

# Housing Needs Assessment

## Kenton Parish Council, Teignbridge

Final Report  
January 2017

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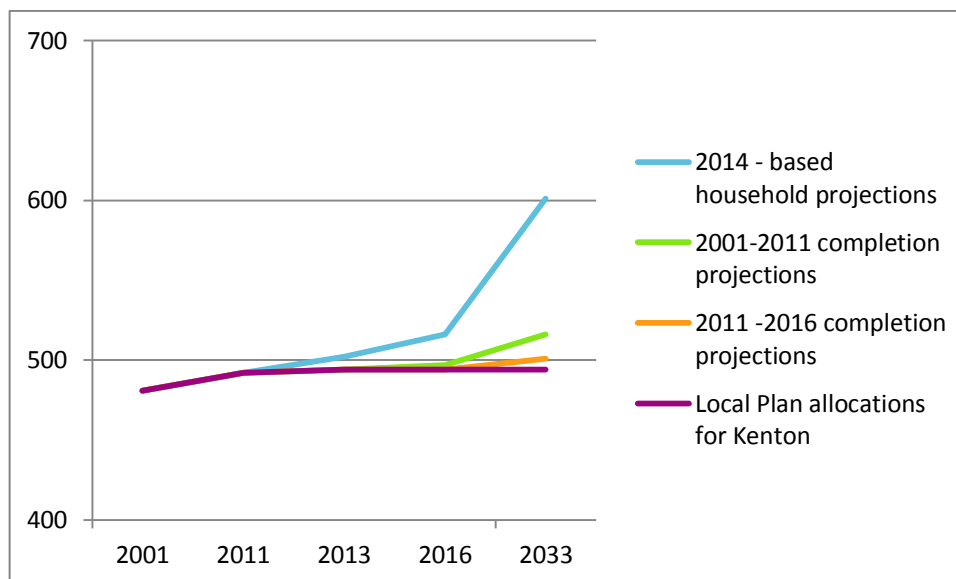
## Glossary of acronyms used in text

DCLG	Department for Communities and Local Government
HMA	Housing Market Area
HNA	Housing Needs Assessment
SHMA	Strategic Housing Market Assessment
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
PPG	Planning Practice Guidance
SHLAA	Strategic Housing Land Availability Assessment

## Executive Summary

1. The 2011 Localism Act introduced neighbourhood planning, allowing parish councils, town councils and neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area.
2. As more and more parishes and forums seek to address housing growth, including tenure and type of new housing, it has become evident that developing policies need to be underpinned by robust, objectively assessed housing data.
3. In the words of the National Planning Practice Guidance (PPG), establishing the future need for housing is not an exact science, and no single approach will provide a definitive answer. The process involves making balanced judgments, as well as gathering numbers and facts. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority average, reflecting the fact that a single town or neighbourhood almost never constitutes a housing market on its own and must, therefore, be assessed in its wider context.
4. The guidance quoted above on housing needs assessment (HNA) is primarily aimed at local planning authorities preparing Strategic Housing Market Assessments (SHMAs), which are used to determine housing need at a Housing Market Area (HMA) level. However, it helpfully states that those preparing neighbourhood plans can use the guidance to identify specific local needs that may be relevant to a neighbourhood, but that any assessment at such a local level should be proportionate.
5. Our brief was to advise on data at this more local level to help Kenton Parish Council understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.
6. This objective and independent housing needs advice note follows the PPG approach where relevant. This ensures the findings are appropriately evidenced. The PPG advises that assessment of development needs should be thorough but proportionate and does not require planners to consider purely hypothetical future scenarios, only future scenarios that could be reasonably expected to occur.
7. HNA at neighbourhood plan level can be focused either on the quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the Neighbourhood Plan area being assessed is unclear, for example where the local authority has not set a specific target for the Neighbourhood Plan area.
8. In the case of Kenton, this report focuses both on quantity and type of housing needed. In order to understand both topics, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing quantity and characteristics.
9. The planning period for neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Kenton, this would mean aligning with the Teignbridge District Local Plan period, which extends from 2013 to 2033.

10. The PPG states that:
11. 'No single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes'.
12. It continues: 'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which is identified within the guidance'.
13. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.
14. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. We have gathered data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data. Gathering a range of data, some more recent than Census 2011, also ensures allowance is made for the Census now being five years old.
15. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that 'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic underperformance, viability, infrastructure or environmental constraints.'
16. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study. This would include a review of the SHLAA as a capacity-based analysis, and could also be, in part, delivered through site assessment technical support offered through Locality.
17. Four separate projections of dwelling numbers for Kenton between 2013 and 2033 have been identified (see **Figure ES1**).

**Figure ES1: Kenton housing projections**

18. These are based on:

- The government's 2014-based household projections, extrapolated to Kenton, translated from households to dwellings (which gives a total of 99 new dwellings over the plan period, or approximately 4.95 dwellings per year).
- A projection forward of dwelling completion rates 2001-2011, (which gives a total of 22 new dwellings, or 1.1 per year).
- A projection forward of dwelling completion rates 2011-2016, (which gives a total of 8 new dwellings, or 0.4 per year) derived allocations for Kenton, (which gives a new total of 494 dwellings, i.e. no new dwelling completions over the Plan period).
- The local Plan derived allocations for Kenton, (which gives a new total of 494 dwellings, i.e. no new dwelling completions over the Plan period).

19. A summary of the findings of the data gathered is shown in **Table ES1**. The source for each factor with particular relevance to the neighbourhood is shown, together with AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area's future housing need. The number of arrows indicates the influence of the factor in question (e.g more arrows indicates a higher influence). Following PPG guidance, the factors relate both to housing price and housing quantity.



**Table ES1: Summary of factors specific to Kenton with a potential impact on neighbourhood housing need**

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>Age structure of population</b>	SHMA, Census	↑ ↑	Census 2011 data shows an older population relative to the national average, and trends toward this increasing. The SHMA notes that the current supply of specialist housing units in Teignbridge (98 per 1000 of population over 75) is significantly below national average of 170 per 1000 of population over 75. Census data indicates that between 2001 and 2011 Kenton has become more under-crowded, which is strongly indicative of an ageing population. In other words, larger units that once housed a family are gradually losing residents from children moving away etc. This will put additional pressure on both smaller housing units and specialist housing units. AECOM considers that this factor has two rather than three up arrows as older members of the population downsizing from family homes will free up dwellings for younger families and first time buyers.
<b>Economic performance</b>	SHMA, census	↓ ↓	Data on economic performance is available at the Teignbridge District level. The SHMA noted that Teignbridge has a lower job density than the rest of the HMA. As such, there are proportionally fewer jobs present in Teignbridge compared to the remainder of the HMA. Conversely however, Teignbridge also has higher employment rates and lower unemployment rates than the national average, and similar to those of the HMA. High employment rates have the potential to drive demand in the future. Although economic

			<p>performance is potentially strong, Kenton has a higher proportion of retired people than the national average. This can have a detrimental effect on the economy of an area creating lower levels of economically active households.</p>
<p><b>Overcrowding/concealed families</b></p>	<p>Census, SHMA</p>	<p>↔</p>	<p>Census data highlights that between 2001 and 2011, the proportion of under-crowding (rather than over-crowding) in Kenton increased slightly more than district and national levels. The proportion of concealed families (any group of people who want to form a new household but are unable to do so, typically for economic reasons) is very slightly higher than the Teignbridge average but slightly lower than the England average. This data does not suggest that there is significant over-crowding in Kenton. As such, this factor has been given a sideways arrow to reflect that the pressure from overcrowding / concealed families does not differ significantly from the national average, showing that there are not significant levels of overcrowding.</p>
<p><b>Level of new supply in local housing market</b></p>	<p>Census</p>	<p>↑↑↑</p>	<p>Between 2001 and 2011 there was a total of 1.1 new dwellings completed each year in Kenton leading to a 2.3% increase over the ten year period. In comparison there was a 7.3% increase for Teignbridge as a whole. This suggests that (relative to Teignbridge) there has been a limited supply of dwellings in Kenton and, as such this may contribute to an increased demand on future housing need. This is further evidenced by the high local house prices which are also likely to reflect constrained housing supply.</p>

<p><b>Local housing waiting list/need for affordable housing</b></p>	<p>Local Housing waiting list, SHMA, Census</p>	<p>↓ ↓ ↓</p>	<p>The Census shows shared ownership (an indication of a lack of affordable housing) is much lower in Kenton than both Teignbridge and national averages. The proportion of socially rented housing has also decreased by 6.3% in Kenton between 2001 and 2011, this is a much larger decrease than seen nationally or compared to the modest growth seen in Teignbridge, which suggests there are not affordability issues in the Parish which can be an indicator of a high demand for housing. Teignbridge District Council advises that currently there are seven household applications on the waiting list for Kenton. This is 1.4% of the total households in Kenton. Although the waiting list is only a snapshot in time, it does seem apparent that, with only 1.4% of households within Kenton in need of affordable housing at present, the emerging Local Plan policy of 30% affordable housing provision should be adequate.</p>
<p><b>House prices relative to wider area</b></p>	<p>The Land Registry, SHMA</p>	<p>↑ ↑</p>	<p>Demand is also relatively strong for home sales. House price data from The Land Registry<sup>1</sup> shows that over the course of 2015, the average sold house price in Kenton was £328,380. This is higher than the overall Teignbridge average of £241,126<sup>2</sup> over the same period and suggests that there may be a high demand for homes. This factor has been given two up arrows rather than three, as it should be borne to mind that the small sample size of properties sold in Kenton (13) over the course of 2015 means that the average prices may only reflect the mix of properties sold, rather than changes in the local market itself. With regards to</p>

<sup>1</sup> The land Registry Open Data [online] available at: <http://landregistry.data.gov.uk>

<sup>2</sup> ibid

			Teignbridge as whole, the SHMA showed that the entry level prices for one or two bedroom flats in Teignbridge were the second highest in the HMA after Exeter; and that the income threshold required to be able to purchase a 1 or 2 bedroom flat in Teignbridge was again the second highest in the HMA.
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20. Ordinarily, in line with Basic Condition E<sup>3</sup>, of the four projections shown in **Figure ES1**, it would be recommended that the projection from the adopted plan should be given the greatest weight. However, in this case, it forms a projection of zero new dwellings for Kenton over the Plan period. Neighbourhood Plans are considered to meet Basic Condition E as long as they seek to meet the Local Plan housing target, which is considered a minimum figure. In this case, this means that Kenton has the option either of allocating no new dwellings, or seeking to meet some or all of the unmet demand evidenced by this report.
21. AECOM would advise against relying on either the 2001-2011 or 2011-2016 dwelling completions-derived projections. Although these can be useful in certain circumstances, where supply and demand are not in balance (as in Kenton) they are less useful. This is because dwelling completions-derived projections are a function of supply as much as of demand. In other words, part of the reason why only two dwellings were completed in the parish between 2011 and 2016 is likely to be a lack of suitable or available sites, which is not a demand-side factor. Additionally, the current high level of demand (as evidenced by high house prices), suggests that a demand-side projection based on these completion rates would be too low.
22. It is therefore recommended that the most appropriate course of action for the Parish Council is to discuss a figure with Teignbridge District Council, based on the 2014 household projection figure of 99 new dwellings over the plan period (approximately 4.95 dwellings per year). Taking into account the high demand identified in **Table ES1**, it is suggested that raising the estimate of demand by around 10% would be an appropriate starting point. This results in a demand for 109 dwellings over the Plan period 2013-2033, or 5.45 dwellings per year.
23. Note that this is, of course, a demand-side projection only. In line with government guidance, the estimated demand for 109 dwellings over the neighbourhood plan period needs to be aggregated with the results of the supply-side evidence base; and local constraints on the supply-side, such as, for example, landscape, heritage, transport, infrastructure. This could result in the neighbourhood plan's final dwelling target being significantly lower than 109.
24. Having estimated the quantity of housing required in Kenton based on the demand-side evidence, the remainder of the assessment focused on the characteristics and/or type of the housing needed. Summaries of the conclusions from all sources are in **Table ES2** below.

<sup>3</sup> Basic Condition E requires that the neighbourhood plan's housing policies are in general conformity with the strategic policies of the relevant Local Plan.

Factors in the table are in alphabetical but no other order. Note that there is potential for overlap between some factors (e.g. dwelling type and housing for older people) but an inclusive approach has been taken to ensure all relevant factors are covered.

**Table ES2: Summary of local factors specific to Kenton with a potential impact on neighbourhood plan housing characteristics**

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Affordable housing</b>	Census, SHMA, Teignbridge Local Plan,	<p>Teignbridge District Council advises that currently there are seven household applications on the waiting list for Kenton. This is 1.4% of the total households in Kenton. Although the waiting list is only a snapshot in time, it does seem apparent that with only 1.4% of households within Kenton in need of affordable housing at present, the emerging Local Plan policy of 30% affordable housing provision should be adequate.</p> <p>Additionally, shared ownership (an indication of a lack of affordable housing) in Kenton is significantly lower than both the Teignbridge and national average.</p>	<p>The evidence suggests that there is not a significant unmet need for affordable housing in Kenton Parish. As such, current proportions of market housing (both private rented and ownership) should be sufficient to meet resident's needs. However, it is recommended that the Parish Council work closely with Teignbridge District Council to ensure that both local affordable need, and also Local Plan Policy requirements are met.</p>
<b>Dwelling type</b>	SHMA, Census	<p>The most popular dwelling types in Kenton in 2011 were detached and semi-detached houses. Future need for detached housing (other than smaller bungalows) may be limited due to the proportionally older population structure of the Parish and the corresponding number of older people wishing to downsize from family homes and / or move to specialist accommodation. Although demand for flats or apartments is likely to remain low due to the rural nature of Kenton, there may be an increased need for terraced houses and bungalows to accommodate those wishing to downsize from detached family homes.</p> <p>The entry level prices for one or two bedroom flats in Teignbridge were the second highest in the HMA<sup>4</sup> after</p>	<p>It is recommended that new dwellings to be provided should be a mix of houses and bungalows, designed to meet the needs of a range of population sectors, but bearing in mind the need for a particular focus on homes for older people and also starter homes<sup>5</sup> for younger people.</p> <p>Although it is accepted that the local context suggests a proportion of the new dwellings coming forward would be semi-detached and detached, the neighbourhood plan should seek to avoid an over-provision of new detached dwellings (except for bungalows) in light of the high proportion already</p>

<sup>4</sup> The PPG provides a definition of housing market areas: "A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work."

<sup>5</sup> The PPG defines starter homes as those which are to be offered at below open market value, and are aimed at first time buyers who are unable to afford such housing.

		Exeter and the income threshold required to be able to purchase a 1 or 2 bedroom flat in Teignbridge was again the second highest in the HMA after Exeter.	available and the identified future needs of an ageing population.
<b>Dwelling size</b>	Census, SHMA	<p>Between 2001 and 2011 Kenton showed a larger increase in one person households than the Teignbridge or England average. This, combined with an ageing population, evidence of under-crowding and wider national trends of decreasing household sizes, is likely to result in a shift towards a requirement for smaller dwellings relative to current housing stock distribution in the future.</p> <p>The SHMA notes that across the Teignbridge District Area household growth will be mostly from smaller households (due in part to older people downsizing from family homes into smaller and specialist housing). It is therefore considered that smaller units will play a key role in meeting future market housing requirements. It recommends a property size target of 60% one and two bedrooms and 40% three/ four bedroom split in the market sector to provide a better balanced housing stock.</p>	<p>Support, encourage and/or require the development of a large proportion of smaller (1-2 bedroom) dwellings to meet the needs of older people looking to downsize, and also younger families.</p> <p>Smaller dwellings most likely to be in demand would be houses and bungalows rather than flats, and could be terraced or semi-detached depending on local context.</p> <p>There may also continue to be a demand for larger detached homes. However, this need will in part be met through older residents downsizing from under-occupied homes rather than the provision of new dwellings.</p>
<b>Housing for older people</b>	Census, SHMA	<p>Census data shows that Kenton is becoming significantly more under-crowded, which is strongly indicative of an ageing population. Additionally, the SHMA notes that Teignbridge, as a whole, has a higher proportion of retired people than the national average. High levels of retirement also indicate an elderly population.</p> <p>This is confirmed from data between 2001 and 2011 that shows the 65-84 age group and the 85 + age group have seen increases of 10.3% and 35.0% respectively. This increase (especially in the 85+ age group) is significantly higher than the Teignbridge and national averages. This suggests that there will be a large demand for housing suitable for older people in the</p>	<p>The choice of housing for older people needs to increase in the future in line with expected demographic changes. There will be increased demand for smaller housing and bungalows from retirees who wish to downsize; and there will also need to be opportunities for specialist housing.</p> <p>The Plan may tackle this by setting out policy to enable specialist providers to provide dwellings suitable for older people, essentially smaller units and/or bungalows with 1-2 bedrooms. AECOM advises that the group should refer to guidance from The Housing</p>

		<p>future.</p> <p>The SHMA notes that the current supply of specialist housing units in Teignbridge (98 per 1000 of population over 75) is significantly below national average of 170 per 1000 of population over 75.</p>	<p>Learning and Improvement Network (Housing LIN)<sup>6</sup> which can be used to give an indication of the potential future demand for specialist provision.</p> <p>A community aspiration to support downsizing for households currently under-occupying larger properties, though aspirational, could at least be a useful statement of intent.</p> <p>The Parish Council should monitor downsizing as it takes place- the more that happens, the lower the need for new family-sized/larger dwellings.</p>
<p><b>Tenure of Housing</b></p>	<p>Census, SHMA, Teignbridge Local Plan</p>	<p>The level of owner occupation in Kenton is higher than both the Teignbridge and national averages. However, the proportion of both shared ownership and socially rented housing (rented from the Council or a Registered Social Landlord) is much lower than the Teignbridge and national averages. There are also a lower proportion of privately rented units in Kenton compared to the Teignbridge and England averages (although this is shown to have increased between 2001 and 2011).</p> <p>Between 2001 and 2011 home ownership in the area increased at a lower rate than the level of growth in Teignbridge, but at a higher rate than the contraction at the national level. Shared ownership (an indication of a lack of affordable housing) remained stable compared to the 30.3% and 30% increases seen respectively in Teignbridge and nationally. There has also been a much larger decrease in social rentals in Kenton compared with the small decrease seen nationally and the small growth seen in Teignbridge.</p>	<p>Relative to both national and Teignbridge data, there is clearly a lower demand for social and market rented housing. The low levels of shared ownership also suggest that there are few issues with affordability.</p> <p>Although these factors demonstrate a weaker demand for social and private lets than seen in Teignbridge or nationally, as previously discussed, the ageing population may result in an increased demand on both social and private rents as older residents may wish to downsize.</p> <p>The tenure of housing during the Plan period is likely to remain weighted towards ownership. However the demand for private rented accommodation increased between 2001 and 2011 and this trend is likely to continue in line with an ageing population who may wish to downsize.</p> <p>The Parish Council should</p>

<sup>6</sup> Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: <http://www.housinglin.org.uk/library/Resources/Housing/SHOP/SHOPResourcePack.pdf>

			therefore work closely with Teignbridge District Council to ensure that the balance of tenure within the Parish meets the needs of the residents.
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# 1 Introduction

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

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

## **Local Study Context**

30. Kenton is a village in Devon with a population of 8,111 (2011 Census). It is situated approximately 12.8km south of Exeter and the local authority is Teignbridge District Council. The A379 provides a road link to Exeter and the M5 Devon Expressway.
31. There is a coach station in Kenton, however, there is no rail station. The nearest rail station is located in Starcross which is approximately 2.5 km south east of Kenton. It provides rail links to Exeter and subsequently services over the Bristol to Exeter line to London Paddington via Reading. The nearest major airport is Exeter Airport which is located, 16 km to the north, or approximately a 25 minute drive. .
32. The Neighbourhood Plan area is the same as the Kenton Parish boundary. This greatly simplifies the gathering of statistics, as all are available at the parish level.
33. For planning purposes, Kenton is covered by the adopted Teignbridge Local Plan 2013 to 2033. The plan was adopted on 6 May 2014. The Local Plan defines Kenton as a village, which has close access to a shop, public house, village hall, school, and daily public transport services. It goes on to state: *"These defined villages will be appropriate locations*

*for limited development which meets their social and economic needs, protects their rural character and is consistent with the need to minimise travel.” And that development will be permitted “only where it can be demonstrated that it will not have an adverse impact on the integrity of the South Hams SAC.<sup>7</sup>”*

34. The Local Plan does not allocate any housing for Kenton. However, it states that the emphasis should be “on the provision of affordable housing, employment, services, facilities, environmental enhancements and to small scale development brought forward through Neighbourhood Plans”. Therefore, this HNA will provide a key piece of the evidence base to help Kenton Parish Council understand, among other matters, the quantity of housing likely to be needed in the Neighbourhood area over the Neighbourhood Plan period, as well as the type and tenure of housing that would be most suitable for the neighbourhood area.
35. Kenton is located within the Exeter Housing Market Area (HMA) and as such, the SHMA for the Exeter Housing Market Area<sup>8</sup> is relevant to this housing needs analysis and will be interrogated as appropriate.

## 2 Approach

### PPG-Based Assessment

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

### Summary of Methodology

37. HNA at neighbourhood plan level can be focused either on the quantity of housing needed, type of housing need, or both. In the case of Kenton, this report focuses both on quantity and type of housing needed. In order to understand both topics, a wide range of data and local evidence has been interrogated and summarised it into policy recommendations designed to inform decisions on housing quantity and characteristics.
38. The planning period for neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Kenton, this would mean aligning with the Teignbridge Local Plan period, which extends from 2013 to 2033.

### Gathering and Using a Range of Data

39. The PPG states that:

*“No single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price*

<sup>7</sup> Special Area of Conservation - an internationally protected site of high biodiversity value.

<sup>8</sup> [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

*or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes."*

40. It continues:

*"Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance."*

41. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.

42. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative data (if used judiciously) also has an important role to play, perhaps to a greater extent than at local authority level. Data has been gathered from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data.

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

43. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that:

*"The assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints."*

44. For this reason, it is advised that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study.<sup>9</sup>

### **Study Objectives**

45. The objectives of this report can be summarised as:

- Collation of a range of data with relevance to housing need in Kenton relative to Teignbridge, Devon and the national average;
- Analysis of that data to determine patterns of housing need and demand;

<sup>9</sup> Such an approach, clearly separating housing need assessment (demand-side) from dwelling capacity assessment (supply side), was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

- Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

46. The remainder of this report is structured around the objectives set out above:

- Chapter 3 sets out the data gathered from all sources; and
- Chapter 4 sets out our conclusions and recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

### 3 Relevant Data

#### Local Planning Context

*Exeter Strategic Housing Market area: Strategic Housing Market Assessment (DCA 2014)*

47. The PPG states that neighbourhood planners can refer to existing needs assessments prepared by the local planning authority as a starting point. As Kenton is located within the Exeter housing market area, the starting point was the Exeter Strategic Housing Market Assessment (SHMA)<sup>10</sup> which was carried out by DCA. The Exeter Housing Market Area (HMA) covers the local authorities of East Devon, Exeter, Mid Devon and Teignbridge. It informs housing policies across these local authorities, including affordable housing policy.<sup>11</sup>
48. As population and household projections are only published at a local authority scale, it is accepted standard practice to group local authorities as the 'best fit' to the HMA. The benefits of drilling down below local authority level are outweighed by the complexities and multiple assumptions necessary to model housing need at this more local level.
49. Additionally, for the purposes of local plan preparation, it is important that there is a consistent assessment of development needs across local plan areas. Therefore the Exeter SHMA report deals principally with development needs in Teignbridge District as a whole.
50. The SHMA assessed a wide range of factors pertinent to the demand for housing. A selection of key issues have been discussed in this report which are deemed most relevant to Kenton. These key issues include: conclusions on economic drivers and considerations, house prices and affordability, the needs of specific household groups, and the characteristics of potential future supply.

#### SHMA conclusions on economic drivers and considerations

51. The SHMA notes that the economic development of an area can be of equal importance in driving change in housing markets, especially due to the effect of migration, and that it is important to highlight the reciprocal relationship between economic development and the provision of housing.

<sup>10</sup> Available online at <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>11</sup> Here and throughout this report, we have defined affordable housing according **only** to the standard definition found in Annex 2 of the National Planning Policy Framework (NPPF), namely: 'Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.' We have avoided the definition of affordable housing in its colloquial sense of 'relatively cheaper market housing'.

52. 'Labour demand' consists of the jobs and vacancies available within an area. In this context, the SHMA notes that Teignbridge has a job density<sup>12</sup> of 0.73% which is lower than the Devon average of 0.82% and the HMA average of 0.83%. It is the second lowest value within the HMA which suggests that there are proportionally fewer jobs present in Teignbridge than in the remainder of the HMA.
53. Contrastingly, 'labour supply' consists of people who are employed as well as people defined as unemployed or economically inactive, who can be considered as a potential labour supply. In this regard, the SHMA notes that Teignbridge has an employment rate of 76.8%. This is broadly comparable to the average employment rate of the HMA (76.6%) but is higher than regional (73.9%) and national (71.1%) averages. In contrast, the unemployment rate of 4.7% in Teignbridge is also comparable to the HMA average of 4.6%, which is lower than regional (6.0%) and national (7.8%) averages. However, between 2007 and 2013 Teignbridge showed the second highest fall in employment rates (-3.5%) across the HMA. This suggests that there is not likely to be significant levels of in-migration for the purpose of employment.
54. With regard to employment types, Teignbridge has one of the largest Professional, Managers and Senior Officials occupation groups in the HMA, and these levels are also higher than the county and regional benchmark areas.
55. Regarding the number of retired people, Teignbridge also has a higher proportion (19.0%) than the county (18.2%), regional (15.8%) and national levels (13.7%). Overall, across the HMA area, the retirement level is an average of 17.3%. The SHMA notes that high levels of retirement can impact on the economy of an area creating lower levels of economically active households. High levels of retirement also indicate an elderly population who will in the future require suitable accommodation to meet their needs and housing may need to be purpose built or adapted for households with older residents.

#### SHMA conclusions on house prices and affordability

56. The SHMA notes that prices in the HMA are at the upper end of national levels, but that the average house price change between 2000 and 2013 in the HMA has been lower than the county average and the same as national averages. This is shown in Table 1 [replicated from Exeter SHMA table 6.4]. Within the HMA, Teignbridge district has shown an increase of 120% which is lower than both the England and Devon averages. It has also grown significantly slower than the largest (137%) local authority increase within the HMA (Exeter).

**Table 1: House price increase (%) 2000 – 2013**

Area	Price increase (%)
Exeter	137%
East Devon	118%
Mid Devon	121%

<sup>12</sup> Job density, as defined by the ONS, is the number of jobs in an area divided by the resident population aged 16-64 in that area. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64.

Teignbridge	120%
HMA average	124%
Devon	129%
England	124%

Source: Exeter SHMA<sup>13</sup>

57. The SHMA also assessed average house prices by type across the local authorities within the HMA. This information was from the third quarter of 2014. More recent data was readily available from the Office for National Statistics (ONS)<sup>14</sup>, and as such this information has been updated for the 2015 annual average. This data is shown in Figure 1 [replicated from Exeter SHMA figure 6.1].

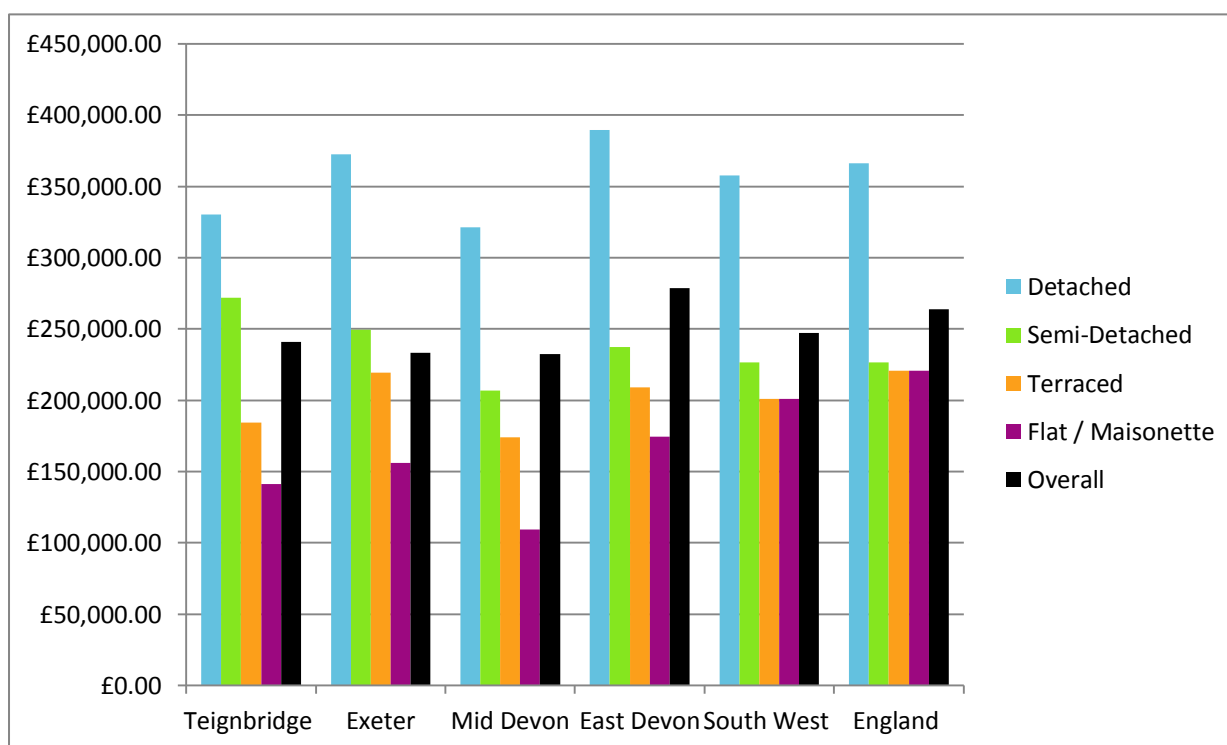


Figure 1: Average house price for Q1 – Q4 2015. Source: Exeter SHMA<sup>15</sup>

58. The updated data shows that the overall average price of property in Teignbridge (£241,126) is the second highest in the HMA after East Devon (£278,466). Although the value of property in Teignbridge is high in the local context, the value is lower than that of the average price in the South West (£247,180) and England (£263,969). With regard to the value of differing property types, semi-detached houses in Teignbridge are the most

<sup>13</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>14</sup>ONS (2016) Mean house price for national and subnational geographies (existing dwellings) – HPSSA Dataset 14 <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/meanhousepriceformationalandsubnationalgeographiesexistingdwellingsquarterlyrollingyearhpssadataset14>

<sup>15</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

expensive in the HMA, and also more expensive than South West and England averages. Entry to the market is clearly dependent on availability, a factor which is particularly critical for low income households who can only enter the market in any numbers where there is an adequate supply of affordable homes. First-time buyers as new entrants to the housing market do not purchase houses at average prices; in broad terms, new purchasers of either flats or terraced properties buy in the lowest quartile of prices. The SHMA used an internet search of the local estate agents to ascertain the cost of the cheapest units available i.e. the lowest quartile stock costs in each District and sample size. The sample size of entry level properties was 268 across the HMA.

Table 2: Entry Level house prices within the HMA<sup>16</sup>

	1 Bedroom Flat	2 Bedroom Flat	2 Bedroom Terraced
Teignbridge	90,000	125,000	125,000
Exeter	100,000	135,000	160,000
East Devon	89,950	115,500	125,000
Mid Devon	78,500	108,000	115,000

Source: Exeter SHMA<sup>17</sup>

59. At the time of the SHMA, the average price of flats in the whole HMA area according to the Land Registry survey was £110,962. However, lower quartile levels varied across each District with entry prices, starting at around £78,500 for a 1-bed flat in Mid Devon, rising to £135,000 for a 2-bed flat in Exeter. In this context, the entry level prices for one or two bedroom flats in Teignbridge were the second highest in the HMA after Exeter. This is shown in table 2 [replicated from Exeter SHMA table 6.1]
60. In order to relate this to relative income thresholds required to purchase property, the cheapest purchase prices of the smallest units in the Districts were assessed in order to calculate the purchase income threshold levels. These are based on 95% mortgage availability and a 3.5 x gross income lending ratio for single earner households.
61. Table 3 [replicated from Exeter SHMA table 6.4] shows the income levels needed to access the owner-occupied market in each area. It can be seen that Teignbridge has the second highest income (jointly with East Devon) required to buy a one bed flat or two bed terraced home; and the second highest income required to purchase a 2 bedroom flat.

<sup>16</sup> Adapted from: DCA (2014) Assessment of the Exeter Strategic Housing Market area [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>17</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

Table 3: Purchase income thresholds (as of December 2014) within the HMA<sup>18</sup>

	1 Bedroom Flat	2 Bedroom Flat	2 Bedroom Terraced
Teignbridge	24,400	33,900	33,900
Exeter	27,100	36,600	43,400
East Devon	24,400	31,400	33,900
Mid Devon	21,300	29,300	31,200

Source: Exeter SHMA<sup>19</sup>

- 62. In line with the NPPG, the SHMA examined evidence of affordability by looking at lower quartile house prices and incomes. The data source used is the ratio of house prices to earnings updated in April 2014 based on data from CLG, Land Registry and ONS. Figure 2 [replicated from Exeter SHMA figure 9.4] shows the lower quartile affordability trend over the 16 year period from 1997 to 2013 in the HMA compared with Devon and England.
- 63. Affordability in the HMA worsened in the middle of the period and then gradually improved from around 2010 through to 2013, similar to the County and national profiles. The price to earnings ratio remains high, creating an affordability problem for new forming households. The price to earnings ratio in Teignbridge is the second highest in the HMA after East Devon which can be seen to be the least affordable.

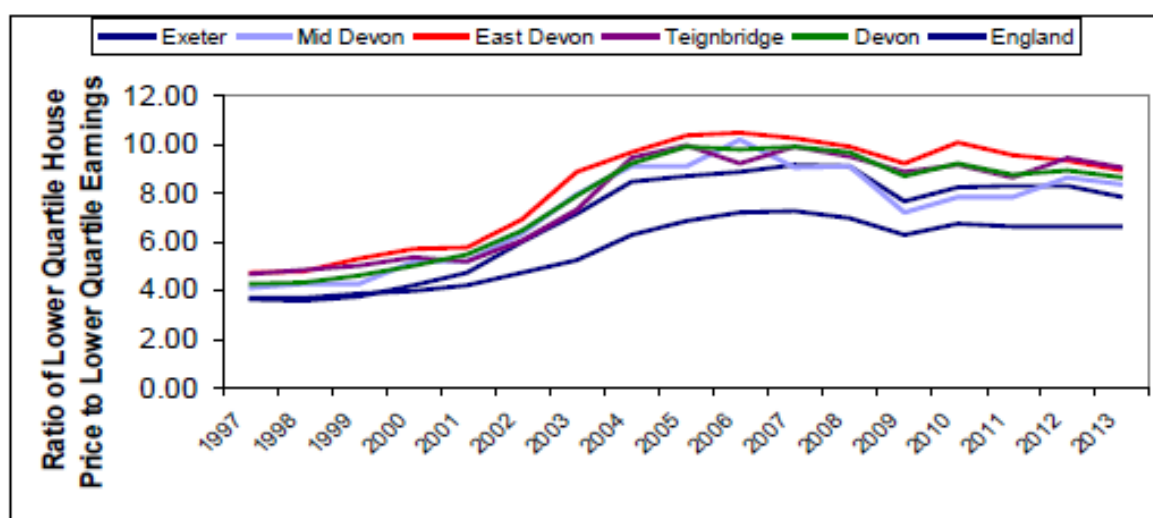


Figure 2: Lower Quartile affordability trend 1997 -2013<sup>20</sup> Source: Exeter SHMA<sup>21</sup>

<sup>18</sup> Adapted from: DCA (2014) Assessment of the Exeter Strategic Housing Market area [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>19</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>20</sup> DCA (2014) Assessment of the Exeter Strategic Housing Market area [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>



64. The cost of private rented accommodation is also an important factor to consider when determining the tenure which may be required in the Kenton Neighbourhood Area. Table 4 [replicated from Exeter SHMA table 9.3] shows the growth of the private rented sector between 2001 and 2011. Nationwide the private rented sector has grown by 50%, while in the South West this has been lower, at 38%. The proportion in Teignbridge is similar to the South West average (40%), which is the lowest in the HMA.

Table 4: Growth of private rented sector (%) 2001 – 2011<sup>22</sup>

Area	Proportional increase in share of market (%)
Teignbridge	40%
Exeter	48%
East Devon	53%
Mid Devon	53%
South West	38%
England	50%

Source: Exeter SHMA<sup>23</sup>

65. Table 5 [replicated from Exeter SHMA table 9.4] shows the average monthly rent across the HMA area, as well as county, regional and national averages. The monthly rent at the time of the SHMA research in Teignbridge was £625. This was the second lowest in the HMA after Mid Devon (£595). The rent cost in Teignbridge is the same as the Devon average and lower than the South West average of £650, however, it is still more expensive than the national average.

<sup>21</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>22</sup> Ibid

<sup>23</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

Table 5: Average monthly private rents (December 2014)<sup>24</sup>

Area	Price of monthly rent (£)
Teignbridge	£625
Exeter	£700
East Devon	£650
Mid Devon	£595
HMA average	£643
Devon	£625
South West	£650
England	£595

Source: Exeter SHMA<sup>25</sup>

66. The National Planning Practice Guidance (2014) states that plan makers should estimate the number of households who lack their own housing or live in unsuitable housing and who cannot afford to meet their housing needs in the market and therefore will require some form of affordable housing).
67. The SHMA states that:
- “As highlighted in the PAS Technical Advice Note (Objectively Assessed Need and Housing Targets (June 2014)) only new forming households should be taken into account in the calculation as the backlog and existing households already live in housing units which would be freed up when they are housed and do not create any net need in terms of the total future requirement.”
68. Table 6 [replicated from Exeter SHMA table 11.2] highlights the proportion of newly forming households which could not afford market rent in each of the HMA local authority areas at the time of the SHMA research. In the case of Teignbridge, 37.9% of newly forming households were unable to afford market rent. This is the second lowest proportion in the HMA after Mid Devon (32.6%) and consequently was lower than the HMA average of 43%.

<sup>24</sup> DCA (2014) Assessment of the Exeter Strategic Housing Market area [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

<sup>25</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

Table 6: Affordable need (2011 based household model assumptions)<sup>26</sup>

	Teignbridge	Exeter	East Devon	Mid Devon	HMA
New Households pa.	589	549	559	361	2058
Proportion unable to afford market rent	37.9%	55.1%	46.6%	32.6%	43%
Number unable to afford market rent	223	303	260	118	904

Source: Exeter SHMA<sup>27</sup>

#### SHMA conclusions on needs of specific household groups

69. Analysis of changes in population and household profiles are essential in enabling an understanding of the level of housing need and demand within an area. In this regard, the key features of population change impacting on the housing market are a migration of mainly younger and economically active households and older people with increasing care and support needs.
70. The NPPF's glossary contains a useful definition of older people:
- "People over retirement age, including the active, newly-retired through to the very frail elderly, whose housing needs can encompass accessible, adaptable general needs housing for those looking to downsize from family housing and the full range of retirement and specialised housing for those with support or care needs."
71. In this context, the SHMA highlights that the 65+ population in Teignbridge is forecast to increase by 49.1% by 2033. This is an increase of 15,471 people and the largest increase in numbers across the HMA area.
72. The SHMA also drew on the Projecting Older Person Population Information System (POPPI) developed by the Institute of Public Care (IPC) for the Care Services Efficiency Delivery Programme (CSED). It provides a more detailed picture of the changing population age profile of the local authorities. The data shows that the number of older persons (aged 65+) living alone in Teignbridge is forecast to increase by 53.6% by 2030, the second highest level in the HMA area after Mid Devon at 64.7%.

<sup>26</sup> ibid

<sup>27</sup> DCA (2015) Exeter Housing Market Area: Strategic Housing Market Assessment [online] available at: <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

73. In addition to this, the 75+ population in Teignbridge is also forecast to increase by 72.3%, a change of 10,589 people. This is the second highest level in the HMA after Mid Devon at 81.8%.
74. At the time of the SHMA research, Teignbridge was shown to have a total specialist housing supply of 1,567. This results in a supply of 98 per 1000 population aged over 75 which is lower than the national supply level of 170 per 1000 population aged over 75.

#### SHMA conclusions on characteristics of future housing required

75. With regard to future housing type and size; 73.5% of homes in Teignbridge are owner-occupied. This is the second highest proportion in the HMA and much higher than the national average of 63.4%.
76. The SHMA notes that across the HMA, the property type balance is heavily weighted in favour of detached and semi-detached property which ranges from 61% to 67% (except in Exeter where terraced houses are 32.7% of the stock, close to the combined detached and semi-detached total of 39.1% in the City). The combination of larger property types and demographic profile tends to result in a high level of under-occupation (two spare bedrooms in 39% of all stock).
77. Broadly, the SHMA recommends a property size target of 60% one and two bedrooms and 40% three/ four bedroom split in the market sector to provide a better balanced housing stock.
78. Given that household growth will be mostly from smaller households (due in part to older people downsizing from family homes into smaller and specialist housing), it is considered that smaller units will play a key role in meeting future market housing requirements. In particular, it is forecast that a higher proportion of two bedroom units will be needed.
79. Given the ageing population and higher levels of disability and health problems amongst older people, as well as the projected increase in older people living alone, in addition to the small proportion of smaller homes in the district there is likely to be an increased requirement both for specialist housing options, and also smaller housing.

#### *Teignbridge Council Local Planning Documents*

80. Basic Condition E<sup>28</sup> of neighbourhood planning requires the neighbourhood plan's policies on housing type to be in strategic conformity with those of the relevant Local Plan. In the case of Kenton, the neighbourhood plan should therefore be in strategic conformity with the adopted Teignbridge Local Plan which sets out targets until 2033.

#### *Adopted Teignbridge Local Plan (Teignbridge District Council, May 2014)*

81. The Spatial Strategy sets out the broad approach to the distribution of development across the plan area. A spatial strategy policy in the adopted Teignbridge Local Plan which is relevant to Kenton is Policy S21 'Villages' which states that Kenton has been defined as a village which is appropriate "for limited development which meets their social and economic needs, protects their rural character and is consistent with the need to minimise travel". An emphasis is also placed on the provision of affordable housing.

<sup>28</sup> Online, available at: <http://planningguidance.communities.gov.uk/blog/guidance/neighbourhood-planning/the-basic-conditions-that-a-draft-neighbourhood-plan-or-order-must-meet-if-it-is-to-proceed-to-referendum/>

82. Local Plan Policy S4 'Land for New Homes' sets out the distribution of dwellings between towns including the allocations and commitments over the Local Plan period. Kenton is not included in any of the areas a) to f) outlined in Policy S4, and therefore the Local Plan allocation for Kenton is considered to be zero.
83. The Local Plan does, however, have a bearing on the type of housing to be delivered. In this regard, Policy WE2 'affordable housing site targets' sets out the delivery of affordable housing expected over the Plan Period. It requires that all open market housing sites (including change of use and conversion to dwellings) with a capacity of more than 4 dwellings are to provide affordable housing as part of any development. In Kenton, the requirement is for 30% affordable housing. However, it should be noted that the recent Court of Appeal case on small exemption sites, such that sites delivering less than ten dwellings are exempt from affordable housing contributions, means that elements of this policy have been superseded.<sup>29</sup>
84. Policy WE4 'Inclusive Design and Layout' requires that housing sites to which policy WE2 applies are developed to ensure the creation of inclusive, mixed communities as follows:
- Affordable and market housing on a site should as far as practicable be visually indistinguishable from each other in quality, whilst allowing for buildings to be individual and having character;
  - Affordable and market dwellings should be intermixed within the site, avoiding concentrations of affordable housing in any part of the site. Exceptions should be clearly justified;
  - Affordable housing should be provided broadly in step with the market housing as the development progresses.
85. Policy WE7 sets out the council's intention to support prospective custom builders on sites of more than 20 dwellings, whereby developers will be required to supply at least 5% of dwelling plots for sale to custom builders.

#### *DCLG Household Projections*

86. The Department for Communities and Local Government (DCLG) periodically publishes household projections. The NPPG recommends that these household projections should form the starting point for the assessment of housing need, albeit that this advice is likely aimed more at local authorities than neighbourhood planners. However, as there is no Local Plan dwelling target provided for Kenton, an exercise extrapolating the household projections to the neighbourhood area will, therefore, be helpful in determining the number of houses to plan for.
87. The most recent (2014-based) household projections were published in July 2016<sup>30</sup> and extend to 2039. Although population projections are only available at a local authority level, a calculation of the share for Kenton is nevertheless possible for the household projections based on the neighbourhood's household numbers in 2011.

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<sup>29</sup> More information available at: <http://www.bailii.org/ew/cases/EWCA/Civ/2016/441.html>

<sup>30</sup> See 2014-based DCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

88. At the 2011 Census, Teignbridge had 54,003 households and Kenton had 470 households, or 0.87% of the Teignbridge total. In the 2014-based household projections, the projection for 2030 is for 64,003 households in Teignbridge. Therefore, in 19 years, there is projected to be a growth of 10,000 households. This equates to 526.3 households per year. On this assumption, by 2033 there would be a total of 65,581<sup>31</sup> households in Teignbridge.
89. Assuming Kenton continues to form 0.87% of the Teignbridge total, Kenton's new total number of households would be 571<sup>32</sup> and therefore 101 new households would have formed in Kenton between 2011 and 2033.
90. Number of households does not, however, equate precisely to number of dwellings, with the latter usually slightly higher. In Kenton in the 2011 Census, there were 470 households but 492 dwellings. This gives a ratio of 0.95 households per dwelling. In the case of Kenton, then, a projection of 571 households translates into a total of 601 dwellings.<sup>33</sup> This would result in a total of 109 new dwellings forming in Kenton between 2011 and 2033, which in turn works out as 4.95 dwellings per year, or a total of 99 dwellings over the plan period (2013 to 2033).
91. This projection is an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase, and thus, does not take into account political, economic, demographic or any other drivers that might have influenced, or may in future influence, the Local Plan distribution across Teignbridge.

#### *Dwelling growth 2001-2011*

92. The dwelling growth for Kenton between 2001 and 2011 can be determined using census data. The 2001 Census showed 481 dwellings and Census 2011 showed 492 dwellings. This equates to a ten-year growth rate of 11 dwellings, or 1.1 dwellings per year.
93. If this rate of completion was projected forward for the period 2013-2033 (the Local Plan period), a dwelling requirement of (20 x 1.1) i.e. 22 dwellings over the plan period would be the outcome. This would result in a new total of 516<sup>34</sup> dwellings if taken forward 22 years from the 2011 census number.

#### *Dwelling growth 2011-2016*

94. Teignbridge District Council provided data on the number of dwelling completions recorded in Kenton between 1<sup>st</sup> January 2011 and 1<sup>st</sup> January 2016. The number of completions over this period came to a total of two dwellings. This therefore results in a theoretical yearly average of 0.4 dwellings.
95. If this assumption is projected forward from the 2011 to the end of the Plan life time (2011 – 2033), a total of 9<sup>35</sup> new dwellings will have formed since 2011. This would result in a new total of 501 dwellings for Kenton by 2033 (a total of 8 dwellings over the Plan period of 2013-2033).

<sup>31</sup> Rounded to the nearest whole number

<sup>32</sup> Ibid

<sup>33</sup> Ibid

<sup>34</sup> Rounded to the nearest whole number

<sup>35</sup> Ibid

### *Teignbridge Local Plan 2013-2033*

96. As discussed in Paragraph 82, Local Plan Policy S4 'Land for New Homes' sets out the housing allocations to be delivered by the Local Plan. Kenton has not been included within these allocations and, as such, the Local Plan effectively allocates no dwellings to Kenton. Taking the dwelling growth between 2011 and 2016 into account, this would result in a new total of 494 dwellings for Kenton by 2033, i.e. the same as the 2016 total.
97. This estimate does not take into account political, economic, and demographic or any other drivers that might have influenced, or may in future influence the Local Plan distribution across Teignbridge. As such, it is therefore a purely theoretical projection.

### *Local housing waiting list (Kenton, May 2016)*

98. AECOM contacted Teignbridge District Council for information on the local housing waiting list in Kenton. Teignbridge District Council was able to provide this information from May 2016. This provides a useful indication of whether the adopted Local Plan affordable homes target is sufficient to meet present affordable need. As the waiting list is only a snapshot in time, it needs to be treated with caution when seeking to determine if the emerging Local Plan target of 30% affordable homes (originally for developments of over 4 dwellings, but now superseded and likely to be over 10 dwellings) will meet affordable need into the future.
99. Teignbridge District Council advises that currently there are seven households on the housing waiting list for Kenton. This is 1.4% of the total households in Kenton.
100. Although the waiting list is only a snapshot in time, it does seem apparent that, with only 1.4% of households within Kenton in need of affordable housing at present, the emerging Local Plan policy of 30% affordable housing provision should be adequate to meet affordable need in Kenton over the remainder of the plan period, even allowing for a reasonable level of increase in affordable need in future. As such, on the basis of this evidence, there does not appear to be a requirement for the Kenton Neighbourhood Plan to set its own affordable housing target, although it may reference the Teignbridge housing waiting list and mention the need to work closely with the District Council to ensure the needs of those on the list continue to be met.
101. Note that even after the Neighbourhood Plan is adopted, Teignbridge District Council 's affordable housing policy will continue to apply within Kenton, and as such it will still be the Council that controls the housing waiting list and negotiate affordable housing commitments with developers as part of the development management process.

### **Characteristics of Population**

102. Through analysis of Census 2001 and 2011 data, the population of Kenton neighbourhood plan area has been investigated to determine whether it differs from that of Teignbridge and England averages.<sup>36</sup>
103. Table 7 gives the population and number of households in Kenton, Teignbridge and England, as recorded in the 2011 census. In 2011, Kenton had a population of 1,114, and an average household size of 2.4 persons.

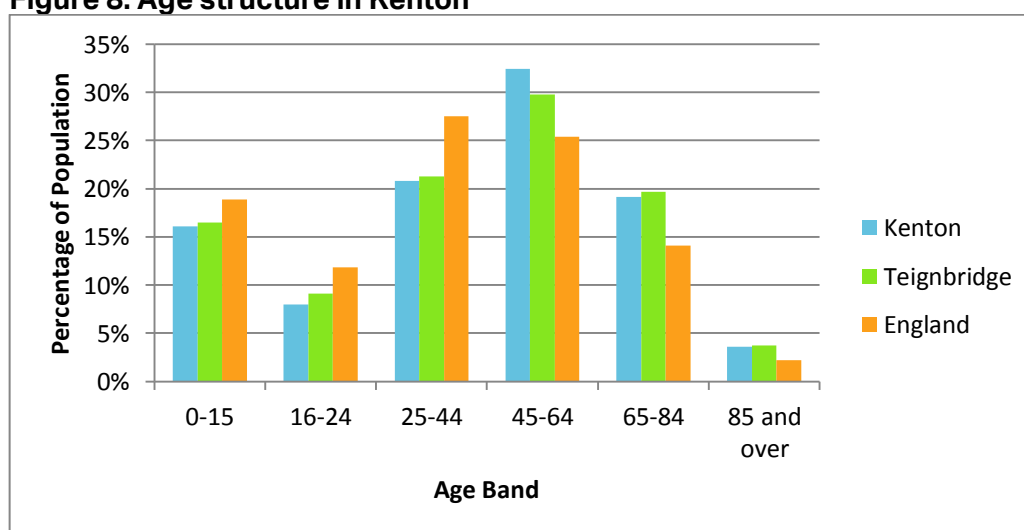
**Table 7: Population and household size in Kenton, 2011<sup>37</sup>**

	Kenton	Teignbridge	England
Population	1,114	124,220	53,012,456
Households	470	54,003	22,063,368
Household size	2.37	2.30	2.40
Dwellings	492	57,720	22,976,066

Source: ONS, Census 2011. AECOM calculations

104. As illustrated in Figure 8 below, the largest age group in Kenton is ages 45-64, at 32%. This is higher than the figures for both Teignbridge (30%) and England averages (25%). The proportion of all age groups younger than 44 is slightly lower than Teignbridge and much lower than the England average. The proportion of people aged 65-84 is slightly lower in Kenton (19%) than in Teignbridge (20%) but higher than in England (14%). The proportion of people aged 85 and over is the same in Kenton (4%) as in Teignbridge (4%) and larger than the national (2%) average.

105. Table 8 shows the rate of change of the population by age band between 2001 and 2011. It shows that the largest increase has been seen in the 85 and over age group (35%). This increase is greater than the increase seen in Teignbridge (20.4%) and nationally (23.7%). The second largest increase in Kenton has been in the 65-84 age group (10.3%) compared to the Teignbridge (6.4%) and national (9.1%) increases. There has been a large decrease (19.0%) in the 25-44 age group in the Plan area. This decrease is larger than the (12.6%) decrease seen in Teignbridge. Conversely there has been a 1.4% increase in the national average in this age group. The largest decrease in Kenton is seen in the 0-15 age group where there has been a 22.3% decrease. This is a larger decrease than seen at Teignbridge level (9.7%) while the national average has shown an increase of 1.2%.

**Figure 8: Age structure in Kenton<sup>38</sup>**

Source: ONS, Census 2011. AECOM calculations

<sup>37</sup> ONS, Census 2011, Population Density (QS102EW); Household Size, 2011 (QS406EW).

<sup>38</sup> ONS, Census 2011, Age Structure (KS102EW)



**Table 8: Rate of change in the age structure of Kenton population, 2001-2011<sup>39</sup>**

Age group	Kenton	Teignbridge	England
0-15	-22.3%	-9.7%	1.2%
16-24	1.1%	12.1%	17.2%
25-44	-19.0%	-12.6%	1.4%
45-64	8.6%	12.7%	15.2%
65-84	10.3%	6.4%	9.1%
85 and over	35.0%	20.4%	23.7%

Source: ONS, Census 2001 and 2011. AECOM calculations

106. Table 9 shows that Kenton is home to a lower proportion of people born outside the UK than the Teignbridge average, which in turn is less than in England, and that correspondingly, the born in the UK category is higher than both the local authority and the England proportions.

**Table 9: Country of birth and length of residence**

Place of birth	Population breakdown		Kenton	Teignbridge	England
Born in the UK	Total		95.8%	95.3%	86.2%
Born outside the UK	Total		4.2%	4.7%	13.8%
	EU		1.8%	2.0%	3.7%
	Other		2.4%	2.6%	9.4%
	Length of residence	Less than 2 years	0.3%	0.4%	1.8%
		2-5 years	0.3%	0.5%	2.2%
		5-10 years	0.3%	0.6%	2.9%
10 years or more		3.4%	3.1%	7.0%	

Source: ONS, Census 2011. AECOM calculations

107. Of the 4.2% of Kenton residents who were born overseas, the majority (3.4%) have lived in the UK for ten years or more, while only 0.9% have lived in the UK for less than 10 years, this indicates that there has been only a very minor increase in migration to Kenton between 2001 and 2011.

### Household Type

108. Table 10 shows that the largest increase has been seen in households with 3 rooms (13.3%). This is greater than the increase seen in Teignbridge (10.4%) but less than that seen nationally (20.4%). Kenton has also seen a 10.7% increase in the number of 6 bedroom

<sup>39</sup> ONS, Census 2011, Age Structure (KS102EW); ONS, Census 2001, Age Structure (KS02)

households, this is much larger than the 5.9% seen in Teignbridge and the 2.1% seen in England as a whole.

109. The largest decrease has been seen in households with 1 room (-100%) and this decrease is significantly greater than the decrease seen in Teignbridge (-45.0%) and nationally (-5.2%). The second largest decrease was seen in 2 room households (-25%). Comparatively, both Teignbridge and England showed increases of 34.6% and 24.2% respectively. A decrease has also been seen in households with 5 rooms. This is greater than the decrease seen nationally and in Teignbridge.

**Table 10: Rates of change in number of rooms per household in Kenton, 2001-2011<sup>40</sup>**

Number of Rooms	Kenton	Teignbridge	England
1 Room	-100.0%	-45.0%	-5.2%
2 Rooms	-25.0%	34.6%	24.2%
3 Rooms	13.3%	10.4%	20.4%
4 Rooms	0.0%	-6.5%	3.5%
5 Rooms	-4.7%	-1.6%	-1.8%
6 Rooms	10.7%	5.9%	2.1%
7 Rooms	12.2%	16.6%	17.9%
8 Rooms or more	0.8%	20.3%	29.8%

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

110. The PPG states that factors such as overcrowding, concealed and shared households, homelessness and the numbers of people in temporary accommodation demonstrate unmet need for housing. Increases in the number of such households may be a signal to consider increasing planned housing numbers.
111. Table 11 demonstrates that, on the contrary, Kenton is becoming more under-crowded. This trend is generally indicative of an ageing population. In other words, larger units that once housed a family are gradually losing residents (from children moving away, and then parents becoming widowed or moving into care), resulting in decreasing number of persons per room. This is in-line with, although more pronounced than, trends seen in Teignbridge as a whole. By contrast, England as a whole is seeing increasing levels of overcrowding.

<sup>40</sup> ONS, Census 2011, Number of Rooms (QS407EW); ONS, Census 2001, Number of Rooms (UV57)

**Table 11: Trends in number of persons per room in Kenton, 2001-2011<sup>41</sup>**

Persons per room	Kenton	Teignbridge	England
Up to 0.5 persons per room	8.5%	7.3%	7.9%
Over 0.5 and up to 1.0 persons per room	-18.4%	-1.9%	7.0%
Over 1.0 and up to 1.5 persons per room	-66.7%	-2.8%	27.3%
Over 1.5 persons per room	0.0%	-29.0%	2.5%

Source: ONS, Census 2001 and 2011. AECOM calculations

### Household Tenure

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

**Table 12: Tenure (households) in Kenton, 2011<sup>42</sup>**

Tenure	Kenton	Teignbridge	England
Owned; total	81.5%	73.5%	63.3%
Shared ownership	0.2%	0.9%	0.8%
Social rented; total	6.4%	8.9%	17.7%
Private rented; total	11.1%	15.5%	16.8%

Source: ONS, Census 2011. AECOM calculations

113. Table 12 shows that the level of owner occupation in Kenton is higher than both the Teignbridge average and the England average. The proportion of socially rented housing (rented from the Council or a Registered Social Landlord) is lower than the Teignbridge and national averages. There are also a lower proportion of privately rented units in Kenton compared to the Teignbridge and England averages.

114. Table 13 shows how tenure has changed in Kenton between the 2001 Census and 2011 Census. Home ownership in the area has increased at a modest rate (0.5%), lower than the

<sup>41</sup> ONS, Census 2011, Persons Per Room - Households (QS409EW); ONS, Census 2001, Persons per Room - Households (UV58)

<sup>42</sup> ONS, Census 2011, Tenure - Households (QS405EW)

level of growth in Teignbridge, but higher than the contraction at the national level (-0.6%). Note also how shared ownership (an indication of a lack of affordable housing) has remained stable in Kenton, while it has increase by 30.3% and 30% for Teignbridge and England respectively. There has also been a 6.3% decrease in social rentals in Kenton, compared to the 1.2% increase in Teignbridge, and the smaller 0.9% decrease nationally. Kenton has seen a larger increase in private rentals than the Teignbridge average; however this is still lower than the national average.

**Table 13: Rate of tenure change in Kenton, 2001-2011**

Tenure	Kenton	Teignbridge	England
Owned; total	0.5%	1.3%	-0.6%
Shared ownership	0.0%	30.3%	30.0%
Social rented; total	-6.3%	1.2%	-0.9%
Private rented; total	62.5%	52.2%	82.4%

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

### House prices

115. Demand is also relatively strong for home sales. House price data from the Land Registry<sup>43</sup> shows that over the course of 2015, the average sold house price in Kenton was £328,380. This is higher than the overall Teignbridge average of £241,126<sup>44</sup> over the same period and suggests that there may be a high demand for homes. It should, however, be noted that due to the size of Kenton, there were only 13 properties sold in the 2015 period. Therefore, the average prices may only reflect the mix of properties sold, rather than changes in the local market itself.

### Local Household Composition

116. Table 12 shows that the proportion of single person households in Kenton is lower than both the Teignbridge and England averages. By contrast, the proportion of households with a single family occupancy is slightly higher than the Teignbridge and England averages.

**Table 14: Household composition (by household) in Kenton, 2011<sup>45</sup>**

		Kenton	Teignbridge	England
One person household	Total	25.7%	30.0%	30.2%
	Aged 65 and over	14.3%	15.5%	12.4%
	Other	11.5%	14.5%	17.9%

<sup>43</sup> The land Registry Open Data [online] available at: <http://landregistry.data.gov.uk>

<sup>44</sup> ibid

<sup>45</sup> ONS, Census 2011, Household Composition - Households (QS113EW)

One family only <sup>46</sup>	Total	69.8%	64.5%	61.8%
	All aged 65 and over	12.8%	11.9%	8.1%
	With no children	21.7%	20.6%	17.6%
	With dependent children	24.0%	23.4%	26.5%
	All children non-dependent	11.3%	8.7%	9.6%
Other household types	<i>Total</i>	4.5%	5.4%	8.0%

Source: ONS, Census 2011. AECOM calculations

117. The proportion of single person households aged 65 and over in Kenton is higher than both the Teignbridge and England averages; this is perhaps unsurprising given the age profile of the population (i.e. a higher proportion of older people than the national average).
118. The plan area is home to a slightly higher proportion of families with no children relative to both the Teignbridge and national averages. The proportion of households with dependent children is slightly higher than the Teignbridge average but lower than the national average. The proportion of households where all children are non-dependent is slightly higher than the Teignbridge and national averages. The proportion of other household types is lower than the Teignbridge average and significantly lower than the national average.
119. Table 15 shows how household composition changed in the 10 years between the 2001 and 2011 Censuses. Overall, there was a larger increase (11%) in one person households relative to Teignbridge (8.6%) and national (8.4%) averages. In particular there was a 8.1% increase in the number of one person households over the age of 65, which contrasts with the decreases seen in Teignbridge and England (4.2% and 7.3% decrease respectively).
120. By contrast, there has been a 2.1% decrease in one family households in Kenton compared to a 3.1% increase in Teignbridge and a 5.4% increase in England. There has also been an 11.1% increase in family households where all members are 65 or over, compared to a 4.4% and 2.0% decrease in Teignbridge and England respectively. Additionally there has been an 18.7% decrease in households with dependent children, compared to a much smaller decrease of 2.4% in Teignbridge and a 5.0% increase in England as a whole.

<sup>46</sup> This includes: married couples, cohabiting couples, same-sex civil partnership couples and lone parents.

**Table 15: Rates of change in household composition in Kenton, 2001-2011<sup>47</sup>**

Household type		Percentage change, 2001-2011		
		Kenton	Teignbridge	England
One person household	Total	11.0%	8.6%	8.4%
	Aged 65 and over	8.1%	-4.2%	-7.3%
	Other	14.9%	26.5%	22.7%
One family only	Total	-2.1%	3.1%	5.4%
	All aged 65 and over	11.1%	-4.4%	-2.0%
	With no children	3.0%	8.8%	7.1%
	With dependent children	-18.7%	-2.4%	5.0%
	All children non-dependent	23.3%	19.0%	10.6%
Other household types	Total	16.7%	9.6%	28.9%

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

121. Table 16 shows that the plan area experienced a 1.4% decrease in its population over the period 2001-2011 compared to a 2.7% increase in Teignbridge and a 7.9% increase nationally. The number of households in Kenton increased by 1.7% despite the falling population. This is likely to be due to an increase in the number of single person households relative to family households. However, this increase was much smaller than the 5% and 7.9% increases seen in Teignbridge and nationally.
122. Over the same period there was a decrease in household size, which again reflects the increase in the number of single person households. This trend was more marked in Kenton than for Teignbridge as a whole, while the national average showed no percentage change in household size. Due to the increasing average age of the population, this decrease in household size is to be expected as older residents downsize from family homes, and increasing numbers may be likely to move to specialist care accommodation.

<sup>47</sup> ONS, Census 2011, Household Composition - Households (QS113EW); ONS, Census 2001, Household Composition - Households (UV65)

**Table 16: Change in household numbers and size in Kenton, 2001-2011**

Key indicator	Percentage change, 2001-2011		
	Kenton	Teignbridge	England
Population	-1.4%	2.7%	7.9%
Households	1.7%	5.0%	7.9%
Household size	-3.1%	-2.2%	0.0%

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

123. Table 17 shows that the proportion of dwellings in Kenton that are detached (42.3%) is higher than the Teignbridge average of 36.7%, and almost double the national average of 22.4%. The proportion of semi-detached dwellings is higher than both Teignbridge and national averages, however by a smaller margin. In contrast, the proportions of terraced homes are lower than that of Teignbridge and England. The prevalence of flats in Kenton (0.6%) is also significantly lower than the Teignbridge (8.4%) and England (16.4%) averages.

**Table 17: Accommodation type (households), 2011**

Dwelling type		Kenton	Teignbridge	England
Whole house or bungalow	Detached	42.3%	36.7%	22.4%
	Semi-detached	31.7%	24.1%	31.2%
	Terraced	19.9%	22.7%	24.5%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	0.6%	8.4%	16.4%
	Parts of a converted or shared house	4.5%	5.1%	3.8%
	In commercial building	0.4%	1.2%	1.0%

Source: ONS, Census 2001 and 2011. AECOM calculations

124. A 'concealed family' means any group of people who want to form a new household but are unable to do so, typically for economic reasons such as high house prices or a lack of suitable property. Table 18 shows that there are 6 concealed families in the plan area (1.7%); this number is very slightly higher than that in Teignbridge (1.5%) and slightly lower than the national average (1.9%). One would normally expect a correlation between lower numbers of people per household and lower numbers of concealed families. Indeed, Kenton shows slightly higher numbers of single person households than the national average and subsequently slightly lower numbers of concealed families.

**Table 18: Concealed families in Kenton, 2011<sup>48</sup>**

Concealed families	Kenton	Teignbridge	England
All families: total	350	37,413	14885145
Concealed families: total	6	564	275954
Concealed families as % of total	1.7%	1.5%	1.9%

Source: ONS, Census 2001 and 2011. AECOM calculations

125. Official statistics do not clarify the overlap, if any, between the Kenton housing waiting list and the stated number of concealed families in Teignbridge.

### **Economic Activity**

126. Table 19 shows that the Kenton proportion of economically active residents is slightly lower than in both Teignbridge and England. As would be expected, the number of economically inactive residents is slightly higher than that seen in both Teignbridge and England. Full-time employment levels in Kenton are higher than the Teignbridge level, and significantly higher than the England level.

127. In contrast, part time employment levels are slightly lower than Teignbridge averages, and significantly lower than the national average. Additionally, the proportion of economically active residents who are self-employed in Kenton is lower than the proportion in Teignbridge but slightly higher than the proportion for England. The proportion of economically active residents who are unemployed in Kenton is lower than that of the Teignbridge and much lower than the national average.

128. Levels of retired people are higher than both the Teignbridge and national average. Additionally, the number of economically inactive students is comparable to the average for Teignbridge, but lower than that of the national average. A lower proportion of the population is looking after home or family when compared to the Teignbridge and national average.

129. There are significantly fewer long term sick or disabled people in Kenton than the Teignbridge and national average. This is perhaps surprising given the comparatively older population age structure for the neighborhood area compared to the national average. This may therefore reflect a high quality of life and relative affluence in Kenton.

<sup>48</sup> NOMIS, LC1110EW - Concealed family status by family type by dependent children by age of Family Reference Person (FRP)



**Table 19: Economic activity in Kenton, 2011<sup>49</sup>**

Economic category		Kenton	Teignbridge	England
Economically active	Total	68.6%	69.1%	69.9%
	Employee: Full-time	36.2%	34.6%	13.7%
	Employee: Part-time	15.0%	16.0%	38.6%
	Self-employed	11.9%	13.2%	9.8%
	Unemployed	1.7%	2.8%	4.4%
	Full-time student	3.8%	2.5%	3.4%
Economically inactive	Total	31.4%	30.9%	30.1%
	Retired	22.3%	19.0%	13.7%
	Student	2.8%	3.0%	5.8%
	Looking after home or family	2.8%	3.3%	4.4%
	Long-term sick or disabled	1.7%	3.6%	4.1%
	Other	1.7%	2.0%	2.2%

Source: ONS, Census 2001 and 2011. AECOM calculations

**Table 20: Rates of long-term health problems or disability in Kenton, 2011<sup>50</sup>**

Extent of activity limitation	Kenton	Teignbridge	England
Day-to-day activities limited a lot	6.6%	9.3%	8.3%
Day-to-day activities limited a little	10.1%	11.3%	9.3%
Day-to-day activities not limited	83.3%	79.4%	82.4%

Source: ONS, Census 2001 and 2011. AECOM calculations

130. The PPG advises taking account in housing need assessment of the number of people with long-term limiting illness. Table 20 shows that, in general, the proportion of working-age residents of Kenton who are long-term sick or disabled is lower than the Teignbridge and England averages.

131. The proportion of residents in Kenton whose day-to-day activities are not limited by disability is higher than that in Teignbridge, and slightly higher than that of England. The proportion of Kenton residents whose day to day activities are limited a little by disability is slightly lower than Teignbridge, but slightly higher than that of England. For those residents

<sup>49</sup> ONS, Census 2011, Economic Activity (QS601EW)

<sup>50</sup> ONS, Census 2011, Long-Term Health Problem or Disability (QS303EW)

whose day to day activities are limited a lot, the proportion is lower than both Teignbridge and England averages.

132. Table 21 shows that, in general, Kenton residents have a slightly longer commuting distance to their place of work when compared to Teignbridge and national average. There are slightly fewer employees in Kenton with a commute of less than 10km compared to Teignbridge and significantly fewer when compared to national averages. Typically, a higher proportion of Kenton residents travel 10km to 30km to their place of work when compared to Teignbridge and England averages. The proportion of people commuting 30km and over to their place of work is slightly higher than Teignbridge levels but slightly lower than national levels. The number of people working from home in Kenton is marginally higher than Teignbridge levels and significantly higher than the national averages.

**Table 21: Distance travelled to work, 2011<sup>51</sup>**

Location of work	Kenton	Teignbridge	England
Less than 10km	43.7%	44.9%	52.3%
10km to less than 30km	27.0%	25.6%	21.0%
30km and over	7.0%	6.2%	8.0%
Work mainly at or from home	15.6%	14.6%	10.3%
Other	6.7%	8.8%	8.5%

Source: ONS, Census 2011, AECOM calculations

<sup>51</sup> NOMIS, QS702EW - Distance travelled to work

## 4 Conclusions

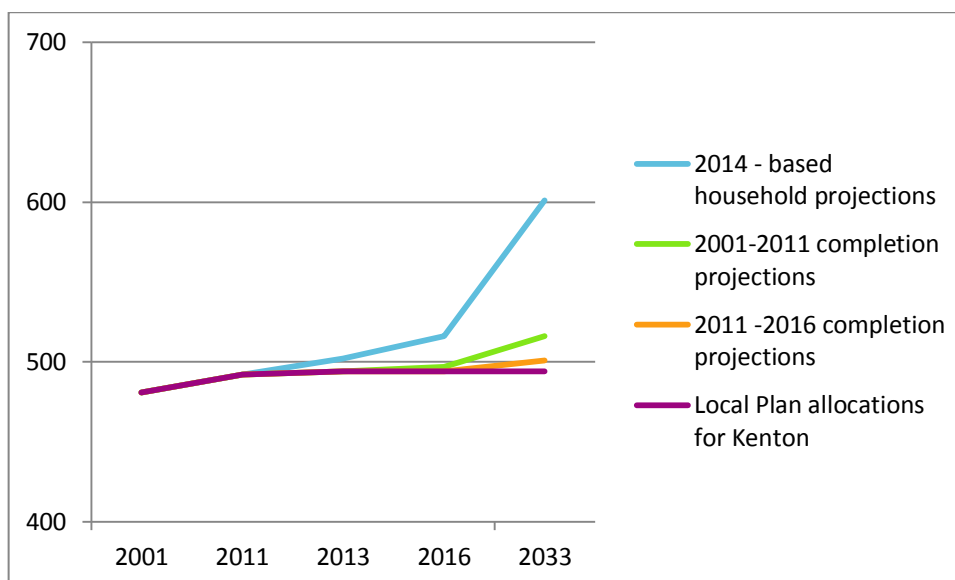
### Overview

133. This housing needs assessment has interrogated a wide range of data sources, which, taken together, can inform key trends and messages relevant to the Neighbourhood Plan's housing policies.
134. In this first section of the conclusion, recommendations are made on the overall quantum of housing growth required.
135. In the second section, an assessment is presented based on the data uncovered, and indications of the components and characteristics of future housing based on the data analysed.
136. In line with recommended best practice, our preferred methodology is to present the projections our analysis has produced as a starting point, and then highlight the factors<sup>52</sup> that the Parish Council might wish to take into consideration as they determine the final housing policy text, bearing in mind the requirement to be in general conformity with the strategic housing policies of the Teignbridge Local Plan.

### Quantity of Housing Needed

137. To recap, four separate projections of dwelling numbers for Kenton between 2013 and 2033 have been identified (see also Figure 9).

**Figure 9: Kenton housing projections**



<sup>52</sup> These factors are also referred to as 'indicators' in the PPG.

138. These are based on:

- The government's 2014-based household projections, extrapolated to Kenton, translated from households to dwellings (which gives a total of 99 new dwellings over the plan period, or approximately 4.95 dwellings per year).
- A projection forward of dwelling completion rates 2001-2011, (which gives a total of 22 new dwellings or 1.1 per year).
- A projection forward of dwelling completion rates 2011-2016, (which gives a total of 8 new dwellings or 0.4 per year).
- The local Plan derived allocations for Kenton, (which gives a new total of 494 dwellings, i.e. no new dwelling completions over the Plan period).

139. A summary of the findings of the data gathered in Chapter 3 above are outlined in Table 22 below. The source for each factor with particular relevance to the neighbourhood is shown, together with an AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area's future housing need. Following PPG guidance, the factors relate both to housing price and housing quantity.

140. Professional judgement was applied on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates 'some impact', two arrows 'stronger impact' and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.

141. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Parish Council is invited to use its judgement in resolving any conflicts, but it is advised that the more local and more recent data should generally have priority over data gathered at a larger spatial scale or older data.

142. However, our general approach reflects PPG advice to adjust the housing quantity suggested by household projections to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings, such as house prices and past build-out rate.

143. The PPG also advises that market signals are affected by a number of factors, and plan makers should not attempt to estimate the precise impact of an increase in housing supply. Rather they should increase planned supply by an amount that, on reasonable assumptions and consistent with principles of sustainable development, could be expected to improve affordability, and monitor the response of the market over the plan period.

144. As such, Table 22 should be used as a basis for qualitative judgement rather than quantitative calculation. It is designed to form the starting point for steering group decisions on housing policy rather than to provide definitive answers. Again, this reflects the PPG approach- it states that when considering future need for different types of housing, planners have the option to consider whether they plan to attract an age profile that differs from the present situation. They should look at the household types, tenure and size in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs.

145. The PPG also states that appropriate comparisons of indicators (i.e. factors) should be made and that trends uncovered may necessitate adjustment to planned housing numbers compared to ones based solely on household projections. Where upward adjustment is considered necessary, it should be at a reasonable level and not negatively affect strategic conformity with the emerging Local Plan.
146. To help inform the steering group discussions that will be necessary to determine a neighbourhood plan housing target, professional judgement of need level, based on the market factors presented in Table 22, and taking into account our own knowledge and experience of housing need at neighbourhood plan level has been provided.

**Table 22: Summary of factors specific to Kenton with a potential impact on neighbourhood plan housing quantity**

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<b>Age structure of population</b>	SHMA, Census	↑↑	Census 2011 data shows an older population relative to the national average, and trends toward this increasing. The SHMA notes that the current supply of specialist housing units in Teignbridge (98 per 1000 of population over 75) is significantly below national average of 170 per 1000 of population over 75. Census data indicates that between 2001 and 2011 Kenton has become more under-crowded, which is strongly indicative of an ageing population. In other words, larger units that once housed a family are gradually losing residents from children moving away etc. This will put additional pressure on both smaller housing units and specialist housing units. AECOM considers that this factor has two rather than three up arrows as older members of the population downsizing from family homes will free up dwellings for younger families and first time buyers.
<b>Economic performance</b>	SHMA, census	↓↓	Data on economic performance is available at the Teignbridge District level. The SHMA noted that Teignbridge has a lower job density than the rest of the

			<p>HMA. As such, there are proportionally fewer jobs present in Teignbridge compared to the remainder of the HMA. Conversely however, Teignbridge also has higher employment rates and lower unemployment rates than the national average, and similar to those of the HMA. High employment rates have the potential to drive demand in the future. Although economic performance is potentially strong, Kenton has a higher proportion of retired people than the national average. This can have a detrimental effect on the economy of an area creating lower levels of economically active households.</p>
<p><b>Overcrowding/concealed families</b></p>	<p>Census, SHMA</p>	<p>↔</p>	<p>Census data highlights that between 2001 and 2011, the proportion of under-crowding (rather than over-crowding) in Kenton increased slightly more than district and national levels. The proportion of concealed families (any group of people who want to form a new household but are unable to do so, typically for economic reasons) is very slightly higher than the Teignbridge average but slightly lower than the England average. This data does not suggest that there is significant over-crowding in Kenton. As such, this factor has been given a sideways arrow to reflect that the pressure from overcrowding / concealed families does not differ significantly from the national average, showing that there are not significant levels of overcrowding.</p>
<p><b>Level of new supply in local housing market</b></p>	<p>Census</p>	<p>↑↑↑</p>	<p>Between 2001 and 2011 there was a total of 1.1 new dwellings completed each year in Kenton leading to a 2.3% increase over the ten year period. In</p>

			comparison there was a 7.3% increase for Teignbridge as a whole. This suggests that (relative to Teignbridge) there has been a limited supply of dwellings in Kenton and, as such this may contribute to an increased demand on future housing need. This is further evidenced by the high local house prices which are also likely to reflect constrained housing supply.
<b>Local housing waiting list/need for affordable housing</b>	Local Housing waiting list, SHMA, Census	↓ ↓ ↓	The Census shows shared ownership (an indication of a lack of affordable housing) is much lower in Kenton than both Teignbridge and national averages. The proportion of socially rented housing has also decreased by 6.3% in Kenton between 2001 and 2011, this is a much larger decrease than seen nationally or compared to the modest growth seen in Teignbridge, which suggests there are not affordability issues in the Parish which can be an indicator of a high demand for housing. Teignbridge District Council advises that currently there are seven household applications on the waiting list for Kenton. This is 1.4% of the total households in Kenton. Although the waiting list is only a snapshot in time, it does seem apparent that, with only 1.4% of households within Kenton in need of affordable housing at present, the emerging Local Plan policy of 30% affordable housing provision should be adequate.
<b>House prices relative to wider area</b>	The Land Registry, SHMA	↑ ↑	Demand is also relatively strong for home sales. House price data from The Land Registry <sup>53</sup> shows that over the course of 2015, the average sold house price in Kenton was £328,380.

<sup>53</sup> The land Registry Open Data [online] available at: <http://landregistry.data.gov.uk>

			<p>This is higher than the overall Teignbridge average of £241,126<sup>54</sup> over the same period and suggests that there may be a high demand for homes. This factor has been given two up arrows rather than three, as it should be borne to mind that the small sample size of properties sold in Kenton (13) over the course of 2015 means that the average prices may only reflect the mix of properties sold, rather than changes in the local market itself. With regards to Teignbridge as whole, the SHMA showed that the entry level prices for one or two bedroom flats in Teignbridge were the second highest in the HMA after Exeter; and that the income threshold required to be able to purchase a 1 or 2 bedroom flat in Teignbridge was again the second highest in the HMA.</p>
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147. Table 22 contains in total seven up arrows, five down arrows and one horizontal arrow. This indicates that local market factors such as an ageing population are acting to increase housing demand; this is evidenced through market signals such as high house prices, and low levels of affordability for entry level buyers. However, these factors are tempered to some extent by the high proportion of under-crowding in Teignbridge and low proportion of residents on the local housing waiting list.
148. Ordinarily, in line with Basic Condition E<sup>55</sup>, of the four projections shown in figure 9, it would be recommended that the projection from the adopted plan should be given the greatest weight. However, in this case, it forms a projection of zero new dwellings for Kenton over the Plan period. Consequently, there is no risk of the Neighbourhood Plan lacking strategic conformity with it except in the highly unlikely and undesirable case of a net loss of housing over the plan period. Neighbourhood Plans are considered to meet Basic Condition E as long as they seek to meet the Local Plan housing target, which is considered a minimum figure. In this case, this means that Kenton has the option either of allocating no new dwellings or seeking to meet some or all of the unmet demand evidenced by this report.
149. Which of the three remaining demand projections, then, should be considered most reliable? AECOM would advise against relying on either the 2001-2011 or 2011-2016 dwelling completions-derived projections. Although these can be useful in certain

<sup>54</sup> *ibid*

<sup>55</sup> Basic Condition E requires that the neighbourhood plan's housing policies are in general conformity with the strategic policies of the relevant Local Plan.



circumstances, where supply and demand are not in balance (as in Kenton) they are less useful.

150. This is because dwelling completions-derived projections are a function of supply as much as of demand. In other words, part of the reason why only two dwellings were completed in the parish between 2001 and 2016 is likely to be a lack of suitable or available sites, which is not a demand-side factor. These projections therefore do not provide a purely demand based estimate. Additionally, it is clear from the assessment that recent rates of dwelling supply have been below both historic levels and the current level of demand (as evidenced by high house prices). This suggests that a demand-side projection based on these completion rates would be too low.
151. This therefore leaves the 2014 based household projection figure of 99 new dwellings over the plan period, or approximately 4.95 dwellings per year. As this is a purely demand-side estimate, this is considered the most suitable to use in the case of Kenton. However, note that the larger number of up arrows than down arrows in table 22 indicates that demand for housing in Kenton is likely to be higher than this local authority average-derived estimate. As such, it is recommended that a figure around 10% above this should be applied to account for the high level of demand locally. This would result in a new projection of 109 dwellings over the Plan period 2013-2033, or 5.45 dwellings per year.
152. Note that this is, of course, a demand-side projection only. In line with government guidance, the estimated demand for 109 dwellings over the neighbourhood plan period needs to be aggregated with the results of the supply-side evidence base; and local constraints on the supply-side, such as, for example, landscape, heritage, transport, infrastructure and so on could result in the neighbourhood plan's final dwelling target being significantly lower than 109.

### **Characteristics of housing needed**

153. Having confirmed the quantity of housing required in Kenton, the remainder of the assessment focused on the characteristics and/or type of the housing needed. Summaries of the conclusions from all sources are in Table 23 below. Factors in the table are in alphabetical but no other order. Note that there is potential for overlap between some factors (e.g. dwelling type and housing for older people) but an inclusive approach has been taken to ensure all relevant factors are covered.

**Table 23: Summary of local factors specific to Kenton with a potential impact on neighbourhood plan housing characteristics**

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
<b>Affordable housing</b>	Census, SHMA, Teignbridge Local Plan,	<p>Teignbridge District Council advises that currently there are seven household applications on the waiting list for Kenton. This is 1.4% of the total households in Kenton. Although the waiting list is only a snapshot in time, it does seem apparent that with only 1.4% of households within Kenton in need of affordable housing at present, the emerging Local Plan policy of 30% affordable housing provision should be adequate.</p> <p>Additionally, shared ownership (an indication of a lack of affordable housing) in Kenton is significantly lower than both the Teignbridge and national average.</p>	<p>The evidence suggests that there is not a significant unmet need for affordable housing in Kenton Parish. As such, current proportions of market housing (both private rented and ownership) should be sufficient to meet resident's needs. However, it is recommended that the Parish Council work closely with Teignbridge District Council to ensure that both local affordable need, and also Local Plan Policy requirements are met.</p>
<b>Dwelling type</b>	SHMA, Census	<p>The most popular dwelling types in Kenton in 2011 were detached and semi-detached houses. Future need for detached housing (other than smaller bungalows) may be limited due to the proportionally older population structure of the Parish and the corresponding number of older people wishing to downsize from family homes and / or move to specialist accommodation. Although demand for flats or apartments is likely to remain low due to the rural nature of Kenton, there may be an increased need for terraced houses and bungalows to accommodate those wishing to downsize from detached family homes.</p> <p>The entry level prices for one or two bedroom flats in Teignbridge were the second highest in the HMA<sup>56</sup> after Exeter and the income threshold required to be able to purchase a 1 or 2 bedroom flat in Teignbridge was again the second highest in the HMA</p>	<p>It is recommended that new dwellings to be provided should be a mix of houses and bungalows, designed to meet the needs of a range of population sectors, but bearing in mind the need for a particular focus on homes for older people and also starter homes<sup>57</sup> for younger people.</p> <p>Although it is accepted that the local context suggests a proportion of the new dwellings coming forward would be semi-detached and detached, the neighbourhood plan should seek to avoid an over-provision of new detached dwellings (except for bungalows) in light of the high proportion already available and the identified future needs of an ageing population.</p>

<sup>56</sup> The PPG provides a definition of housing market areas: "A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work."

<sup>57</sup> The PPG defines starter homes as those which are offered at below open market value, and are aimed at first time buyers who are unable to afford such housing.

		after Exeter.	
<b>Dwelling size</b>	Census, SHMA	<p>Between 2001 and 2011 Kenton showed a larger increase in one person households than the Teignbridge or England average. This, combined with an ageing population, evidence of under-crowding and wider national trends of decreasing household sizes, is likely to result in a shift towards a requirement for smaller dwellings relative to current housing stock distribution in the future.</p> <p>The SHMA notes that across the Teignbridge District Area household growth will be mostly from smaller households (due in part to older people downsizing from family homes into smaller and specialist housing). It is therefore considered that smaller units will play a key role in meeting future market housing requirements. It recommends a property size target of 60% one and two bedrooms and 40% three/ four bedroom split in the market sector to provide a better balanced housing stock.</p>	<p>Support, encourage and/or require the development of a large proportion of smaller (1-2 bedroom) dwellings to meet the needs of older people looking to downsize, and also younger families.</p> <p>Smaller dwellings most likely to be in demand would be houses and bungalows rather than flats, and could be terraced or semi-detached depending on local context.</p> <p>There may also continue to be a demand for larger detached homes. However, this need will in part be met through older residents downsizing from under-occupied homes rather than the provision of new dwellings.</p>
<b>Housing for older people</b>	Census, SHMA	<p>Census data shows that Kenton is becoming significantly more under-crowded, which is strongly indicative of an ageing population. Additionally, the SHMA notes that Teignbridge, as a whole, has a higher proportion of retired people than the national average. High levels of retirement also indicate an elderly population.</p> <p>This is confirmed from data between 2001 and 2011 that shows the 65-84 age group and the 85 + age group have seen increases of 10.3% and 35.0% respectively. This increase (especially in the 85+ age group) is significantly higher than the Teignbridge and national averages. This suggests that there will be a large demand for housing suitable for older people in the future.</p>	<p>The choice of housing for older people needs to increase in the future in line with expected demographic changes. There will be increased demand for smaller housing and bungalows from retirees who wish to downsize; and there will also need to be opportunities for specialist housing.</p> <p>The Plan may tackle this by setting out policy to enable specialist providers to provide dwellings suitable for older people, essentially smaller units and/or bungalows with 1-2 bedrooms. AECOM advises that the group should refer to guidance from The Housing Learning and</p>

		<p>The SHMA notes that the current supply of specialist housing units in Teignbridge (98 per 1000 of population over 75) is significantly below national average of 170 per 1000 of population over 75.</p>	<p>Improvement Network (Housing LIN)<sup>58</sup> which can be used to give an indication of the potential future demand for specialist provision.</p> <p>A community aspiration to support downsizing for households currently under-occupying larger properties, though aspirational, could at least be a useful statement of intent.</p> <p>The Parish Council should monitor downsizing as it takes place- the more that happens, the lower the need for new family-sized/larger dwellings.</p>
<p><b>Tenure of Housing</b></p>	<p>Census, SHMA, Teignbridge Local Plan</p>	<p>The level of owner occupation in Kenton is higher than both the Teignbridge and national averages. However, the proportion of both shared ownership and socially rented housing (rented from the Council or a Registered Social Landlord) is much lower than the Teignbridge and national averages. There are also a lower proportion of privately rented units in Kenton compared to the Teignbridge and England averages (although this is shown to have increased between 2001 and 2011).</p> <p>Between 2001 and 2011 home ownership in the area increased at a lower rate than the level of growth in Teignbridge, but at a higher rate than the contraction at the national level. Shared ownership (an indication of a lack of affordable housing) remained stable compared to the 30.3% and 30% increases seen respectively in Teignbridge and nationally. There has also been a much larger decrease in social rentals in Kenton compared with the small decrease seen nationally and the small growth seen in Teignbridge.</p>	<p>Relative to both national and Teignbridge data, there is clearly a lower demand for social and market rented housing. The low levels of shared ownership also suggest that there are few issues with affordability.</p> <p>Although these factors demonstrate a weaker demand for social and private lets than seen in Teignbridge or nationally, as previously discussed, the ageing population may result in an increased demand on both social and private rents as older residents may wish to downsize.</p> <p>The tenure of housing during the Plan period is likely to remain weighted towards ownership. However the demand for private rented accommodation increased between 2001 and 2011 and this trend is likely to continue in line with an ageing population who may wish to</p>

<sup>58</sup> Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: <http://www.housinglin.org.uk/library/Resources/Housing/SHOP/SHOPResourcePack.pdf>

			<p>downsize.</p> <p>The Parish Council should therefore work closely with Teignbridge District Council to ensure that the balance of tenure within the Parish meets the needs of the residents.</p>
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### Recommendations for next steps

154. This neighbourhood plan housing needs assessment has aimed to provide Kenton Parish Council with evidence on housing trends from a range of sources. It is recommended that the Parish Council should, as a next step, discuss the contents and conclusions with Teignbridge District Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:
- the contents of this report, including but not limited to Tables 22 and 23;
  - Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the development plan;
  - the types (detached, semi-detached, terraced etc.) and sizes (1 bedroom, 2 bedroom etc.) of recent and existing dwelling completions and commitments (i.e. post 2015) and cross-referencing the findings of this assessment with Table 23, as what has already been provided will have an impact on the types and sizes of the remaining homes to be provided over the rest of the plan period;
  - the views of Teignbridge District Council;
  - the views of local residents;
  - the views of other relevant local stakeholders, including housing developers; and
  - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the Council, including but not limited to the SHLAA.
155. Recent changes to the planning system, as well as forthcoming changes to the National Planning Policy Framework and the implementation of the Housing and Planning Act 2016, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.<sup>59</sup>
156. This report has been provided in good faith by AECOM consultants on the basis of housing data current at the time of writing (alongside other relevant and available information).
157. Bearing this in mind, it is recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by Teignbridge

<sup>59</sup> Further information on the Housing and Planning Act 2016 can be found online at: <http://www.legislation.gov.uk/ukpga/2016/22/contents/enacted/data.htm>

District Council or any other relevant body, and review the neighbourhood plan accordingly to ensure that general conformity is maintained.

158. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 22 and 23 would be particularly valuable.

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