



HOUSING VISION

Strategic Housing Market Assessment Update: Exmoor National Park

Final Report

March 2015

Strategic Housing Market Assessment Update: Exmoor National Park

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Acronyms & Abbreviations

DC	District Council
ND	Exmoor National Park
ENP	North Devon
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. Introduction

Context and approach

- 1.1 This report undertakes three activities as follows:
1. providing coherent 2011 Census data for the whole Exmoor National Park area aligned to the Park boundary. This has been achieved by repeating for North Devon the previous exercise of allocating population, households and housing for Census Output Areas which are shared between the National Park and the West Somerset Council area. The approach is explained in the following section.
 2. breaking down the housing figure in the most recent 2015 SHMA Update for the Northern Peninsula Housing Market Area into that part which results from Internal Migration into the National Park as an element of the overall housing figure.
 3. checking the 267 affordable figure from the 2014 Exmoor National Park in West Somerset Update as the best available figure on affordable housing need.

Boundaries

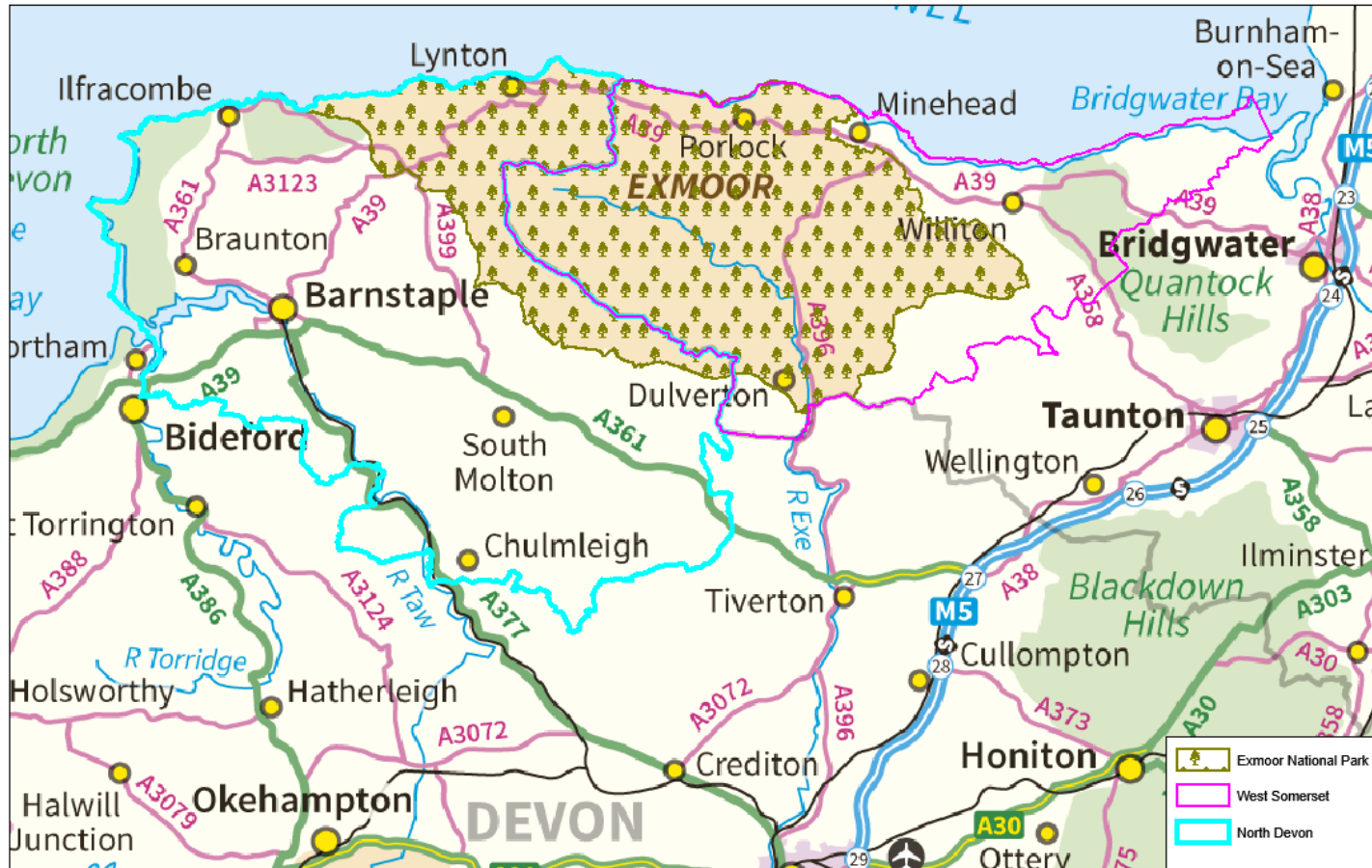
- 1.2 The Exmoor National Park Authority is responsible for spatial and land-use planning within the Exmoor National Park (ENP). In order to identify with accuracy the demographic profile of the ENP area in West Somerset, including the population and household numbers and projections on which housing 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.
- 1.3 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.
- 1.4 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.

- 1.5 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
- 1.6 The same process that was followed for West Somerset of producing estimates for the splitting of the Census Output areas which intersect the Exmoor National Park was carried out for the North Devon side of the park area.
- 1.7 There were 11 Census Output Areas in North Devon that intersected the Exmoor National Park boundary. It was decided that 100% of the population was in the North Devon side of the Census Output Area for 3 of these intersecting Census Output Areas. Estimates were produced for the remaining 8 Census Output areas as to what percentage of residents were on either side of the Exmoor National Park boundary based on 1:10,000 Ordnance Survey Streetview, Google Earth plus Google Earth Streetview and Right Move/Zoopla websites. These were then confirmed or amended on the basis of local knowledge.
- 1.8 Maps 1.1 to 1.6 below identify the Exmoor National Park, West Somerset and North Devon Council boundaries. The West Somerset Local Planning Authority area excludes the District Council area which falls within the National Park area.

Map 1.1

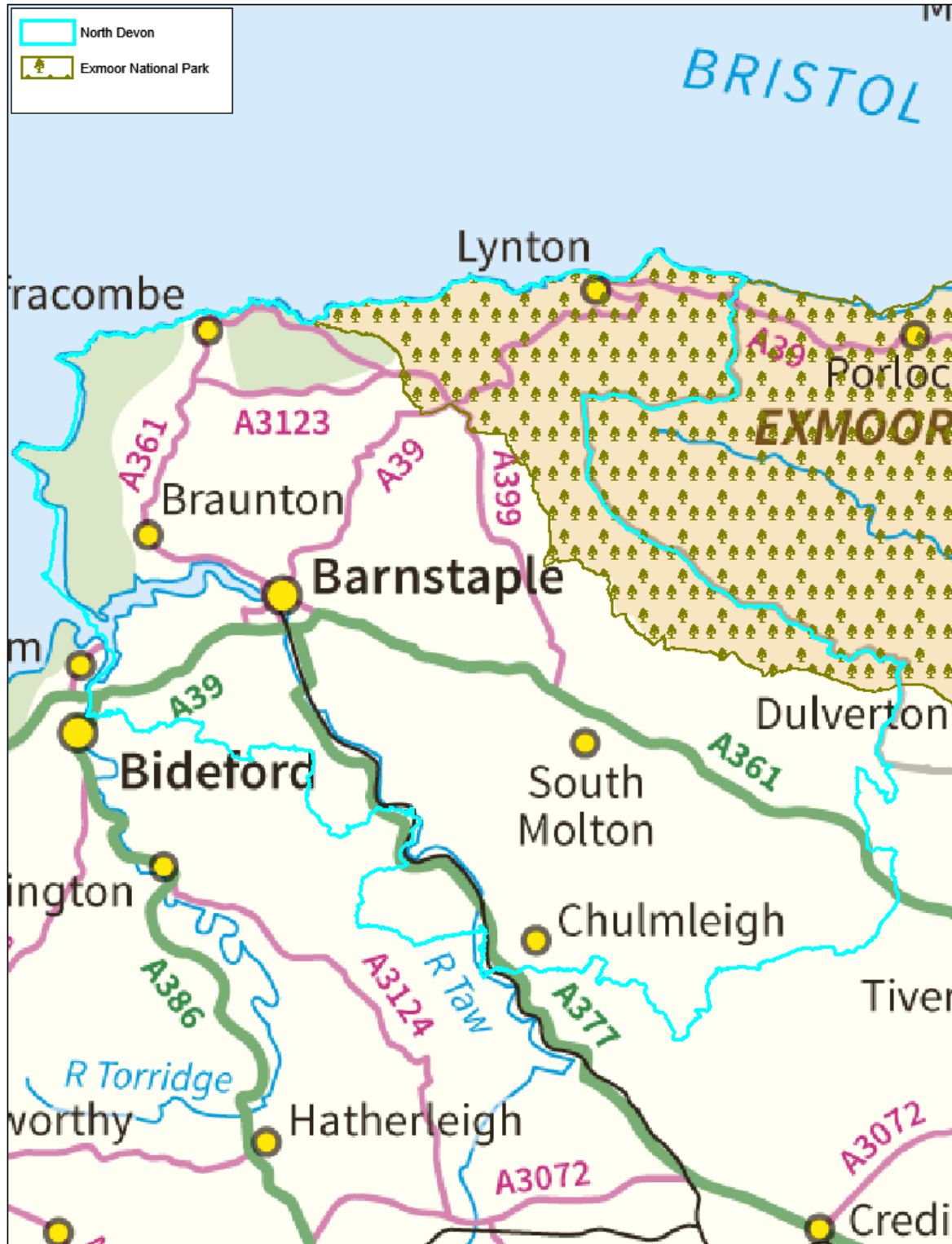
Exmoor National Park with West Somerset and North Devon



Source: (c) Natural England copyright 2013 <http://www.naturalengland.org.uk>.
Contains Ordnance Survey data. (c) Crown Copyright and Database Right 2015

Map 1.2

North Devon with Exmoor National Park Boundary



Source: (c) Natural England copyright 2013 <http://www.naturalengland.org.uk>.
 Contains Ordnance Survey data. (c) Crown Copyright and Database Right 2015

Map 1.3

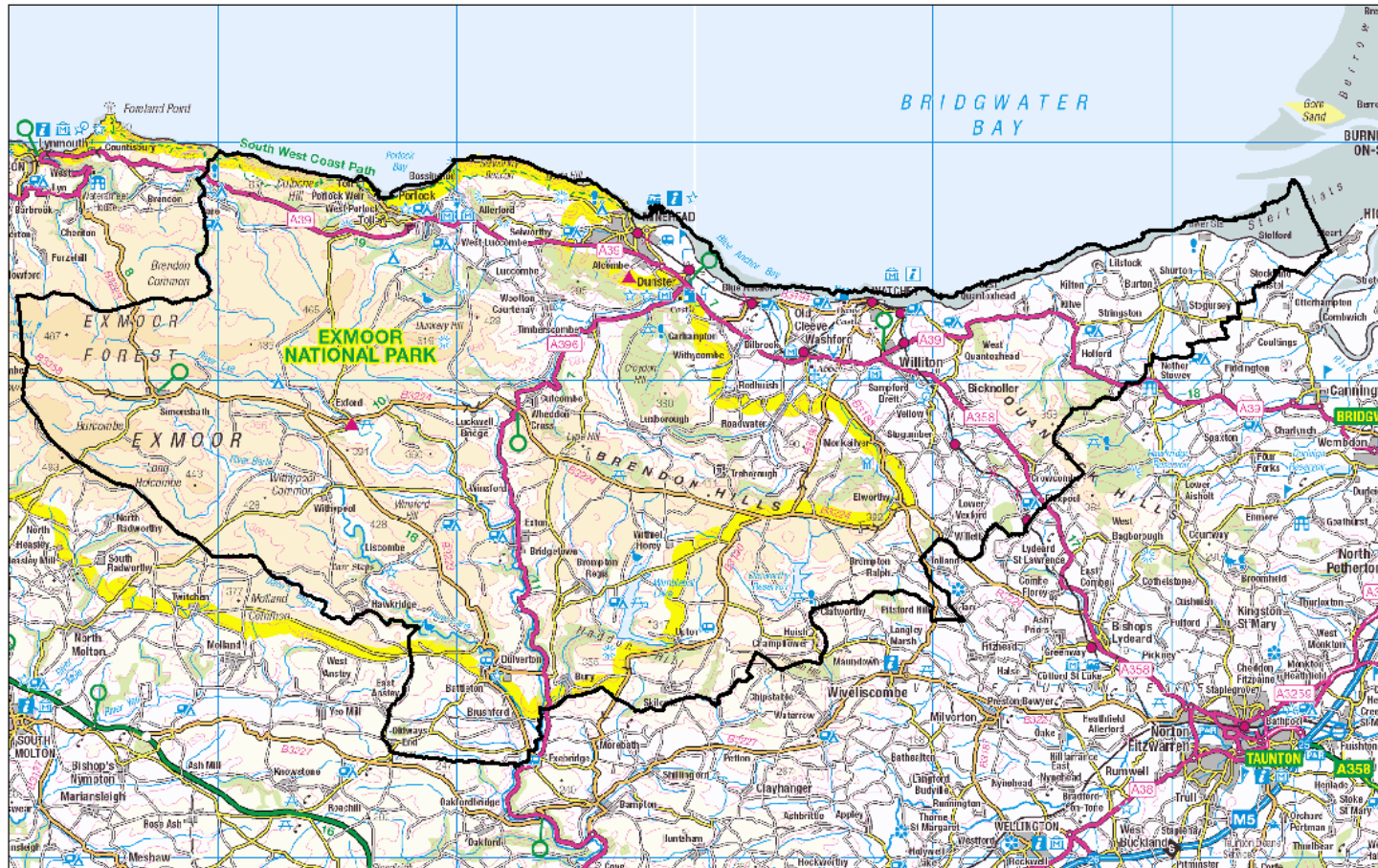
North Devon with Exmoor National Park Boundary



Source: (c) Natural England copyright 2013 <http://www.naturalengland.org.uk>.
 Contains Ordnance Survey data. (c) Crown Copyright and Database Right 2015

Map 1.4

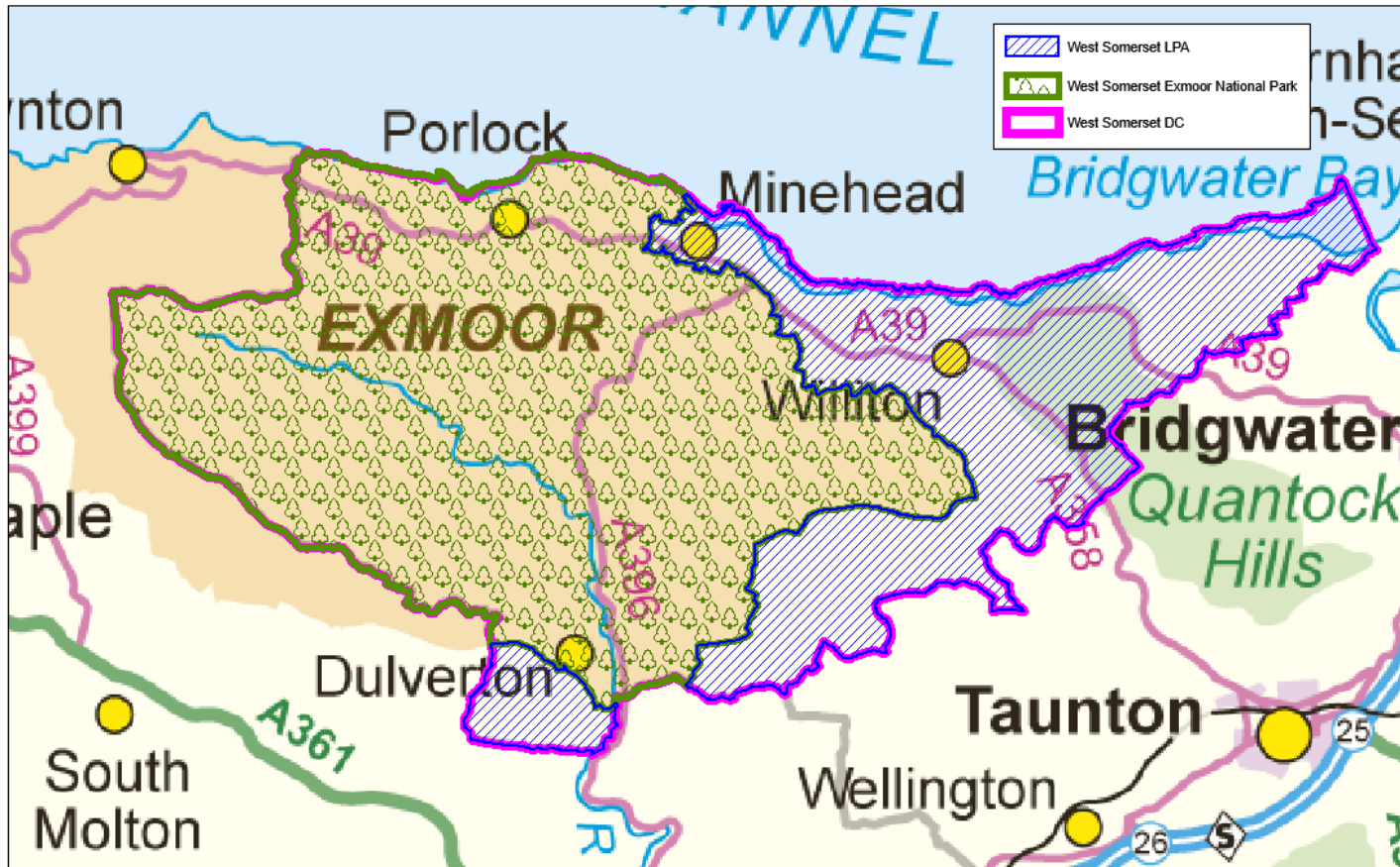
West Somerset



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

Map 1.5

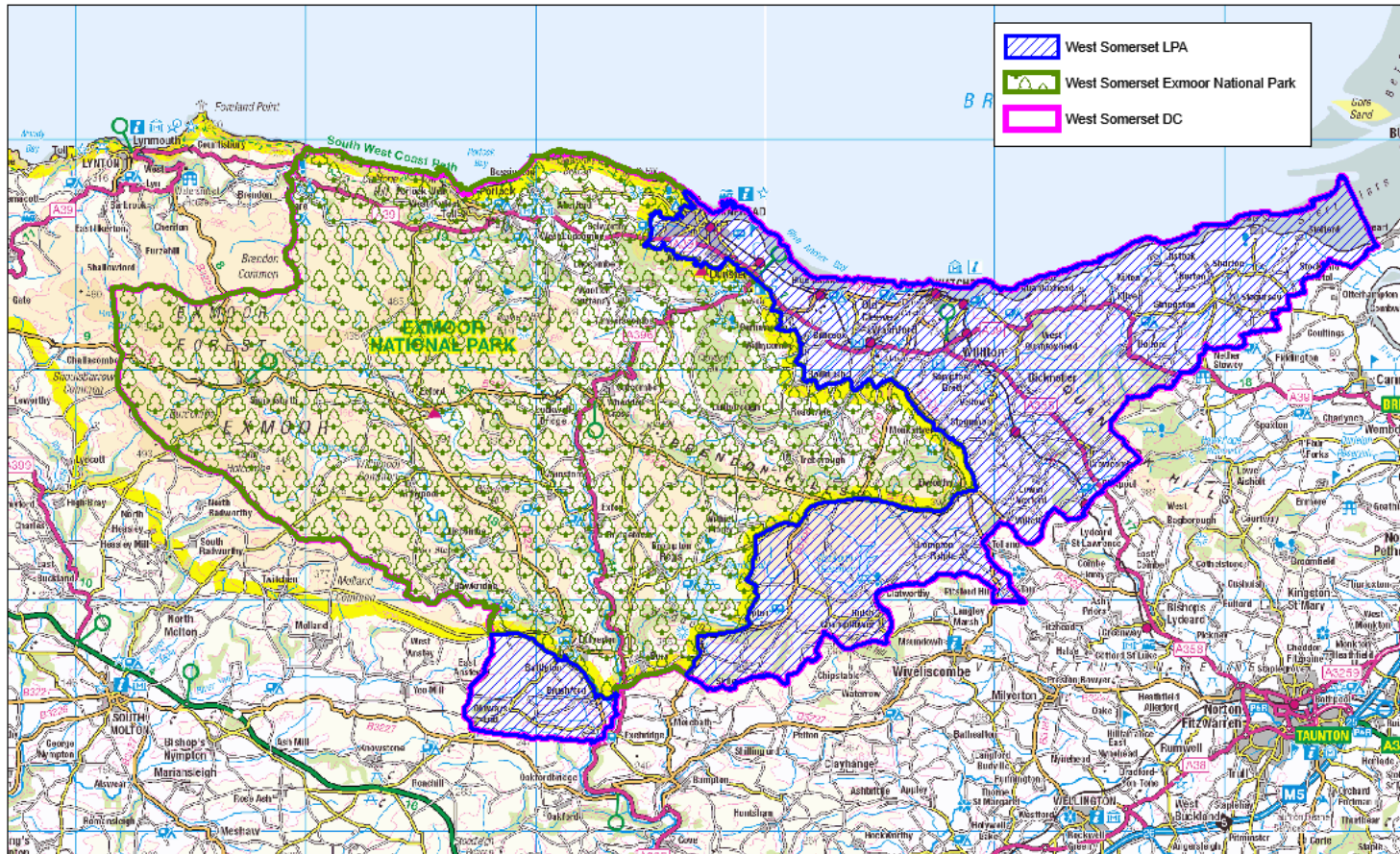
West Somerset Administrative Boundaries



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Map 1.6

West Somerset Administrative Boundaries



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2. Demographic Data for Exmoor National Park

Introduction

- 2.1 Previous estimates from the 2011 Census identified 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. This report adds estimates for the Exmoor National Park in North Devon to enable coherent data for the whole National Park area to be derived.

Population by age band

- 2.2 The Exmoor National Park 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 for the complete National Park area.

Table 2.1: age structure, West Somerset ENP, North Devon ENP and Exmoor National Park 2011

Age Bands	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Age 0 to 15	958	12.3	340	13.1	1,297	12.5
Age 16 to 17	163	2.1	51	2.0	214	2.1
Aged 18 to 24	452	5.8	144	5.5	596	5.7
Aged 25 to 44	1,162	14.9	468	18.1	1,630	15.7
Age 45 to 64	2,705	34.7	916	35.3	3,621	34.8
Age 65 plus	2,360	30.3	675	26.0	3,035	29.2
All Categories: Age Structure	7,800	100	2,594	100.0	10,393	100.0

(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:

- There was a higher percentage (30.3%) of 65 plus year olds in West Somerset ENP than in North Devon ENP (26.0%) and the Exmoor National Park area as a whole (29.2%).
- There was a higher percentage of 25 to 44 year olds in North Devon ENP (18.1%), than in West Somerset ENP (14.9%) and Exmoor National Park as a whole (15.7%).

Household total, composition and size

- 2.3 The following tables below identify the composition and size of households in the Exmoor National Park area.

Table 2.2: household total and composition, West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Household Composition	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
One Person Household						
Aged 65 and over	696	19.0	158	14.6	855	18.0
Other	483	13.2	165	15.2	648	13.7
One family only						
All aged 65 and over	573	15.6	143	13.2	716	15.1
Married or same-sex civil partnership couple: No children	670	18.3	216	19.9	886	18.7
Married or same-sex civil partnership couple: Dependent children	349	9.5	125	11.5	474	10.0
Married or same-sex civil partnership couple: All children non-dependent	195	5.3	55	5.0	250	5.3
Cohabiting couple: No children	163	4.5	61	5.7	225	4.7
Cohabiting couple: Dependent children	106	2.9	41	3.7	146	3.1
Cohabiting couple: All children non-dependent	17	0.5	3	0.3	20	0.4
Lone parent: Dependent children	135	3.7	29	2.7	164	3.5
Lone parent: All children non-dependent	87	2.4	22	2.0	109	2.3
Other household types						
With dependent children	51	1.4	27	2.5	78	1.6
All full-time students	0	0.0	0	0.0	0	0.0
All aged 65 and over	18	0.5	11	1.0	29	0.6
Other	117	3.2	29	2.6	145	3.1
All Categories: Household Composition	3,661	100	1,085	100.0	4,746	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

- There was a higher percentage of households consisting of Over 65s in West Somerset ENP (35.1%) than in North Devon ENP (28.8%) and the Exmoor National Park area as a whole (29.3%).
- The percentage of single person households was slightly higher in West Somerset ENP (32.2%) than in North Devon ENP (29.8%) and the Exmoor National Park area as a whole (31.7%).
- The percentage of households with dependent children was higher in North Devon ENP being just over one fifth (20.4%) than in West Somerset ENP (17.5%) and the Exmoor National Park Area as a whole (18.2%).

2.4 The following table profiles household size for the Exmoor National Park area.

Table 2.3: household size, West Somerset ENP, North Devon ENP and Exmoor National Park

Household Size	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
1 person in household	1,179	32.2	324	29.8	1,503	31.7
2 people in household	1,599	43.7	469	43.2	2,068	43.6
3 people in household	436	11.9	132	12.2	568	12.0
4 people in household	307	8.4	117	10.8	424	8.9
5 people in household	94	2.6	31	2.9	125	2.6
6 people in household	36	1	8	0.7	44	0.9
7 people in household	7	0.2	3	0.2	10	0.2
8 or more people in household	2	0.1	2	0.2	4	0.1
All categories: Household size	3,661	100	1,085	100.0	4,746	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

- There was a higher percentage of 1 person households (32.2%) in the West Somerset ENP area than in the North Devon ENP area (29.8%) and Exmoor National Park area as a whole (31.7%).
- More than two fifths were 2 person households in West Somerset ENP (43.7%), North Devon ENP (43.2%) and Exmoor National Park as a whole (43.6%).
- More than one tenth were 3 person households in West Somerset ENP (11.9%), North Devon ENP (12.2%) and Exmoor National Park as a whole (12.0%)
- Just under one tenth were 4 person households in West Somerset ENP (8.4%) and Exmoor National Park as a whole (8.9%) and just over one tenth were 4 person households in North Devon ENP (10.8%).
- There were similar percentages of 5 plus households in West Somerset ENP (3.9%), North Devon ENP (4.0%) and Exmoor National Park as a whole (3.9%).

Ethnicity

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

Table 2.4: ethnic origin, West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Ethnic origin	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
White: English/Welsh/Scottish/Northern Irish/British	7,594	97.4	2,483	95.7	10,077	97.0
White: Irish	23	0.3	14	0.5	37	0.4
White: Gypsy or Irish Traveller	2	0	0	0.0	2	0.0
White: Other White	108	1.4	55	2.1	163	1.6
Mixed/multiple ethnic group: White and Black Caribbean	18	0.2	4	0.2	22	0.2
Mixed/multiple ethnic group: White and Black African	2	0	5	0.2	7	0.1
Mixed/multiple ethnic group: White and Asian	11	0.1	16	0.6	27	0.3
Mixed/multiple ethnic group: Other Mixed	8	0.1	5	0.2	13	0.1
Asian/Asian British: Indian	4	0	3	0.1	7	0.1
Asian/Asian British: Pakistani	0	0	1	0.0	1	0.0
Asian/Asian British: Bangladeshi	1	0	1	0.0	2	0.0
Asian/Asian British: Chinese	3	0	0	0	3	0.0
Asian/Asian British: Other Asian	19	0.2	2	0.1	22	0.2
Black/African/Caribbean/Black British: African	1	0	3	0.1	4	0.0
Black/African/Caribbean/Black British: Caribbean	1	0	1	0.0	1	0.0
Black/African/Caribbean/Black British: Other Black	0	0	0	0.0	0	0.0
Other ethnic group: Arab	2	0	0	0.0	2	0.0
Any other ethnic group	2	0	0	0.0	2	0.0
All Categories: Ethnic Origin	7,800	100	2,594	100.0	10,393	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:

- There were small non-white ethnic populations, these being, 0.6% in West Somerset ENP, 1.6% in North Devon ENP and 1.1% in the Exmoor National Park as a whole.
- There were small White Other ethnic populations, these being, 1.4% in West Somerset ENP, 2.1% in North Devon ENP and 1.6% in Exmoor National Park as a whole.

Occupational profile

- 2.6 Profiling Occupation Groups is useful as it indicates, from a hierarchy of skills and qualifications, the likely associated income levels of the employed population. 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, North Devon ENP and Exmoor National Park, 2011

Occupation	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
1. Managers, directors and senior officials	567	15.6	284	21.5	851	17.2
2. Professional occupations	471	13	135	10.2	607	12.3
3. Associate professional and technical occupations	320	8.8	109	8.3	429	8.7
4. Administrative and secretarial occupations	273	7.5	92	6.9	364	7.4
5. Skilled trades occupations	823	22.7	313	23.7	1,135	23.0
6. Caring, leisure and other service occupations	365	10.1	120	9.1	485	9.8
7. Sales and customer service occupations	210	5.8	73	5.5	283	5.7
8. Process, plant and machine operatives	169	4.7	51	3.8	220	4.4
9. Elementary occupations	426	11.8	146	11.0	572	11.6
All Categories: Occupation	3,623	100	1,322	100.0	4,945	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> Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>)

Key findings:

- Nearly two fifths of working people aged 16 to 74 were in Categories 1, 2 and 3 in North Devon ENP (40.0%), compared to 37.4% in West Somerset ENP and 38.2% in Exmoor National Park overall.
- Just over two fifths of working people aged 16 to 74 were in Categories 4,5 and 6 in West Somerset ENP (40.3%), and in Exmoor National Park overall (40.1%) and almost two fifths in North Devon ENP (39.6%).
- More than one fifth of working aged people aged 16 to 74 years were in Categories 7, 8 & 9 in all three areas. 22.3% in West Somerset ENP were in these categories, 20.4% in North Devon ENP and 21.7% in Exmoor National Park overall.

3. Housing Data for Exmoor National Park

Introduction

3.1 This section uses 2011 Census to provide a housing profile of the Exmoor National Park area.

Property type

3.2 The following table summarises the baseline position by accommodation type in 2011.

Table 3.1: accommodation type, West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Property Type	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Whole House or Bungalow						
Detached	2,098	47.8	649	44.2	2,747	46.9
Semi-detached	1,218	27.8	288	19.6	1,506	25.7
Terraced (including end terrace)	701	16	267	18.2	969	16.5
Flat, maisonette or apartment						
Purpose Built block of flats or tenement	108	2.5	91	6.2	200	3.4
Part of a converted or shared house including bed-sits	145	3.3	102	7.0	247	4.2
In commercial building	100	2.3	59	4.0	159	2.7
Other						
Caravan or other mobile or temporary structure	14	0.3	13	0.9	27	0.5
All Categories: Household Spaces	4,385	100	1,468	100	5,853	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:

- Almost half of homes in West Somerset ENP were detached (47.8%). More than two fifths of homes in North Devon ENP were detached (44.2%). The percentage of detached houses in Exmoor National Park overall (46.9%) was only slightly lower than in West Somerset ENP.
- More than one quarter (27.8%) of homes in West Somerset ENP were semi detached compared to less than one fifth (19.6%) in North Devon ENP and just over one quarter (25.7%) in Exmoor National Park overall.

- 18.2% of homes were terraced in North Devon ENP compared to 16.0% in West Somerset ENP and 16.5% in Exmoor National Park overall.
- 17.1% of homes in North Devon ENP were flats compared to only 10.3% in Exmoor National Park overall and only 8.1% in West Somerset ENP.
- Less than 1% of homes were caravans in all three areas.

Tenure

3.3 The following table summarises the baseline position in 2011.

Table 3.2: Tenure type, West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Tenure	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Owned: Owned Outright	1,713	46.8	488	44.9	2,201	46.4
Owned: Owned with a mortgage or loan	642	17.5	297	27.4	940	19.8
Shared ownership (part owned and part rented)	9	0.3	4	0.4	14	0.3
Social Rented: Council	34	0.9	12	1.1	46	1.0
Social Rented: Other	552	15.1	68	6.3	620	13.1
Rented from: Private landlord or letting agency	481	13.1	163	15.0	644	13.6
Private Rented Other	106	2.9	24	2.2	131	2.8
Living Rent Free	123	3.4	28	2.6	151	3.2
All Categories: Tenure	3,661	100	1,085	100.0	4,746	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:

- 72.4% of homes in North Devon ENP were owner occupied compared to 64.3% in West Somerset ENP and 66.2% in Exmoor National Park overall.
- The percentage of Shared Ownership was very low in all three areas; these being, 0.4% in North Devon ENP and 0.3% in both West Somerset ENP and Exmoor National Park overall.
- The percentage of social rented council housing is very low in all three areas; these being, 1.1% in North Devon ENP, 0.9% in West Somerset ENP and 1.0% in Exmoor National Park overall.

- Care must be taken in accepting the proportions of Council housing where stock transfer has rendered this type non-existent.
- Other social rented housing is higher in West Somerset ENP (15.1%) than in North Devon ENP (6.1%) and Exmoor National Park overall (13.1%).
- Private renting and Living Rent free has similar percentages in all three areas.

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, North Devon ENP and Exmoor National Park, 2011

Rooms	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
1 Room	14	0.4	3	0.2	16	0.3
2 Rooms	40	1.1	15	1.4	56	1.2
3 Rooms	176	4.8	72	6.6	247	5.2
4 Rooms	549	15	184	17.0	733	15.4
5 Rooms	739	20.2	189	17.4	928	19.5
6 Rooms	767	20.9	192	17.7	959	20.2
7 Rooms	486	13.3	164	15.1	650	13.7
8 Rooms	363	9.9	104	9.5	466	9.8
9 or more Rooms	528	14.4	163	15.0	691	14.5
All Households Spaces with At Least One Usual Resident	3,661	100.0	1,085	100.0	4,746	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 were low percentages of homes with 1, 2 or 3 rooms in all three areas; these being 8.2% in North Devon ENP, 6.7% in Exmoor National Park overall and 6.3% in West Somerset ENP.
- More than half of homes had 4, 5 or 6 rooms in all three areas. 56.1% of homes in West Somerset ENP had 4, 5 or 6 rooms compared to 52.1% in West Somerset ENP and 55.2% in Exmoor National Park overall.
- Nearly two fifths (39.7%) of homes in North Devon ENP had 7, 8 or 9 plus rooms compared to 37.6% in West Somerset ENP and 38.1% in Exmoor National Park overall.

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, North Devon ENP and Exmoor National Park, 2011

Bedrooms	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
None	4	0.1	3	0.3	7	0.2
1 Bedroom	216	5.9	81	7.4	297	6.2
2 Bedrooms	951	26	277	25.5	1,228	25.9
3 Bedrooms	1,497	40.9	383	35.3	1,880	39.6
4 Bedrooms	607	16.6	205	18.9	812	17.1
5 or More Bedrooms	385	10.5	137	12.6	522	11.0
All Household Spaces with at least one usual resident	3,661	100.0	1,085	100.0	4,746	100.0

(Source: Table QS411EW 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:

- One third of homes in North Devon ENP had 0, 1 or 2 bedrooms (33.2%) compared to nearly one third (32.0%) of homes in West Somerset ENP and nearly one third (32.3%) in Exmoor National Park as a whole.
- Two fifths of homes (40.9%) in West Somerset ENP had 3 bedrooms compared to 35.3% in North Devon ENP and 39.6% in Exmoor National Park overall.
- Almost one third (31.5%) of homes in North Devon ENP had 4 or 5 plus bedrooms compared to 27.1% in West Somerset ENP and 28.1% in Exmoor National Park overall.

3.6 The table below shows average household size and the average number of rooms and bedrooms.

Table 3.5: average household size and average number of rooms and bedrooms in West Somerset ENP, Devon ENP and Exmoor National Park 2011

	West Somerset ENP	Devon ENP	Exmoor National Park
Indicator	Average	Average	Average
Household size	2.1	2.4	2.2
Number of rooms per household	6.1	6.0	6.0
Number of bedrooms per household	3.0	3.0	3.0

(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 household size appears to be slightly lower in West Somerset ENP (2.1) than in North Devon ENP (2.4) and Exmoor National Park as a whole (2.2).
- The calculations for average number of rooms are an estimate in that all homes with 9 plus rooms have been counted as 9 for the purposes of this calculation in the absence of more detailed information. The estimated room averages are only slightly higher in West Somerset ENP (6.1) than in North Devon ENP (6.0) and Exmoor National Park overall (6.0).
- The calculations for average number of bedrooms are an estimate in that all homes with 5 plus beds have been counted as 5 for the purposes of this calculation in the absence of more detailed information. The estimated bedroom averages are the same in all three areas (3.0).

Under-occupation and overcrowding

- 3.7 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.
- 3.8 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).

3.9 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.

3.10 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.

3.11 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**.

3.12 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.

3.13 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 3.6: under-occupation and overcrowding, West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Occupancy Rating	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Under-occupation: occupancy rating 2+ or more rooms	2,534	69.2	710	65.5	3,245	68.4
Overcrowding: occupancy rating rooms of -1 or less	106	2.9	32	2.9	137	2.9
Under-occupation: occupancy rating 2+ or more bedrooms	1,927	52.6	558	51.4	2,485	52.4
Overcrowding: occupancy rating of -1 or less bedrooms	53	1.4	14	1.3	68	1.4
All Households	3,661	100.0	1,085	100.0	4,746	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>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings:

- A small percentage of homes are overcrowded in all three areas. Using the bedroom occupancy rating 1.4% in West Somerset ENP were overcrowded, 1.3% in the North Devon ENP and 1.3% in Exmoor National Park overall. Using the room measure 2.9% were overcrowded in all 3 areas.
- There is a high level of underoccupancy in all three areas. Using the bedroom 2+ occupancy measure 52.6% in West Somerset ENP, 51.4% in North Devon ENP and 52.4% in Exmoor National Park area. Using the 2+ rooms measure 69.2% in West Somerset ENP, 65.5% in North Devon ENP and 68.4% in Exmoor National Park area were under-occupied.

Vacant, second and holiday homes

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

Table 3.7: vacant homes in West Somerset ENP, North Devon ENP and Exmoor National Park, 2011

Household spaces	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Household spaces with at least one usual resident	3,661	83.5	1,085	73.9	4,746	81.1
Household spaces with no usual residents	724	16.5	383	26.1	1,107	18.9
All categories: Household spaces	4,385	100	1,468	100.0	5,853	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

- More than one quarter (26.1%) of homes are estimated to be vacant in the North Devon ENP area compared with 16.5% in West Somerset ENP and 18.9% in Exmoor National Park overall.

4. Internal Migration and the Need for Housing

Introduction

- 4.1 Having generated more accurate population and household totals, this section:
- disaggregates household and housing projections provided in the January 2015 Northern Peninsula Housing Market Area SHMA Update for the Exmoor National Park area; and
 - considers that part which results from migration into the National Park as an element of the overall housing figure.
- 4.2 It is important to add a note to explain the process being applied here. It would be unrealistic to exclude all migration to or from the Exmoor National Park area. For example, people move homes to be nearer family or work, for reasons of affordability or to access a different quality of life. Most moves are over a short distance and therefore, people will continue to cross the National Park Boundary to and from neighbouring local authority areas. Vacancies created by moves may be taken up by local people or by people moving into the area. These are normal patterns of movement within the supply of housing. The difference in the case of North Devon, West Somerset and Exmoor National Park is that moves into these areas are projected to exceed moves out. The main driver of growth in the number of households, and the associated requirement for housing, is not natural growth from the resident population but movement into the area. Consequently, this section models the effect of excluding the increase in households resulting from Internal Migration, saying effectively that 'Natural Change' from the resident population will be taken into account, but in terms of immigration, only the replacement of existing households by new ones.
- 4.3 The approach adopted is as follows:
- Stage 1: Calculate population and household totals and percentages for Exmoor National Park in North Devon and West Somerset.
- Stage 2: Calculate average household size in each area.
- Stage 3: Calculate the proportions of population and households in North Devon and West Somerset which fall within the Exmoor National Park area.
- Stage 4: From 2012-based Components of Population Change, calculate the proportions of net Internal Migration of population which apply to the Exmoor National Park area and divide net Internal Migration by average household size for Exmoor National Park in North Devon and West Somerset.

Stage 5: Recalculate ONS 2012-based Subnational Population Projections for Exmoor National Park in North Devon and West Somerset to derive totals for the Exmoor National Park area.

Stage 6: Subtract the number of households gained through net Internal Migration from household projections derived from 2012-based Subnational Population projections.

Stages 1 and 2: population and household totals and percentages, and average household size

4.3 The following table sets out population and household totals and percentages and average household size for Exmoor National Park in North Devon and West Somerset and in total.

Table 4.1: population and households, and average household size, West Somerset ENP, North Devon ENP and Exmoor National Park 2011

Indicator	West Somerset ENP		North Devon ENP		Exmoor National Park	
	No	%	No	%	No	%
Population	7,800	75.0	2,594	25.0	10,394	100
Households	3,661	77.1	1,085	22.9	4,746	100
Average household size	2.13	-	2.39	-	2.19	-

(Source: KS102EW and 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

- There are an estimated 10,394 people and 4,746 households in the Exmoor National Park area, an average household size of 2.19.
- Because of smaller average household size in the West Somerset ENP area, 75% of the National Park's population is in the West Somerset area but over 77% of households. The reverse is the case in North Devon.

Stage 3: the proportions of populations and households in North Devon and West Somerset which fall within the Exmoor National Park area

4.4 The following table sets out the proportions of North Devon and West Somerset populations and households which fall within the Exmoor National Park area.

Table 4.2: North Devon and West Somerset populations and households in the Exmoor National Park area, 2011, numbers and proportions

Indicator	North Devon		West Somerset		Exmoor National Park	
	No	%	No	%	No	%
Total Population	91,528	100	34,600	100	-	-
ENP Population	2,594	2.83	7,800	22.54	10,394	8.24
Total Households	39,073	100	15,520	100	-	-
ENP Households	1,085	2.78	3,661	23.59	4,746	8.69

(Source: KS102EW and 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

- The National Park's population in North Devon constitutes 2.83% of the total and 2.78% of all households.
- The National Park's population in West Somerset constitutes 22.54% of the total and 23.59% of all households.

Stage 4: using 2012-based Components of Population Change, calculate the proportions of net Internal Migration of population which apply to the Exmoor National Park area and divide net Internal Migration by average household size for Exmoor National Park in North Devon and West Somerset.

- 4.5 The following table sets out the 2012-based Components of Population Change for North Devon.

Table 4.3: 2012-based Components of Population Change, North Devon, 2013-2032, 000s

Component	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Population	94.1	94.4	94.8	95.2	95.6	96.0	96.5	97.0	97.5	98.0	98.4	98.9	99.4	99.8	100.3	100.7	101.1	101.5	101.9	102.3
Natural Change	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2
Births	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Deaths	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.2	1.2
All Migration Net	0.3	0.3	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Internal Migration In	4.2	4.2	4.2	4.2	4.2	4.3	4.3	4.3	4.3	4.3	4.3	4.3	4.4	4.4	4.4	4.4	4.5	4.5	4.5	4.5
Internal Migration Out	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.9	3.9	3.9	3.9
International Migration In	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
International Migration Out	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Cross Border Migration In	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Cross Border Migration Out	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2

Key findings

- It is clear from this table that the main driver of growth is Net Migration (see row 5), Natural Change (row 2), which is the relationship between births and deaths, is either stable or declining.

4.6 The following table:

1. focuses on the net effect of Internal Migration for North Devon;
2. on the basis that 2.83% of the total North Devon population falls within Exmoor National Park, it allocates the proportion of North Devon's net Internal Migration which applies to Exmoor National Park; and

3. divides the resulting total by average household size within Exmoor National Park in North Devon to identify the effect of net Internal Migration for the number of households.

Table 4.4: 2012-based Components of Population Change, North Devon and Exmoor National Park in North Devon, 2013-2037, 000s

Indicator	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Internal Migration in – North Devon	4.2	4.2	4.2	4.2	4.2	4.3	4.3	4.3	4.3	4.3	4.3
Internal Migration out – North Devon	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8
Net Internal Migration – North Devon	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5
Net Internal Migration – ENP in North Devon	11.3	11.3	11.3	11.3	11.3	14.2	14.2	14.2	14.2	14.2	14.2
Net households– ENP in North Devon	4.7	4.7	4.7	4.7	4.7	5.9	5.9	5.9	5.9	5.9	5.9

Indicator	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	Total	Annual average
Internal Migration in – North Devon	4.3	4.3	4.4	4.4	4.4	4.4	4.5	4.5	4.5	4.5	4.6	4.6	4.6	4.6	-	-
Internal Migration out – North Devon	3.8	3.8	3.8	3.8	3.8	3.8	3.9	3.9	3.9	3.9	3.9	4.0	4.0	4.0	-	-
Net Internal Migration – North Devon	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.6	0.6	13.0	0.5
Net Internal Migration – ENP in North Devon	14.2	14.2	17.0	17.0	17.0	17.0	17.0	17.0	17.0	17.0	19.8	17.0	17.0	17.0	379.2	15.2
Net households – ENP in North Devon	5.9	5.9	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	8.3	7.1	7.1	7.1	158.0	6.3

Key findings

- The effect of net Internal Migration for Exmoor National Park in North Devon is a net gain of between 11 and 20 people per annum at an average of 15 and between 5 and 8 households at an average of 6 households.

4.7 The following table sets out the 2012-based Components of Population Change for West Somerset.

Table 4.5: 2012-based Components of Population Change, West Somerset, 2013-2032, 000s

Component	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Population	34.6	34.6	34.7	34.7	34.8	34.9	35.1	35.2	35.3	35.5	35.6	35.7	35.9	36.1	36.2	36.4	36.5	36.7	36.8	36.9
Natural Change	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
Births	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Deaths	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
All Migration Net	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Internal Migration In	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
Internal Migration Out	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.7	1.7	1.7	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
International Migration In	0.1	0.1	0.1	0.2	0.1	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
International Migration Out	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Cross Border Migration In	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Cross Border Migration Out	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Key findings

- It is clear from this table that the main driver of growth is Net Migration (see row 5), Natural Change (row 2), which is the relationship between births and deaths, is either stable or declining.

4.8 The following table:

1. focuses on the net effect of Internal Migration for West Somerset;

2. on the basis that 2.83% of the total West Somerset population falls within Exmoor National Park, it allocates the proportion of West Somerset's net Internal Migration which applies to Exmoor National Park; and
3. divides the resulting total by average household size within Exmoor National Park in West Somerset to identify the effect of net Internal Migration for the number of households.

Table 4.6: 2012-based Components of Population Change, West Somerset and Exmoor National Park in West Somerset, 2013-2037, 000s

Indicator	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Internal Migration in – West Somerset	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Internal Migration out – West Somerset	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.7	1.7
Net Internal Migration – West Somerset	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.3
Net Internal Migration – ENP in West Somerset	45.1	45.1	45.1	45.1	45.1	45.1	45.1	45.1	45.1	67.6	67.6
Net households – ENP in West Somerset	21.5	21.5	21.5	21.5	21.5	21.5	21.5	21.5	21.5	32.2	32.2

Indicator	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	Total	Annual average
Internal Migration in – West Somerset	2.0	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.2	2.2	2.2	2.2	2.2	-	-
Internal Migration out – West Somerset	1.7	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	-	-
Net Internal Migration – West Somerset	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	6.9	6.9	0.3
Net Internal Migration – ENP in West Somerset	67.6	67.6	67.6	67.6	67.6	67.6	67.6	67.6	67.6	90.2	90.2	90.2	90.2	90.2	1,600.3	64.0
Net households – ENP in West Somerset	32.2	32.2	32.2	32.2	32.2	32.2	32.2	32.2	32.2	42.9	42.9	42.9	42.9	42.9	762.1	30.5

Key findings

- In view of the greater proportion of population in West Somerset, the effect of net Internal Migration for Exmoor National Park in West Somerset is a net gain of between 45 and 90 people per annum at an average of 64 and between 21 and 43 households at an average of 31 households.

4.9 The following table combines data estimating the impact of net Internal Migration on population and household growth for Exmoor National Park in North Devon and West Somerset to provide totals for the Exmoor National Park area.

Table 4.7: 2012-based Components of Population Change, Exmoor National Park, 2013-2037

Indicator	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Net Internal Migration – Population	56.4	56.4	56.4	56.4	56.4	59.2	59.2	59.2	59.2	81.8	81.8
Net households – Households	26.2	26.2	26.2	26.2	26.2	27.4	27.4	27.4	27.4	38.1	38.1

Indicator	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	Total	Annual average
Net Internal Migration – Population	81.8	84.6	84.6	84.6	84.6	84.6	84.6	84.6	84.6	110.0	107.1	107.1	107.1	107.1	1,979.6	79.2
Net households – Households	38.1	39.3	39.3	39.3	39.3	39.3	39.3	39.3	39.3	51.2	50.0	50.0	50.0	50.0	920.1	36.8

Key findings

- The effect of Internal Migration for Exmoor National Park is a net gain of between 56 and 107 people per annum at an average of 79, and between 26 and 51 households at an average of 37 households.

Stage 5: recalculate ONS 2012-based Subnational Population Projections for Exmoor National Park in North Devon and West Somerset to derive totals for the Exmoor National Park area

- 4.10 The January 2015 Update for the Northern Peninsula Housing Market Area SHMA applied 2012-based Subnational Population Projections to provide household projections for the period 2011-2031 based on a range of scenarios. Projections for Exmoor National Park in West Somerset are unchanged as they were based on a detailed analysis of the National Park population in West Somerset. Using the same approach, this report has provided a new analysis of the National Park population in North Devon. Consequently it has been necessary to recalculate the previous projections for both Exmoor National Park in North Devon and overall as set out in the following tables.

Table 4.8: household projections scenarios based on the 2012-based subnational population projections, North Devon in the Exmoor National Park area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based												
Households	1,112	1,123	1,134	1,145	1,157	1,168	1,181	1,193	1,205	1,218	1,230	118
2011-based (only available to 2021)												
Households	1,108	1,113	1,118	1,124	1,130	1,136	1,143	1,150	1,158	1,165	1,172	60
2012-based scenarios												
Population	2,594	2,589	2,597	2,605	2,616	2,628	2,639	2,650	2,663	2,677	2,691	97
1. Households @ 2008 average household size	1,123	1,129	1,137	1,146	1,155	1,166	1,176	1,184	1,195	1,205	1,215	92
2. Households @ 2011 average household size	1,109	1,107	1,117	1,118	1,122	1,130	1,135	1,143	1,151	1,159	1,164	55
3. Households @ CLG 2011 to 2021+2008 post -2021	1,108	1,110	1,116	1,122	1,128	1,135	1,143	1,151	1,158	1,166	1,174	66
4. Households @ CLG 2008 adjusted to 2011 Census	1,108	1,113	1,122	1,131	1,141	1,150	1,160	1,170	1,180	1,190	1,200	92
5. Households @ constant household formation rates	1,108	1,111	1,118	1,125	1,132	1,140	1,148	1,156	1,164	1,172	1,181	73

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based											
Households	1,242	1,255	1,267	1,279	1,291	1,302	1,314	1,325	1,336	1,347	235
2012-based scenarios											
Population	2,705	2,716	2,730	2,743	2,754	2,768	2,779	2,790	2,801	2,812	218
1. Households @ 2008 average household size	1,226	1,234	1,244	1,255	1,263	1,273	1,282	1,291	1,299	1,307	184
3. Households @ CLG 2011 to 2021+2008 post -2021	1,184	1,194	1,204	1,214	1,223	1,233	1,242	1,251	1,260	1,268	161
4. Households @ CLG 2008 adjusted to 2011 Census	1,211	1,222	1,232	1,242	1,252	1,261	1,271	1,282	1,292	1,302	194
5. Households @ constant household formation rates	1,191	1,200	1,209	1,218	1,226	1,234	1,242	1,250	1,258	1,266	159

Table 4.9: household projections scenarios based on the 2012-based subnational population projections, West Somerset in the Exmoor National Park area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based												
Households	3,721	3,745	3,772	3,801	3,831	3,863	3,896	3,931	3,966	4,001	4,039	318
2011-based (only available to 2021)												
Households	3,492	3,519	3,546	3,575	3,603	3,634	3,666	3,697	3,731	3,760	3,794	314
2012-based scenarios												
Population	7,785	7,785	7,785	7,785	7,808	7,808	7,830	7,853	7,898	7,920	7,943	158
1. Households @ 2008 average household size	3,604	3,620	3,636	3,643	3,672	3,683	3,715	3,738	3,773	3,796	3,812	208
2. Households @ 2011 average household size	3,491	3,509	3,496	3,495	3,522	3,523	3,554	3,584	3,587	3,607	3,639	148
3. Households @ CLG 2011 to 2021+2008 index post -2021	3,492	3,498	3,503	3,514	3,524	3,539	3,557	3,574	3,594	3,611	3,632	140
4. Households @ CLG 2008 adjusted to 2011 Census	3,492	3,508	3,521	3,540	3,556	3,576	3,599	3,623	3,647	3,671	3,699	207
5. Households @ constant household formation rates	3,492	3,503	3,512	3,528	3,541	3,558	3,578	3,598	3,620	3,641	3,665	173

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based											
Households	4,077	4,115	4,155	4,194	4,235	4,276	4,316	4,356	4,394	4,433	712
2012-based scenarios											
Population	8,460	8,528	8,573	8,640	8,708	8,775	8,820	8,888	8,933	9,000	1,215
1. Households @ 2008 average household size	3,850	3,866	3,893	3,921	3,950	3,969	4,008	4,025	4,062	4,079	474
3. Households @ CLG 2011 to 2021+2008 post -2021	3,654	3,673	3,696	3,716	3,741	3,767	3,793	3,818	3,844	3,869	377
4. Households @ CLG 2008 adjusted to 2011 Census	3,731	3,761	3,790	3,818	3,844	3,871	3,896	3,923	3,947	3,972	480
5. Households @ constant household formation rates	3,693	3,719	3,745	3,769	3,793	3,817	3,841	3,866	3,889	3,913	421

Table 4.10: household projections scenarios based on the 2012-based subnational population projections, Exmoor National Park Authority area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based												
Households	4,833	4,868	4,906	4,946	4,988	5,031	5,077	5,123	5,171	5,218	5,269	436
2011-based (only available to 2021)												
Households	4,599	4,632	4,665	4,700	4,733	4,771	4,809	4,848	4,888	4,925	4,966	367
2012-based scenarios												
1. Households @ 2008 average household size	10,379	10,374	10,382	10,390	10,424	10,435	10,469	10,502	10,561	10,597	10,634	254
2. Households @ 2011 average household size	4,727	4,749	4,773	4,789	4,828	4,849	4,890	4,922	4,968	5,001	5,027	300
3. Households @ CLG 2011 to 2021+2008 index post -2021	4,600	4,615	4,613	4,613	4,644	4,653	4,689	4,728	4,738	4,766	4,803	203
4. Households @ CLG 2008 adjusted to 2011 Census	4,600	4,608	4,618	4,636	4,652	4,674	4,700	4,725	4,752	4,777	4,806	206
5. Households @ constant household formation rates	4,600	4,621	4,642	4,671	4,696	4,726	4,759	4,792	4,827	4,861	4,898	299
	4,600	4,614	4,630	4,653	4,673	4,698	4,726	4,754	4,784	4,813	4,846	246

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based											
Households	5,320	5,370	5,422	5,473	5,525	5,578	5,630	5,681	5,730	5,780	947
2012-based scenarios											
1. Households @ 2008 average household size	5,076	5,100	5,138	5,176	5,213	5,242	5,290	5,316	5,361	5,385	658
3. Households @ CLG 2011 to 2021+2008 post -2021	4,838	4,867	4,900	4,930	4,965	5,000	5,035	5,070	5,104	5,137	537
4. Households @ CLG 2008 adjusted to 2011 Census	4,942	4,983	5,022	5,060	5,096	5,132	5,167	5,204	5,239	5,274	675
5. Households @ constant household formation rates	4,884	4,919	4,954	4,986	5,019	5,051	5,083	5,116	5,147	5,179	579

Key findings

- The effect of recalculating population and households for Exmoor National Park in North Devon has been to increase slightly the overall projections of household growth. The reason for this is that the proportion of North Devon's population estimated

to fall within the National Park area has increased from 2.63% to 2.76%. The largest projection of a growth of 947 households is 2008-based with ranges of 537-675 households for the 2012-based Scenarios.

Stage 6: subtract the number of households gained through net Internal Migration from household projections derived from 2012-based Subnational Population projections

- 4.11 Having recalculated household projections of the Exmoor National Park area, it is now possible to examine the effect of subtracting household growth due to net Internal Migration. The following table applies the projected reductions in household growth detailed in Table 4.7 to Table 4.10 above.

Table 4.11: household projections scenarios based on the 2012-based subnational population projections, Exmoor National Park Authority area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based												
Households	4,807	4,816	4,827	4,841	4,857	4,874	4,893	4,913	4,933	4,953	4,976	169
2011-based (only available to 2021)												
Households	4,573	4,579	4,586	4,595	4,602	4,614	4,626	4,637	4,650	4,660	4,673	100
2012-based scenarios												
1. Households @ 2008 average household size	4,701	4,696	4,695	4,685	4,697	4,691	4,707	4,711	4,730	4,735	4,734	33
2. Households @ 2011 average household size	4,574	4,563	4,534	4,508	4,513	4,496	4,505	4,517	4,500	4,500	4,510	-64
3. Households @ CLG 2011 to 2021+2008 index post -2021	4,573	4,556	4,540	4,531	4,521	4,517	4,516	4,514	4,514	4,511	4,513	-61
4. Households @ CLG 2008 adjusted to 2011 Census	4,573	4,569	4,564	4,567	4,565	4,569	4,575	4,582	4,589	4,595	4,605	32
5. Households @ constant household formation rates	4,573	4,562	4,552	4,548	4,542	4,541	4,542	4,543	4,546	4,548	4,553	-20

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based											
Households	4,989	5,001	5,015	5,026	5,040	5,053	5,065	5,077	5,087	5,097	291
2012-based scenarios											
1. Households @ 2008 average household size	4,745	4,731	4,730	4,729	4,727	4,717	4,725	4,712	4,718	4,703	2
3. Households @ CLG 2011 to 2021+2008 post -2021	4,507	4,498	4,492	4,483	4,479	4,475	4,470	4,466	4,461	4,454	-119
4. Households @ CLG 2008 adjusted to 2011 Census	4,611	4,614	4,615	4,613	4,610	4,607	4,603	4,600	4,596	4,592	19
5. Households @ constant household formation rates	4,552	4,550	4,547	4,540	4,533	4,526	4,518	4,512	4,504	4,496	-77

Key findings

- Excluding the net effect of Internal Migration has a dramatic effect on projected household growth and the associated requirement for housing, leading to the substantial reduction of 656 households when compared with the unadjusted projections in Table 4.10.

- The highest projection - using the 2008-based household projections applied in the 2008 SHMA for the Northern Peninsula - is a growth of 291 households between 2011 and 2031.
- Applying the 4 Scenarios modelled for the full 20 year projection period results in growth of 2 and 19 households for Scenarios 1 and 4 respectively, and reductions of 119 and 77 households for Scenarios 3 and 5.
- Not all household growth will translate directly into an equivalent requirement for housing, for example, where households choose to share a single home or older households enter residential care, but most growth is likely to have this effect.
- If growth in households arising from net Internal Migration and the associated requirement for housing is not met, these projection Scenarios imply a maximum requirement for in the region of 20 homes over the 20 year projection period, or even a decline in the requirement for housing of almost 120 homes.

5. Conclusions

- 5.1 As data boundaries were not available for the Exmoor National Park, the 2008 Strategic Housing Market Assessment for the Northern Peninsula included the National Park within the Exmoor and Downland Fringe Sub-Market Area. Housing requirement projections were provided at district level and the National Park was included within projections made for both North Devon and West Somerset Councils.
- 5.2 The SHMA: North Devon and Torridge Update (December 2012) and SHMA: West Somerset Update (November 2013) revised the housing projections for the three districts by taking account of the findings of the 2011 Census. However, the lack of defined data boundaries for the Exmoor National Park meant that these could not be disaggregated for the National Park area.
- 5.3 The SHMA Update for Exmoor National Park in West Somerset (January 2014) determined the boundaries with the district authority within which most of the National Park's population is located, and provided a projected housing requirement for 437 homes over the period 2011-2031, of which 267 (61.22%) should be affordable homes.
- 5.4 In the period since the production of the original 2008 SHMA for the Northern Peninsula, data has become available from the 2011 Census and new Subnational Population Projections provided which are 2012-based. These take account of Census findings and changed demographic trends such as reduced levels of Internal Migration. The Northern Peninsula Housing Market Area SHMA Update (January 2015) took account of this new data, and provided a housing requirement projection for the Exmoor National Park area, although without a defined boundary for the National Park within North Devon.
- 5.5 As no official 20 year household projections were available other than those which are 2008-based and precede the Census, the implications for household change of 2012-based Subnational Population Projections were modelled according to 5 Scenarios of household formation, four of which could be provided for a 20 year projection period.
- 5.6 The recommended Scenario (Scenario 3, Interim 2011-based household projections to 2021 followed by 2008-based projections to 2031) accepted that there had been a 'recession effect' in the four years leading up to the Census in relation to net Internal Migration. This Scenario identified a projected housing requirement for 537 homes in the National Park area over the period 2011-2031. Applying the tenure breakdown from the January 2014 SHMA Update for Exmoor National Park in West Somerset - in which most National Park households are located - this projection identified a requirement for 325 affordable homes (61.22%) across the whole National Park area.
- 5.7 The current SHMA Update for Exmoor National Park in North Devon has finally resolved the boundary with North Devon and has enabled an accurate housing requirement projection to be derived for the National Park as a whole.

The recommended 'recession effect' Scenario identified a projected housing requirement for 537 homes over the period 2011-2031.

- 5.8 Applying the tenure breakdown from the January 2014 SHMA Update for Exmoor National Park in West Somerset, and which is likely to prevail into the North Devon National Park area, this projection identifies a requirement for 99 affordable homes in North Devon and 231 affordable homes in West Somerset, a total of 330 affordable homes (61.22%) across the whole National Park area.
- 5.9 The projections for all Scenarios and for the National Park area including where it forms part of North Devon and West Somerset are set out in the table below and also includes conversion factors allowing for such 'market signals' as vacant dwellings, second homes and homes occupied by non-residents to provide a net dwelling requirement.

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 (which is placed in brackets in the final column where appropriate).

Table 5.1: 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 (recommended Scenario 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 households	235	712	947
2012-based @ 2008 average household size	184	474	658
2012-based @ CLG 2011 to 2021+2008 post -2021	161	377	538 (537)
2012-based @ CLG 2008 adjusted to 2011 Census	194	480	674 (675)
2012-based @ constant household formation rates	159	421	580 (579)
2. Adjusted for vacant dwellings rates of:	3.68%	3.10%	3.68% & 3.10%*
2008-based households	244	734	978
2012-based @ 2008 average household size	191	489	679 (678)
2012-based @ CLG 2011 to 2021+2008 post -2021	167	389	556 (554)
2012-based @ CLG 2008 adjusted to 2011 Census	201	495	696
2012-based @ constant household formation rates	165	434	599 (597)
3. Adjusted for vacant dwellings and second homes rates of:	19.20%	19.20%	19.20%
2008-based households	280	849	1,129
2012-based @ 2008 average household size	219	565	784
2012-based @ CLG 2011 to 2021+2008 post -2021	192	449	641 (640)
2012-based @ CLG 2008 adjusted to 2011 Census	231	572	803 (805)
2012-based @ constant household formation rates	190	502	691 (690)
4. The backlog of affordable housing:	11	75	86

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.

5.10 The Update has also 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 and resulting in a reduction of 656 households over the period 2011-2031.

5.11 The consequences for the recommended 'recession effect' scenario are dramatic (2012-based @ CLG 2011 to 2021+2008 post -2021) implying a loss of 119 households in the period 2011-2031, and an equivalent fall in the requirement for housing. The following table summarises the outcome of excluding net internal migration on the projections in Table 4.12 above. The impact on the National Park area in each of North Devon and West Somerset has been calculated on the basis that 77.16% of the National Park's households are located in West Somerset (3,661) and 22.86% in North Devon (1,085). These proportions have been applied to the reduction of 656 households between 2011 and 2031, 506 in West Somerset and 150 in North Devon. The following table shows the effect of applying these reductions.

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 (which is placed in brackets in the final column where appropriate).

Table 5.2: 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 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 households	85	206	291
2012-based @ 2008 average household size	34	-32	2
2012-based @ CLG 2011 to 2021+2008 post -2021	11	-129	-118 (-119)
2012-based @ CLG 2008 adjusted to 2011 Census	44	-26	18 (19)
2012-based @ constant household formation rates	9	-85	-76 (-77)
2. Adjusted for vacant dwellings rates of:	3.68%	3.10%	3.68% & 3.10%*
2008-based households	94	228	322
2012-based @ 2008 average household size	41	-17	23 (-22)
2012-based @ CLG 2011 to 2021+2008 post -2021	17	-117	-100 (-102)
2012-based @ CLG 2008 adjusted to 2011 Census	51	-11	40
2012-based @ constant household formation rates	15	-72	-57 (-59)
3. Adjusted for vacant dwellings and second homes rates of:	19.20%	19.20%	19.20%
2008-based households	130	343	473
2012-based @ 2008 average household size	69	59	128
2012-based @ CLG 2011 to 2021+2008 post -2021	42	-57	-15 (-16)
2012-based @ CLG 2008 adjusted to 2011 Census	81	66	147 (149)
2012-based @ constant household formation rates	40	-4	35 (34)
4. The backlog of affordable housing:	11	75	86

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.