Social Housing - Working Age. Size restrictions will be introduced for working age tenants on HB in the social sector. Customers who have one spare bedroom will experience a 14% reduction in the rent allowed for HB. Those with two or more spare bedrooms will see a 25% reduction in the rent allowed for calculating HB.	Social rented	Working age applicants	Greater pressure is likely to be placed on the demand for smaller homes.

Date	Change	Housing sector	People affected	Impact
01.04.13	<p>Household Benefit Cap. There will be a total maximum amount that can be claimed in all benefits for working age non-working families. It is proposed that the threshold will be set at the median net earnings for working age households:</p> <p>£500 per week (£26,000 p.a.) for a couple and lone parent households</p> <p>A lower rate of £350 per week will apply for single adult households.</p>	Social rented	Working age applicants	This is likely to have the greatest impact on larger families living in larger homes which attract the highest rentals.
01.04.13	<p>Community Care Grants and Crisis Loans for living expenses (Part of the Discretionary Social Fund) will be abolished and replaced with a locally-based non-ring fenced provision. There will be no new duties on local authorities to provide the new assistance.</p>	All	All in receipt of emergency loans	Unknown, emergency provision will be at the discretion of local authorities.
2013	<p>Introduction of Universal Credit (UC). The aim of UC is to simplify the benefits system by bringing together a range of working-age benefits into a single streamlined payment.</p> <p>Payments will go to one member of the household, although it will be the whole household that claims.</p> <p>Payments will be calendar monthly and paid in arrears.</p> <p>Payments to go direct to the tenant unless vulnerable.</p>	All	<p>All in receipt of</p> <ul style="list-style-type: none"> • Income related Job Seeker's Allowance • Income related Employment & Support Allowance • Income Support • Child Tax Credits • Working Tax Credits • Housing Benefit 	Unknown.

Executive summary

What is the current pattern of need and demand for social rented housing?

- 4.26 Homefinder Somerset data provides comprehensive data identifying patterns and trends in the need for housing. At September 2013, there were 172 registered applicants, 17% of whom were in the Gold high housing need band.
- 4.27 35% of people were registered for a 1 bed property and 27% for a 2 bed property. Other than matching requirement or preference, there may be a number of reasons why applicants register for smaller properties, including the greater likelihood of obtaining a tenancy. Care must also be taken in interpreting the figure of only 11% registering for a 3 bed and 4% for a larger home as indicative of low need or lesser preference when lack of supply may act as a disincentive to registering for homes of this size.
- 4.28 From a peak of 129 households in 2002-03, homeless acceptances across the district fell steadily to 2009-10 but the trend reversed slightly in 2010-11 which is likely to be associated with the impact of the economic recession and associated increases in repossessions and redundancy etc. It is anticipated that this trend is likely to continue.
- 4.29 Just over 70 applicants across the district identified special requirements, mostly for sheltered or adapted accommodation. The availability of appropriate accommodation could free up other stock, especially larger family dwellings, to meet wider housing needs.
- 4.30 On the basis of current turnover, it would take a minimum of 3 years to clear the backlog of demand for any property type; 10 years for 1 bed properties; 1 year for 2 bed and 2 years for 3 bed. However, it is not possible to estimate the time required to house those requiring 4 bed properties as there has been no recent supply.
- 4.31 Data on acceptances by household type identified that 26% consisted of 1 person; 31% of 2 people; 35% of 3 or 4 people and 7% of 5 people or more.

What is the current pattern of need and demand for intermediate housing?

- 4.32 Based on very limited district-wide sales data from 2006 to 2012, and almost certainly reflecting the type of stock available, the intermediate sector was most successful in housing single people, couples and two parent families. No lone parents or older people were housed in this sector.
- 4.33 60% of purchasers earned £18-29,999 - which is in excess of median gross incomes from full-time work of £17,612.

- 4.34 This very limited information suggests that the intermediate housing sector is more successful in housing people who were previously renting privately or living with family or friends. Only 2 people were previously renting from a local authority or housing association, indicating a lack of access to this type of product by that applicant.

What is the pattern of affordability?

- 4.35 Applying an affordability threshold of 25% of gross equivalent to 34% of net household income, a range of housing and tenures is affordable for those on average incomes but the only housing affordable for those on lower quartile incomes without housing support is one bed social rented flats.

The impact of housing and welfare reforms

- 4.36 Whilst the precise impact is still to be determined, the government's housing and welfare reform will have a profound effect on access to housing in the affordable and private rented sectors, limiting choice and households to housing by bedroom requirement. Those most affected are of working age, especially young single people under 35, and in receipt of Council Tax or Housing Benefit. Some indication of the potential extent of the impact of the reforms across the district can be gauged from the number of people claiming Housing Benefit. There are currently almost 3,000 claimants, 1,700 in the social sector and 1,270 in the private rented sector; and there were 3,600 claimants for Council Tax Benefit, almost one quarter of all households.

5. Determining Future Housing Requirements

Introduction

- 5.1 This chapter explains the approach adopted in determining future housing requirements for West Somerset, the detailed requirements are set out by tenure and bed size in the subsequent chapter providing Conclusions and Recommendations. The operation of housing markets is like a complex version of ‘musical chairs’ as people move between homes and sectors within the limits of the supply available. This process can be likened to a ‘zero sum’ game whereby a home becoming available through a household dissolving or moving home is matched by a home taken elsewhere by a forming or moving household. However, it is rare for housing markets to be in perfect balance such that all moves are internal to the market and static supply meets fixed demand. In the real world, populations change, increase or decrease; people move in and out of areas - not always in balance; some areas may be more or less popular and the ‘fit’ between people’s requirements and the housing available may be poor, homes may be too large or too small, or just too expensive.
- 5.2 These are the dynamics against which future housing requirements are determined. All households have to fit around the housing available, but where projections indicate that numbers are set to grow, additional housing provision needs to be planned for on the basis of household type, size, age and income, all of which will shape their requirements.

Confidence and certainty in determining housing requirements

- 5.3 We have experienced a unique coincidence of economic and financial problems, the outcome of which has still not fully played out. Turnover and home moves had reduced dramatically and property prices fallen, but these trends began to reverse over the course of 2013. There is growing evidence of the growth of two or even three generation households which – if they persist - would impact on housing requirements. The consequences of the economic and financial situation for households, housing markets and housing projections are uncertain.
- 5.4 In summary, we can be confident that we have the evidence to demonstrate that household numbers and housing requirements will grow, but in current circumstances, we cannot be certain of the precise pattern of growth and its housing consequences.

Applying the Exmoor National Park in West Somerset HMA and Housing Requirements Toolkit

- 5.6 This Update adopts a new approach to determining housing requirements. It moves away from static or scenario-based analyses by applying an interactive

Toolkit developed by Housing Vision to identify the requirements of new or additional households and enable them to be constantly modelled and monitored. The structure of the Toolkit is explained below, and guidance on its application is available through a separate User Manual.

5.7 The key principles are as follows:

- The Toolkit applies local data for household projections, incomes and housing costs to identify the basic housing requirements of households, i.e., the bedrooms required by size and composition of household; it does not assume the provision of 'spare' bedrooms. This is not to advocate the minimal provision of bedrooms and the provision of additional bedrooms can be modelled as preferred.
- the Toolkit allows any housing backlog from any sector to be included and its reduction to be modelled over any policy period;
- it estimates levels of under-occupation in older (65+) households and projects potential requirements for specialised housing for all older and projected additional older households.

The structure of the toolkit

5.8 The toolkit consists of 5 sections, each of which represents a stage in assessing the housing required to meet household growth as follows:

- **Household projections:** for any two years, this identifies the number of households by type and age, and changes between the start and finish years chosen in terms of absolute and proportionate change. A final table on the Households page identifies whether there is growth (red) or decline (green) in any household type and the outcome in terms of projected growth in households by type and age over the selected period.
- **Housing supply:** this enables constant monitoring of the local housing stock and housing supply as the context for understanding future housing requirements.
- **Housing costs and affordability:** this determines the cost of housing of different types, bedsizes and tenures, the income required to afford housing of different types and applies an affordability threshold to determine the proportion of households who are able to afford housing by tenure. Further detail of the approach to determining affordability has been provided at para 4.39 above.
- **Housing requirements:** the future housing requirements arising from new or additional households by bed size and tenure are derived by combining household projections with cost and affordability data. There is also the

facility to assess the impact of a backlog in the requirement for affordable housing and of previous under-supply in any tenure.

- **Housing requirements by age:** separate consideration is given to the special housing requirements of all and additional older households in the context of the extent of under-occupation.

5.9 The toolkit is based on two types of data, fixed and variable.

- The fixed data will be constant until it is re-issued, for example, household projections and CACI incomes data although both the household projections and household incomes can be varied by +/- 100% using sliders within the Toolkit.
- The variable data can be input and changed by the user at any time and includes the start and finish years for projections, housing costs, housing supply; bedsize by household type, any affordable housing backlog and estimated levels of under-occupation in 65+ households.

5.10 The following sections explain the stages in assessing the housing requirements of new or additional households in West Somerset.

Components of household projections

5.11 Household projections take account of the effects of a number of factors:

- 'natural change': underpinned by the relationship between births and deaths, and which results in the formation of new households and the ending of existing ones;
- changes affecting existing households: for example relationship breakdown and movements through the life cycle; and finally
- in and out migration: and the relationship between them.

5.12 The CLG methodology for estimating household projections takes account of these factors which are based on the following 17 household types:

1. One person male
2. One person female
3. Other households
4. Couple no children
5. Couple 1 child
6. Lone parent 1 child
7. Couple 2 children
8. Couple and 1 or more adults no children
9. Lone parent 2 children
10. Couple and 1 or more adults 1 child

11. Lone parent 1 or more adults 1 child
12. Couple 3+ children
13. Couple and 1 or more adults 2 children
14. Lone parent 3+ children
15. Lone parent 1 or more adults 2 children
16. Couple and 1 or more adults 3+ children
17. Lone parent 1 or more adults 3+ children

5.13 The differences in many of these household types are very minor, and to make the process more manageable, these have been combined into 7 which match their bedsize/person requirements as set out in the following table. Where there are 2 or more children in a household, the bedroom requirement will be determined according to their age and sex. It is not possible to predict these with accuracy and therefore the minimum bedroom requirement has been assumed in all cases.

Table 5.1: derived household types and associated minimum bedsize

Derived household types	Household type	Bedsizes	Persons	Minimum Bedsize
One person	One person male	0/1	1	1
	One person female	0/1	1	
	Other households	0/1	1	
Couple no children	Couple no children	1	2	1
Couple/lone parent and 1 child	Couple 1 child	2	3	2
	Lone parent 1 child	2	2	
Couple/lone parent and 2 children/couple and 1 or more adults no children	Couple 2 children	2/3	4	2
	Couple and 1 or more adults no children	2/3	3/4	
	Lone parent 2 children	2/3	3/4	
Couple/lone parent and 1 or more adults and 1 child	Couple and 1 or more adults 1 child	3	4/5	3
	Lone parent and 1 or more adults 1 child	3	3/4	
Couple/lone parent and 3+ children/couple/lone parent and 1 or more adults and 2 children	Couple 3+ children	3/4	5/6	3
	Couple and 1 or more adults and 2 children	3/4	5/6	3
	Lone parent and 3+ children	3/4	4/5	
	Lone parent 1 or more adults 2 children	3/4	4/5	
Couple/lone parent and 1 or more adults 3+ children	Couple and 1 or more adults 3+ children	4/5	6/7	4

	Lone parent 1 or more adults 3+ children	4/5	5/6	
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(Source: Housing Vision)

5.14 As a result of this exercise, the 7 derived household types applied in projecting housing requirements are:

- One person
- Couple no children
- Couple/lone parent and 1 child
- Couple/lone parent and 2 children/couple and 1 or more adults no children
- Couple/lone parent and 1 or more adults and 1 child
- Couple/lone parent and 3+ children/ couple/lone parent and 1 or more adults and 2 children
- Couple/lone parent and 1 or more adults 3+ children

Housing supply

5.15 This is the second section of the Toolkit and deals with the housing stock and housing supply. This page identifies the profile of the housing stock by bedsize and tenure and enables this to be continuously updated through stock gains and losses. Please note that shared accommodation can be an entire house, flat or converted building or any of the following:

- bedsits
- shared houses
- households with a lodger
- purpose-built HMOs
- hostels
- guesthouses - if rented out of season
- bed and breakfasts providing accommodation for homeless people
- some types of self-contained flats converted from houses

5.16 Supply information provides a context for understanding the type of housing becoming available for all households, including additional households, they do not inform the modelling of future housing requirements. The annual supply of housing can be modelled by applying a turnover rate, which will vary over time according to supply: demand issues; financial and economic considerations. Due to uncertainty over these factors, it is not possible to project stock turnover with precision but set out below is a list of possible approaches for determining turnover rates:

- For the home ownership sector: turnover is based on the number of properties recorded as sold by the Land Registry in the previous 12 months as a proportion of all owner occupied homes.

- For the shared ownership/equity sector: the home ownership turnover rate has been applied, or recognising the relatively low levels of staircasing to a maximum of 80%, a slightly lower rate can be applied.
- For the private rented sector: the turnover rate is based on the estimate in the English Housing Survey 2011-12 that 32% of private renters had lived in their property for less than one year. A slightly more cautious turnover rate of 30% has been applied here.
- For the social rented sector: turnover is based on the number of properties advertised in the 42 months from 1st January 2009 annualised as a proportion of all stock.

Housing costs and affordability

- 5.17 Using the approach described at para 4.39 above, the Toolkit assesses the affordability of a typical entry level property, the default setting is a 2 bed house which is especially relevant to meeting the typical requirements of additional households, the majority of which are small, and can be considered an 'average' housing type. The cost of accessing this property for all tenures (local authority renting to new build home ownership and including Affordable Rent) is compared against the maximum housing costs available per household. The maximum costs affordable are based on the affordability threshold selected which is in turn determined in relation to the CACI PayCheck household incomes provided. The Toolkit calculates the household incomes required to access each tenure for an archetype 2 bed house and the absolute numbers and percentages of the households on the CACI profile that can afford each tenure. A column at the end of the housing costs inputs section of the Toolkit allows these costs to be changed so that they can reflect other bed sizes and property types as required, for example a 2 bed flat or a 5 bed house.
- 5.18 All tenures have been included in this Update in terms of a hierarchy of affordability. Affordable Rent has been treated as a full cost market product though access to Housing Benefit may make it more accessible to lower income groups. It is not possible to assess with any accuracy how many households on the CACI PayCheck Profile will be in receipt of sufficient Housing Benefit to be able to afford Affordable Rent but it does indicate the level of household income required to access an Affordable Rented product. Private rent has been separately identified as it now constitutes a major element of housing supply, though in terms of new housing required, this is likely to be provided by the home ownership sector then transferred to the private rental sector.
- 5.19 The Toolkit identifies the household income levels required to access each tenure at September 2013 and the proportion of households that can afford them. The following table lists the outcome and provides a hierarchy of

affordability from those who can only afford social rented housing to the cumulative percentages who can afford other options.

Table 5.2: affordability by sector, proportion of households who can afford each sector, Exmoor National Park in West Somerset, June 2013

Sector	Proportion of households
Social rent only	50.44%
Affordable Rent	3.42%
Shared equity/ownership	7.36%
Private rent	13.49%
Owner occupier	25.29%

(Source: Housing Vision, Exmoor National Park in West Somerset Housing Requirements Toolkit)

Key findings:

- The implication of this assessment is that there is:
 - an affordable housing requirement (social rent only) of 50.4%;
 - an intermediate housing requirement (shared equity/ownership and Affordable Rent) of 10.8%; and
 - a market sector requirement (owner occupier and private rent) of 38.8%.

Determining housing requirements

5.20 Before identifying the housing required over the period 2011-2031, a number of factors need to be considered and assumptions made concerning bedsize, backlog and matching surpluses against deficits of housing required.

Additional bedrooms

5.21 The Toolkit identifies the requirements of additional households by number of bedrooms but it is not possible to determine this with precision for households with children as their requirements will be determined by the age and sex of the individual children. No assumptions have been applied in modelling concerning the provision of a spare bedroom which is additional to that required to meet a household's minimum requirement. However, this is not to advocate building housing to the minimum requirement. It is more sustainable to build housing with a spare bedroom, for example to give young families the opportunity to expand or enable older people to have a carer to stay. This is likely to be decided by providers for market housing but, as Housing Benefit is now only available for the number of bedrooms required, the provision of extra bedrooms is not an option in the social sector.

Housing backlog/shortfall

5.22 The Toolkit can also take account of any shortfall or surplus of housing completions in any sector though none has been applied in this case.

Matching deficits and surpluses of housing required

5.23 The final stage is to identify whether there is a deficit or surplus of housing of different bedsizes and tenures. Shared units are the most problematic as they can be of very variable type, ranging from bedsits to hostels. As a result, where a need for shared units has been identified, these have been added to the need for 1 bed housing. Where surpluses of shared housing have been identified as in the Exmoor National Park area with 46 units, these have not been offset against the future need for housing. Where surpluses are identified for larger sized dwellings, they can be offset against shortages of lower sized properties as follows:

- Surpluses of 1 bed units can be set against the need for shared units;
- Surpluses of 2 bed units can be set against the need for 1 bed units;
- Surpluses of 3 bed units can be set against the need for 2 bed units;
- Surpluses of 4 bed units can be set against the need for 3 bed units.
- Surpluses of shared units have not been set against any need as their variable pattern including purpose-built to sub-divided accommodation makes generalisation difficult.

Gross housing requirements by tenure and bedsize

5.24 The following table identifies gross housing requirements by tenure and bedsize for the period 2011-2031.

Table 5.6: projected gross housing requirements for Exmoor National Park in West Somerset 2011-2031

Tenure	Sector	Shared	1 bed	2 bed	3 bed	4+ bed	Total No.	Total %
Affordable	Social Rent	-17	401	22	-51	-1	353	50.44
	Affordable Rent	-2	58	3	-7	0	52	7.36
Intermediate	Shared Ownership	-1	27	1	-3	0	24	3.42
Market	Private Rent	-5	107	6	-14	0	94	13.49
	Owner Occupier	-9	201	11	-26	-1	177	25.29
Total no.	All sectors	-34	794	44	-101	-2	700	100.00
Total %	All sectors	-4.81	113.40	6.23	-14.48	-0.35	100.0	

(Source: Housing Vision, Exmoor National Park in West Somerset Housing Requirements Toolkit)

Key findings:

- Almost all the additional requirement for housing will be for 1 bed accommodation, a total of 794 units including 459 Social and Affordable Rent

units. This is a consequence of the growth in the number of older households aged 65+ over the next 20 years (see Table 5.10 below). There will also be a small requirement for 2 bed and surpluses of 3 and 4 bed properties.

Gross housing requirements by age and bedsize

5.25 The Housing Requirements Toolkit also enables requirements to be expressed by age band and this identifies that most additional requirement will arise from households aged 65+ as identified in the following tables for the period 2011-2031. **Please note:** the proportions in the final column are in relation to the overall requirement for homes, and whilst they sum to 100%, the constituent proportions can be positive or negative where there is a decline in requirements.

Table 5.10: projected gross housing requirements by age and bedsize for Exmoor National Park in West Somerset, 2011-2031

Age	Shared	1 bed	2 bed	3 bed	4+ bed	Total No.	% of total
15-24	-2	-5	6	0	0	-1	-0.19%
25-34	9	-13	1	2	-6	-7	-0.98%
35-44	-5	12	15	-21	1	3	0.38%
45-54	-13	-35	-1	-42	-2	-93	-13.25%
55-59	-5	1	4	-19	1	-18	-2.56%
60-64	-5	30	5	-11	1	19	2.78%
65-74	-8	211	0	-13	0	189	27.06%
75-84	-9	337	6	-2	4	335	47.90%
85+	4	256	7	5	0	272	38.86%
Totals	-34	794	44	-101	-2	700	100.00%

(Source: Housing Vision, Exmoor National Park in West Somerset Housing Requirements Toolkit)

Key findings:

- Almost all the additional requirement for housing will arise from growth in the number of older households aged 65+ over the next 20 years. There will be a consequential decline in the requirement for housing from those aged:
 - 15-24
 - 45-54; and
 - 55-59

5.26 However, that most of the additional requirement for housing will arise from older households has major implications for meeting future housing requirements in Exmoor National Park in West Somerset. Although some growth in older households may be attributed to net migration, most is the result of more older people living longer who are already resident in the area. Most of these households will already be housed, typically in family-sized

accommodation. More robust data determining the extent to which this is the case will be available when 2011 Census data is released, but Census data on under-occupation provides some indication of the extent to which older households live in family housing. In Exmoor National Park in West Somerset, 62.63% of households aged 65+ were under-occupying in 2001. This implies that in the region of 63% of older people are currently living in family housing, a proportion which will apply to those for whom additional - and smaller - housing is projected to be required. If additional older households do not downsize to smaller homes, replacement family housing will be required to maintain existing levels of supply.

- 5.27 The number of older households able and/or willing to downsize is not known with certainty, but on the basis of studies of under-occupation and housing need, it is estimated that this does not currently exceed 10%. Applying estimates of under-occupation, as much as 57% (90% of 63%) of the requirement for housing for older people may need to be provided as family or other housing to replace supply constrained by older people who do not downsize. Whilst the proportion willing to downsize may change, the estimate that 90% of underoccupying older households will not downsize has been applied in modelling the area's future housing requirement with the effect that replacement 3 bed housing will be required to compensate for the loss of supply. With regard to calculating replacement 3 bed housing, we have taken the 65+ 1 bedroom requirement and calculated the proportion of households underoccupying and unwilling to downsize. We have added this figure proportionately to the 15-64 3 bed requirement.

Adjustment of household projections to take account of net migration trends

- 5.28 The base data sources underpinning household projections are CLG 2008-based subnational population and household projections. A key consideration in determining population and associated household projections is trends in net migration. The fundamental question is what levels of net migration should be incorporated into future modelling? ONS Components of Population Change enable projections of net migration to be identified but these are at considerable variance from trends in West Somerset over the past 10 years. 2008-based subnational population projections assumed for West Somerset an average net gain through internal migration of 470 people per annum between 2012 and 2031. This figure compares with an average of 190 people per annum in the 10 years from 2002 to 2012 and an average of only 140 people in the 5 years since 2007.
- 5.29 A 20 year trend-based projection based on the most recent 5 or 10 year trends would substantially lower population projections compared with the 2008-based Components of Population Change – and on which 2008-based household projections are based.

- 5.30 In view of uncertainty over the trajectory of the economy, a more cautious 10 year trend-based projection of net internal migration has been applied which has the following effect on population, household and associated housing projections:
1. Compared with the 2008-based population projections, net migration would be lower for West Somerset, 4,700 according to the 2008-based projection less 1,900 according to the 10 year trend-based projection applied, a reduction of 2,800 people. The Exmoor National Park area in West Somerset represents 23.4% of the district's population, and applying this percentage implies a reduction of 655 people over the 20 years 2011-2031.
 2. This reduction in population of 655 needs to be converted to a household number which can be most reliably achieved by applying the current average household size for the Exmoor National Park area of 2.13. $655/2.13$ identifies a reduction of 308 households over the 20 years 2011-2031 or approximately 15 per annum.
 3. The overall effect of applying a 10 year trend-based projection of net internal migration to household growth in the Exmoor National Park area in West Somerset is a reduction of 308 in net housing requirements over the period 2011-2031.

The projected net requirement for housing in the Exmoor National Park area in West Somerset, 2011-2031

- 5.31 As identified at 5.24 and 5.25 above, the gross housing requirement for the Exmoor National Park area in West Somerset between 2011 and 2031 is for 700 homes. This figure increases to 746 to take account of a projected surplus of 46 shared units which, as explained at 5.23 above has not been offset against the future need for housing. This figure of 746 is then reduced by 308 to take account of the reduction in net internal migration explained at 5.28-5.30 above. The net effect is that there is a projected requirement for 438 homes the period 2011-2031; and a breakdown by bedsize and tenure is provided below.

Table 5.14: projected net housing requirements for the Exmoor National Park area in West Somerset, 2011-2031

Tenure	Sector	Shared	1 bed	2 bed	3 bed	4+ bed	Total No.	Total %
Affordable	Social Rent	0	104	13	104	-1	220	50.44
	Affordable Rent	0	15	2	15	0	32	7.36
Intermediate	Shared Ownership	0	7	1	7	0	15	3.42
Market	Private Rent	0	28	4	28	0	60	13.49
	Owner Occupier	0	52	6	52	0	110	25.29
Total no.	All sectors	0	206	26	206	-1	437	100
Total %	All sectors	0.00	47.14%	5.95%	47.14%	-0.23%	100	

(Source: Housing Vision, Exmoor National Park in West Somerset Housing Requirements Toolkit)

Key findings:

- Rounding by tenure and bedsize generates a total of 437, but there is a net requirement for 438 additional homes in the Exmoor National Park area in West Somerset between 2011 and 2031.
- There is a projected large growth (47%) in the requirement for 1 bed housing; 6% growth in the requirement for 2 bed; 47% growth in the requirement for 3 bed housing and a very small decline in the requirement for 4 bed housing.
- Please note that these projections are based on the application of a minimum bedsize requirement. In view of restrictions imposed on eligibility for Housing Benefit, it is likely that the requirement for 1 bed affordable housing will be limited to this bedsize but in the market sector, there is likely to be a preference by consumers and providers for an additional bedroom which, in terms of the greater flexibility achieved, should be encouraged. The 1 bed housing requirement also includes the designated, sheltered and extra-care housing for older people detailed below, some of which could also be offset against the 2 bed requirement.
- The challenge arising from these projections may be that, in many instances, the scale of the identified affordable housing need may be such that it might exceed the level of new housing that can be accommodated within the National Park. In arriving at an overall housing figure for the National Park as an estimate of overall housing provision, it will be essential for the National Park Authority to consider the appropriateness of the projections for its area to ensure that policies are consistent with achieving statutory National Park purposes and, in so doing, the social and economic well-being of local communities. Co-operation with neighbouring authorities will be needed in planning for and to meet the housing requirement across the Housing Market Area where development cannot be met within the National Park because of a

lack of physical capacity or because to do so would cause harm to the National Park.

Determining special housing requirements

The housing requirements of older households

5.32 In view of the significance of the projected growth in older households, the Toolkit enables projections to be made of the numbers of pensioner households requiring designated, sheltered or extra-care housing. Following extensive research undertaken by Housing Vision, these have been calculated using the following methodology:

- Stage 1: Needs Groups established within the wider older person's population;
- Stage 2: Need adjusted according to local conditions;
- Stage 3: housing options linked to Needs Groups;
- Stage 4: estimate of the proportion within each Needs Group that in any one year is likely to want to make use of these different options; and
- Stage 5: the need for housing translated into the number of units of service required.

5.33 The requirement for 3 types of specialised housing has been determined:

- Designated: housing, such as private sector retirement apartments, which includes the following features:
 - fully adapted accommodation;
 - integrated alarm with staff response when required;
 - facilitation of mutual support; and
 - opportunities for social activities.
- Sheltered or Supported: as Designated Housing above but providing personal support to residents as required;
- Extra Care: housing which crosses the boundary between high-level support needs and high-level care needs, with a larger proportion in the latter category.

5.34 The following table summarises the specialised housing required for older people between 2011 and 2031 and the number of under-occupying pensioner households. Please note that this table is a sub-set of the overall

housing requirements above. Whilst providers may decide to provide larger accommodation, all of this housing meets a minimum 1 bed requirement.

Table 5.15: projected specialised housing requirements of older households for Exmoor National Park in West Somerset, 2011-2031

65+ Households	65+ totals	Designated	Sheltered	Extra Care	Specialised Total
2011	930	59	28	51	138
2031	1,397	88	42	77	207
2011-2031	466	29	14	26	69

(Source: Housing Vision, Exmoor National Park in West Somerset Housing Requirements Toolkit)

- Based on an estimated current requirement for 138 specialised units of accommodation in the Exmoor National Park area in West Somerset, there is a projected requirement for 69 additional units to be provided between 2011 and 2031 including 14 sheltered and 26 Extra Care housing units.

Conclusions

5.35 Applying an affordability threshold of 25% of gross or 34% of net household income to the entry level cost of a typical two bed house, the following affordability ratio is established for new housing developments:

- an affordable housing requirement (social rent only) of 50%;
- an intermediate housing requirement (shared equity/ownership and Affordable Rent) of 11%; and
- a market sector requirement (owner occupier and private rent) of 39%.

5.36 Based on a minimum bedsize requirement, there is a need for 438 additional homes in the ENP area in West Somerset between 2011 and 2031, consisting of:

- 47% one bed;
- 6% two bed; and
- 47% three bed.

5.37 Between 2011 and 2031, it is estimated that there will be a specialised requirement for 69 units of accommodation for older people which have been included within the overall housing requirement, and consisting of:

- 29 designated units (to achieve a total of 88);
- 14 sheltered units (to achieve a total of 42); and
- 26 Extra Care units (to achieve a total of 77).

6. Conclusions and Recommendations

Introduction

- 6.1 This section draws together the key issues and problems facing the housing market in the Exmoor National Park in West Somerset and the interventions appropriate to responding to them. In conformity with the original SHMA, and with the exception of projected housing requirements, the recommendations are strategic in nature.

Issues and problems

An unaffordable housing market

- 6.2 The fundamental problems are that market housing is overvalued relative to incomes and that there is an inadequate supply of affordable housing, especially for larger families. These are not problems unique to the area but they are exacerbated by net migration which places additional pressures on housing demand in the market sector.
- 6.3 The extent of the current problem can be demonstrated on the basis that lower quartile incomes would have to increase more than threefold for a 2 bedroomed re-sale house to be affordable. Alternatively, property prices would need to fall by 70% to achieve the same level of affordability.
- 6.4 It is not possible to predict with any confidence likely future patterns of immigration, but even if rates are depressed in line with economic conditions, demand will simply be pent up and accelerate once conditions improve. The imperative, in such circumstances is to increase the supply of affordable and lower cost market homes as discussed below.

An imbalanced housing market

- 6.5 The area has historically a larger stock and supply of larger homes which places the housing market at a disadvantage in adjusting to changing demographics within the existing population and from new and additional households - both of which identify a requirement for more smaller homes. In addition, the area's supply of affordable has been affected by the loss of tied accommodation, the extension of smaller housing so that it becomes larger, the right to buy and sales of affordable homes. Whilst this Update is focused on meeting the requirements arising from household growth, it is important to ensure that best use is made of existing housing, for example by encouraging older households to downsize, or by the adaptation of homes to meet changing requirements.
- 6.6 However, it is essential not to lose sight of the requirements of families, especially larger families and those dependent on lower incomes. There is

clear evidence in terms of supply and affordability that local families are in particular at a serious disadvantage in the housing market and that supply needs to be increased to meet their needs. The special measures necessary in protected landscapes together with experience of the ways in which housing providers can contribute to the local need for affordable housing suggest that affordable homes do not always need to be newly built. There is potential to exercise a 'local preference' when those existing affordable homes, which are not subject to a local needs occupancy tie become available for re-letting. Additionally, both the number and proportion of affordable homes might sometimes be increased by buying suitable existing open market homes including creating new units through subdivision. This would be compatible with National Park purposes as it would reduce the overall number of households in housing need and the number of new build homes needed.

The growth in the older population

6.7 The greatest challenge facing the housing market arises from the dramatic increase in the size of the older population and in the number of older households which have a number of related implications:

1. Most older households already live in the area in family housing but, as health and mobility are impaired with age, many older people will find that their homes and/or their location are increasingly unsuitable. This creates the dilemma for many older people of either staying put and being supported in their existing homes - which is the principle informing health and social care - or moving to a more suitable or suitably located including downsizing.
2. The decision to stay or move will be determined by a combination of personal choice and the viability and practicality of providing home-based care and support, especially in dispersed rural areas. However, if older households do not move and downsize, a growing number of older households will under-occupy existing housing and this will have the effect of 'home blocking' family housing. In such a situation, replacement family housing will be required to ensure that the current supply of this type is maintained.
3. If housing more suitable to meeting the requirements of older households is provided, it will have to be of the right type and quality in the right locations, for example providing 2 bedroomed single storey houses in villages. This may create a dilemma in terms of acceptability to communities and there is also a need to market test the acceptability of such options in West Somerset by consultation with elected members, town and parish councils, representative and lobbying bodies for older people and with affordable and market sector providers.

4. There will also be a requirement for an expansion in housing which provides support and/or care including designated, sheltered and extra-care housing, the detail of which has been provided in the previous chapter.

Interventions

Increasing supply

- 6.8 It is essential that additional housing is provided in line with housing projections and to meet any backlog of supply. Increased supply does not only mean building new homes but can be achieved from the existing stock, for example by applying policies to reduce under-occupation and empty homes. Increasing the supply of affordable housing is the absolute priority and every means, however radical, should be explored to increase its supply. The lowest priority is building large family housing in the market sector, a type of supply which may well support or stimulate immigration.

Measures to increase the supply of additional housing

Adopting a radical approach

- 6.9 Conventional approaches to securing supply, even in times of strong economic performance, have produced relatively low rates of affordable housing production. Less conventional approaches need to be explored with registered providers and private landlords including:
 - The provision of temporary housing, including mobile homes. This is usually anathema to registered providers but it is an established sector within the local housing market and may provide a more rapid approach to meeting acute need, especially in deeper rural locations.
 - Encouraging the conversion of commercial premises to residential use, an approach which may be more appropriate in rural locations;
 - The active encouragement of self-building and community-based initiatives such as community land and asset trusts which may be more appropriate in more rural locations. Such initiatives are currently receiving strong support from the government through the HCA, see for example:

<http://www.homesandcommunities.co.uk/community-led-development>

They include the 'community right to build':

<http://www.communities.gov.uk/communities/communityrights/righttobuild/>

Community Land Trusts:

<http://www.communitylandtrusts.org.uk/home>

and self-build pilots:

<http://www.insidehousing.co.uk/development/hca-to-trial-self-build-with-five-pilots-and-%C2%A330m-fund/6521889.article>

- 6.10 We would advise organising an 'Affordable Housing Summit' to bring together all stakeholders to explore and agree an approach to improving supply across the area, including developers and housebuilders; estate and lettings agents; registered providers and private sector landlords; and relevant voluntary and community sector agencies.

Providing family housing

- 6.11 Families, especially larger families, are at a disadvantage in the housing market and it is essential that affordable housing supply is increased.

Providing housing suitable for older households

- 6.12 Housing will need to be provided to meet the housing requirements of older households; to meet their growing support and care needs and to encourage downsizing. This is a priority for the area and will require a range of responses from the assisted adaptation and/or subdivision of homes to the provision of substantial numbers of suitable homes including through the conversion/re-use of existing buildings. New housing should ideally be mixed tenure so that all older people have more opportunities to meet their housing requirements. Mixing the tenures on a site also enables cross-subsidy to provide social rented homes. Consideration should therefore be given to mixed tenure retirement communities providing housing capable of meeting the widest range of support and care need.

- 6.13 Good standard, accessible two bedroom accommodation offers a sustainable housing solution as it provides housing options for people across a broad age range and demand will not be an issue as the older population decreases in the long term.

Developing and promoting bespoke shared equity/shared ownership housing

- 6.14 Local households, especially families, are at a considerable disadvantage in accessing home ownership. Very limited amounts of intermediate ownership have been developed in the area and accessing personal finance is currently a major constraint affecting those entering the market for home ownership. Consultation is required to identify the potential to develop bespoke products, for example shared equity/ownership properties for local occupancy, including with providers and potential purchasers, details of which will be held by the HomeBuy Agent 'South West Homes'. The HMA and Housing Requirements Toolkit can be used to model the affordability of bespoke

products for households in receipt of local incomes and which might be procured through Planning Agreements. The existing web pages HomeBuy in West Somerset provide the opportunity to undertake consultation with potential purchasers and promote bespoke options:

https://www.shareto buy.com/sharedownership/in/West_Somerset

Working with the private rented sector

- 6.15 There are positive and negative sides to the expansion of the private rented sector. It has increased the supply of affordable rented housing but it may also have had the impact of reducing the supply of financially accessible homes for first time buyers. However, the private rented sector has and will continue to have a major role in the supply of housing and especially affordable housing. Close co-operation with landlords is essential in securing and steering the pattern of supply and existing landlord fora could form the basis for developing a more strategic approach to investment by client group and location. This is particularly necessary for younger single people where there is a need to develop suitable shared accommodation options, to monitor supply and to reassess attitudes towards tenants in receipt of Housing Benefit. The alternative might be an increase in poorly managed, poor condition, houses in multiple occupation.

Measures to increase supply from the existing stock

- 6.16 Under-occupation and overcrowding are 2 sides of the same coin, a reduction in under-occupation may have the effect of tackling overcrowding by increasing the supply of family homes. There are currently three initiatives to increase supply from the existing stock in the district:
- In relation to reducing under-occupation: Magna Housing Association's downsizing scheme for under-occupying tenants. It may be that under-occupation is acceptable where a home otherwise meets local housing need but there is a tension now with the strictures of the government's 'bedroom tax.
 - In relation to empty homes: the Somerset West Private Sector Housing Partnership which employs a dedicated empty properties officer.
 - In relation to support for private landlords and tenants: the Somerset West Landlord and Tenant Services providing a range of support services including a landlord accreditations scheme.
- 6.17 Other measures might include the adaptation and/or subdivision of homes; the residential conversion of existing buildings

The requirement for further research and intelligence

6.17 The following priorities have been identified:

1. assessing the impact of housing and welfare reforms

6.18 It is essential that detailed analysis and continual monitoring is undertaken of the current and proposed changes.

2. assessing the impact of second and holiday homes

6.19 Further analysis is required of the performance of this sub-sector of the housing market, in particular:

- the extent to which this sector is self-contained in terms of sales or whether homes are moving in and out of the sector; and
- the extent to which second and holiday homes become permanent homes, either for their existing owners or at sale.

3. monitoring and review

6.20 Whilst housing strategy and planning policy officers will already be monitoring a number of indicators, it is essential to:

- research the extent of downsizing, the types of housing which older people are buying - both existing and new residents - and the housing which will encourage downsizing;
- revise the 2008 Strategic Viability Assessment to take account of changed housing market conditions;
- research the status of minority ethnic communities, include recent migrants from central and eastern Europe, identify their current and future housing requirements and their impact on the housing market;
- monitor the supply of new housing by type, size, tenure and location;
- monitor the number of residential conversions to inform housing supply data; and
- begin to monitor changes in the number of households using, for example, Council Tax data and/or housing completions.

6.21 Data sources enabling overall monitoring and updating of the SHMA Update have been provided at Appendix 1.

APPENDIX 1: DATA SOURCES FOR MONITORING AND UPDATING

Key Influences and Drivers: social and demographic patterns and trends

Nomis is an invaluable source of population and labour market data using the Wizard or Advanced queries at:

<https://www.nomisweb.co.uk/>

Household projections (Update when re-issued)

The most recent projections are 2011-based and are available at:

<https://www.gov.uk/government/statistical-data-sets/detailed-data-for-modelling-and-analytical-purposes>

Population projections by age group (Update when re-issued)

The most recent projections are 2011-based and are available at:

<http://www.ons.gov.uk/ons/rel/snpp/sub-national-population-projections/Interim-2011-based/stb-2011-based-snpp.html>

Components of population change (Update when re-issued)

The most recent were issued in February 2013 and are available at:

<http://www.ons.gov.uk/ons/rel/pop-estimate/population-estimates-for-england-and-wales/mid-2002-to-mid-2010-revised--national/-sty-components-of-population-change.html>

Internal migration (Update annually)

The National Health Service Central Register (NHSCR) compiles and maintains a computerised record of NHS patients registered with an NHS general practitioner (GP) in England, Wales or the Isle of Man. Analysis of this data enables identification of annual moves between local authority areas by age group. Data is available at:

<http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Migration+within+the+UK>

International migration (Update annually)

The collation of National Insurance Number Allocations to Adult Overseas Nationals entering the UK (NiNO) provides an invaluable source of data on international migration. Numbers are only recorded for individual countries for 10 or more migrant workers, and therefore the total is more than the sum of the entries. Data can be accessed at:

<https://www.gov.uk/government/publications/national-insurance-number-allocations-to-adult-overseas-nationals-entering-the-uk>

Household income (Update annually)

CACI provides PayCheck Profiles of gross total household incomes by £5k income bands (CACI stands for Californian Analysis Centre Incorporated, an international company which trades as the Data Depot in Britain) This costs around £400 per commission, a breakdown for almost any defined area. See:

<http://www.caci.co.uk/>

The DWP's Annual Survey of Hours and Earnings (ASHE – the successor to the New Earnings Survey) is an invaluable source of data on income from earnings at local authority and higher levels, it is available through Nomis or at:

<http://www.ons.gov.uk/ons/rel/ashe/annual-survey-of-hours-and-earnings/2012-provisional-results/index.html>

The Supply of Housing

The supply of new housing (Update annually)

The first relevant source is internal monitoring data and typically presented in Annual Monitoring Reports. Data by property type or other criteria will need to be provided by the Planning team. Please note: whilst this is not a requirement for the purposes of annual monitoring, it is essential that the property type and bed size of new homes is recorded to enable more detailed monitoring of trends in the housing market.

The affordable housing sector (Update annually)

The annual Statistical Data Return (SDR) compiled by the Homes and Communities Agency provides property breakdowns for all housing associations and is available annually through the RSR webpage at:

<http://www.homesandcommunities.co.uk/news/statistical-data-return>

The CORE (COntinuous REcording of Lettings and Sales) provides annual reports by local authority area of new lettings, re-lets, affordable sales and costs under 'Analyse CORE data/Housing provider reports/Annual data submission'. More detailed and bespoke tables can be created at 'Analyse CORE data/Interactive reports/Advanced Analysis'

<https://core.communities.gov.uk/>

The Demand for Housing

The affordable housing sector (Update annually)

Social housing demand data can be updated from CORE and Choose Your Home commissioned data. Recommended indicators of social housing demand are:

- total lettings and annual turnover;
- total applicants (waiting list and transfer): by household type and size
- applicant: stock and applicant: lettings ratios
- property type and bed size requested: by household type;
- location requested: by household type, property type and bed size;
- total offers: by household type; property type and bed size;
- total lettings: by household type; property type and bed size;
- refusal rate: by household type; property type and bed size, and,
- difficult to let and void rates.

The market sector (Update annually)

The most reliable source of prices achieved has been the Land Registry which records all residential sales (new build and re-sale) by price, date of sale, type of property, new-build/re-sale, free or leasehold, address, postcode, location, local authority and county. As data is constructed from the notification of completed sales, there is an inevitable time lag of at least one month until their appearance in Land Registry data sets. These are summarised at:

<http://www.landregistry.gov.uk/market-trend-data/public-data/price-paid-data>

One criticism of published Land Registry data is that it is not seasonally nor mix adjusted, but its monthly Property Price Index of average prices at national, regional, county and London borough level claims to meet both these criticisms.

The next most obvious sources are advertisements on the internet and interviews with estate agents. However, care must be taken not to assume that the asking price is the price achieved at sale. Useful sites for both sales and private rental data are:

<http://www.zoopla.co.uk/>

and:

<http://www.rightmove.co.uk/>