HOUSING VISION

Strategic Housing Market Assessment Update - Exmoor National Park: Implications of 2012-based Household Projections

Final Report
December 2015

Strategic Housing Market Assessment Update - Exmoor National Park: Implications of 2012-based Household Projections

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Acronyms & Abbreviations

DC	District Council
ND	North Devon
ENP	Exmoor National Park
GIS	Geographical Information System
LPA	Local Planning Authority
NP	Northern Peninsula
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
SHMA	Strategic Housing Market Assessment
WS	West Somerset

1. The Demographic Implications of 2012-based Subnational Household Projections

1.1   The March 2015 SHMA Update for the Exmoor National Park examined the effect of subtracting household growth due to net Internal Migration. This Update reviews the outcome of applying 2012-based Subnational Household Projections to the National Park area. The following tables are reproduced from the March 2015 Update but include the 2012-based household projections.

1.3   Before the 2012-based Subnational Household Projections were published in February 2015, no household projections were available that fully reflected the results of the 2011 Census and covered the period beyond 2021. In the March 2015 Update, 5 scenarios were modelled to explore:

- the potential implications for household numbers of the 2012-based Sub-national Population Projections; and

- the effects on household change during the period 2011-2031 applying different assumptions about household formation to the 2012-based population projections.

1.4   The scenarios modelled were as follows:

Scenario 1: applied to the 2012-based subnational population projections the average household sizes for each year from 2011 to 2031 from CLG's 2008-based household projections.

Scenario 2: used the same method as Scenario 1, but instead used average household sizes from the 2011-based CLG projections. This Scenario was only available from 2012 to 2021.

Scenario 3: applied CLG 2011-based household representative rates to 2021 then followed the annual trajectory of change of rates in CLG's 2008-based projections. This Scenario was recommended for use in the March 2015 SHMA Updates.

Scenario 4: was based on the household representative rates in the 2008-based CLG projections.

Scenario 5: assumed that household representative rates stayed constant during the projection period.

1.5   Work for this report identified a small error in the allocation of population and household numbers to the North Devon and West Somerset Local Planning Authority Areas and to Exmoor National Park for the household projection scenarios reviewed in the January 2015 Strategic Housing Market

Assessment Update: Northern Peninsula Housing Market Area. Appendix 1 compares the accurate totals for the period 2011-2031 included in this report (Scenario 2 only applied to 2011-2021) with those included in the January 2015 Update Report. Variations are minimal amounting to no more than 7 households for any scenario for any area.

Please note: that the effect of disaggregating Exmoor National Park figures for North Devon and West Somerset then summing them has created variations of 1-2 in the totals for each Scenario when compared with the total recorded in Table 1.3.

Table 1.1: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, North Devon in the Exmoor National Park area, 2011-2031, (recommended Scenario and 2012-based projections highlighted)

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	1,140	1,151	1,162	1,174	1,186	1,198	1,211	1,223	1,236	1,249	1,261	121
2011-based (only available to 2021)												
Households	1,136	1,141	1,147	1,153	1,158	1,165	1,172	1,179	1,187	1,194	1,202	66
2012-based scenarios												
Population	2,660	2,655	2,663	2,672	2,683	2,694	2,705	2,717	2,731	2,745	2,759	99
1. Households @ 2008 average household size	1,152	1,158	1,166	1,175	1,185	1,196	1,206	1,214	1,225	1,236	1,246	94
2. Households @ 2011 average household size	1,137	1,135	1,145	1,147	1,150	1,159	1,164	1,172	1,180	1,188	1,193	57
3. Households @ CLG 2011 to 2021+2008 post -2021	1,136	1,139	1,144	1,150	1,157	1,164	1,172	1,180	1,188	1,195	1,203	68
4. Households @ CLG 2008 adjusted to 2011 Census	1,136	1,141	1,150	1,160	1,170	1,180	1,190	1,200	1,210	1,220	1,230	95
5. Households @ constant household formation rates	1,136	1,139	1,146	1,153	1,161	1,169	1,177	1,185	1,194	1,202	1,211	75
2012-based CLG projections												
Households	1,117	1,121	1,127	1,134	1,140	1,148	1,156	1,163	1,171	1,178	1,186	69

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	1,274	1,286	1,299	1,311	1,324	1,335	1,347	1,359	1,370	1,381	241
2012-based scenarios											
Population	2,773	2,785	2,799	2,813	2,824	2,838	2,850	2,861	2,872	2,884	224
1. Households @ 2008 average household size	1,257	1,266	1,276	1,287	1,295	1,305	1,315	1,323	1,332	1,340	188
3. Households @ CLG 2011 to 2021+2008 post -2021	1,214	1,224	1,235	1,244	1,254	1,264	1,274	1,283	1,292	1,300	165
4. Households @ CLG 2008 adjusted to 2011 Census	1,242	1,253	1,263	1,274	1,284	1,293	1,303	1,314	1,325	1,335	199
5. Households @ constant household formation rates	1,221	1,231	1,240	1,249	1,257	1,265	1,274	1,282	1,290	1,298	163
2012-based CLG projections											
Households	1,194	1,202	1,210	1,219	1,227	1,235	1,243	1,251	1,259	1,266	150

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 15 households lower. The closest scenario applied constant household formation rates and is 13 lower.

Table 1.2: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, West Somerset in the Exmoor National Park area, 2011-2031, (recommended Scenario and 2012-based projections highlighted)

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	3,728	3,752	3,779	3,808	3,838	3,870	3,903	3,938	3,973	4,008	4,046	**318**
2011-based (only available to 2021)												
Households	3,498	3,525	3,553	3,582	3,610	3,641	3,672	3,704	3,737	3,767	3,800	**314**
2012-based scenarios												
Population	7,799	7,799	7,799	7,799	7,821	7,821	7,844	7,866	7,912	7,934	7,957	**158**
1. Households @ 2008 average household size	3,611	3,626	3,642	3,650	3,679	3,689	3,721	3,744	3,779	3,802	3,819	**208**
2. Households @ 2011 average household size	3,497	3,515	3,502	3,501	3,528	3,529	3,560	3,591	3,594	3,613	3,645	**148**
3. Households @ CLG 2011 to 2021+2008 post -2021	3,498	3,504	3,509	3,520	3,530	3,546	3,563	3,580	3,600	3,617	3,639	**140**
4. Households @ CLG 2008 adjusted to 2011 Census	3,498	3,514	3,527	3,546	3,562	3,582	3,605	3,629	3,654	3,678	3,705	**207**
5. Households @ constant household formation rates	3,498	3,510	3,519	3,534	3,547	3,564	3,584	3,605	3,626	3,648	3,672	**174**
2012-based CLG projections												
Households	3,677	3,687	3,693	3,707	3,719	3,737	3,756	3,773	3,795	3,815	3,839	**162**

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	4,084	4,123	4,162	4,201	4,242	4,284	4,324	4,364	4,402	4,441	**713**
2012-based scenarios											
Population	8,024	8,024	8,047	8,092	8,137	8,159	8,205	8,227	8,272	8,295	**496**
1. Households @ 2008 average household size	3,856	3,872	3,900	3,928	3,957	3,976	4,015	4,032	4,069	4,086	**475**
3. Households @ CLG 2011 to 2021+2008 post -2021	3,660	3,680	3,702	3,723	3,748	3,773	3,800	3,825	3,851	3,876	**377**
4. Households @ CLG 2008 adjusted to 2011 Census	3,738	3,768	3,797	3,824	3,851	3,878	3,903	3,930	3,954	3,979	**481**
5. Households @ constant household formation rates	3,699	3,725	3,752	3,775	3,799	3,824	3,848	3,872	3,896	3,919	**421**
2012-based CLG projections											
Households	3,862	3,886	3,910	3,934	3,960	3,986	4,011	4,034	4,057	4,079	**402**

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 25 households higher. The closest scenario applied constant household formation rates and is 19 households lower.

Table 1.3: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, Exmoor National Park Authority area, 2011-2031(recommended Scenario and 2012-based projections highlighted)

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	4,868	4,903	4,942	4,982	5,024	5,068	5,114	5,161	5,209	5,256	5,307	**440**
2011-based (only available to 2021)												
Households	4,634	4,666	4,699	4,734	4,768	4,806	4,845	4,883	4,924	4,962	5,002	**369**
2012-based scenarios												
Population	10,459	10,453	10,462	10,470	10,504	10,516	10,549	10,583	10,642	10,679	10,716	**257**
1. Households @ 2008 average household size	4,762	4,784	4,808	4,825	4,864	4,885	4,927	4,959	5,005	5,038	5,065	**303**
2. Households @ 2011 average household size	4,634	4,650	4,647	4,647	4,678	4,688	4,724	4,763	4,773	4,801	4,839	**205**
3. Households @ CLG 2011 to 2021+2008 post -2021	4,634	4,643	4,653	4,671	4,687	4,709	4,735	4,760	4,788	4,813	4,842	**208**
4. Households @ CLG 2008 adjusted to 2011 Census	4,634	4,655	4,677	4,706	4,732	4,762	4,795	4,829	4,863	4,898	4,935	**301**
5. Households @ constant household formation rates	4,634	4,649	4,665	4,688	4,708	4,733	4,761	4,790	4,820	4,850	4,882	**249**
2012-based CLG projections												
Households	4,794	4,807	4,820	4,841	4,859	4,885	4,911	4,937	4,966	4,994	5,025	**231**

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	5,358	5,409	5,461	5,513	5,566	5,619	5,671	5,723	5,772	5,822	**954**
2012-based scenarios											
Population	10,798	10,809	10,846	10,905	10,961	10,998	11,054	11,088	11,145	11,178	**719**
1. Households @ 2008 average household size	5,114	5,138	5,176	5,215	5,252	5,282	5,329	5,356	5,401	5,426	**664**
3. Households @ CLG 2011 to 2021+2008 post -2021	4,874	4,904	4,937	4,967	5,002	5,038	5,073	5,108	5,143	5,176	**542**
4. Households @ CLG 2008 adjusted to 2011 Census	4,980	5,021	5,060	5,098	5,135	5,171	5,207	5,244	5,279	5,314	**681**
5. Households @ constant household formation rates	4,920	4,956	4,992	5,024	5,056	5,089	5,121	5,154	5,186	5,218	**584**
2012-based CLG projections											
Households	5,056	5,088	5,120	5,152	5,187	5,221	5,254	5,285	5,315	5,346	**552**

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 10 households higher which is the closest scenario

1.2   The following table examines the effect on household projections of subtracting household growth due to net Internal Migration.

Table 1.4: household projections scenarios based on the 2012-based subnational population projections less net internal migration, Exmoor National Park Authority area, 2011-2031, (recommended Scenario and 2012-based household projections highlighted)

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	4,842	4,851	4,863	4,877	4,893	4,911	4,931	4,950	4,971	4,990	5,003	162
2011-based (only available to 2021)												
Households	4,608	4,614	4,620	4,629	4,637	4,649	4,662	4,672	4,686	4,696	4,698	91
2012-based scenarios												
1. Households @ 2008 average household size	4,736	4,732	4,729	4,720	4,733	4,728	4,744	4,748	4,767	4,772	4,761	26
2. Households @ 2011 average household size	4,608	4,598	4,568	4,542	4,547	4,531	4,541	4,552	4,535	4,535	4,535	-73
3. Households @ CLG 2011 to 2021+2008 index post -2021	4,608	4,591	4,574	4,566	4,556	4,552	4,552	4,549	4,550	4,547	4,538	-70
4. Households @ CLG 2008 adjusted to 2011 Census	4,608	4,603	4,598	4,601	4,601	4,605	4,612	4,618	4,625	4,632	4,631	24
5. Households @ constant household formation rates	4,608	4,597	4,586	4,583	4,577	4,576	4,578	4,579	4,582	4,584	4,578	-30
2012-based CLG projections												
Households	4,768	4,755	4,741	4,736	4,728	4,728	4,728	4,726	4,728	4,728	4,721	-47

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based											
Households	5,016	5,029	5,042	5,055	5,068	5,082	5,095	5,107	5,117	5,128	286
2012-based scenarios											
1. Households @ 2008 average household size	4,772	4,758	4,757	4,718	4,754	4,745	4,753	4,740	4,746	4,732	-4
3. Households @ CLG 2011 to 2021+2008 post -2021	4,532	4,524	4,518	4,470	4,504	4,501	4,497	4,492	4,488	4,482	-126
4. Households @ CLG 2008 adjusted to 2011 Census	4,638	4,641	4,641	4,601	4,637	4,634	4,631	4,628	4,624	4,620	12
5. Households @ constant household formation rates	4,578	4,576	4,573	4,527	4,558	4,552	4,545	4,538	4,531	4,524	-84
2012-based CLG projections											
Households	4,714	4,708	4,701	4,655	4,689	4,684	4,678	4,669	4,660	4,652	-116

Key findings

- The outcome of the 2012-based Household Projections is almost identical to the recommended Scenario 3 from the March 2015 Update identifying a decrease of 10 households.

2.0   The Implications for Meeting Housing Need of 2012-based   Subnational Household Projections

2.1   The 2012-based household projections in Tables 1.1-1.4 provide annual totals but are not capable of providing projections by household type. Consequently, it is not possible to provide revised breakdowns of housing requirements by bedsize or tenure. The publication date of detailed Stage 2 household projections has still not been confirmed.

2.2   As the 2012-based projections relate to households, it is appropriate to apply a conversion factor allowing for such 'market signals' as vacant dwellings, second homes and homes occupied by non-residents to provide a net dwelling requirement. Three adjustments have been made:

1. Vacancy rates: CLG Live Table 615, 'All vacant dwellings by local authority district', October 2014 in relation to Table 125, 'Dwelling stock estimates by local authority district, 2001-2014' at 31st March enable typical vacancy rates to be applied to household projections data.

2. Second and holiday homes including vacant dwellings: these are a feature of the area, especially in the Exmoor National Park. Using Census Table KS401, 'Dwellings, household spaces and accommodation', the proportion of 'Household spaces with no usual residents' has been applied to include both vacant dwellings and to take account of second and holiday homes. However, it must be emphasised that there is no evidence that new homes are used as second and holiday homes at the same rate as the general or older housing stock and further research is required. Therefore, the use of this indicator may overstate the conversion requirement arising from the rate of second and holiday homes, especially in the Exmoor National Park.

2.3   The backlog of affordable housing. For the Exmoor National Park area in North Devon, this has been quantified by identifying all those registered with Devon HomeChoice who had no permanent home of their own, i.e., applicants in one of the following circumstances:

• in temporary accommodation/hostel;
• lodger;
• rough sleeping;

- sharing with family/friends; and
- sofa surfing/no fixed abode.

2.4   These categories overlap on the housing register and therefore to avoid double counting, those rough sleeping and of no fixed abode have been subtracted from those in temporary accommodation/hostel; lodgers and those sharing with family/friends.

2.5   As equivalent data is not available for the Exmoor National Park area in West Somerset, the backlog of affordable housing has been quantified by identifying all those registered with Homefinder Somerset allocated to the Gold and Silver housing needs categories which include those lodging or sharing with families.

2.6   The following tables draw from household projections in Tables 1.1-1.4 to assess the implications for housing requirements. The table is in four parts:

1. Part 1 presents the unadjusted household projections.

2. Part 2 presents the household projections adjusted for vacancy rates.

3. Part 3 presents the household projections adjusted for second and holiday homes including vacant homes; and

4. Part 4 sets out the backlog of affordable housing which can be added to any of the totals above.

Please note: that the effect of disaggregating Exmoor National Park figures for North Devon and West Somerset then summing them has created variations of 1-2 in the totals for each Scenario when compared with the National Park total. The accurate total is placed in brackets in the final column where appropriate.

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Table 2.1: the impact on housing requirements of household projection scenarios, the Exmoor National Park Authority and North Devon and West Somerset Councils in the Exmoor National Park, 2011-2031, (recommended Scenario and 2012-based household projections highlighted)

Household projection scenarios	North Devon in the Exmoor National Park	West Somerset in the Exmoor National Park	Exmoor NPA 2011-2031
1. Unadjusted			
2008-based CLG household projections	241	713	954
2012-based @ 2008 average household size	188	475	663 (664)
2012-based @ CLG 2011 to 2021+2008 post -2021	165	377	542
2012-based @ CLG 2008 adjusted to 2011 Census	199	481	680 (681)

2012-based @ constant household formation rates	163	421	584
2012-based CLG household projections	150	402	552
2. Adjusted for vacant dwellings rates of:	**3.33%**	**2.78%**	**3.33% & 2.78%***
2008-based households	249	733	982 (983)
2012-based @ 2008 average household size	194	488	682 (684)
2012-based @ CLG 2011 to 2021+2008 post -2021	170	387	558
2012-based @ CLG 2008 adjusted to 2011 Census	206	494	700 (701)
2012-based @ constant household formation rates	168	433	601 (602)
2012-based CLG household projections	155	413	568 (569)
3. Adjusted for vacant dwellings, second & holiday homes rates of:	**19.20%**	**19.20%**	**19.20%**
2008-based households	287	850	1,137
2012-based @ 2008 average household size	224	566	790 (791)
2012-based @ CLG 2011 to 2021+2008 post -2021	197	449	646
2012-based @ CLG 2008 adjusted to 2011 Census	237	573	811 (812)
2012-based @ constant household formation rates	194	502	696
2012-based CLG household projections	179	479	658
4. Backlog of affordable housing			
At August 2015	17	43	60

Note: * the vacancy rates for the North Devon and West Somerset areas have been applied to those areas of the Exmoor National Park within each Council area.

The effect of disaggregating then summing the Exmoor National Park figures has created variations of 1 -2 in the totals for each scenario when compared with the previous table. The accurate total is in brackets.

2.7 The March 2015 Update examined the impact on the National Park area of the projected effects of Internal Migration (within the UK) which consistently show a net gain of population. This Update models the effect of excluding net internal migration providing only for population change and replacement within the National Park over the period 2011-2031 as set out in the following table.

Please note: that the effect of disaggregating Exmoor National Park figures for North Devon and West Somerset then summing them has created variations of 1-2 in the totals for each Scenario when compared with the National Park total. The accurate total is placed in brackets in the final column where appropriate.

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Table 2.2: the housing requirements based on household projection scenarios for the Exmoor National Park Authority and North Devon and West Somerset Councils in the Exmoor National Park, 2011-2031 showing the effect of excluding net migration, (recommended Scenario and 2012-based household projections highlighted)

Household projection scenarios	North Devon in the Exmoor National Park	West Somerset in the Exmoor National Park	Exmoor NPA 2011-2031
1. Unadjusted			
2008-based CLG household projections	110	176	286
2012-based @ 2008 average household size	57	-62	-5 (-4)
2012-based @ CLG 2011 to 2021+2008 post -2021	33	-159	-126
2012-based @ CLG 2008 adjusted to 2011 Census	68	-56	12
2012-based @ constant household formation rates	31	-116	-85 (-84)
2012-based CLG household projections	18	-135	-117
2. Adjusted for vacant dwellings rates of:	**3.68%**	**3.10%**	**3.68% & 3.10%***
2008-based households	114	181	296
2012-based @ 2008 average household size	59	-64	-5
2012-based @ CLG 2011 to 2021+2008 post -2021	34	-164	-130
2012-based @ CLG 2008 adjusted to 2011 Census	71	-58	13
2012-based @ constant household formation rates	32	-120	-87
2012-based CLG household projections	19	-139	-121
3. Adjusted for vacant dwellings and second homes rates of:	**19.20%**	**19.20%**	**19.20%**
2008-based households	131	210	341
2012-based @ 2008 average household size	68	-74	-6

2012-based @ CLG 2011 to 2021+2008 post -2021	39	-190	-150
2012-based @ CLG 2008 adjusted to 2011 Census	81	-67	14
2012-based @ constant household formation rates	37	-138	-101
2012-based CLG household projections	21	-161	-139
4. The backlog of affordable housing:			
At August 2015	17	43	60

Note: * the vacancy rates for the North Devon and West Somerset areas have been applied to those areas of the Exmoor National Park within each Council area.

3.0   The Need for Affordable Housing

3.1   The 2012-based household projections have identified a requirement for 552 homes in the National Park area over the period 2011-2031 (see Table 2.1).

3.2   The tenure breakdown from the January 2014 SHMA Update for Exmoor National Park in West Somerset - in which most National Park households are located - identified a requirement for 61.22% affordable homes. Applying this proportion to the whole National Park area identifies a requirement for 338 affordable homes, 92 in North Devon and 246 in West Somerset.

APPENDIX 1: POPULATION AND HOUSEHOLD SCENARIO TOTALS 2011-2031 FOR THE NORTH DEVON AND WEST SOMERSET LPAs AND FOR THE EXMOOR NATIONAL PARK COMPARED WITH TOTALS INCLUDED IN THE NORTHERN PENINSULA SHMA UPDATE, JANUARY 2015

A1   Projections for the North Devon and West Somerset Local Planning Authorities; for the Exmoor National Park in North Devon and West Somerset, and for the Exmoor National Park have been apportioned as proportions of Exmoor National Park households in North Devon and West Somerset at the time of the 2011 Census. The methodology underpinning these calculations was explained in paragraphs 5.2-5.6 of the January 2015 Northern Peninsula Housing Market Area Strategic Housing Market Assessment Update. Further refinement of the proportions allocated to each area has been undertaken in this update, the revised proportions are set out in paragraph 4.4 above and their effect is summarised in the following table.

	North Devon LPA		West Somerset LPA		ENP in North Devon		ENP in West Somerset		Exmoor National Park	
Scenario	**12.15**	**01.15**	**12.15**	**01.15**	**12.15**	**01.15**	**12.15**	**01.15**	**12.15**	**01.15**
2008-based CLG projections										
Households	8,269 (-6)	8,275	2,452 (-1)	2,453	241 (+6)	235	713 (+1)	712	954 (+7)	947
2012-based scenarios										
Population	7,676 (-6)	7,682	4,183 (-2)	4,185	224 (+6)	218	1,217 (+2)	1,215	1,441 (+8)	1,433
1. Households @ 2008 average household size	6,468 (-5)	6,473	1,633 (-1)	1,634	188 (+4)	184	475 (+1)	474	663 (+5)	658
3. Households @ CLG 2011 to 2021+2008 post -2021	5,652 (-4)	5,656	1,297 (0)	1,297	165 (+4)	161	377 (0)	377	542 (+5)	537
4. Households @ CLG 2008 adjusted to 2011 Census	6,844 (-5)	6,849	1,654 (-1)	1,655	199 (+5)	194	481 (+1)	480	681 (+6)	675
5. Households @ constant household formation rates	5,585 (-4)	5,589	1,448 (0)	1,448	163 (+4)	159	421 (0)	421	583 (+4)	579

Key findings

- Compared with Tables 5.2, 5.3, 5.6, 5.7 and 5.8 in the January 2015 Updates, there are variations of between 0 and 7 households for any area for any Scenario.