



Long Stratton
(and parts of Tharston and Hapton Parish)

Housing Needs Assessment

December 2017

Quality information

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Revision History

Revision	Revision date	Details	Authorized	Name	Position
1	October 2017	Research and drafting	LAF	Lachlan Anderson-Frank	Assistant Consultant
2	November 2017	Internal QA	SW	Stuart Woodin	Technical Director
3	December 2017	Group comment	By email	Long Stratton Parish Council	
4	December 2017	Final Report	SW	Stuart Woodin	Technical Director

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List of acronyms used in text:

AH	Affordable Housing (NPPF definition)
AMH	Affordable Market Housing
AMR15/16	South Norfolk Authority Monitoring Report 2015-2016
DC	District Council
DCLG	Department for Communities and Local Government
EAGN12	Economic Assessment of Greater Norwich 2012
EGS16	South Norfolk Council Economic Growth Strategy 2016-2021
HNA	Housing Needs Assessment
HMA	Housing Market Area
JCS14	Joint Core Strategy for Broadland, Norwich and South Norfolk 2014
LPA	Local Planning Authority
LSAAP16	Long Stratton Area Action Plan 2016
LSDSER	Long Stratton Demographic, Social and Economic Review 2017
LSPC	Long Stratton Parish Council
NASEP13	New Anglia Local Enterprise Partnership Economic Plan 2013
NP	Neighbourhood Plan
NPA	Neighbourhood Plan Area
NPPF	National Planning Policy Framework 2012
ONS	Office for National Statistics
PPG	Planning Practice Guidance
PRS	Private Rented Sector (Housing)
SHLAA	Strategic Housing Land Availability Assessment
SHMA15.1	Central Norfolk Strategic Housing Market Assessment 2015 – Part 1
SHMA15.2	Central Norfolk Strategic Housing Market Assessment 2015 – Part 2
SHMA17	Central Norfolk Strategic Housing Market Assessment 2017 – Report on Findings
SNDC	South Norfolk District Council

1. Headlines

1. This assessment shows there is a total local housing need arising within the Long Stratton Neighbourhood Plan Area of **408 dwellings from 2017 to 2026**, which should be the starting point for a dialogue with South Norfolk District Council regarding the prioritization of housing, arising out of their strategic allocation of 1800 dwellings within the parish, to meet local need.
2. **132 affordable dwellings** will be needed by the NPA over the period 2017 to 2026, and private rental housing will also have a significant role to play in meeting the needs of the 50% of households in the NPA who would be unable to afford a typical mortgage at 2016 prices without additional equity (either from their existing home or from family assistance).
3. There is likely to be a significant need for small and medium sized housing of 2-3 bedrooms in the future, with approximately **70% of future need arising in this category**, with some of this likely to be met through the provision of flats and terraced homes.
4. There is a need for significant additional specialist housing for the elderly in the plan area totaling **126 units over** the period 2017 to 2026, particularly given the recent growth in the 85+ population who often need additional care.

2. Executive Summary

Introduction

5. The 2011 Localism Act introduced neighbourhood planning, allowing town and parish councils or neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area.
6. As more and more towns and parish councils and forums seek to address housing growth, including tenure and type of new housing, it has become evident that the policies proposed need to be underpinned by robust, objectively assessed housing data.
7. In the words of the national Planning Practice Guidance (PPG), establishing future need for housing is not an exact science, and no single approach will provide a definitive answer¹. The process involves making balanced judgements based on the qualitative and statistical evidence gathered as well as having regard for relevant national and local planning policies and guidance.
8. 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.
9. The guidance quoted above on housing needs assessment 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.
10. Our brief was to advise on data at this more local level to help **Long Stratton Parish Council** understand, among other matters, the type, tenure and quantity of housing needed to inform their neighbourhood plan policies.

PPG-Based Assessment

11. 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.

¹ PPG Paragraph: 014 Reference ID: 2a-014-20140306

Summary of Methodology

12. Housing Needs Assessment at neighbourhood plan level can be focused either on the quantity of housing needed, the type of housing required, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
13. In the case of Long Stratton however, the current adopted Local Plan has given way to the Long Stratton Area Action Plan, which identifies a target of 1800 dwellings for the NPA. As this post-dates the National Planning Policy Framework, this should be used as a guiding authority on housing numbers. This HNA considers a potential quantity of housing arising from local needs in Long Stratton, which could form the basis of discussions with the district council towards prioritising new housing for local people.
14. The rationale for this recommended approach is that neighbourhood plans need to meet the basic conditions, the fulfilment of which is tested through an independent examination. One of these, Basic Condition E, requires the Neighbourhood Plan to be in 'general conformity with the strategic policies' of the Local Plan, in this case the District Core Strategy. The Government's Planning Practice Guidance indicates that the level of housing development is likely to count as a strategic policy.²
15. In terms of the types of housing needed, there is generally more flexibility on what neighbourhood plans can cover. In order to understand the types of housing needed in Long Stratton we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing quantity and characteristics.

Focus On Demand Rather Than Supply

16. Our approach is to provide advice on the housing required based on need and/or demand rather than supply (i.e. available land). 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.'*
17. 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 study³.

Quantity of Housing Needed

18. Our assessment of a wide range of data sources identified five separate projections of dwelling numbers for Long Stratton of between 225 and 1,800 based on:
 - A figure derived from the adopted Long Stratton Area Action Plan (LSAAP), generating a projection of **1,800 new homes over the period 2008-2026, which equates to 100 homes per annum (rounded)**.
 - A 'proportionate share' derivation from the SHMA17, Objectively Assessed Need⁴ (OAN), generating a projection of **279 dwellings up to 2026, or 31 dwellings per annum (rounded)**.
 - DCLG Household Projections which generates **a rebased household projections-derived dwellings of 399 dwellings (rounded) up to 2026, or 44 dwellings per annum (rounded)**. This rebased figure takes into account actual changes in the population up to the year 2016 based on ONS estimates, so as to update the earlier DCLG 2014 household estimates.

² PPG Paragraph: 006 Reference ID: 2a-006-20140306

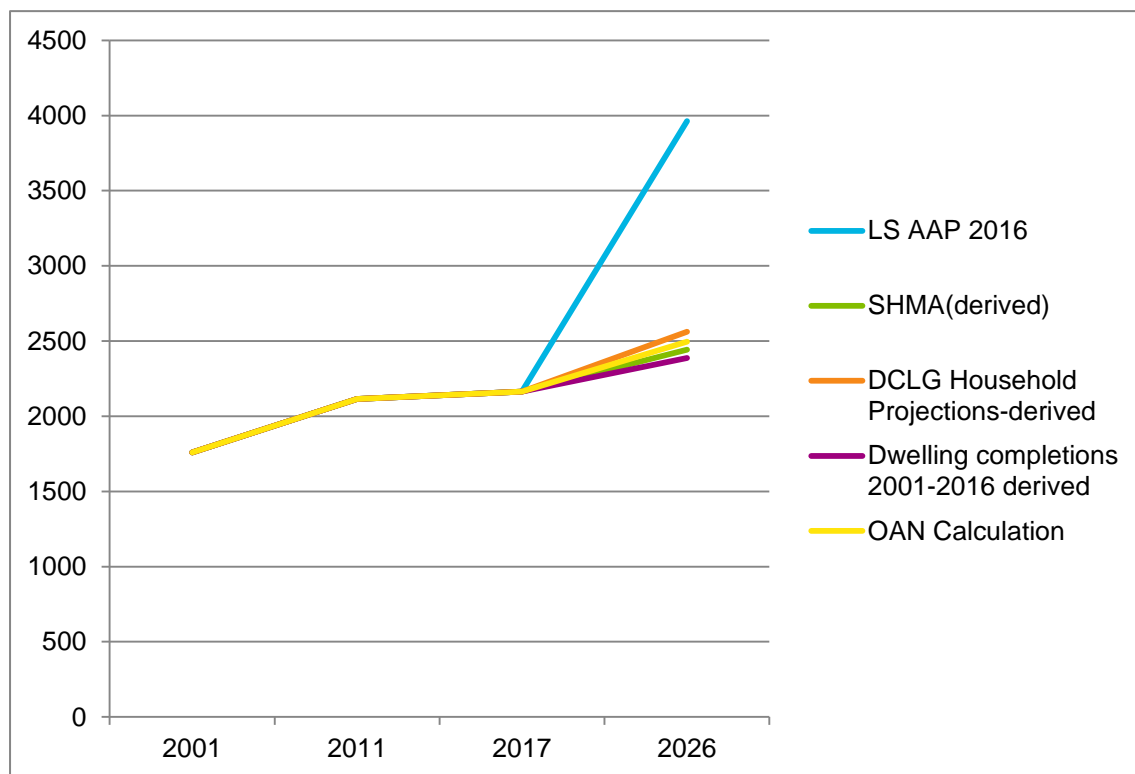
³ Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

⁴ The OAN includes the baseline demographic need, plus any adjustments made to official forecasts to account for projected rates of household formation post 2021, past suppression of the formation of new households, the effect of past under-supply, employment forecasts, market signals and affordable housing need (as set out in paragraph ID2a-004 of the PPG).

- A projection forward of net dwelling completion rates 2001-2016 of **225 homes up to 2026, or 25 dwellings per year (rounded)**.
- A projection based on DCLG's proposed Standard Methodology for calculating OAN of **333 dwellings up to 2026, or 37 dwellings per annum (rounded)**.

19. These dwelling number projections are illustrated in Figure 1 below, which sets out the total number of homes in the NPA for each date, factoring in each of the projections we have identified in Long Stratton.







Figure 1: Dwelling projections for Long Stratton NPA 2017-2026



Source: LSAAP16, SHMA17, DCLG Household Projections, SNDC, DCLG

20. The starting point to arrive at an overall projection for housing numbers to be delivered in the NPA over the Plan Period (2017 to 2026) is usually the average of four of the projections set out above (the standard methodology is not yet policy and is therefore not included). Long Stratton Parish Council have made clear that focus of the study is more on type and size than quantity, given that applications have already come forward for many of the 1800 homes that the AAP requires for Long Stratton. Furthermore, it is clear from the AAP and the Core Strategy that the 1800 home figure is a strategic allocation which is designed to accommodate the growth needs of the City of Norwich and the Norwich Policy Area/Core HMA, as well as to support the delivery of a bypass in Long Stratton.
21. Therefore, given that the LSAAP figure is a clear outlier, it has been discounted from this consideration of local housing need. By considering housing need arising solely from the NPA alone via demographic and population change analysis, it is possible to identify more clearly that mix of housing that would meet the projected local needs. Given that, as outlined in the Long Stratton Demographic and Socio-Economic Review (LSDSER), just 13% of affordable housing in Long Stratton is prioritised for local people, the findings support a strong case for new developments to improve upon this figure to meet local housing needs.
22. In the case of Long Stratton therefore, the initial housing projection for the town would be 349 dwellings over the period 2017 to 2026, representing the average of the SHMA17, DCLG and Past Completion figures. This would represent 19% of the housing planned through the AAP for Long Stratton, and this should provide a compelling guideline for the amount of new housing to be prioritised for local people.

Table 1: Summary of factors specific to Long Stratton with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 9)	Possible impact on future housing need	Rationale for judgement
Employment trends	EAGN12, LSAAP16 EGS16, SHMA17, Census 2001/11		Both Long Stratton itself and Norwich are likely to see significant increases in employment over the next 5-10 years, particularly in the Health Sector which is significant in South Norfolk in particular. The high rates of commuting into Norwich mean that this will increase demand for housing in the NPA. As such, three up arrows has been deemed appropriate to account for this growth.
Housing transactions (Prices)	Land Registry Price Paid Data for 2007-2016, UKHPI		The Long Stratton NPA has been shown to have experienced significant price rises of between 20% and 30% across most housing types between 2007 and 2016. In particular, detached houses, which represent more than 40% of sales in the area during that period, have risen at the same rate as in South Norfolk, and are significantly above their pre-crisis peak, although prices are relatively lower in Long Stratton than in South Norfolk as a whole.
Housing Transactions (Volume)	Land Registry Price Paid Data for 2007-2016, Census 2001/2011 data		Housing transaction levels in the NPA have not recovered to pre-crisis levels for any housing type as prices have above. Indeed, based on an initial analysis, the data suggests that demand is relatively low, particularly for smaller housing types. However, when sales volumes are considered in the context of the available housing stock, it is clear that there is still a mismatch in demand and supply for smaller housing types. Therefore, a diagnosis of one up arrow is considered appropriate.
Migration	Census data 2001, 2011		Migration is not seen as significant factor in determining housing need, given the small number of residents born abroad who have arrived in the last 10 years.
Overcrowding and Concealment	Census Data 2001, 2011		There is some evidence of increased overcrowding in Long Stratton, though this is from a low base when compared with South Norfolk as a whole and England. Conversely, Long Stratton has lower rates of concealment than both the district and England. Therefore one up arrow is deemed appropriate.
Rate of development	SNDC, AMR15/16		There is significant evidence of under-delivery in both Long Stratton and South Norfolk as a whole, and this is also true for the Norwich Policy Area. Therefore, three up arrows is deemed appropriate.

Source: AECOM

23. Moreover, a further assessment applied to this initial housing need projection indicates that market signals (for example the economic context in which the NPA sits, together with the performance of the housing market) are likely to impact on housing need. We have applied our professional judgment 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 set out in the table above in alphabetical but no other order.

24. Taking these factors into consideration, and the overall balance of arrows (10 'up' arrows to 0 'down' arrows) we arrive at an overall target of between and 379 - 384 homes to be delivered over the period 2017 to 2026, that is, an uplift of 8.5-10% on the demographic-based figure put forward in Chapter 5.
25. It is helpful to contextualise this adjustment as a result of market signals in two ways. Firstly, the adjustment made by SHMA17 to account for market signals, which follows current PPG guidance to arrive at an adjustment to the demographic-based housing projections of 10%, including adjustments for suppressed household formation rates, concealed families and homeless households. This they set against comparable uplifts applied across other districts, which ranged from 3% in Cheshire East to 15% in Buckinghamshire and 20% in some parts of London. In this context, the 10% adjustment applied by SHMA17 could be considered conservative
26. Secondly, it is possible to contextualise such adjustments against DCLG's new methodology for calculating housing need, which uses median affordability ratios as a 'market signal' to adjust housing projections figures. Whilst the proposals set out a method of capping this increase to 40% of a given figure based on whether a local plan is out of date or not, they represent a significantly higher uplift (in percent terms), indeed double, than has been applied by consultants in the past in areas of greater housing need such as London. As such, the government's consultation, though not yet made into policy, represents a significant step-change in the application of market signals for adjusting housing numbers.
27. Indeed, as detailed in Chapter 5, DCLG has calculated a preliminary uplift based on affordability ratios in South Norfolk of 21%. Whilst source data was not published for this calculation, it should be assumed that DCLG has followed the method correctly. However, calculations of housing affordability by Cambridgeshire ACRE as part of the LSDSER would, using DCLG's new methodology, imply a higher market signals uplift of 32.5% for South Norfolk.
28. Based on these comparison figures, and on the emerging policy context surrounding market signals uplifts, we apply the median affordability ratio for Long Stratton alone (6.73) to DCLG's proposed methodology for calculating market signals uplift to arrive at an uplift of 17%. This leads to a final figure of 408 homes over the period 2017 to 2026, which is the figure put forward as most appropriate for Long Stratton by this HNA.

Types of Housing Needed

29. In considering this local housing need, it is possible to further break down the final figure into potential types and tenures of housing needed by the population of Long Stratton. Local factors specific to Long Stratton are summarised in the table below, with the conclusions for each alongside.

Table 2: Summary of local factors specific to Long Stratton with a potential impact on neighbourhood plan housing type and tenure characteristics

Factor	Source(s) (see Chapters 6, 7 and 8)	Possible impact on housing needed	Conclusion
Affordable Housing	PPG, Housing and Planning Act, Fixing our Broken Housing Market 2017, Census 2001/2011, SHMA17, PPD, UKHPI, CACI, LSDSER, SNDC	<p>The share of all tenures accounted for by the Private Rented Sector is growing within the Plan Area, and is now close to figure for those in social rented properties.</p> <p>Even those on median incomes have very limited for-sale housing options within Long Stratton, and are more likely to be able to afford a flat outside of the village, elsewhere in South Norfolk, or a rental property. This is compounded by the lack of flats and/or terraced housing for sale in the village, which are usually the most affordable type of housing, in spite of lower prices across other housing types compared with the district.</p> <p>Those on lower quartile household income</p>	<p>Affordable Housing policy suggests that up to 600 of the allocated homes in Long Stratton will be affordable. However, there is a case to be made that 81 affordable homes, or 19% of these, should be made available for local people.</p> <p>Affordable Private Rented Housing should be considered as a means of generating more affordable housing in the Plan Area in future years, and given the context of large scale development in Long Stratton, it is worth considering how this might serve the needs of local people. Type and size of dwelling has a significant impact on its affordability, with smaller housing types such as flats, of which there are very few in the village (39 in total), creating de-facto affordable housing options for people.</p>

are restricted to social and intermediate housing, and this particularly affects those under 25 and lone parent households. As such, in broad terms, 50% of all households in Long Stratton would not be able to afford for-sale housing without additional equity (either from their existing home or from family assistance), but only 26% of existing housing in the NPA is available in other, more affordable tenures, including the private rental sector.

A local register of housing need should be established to record housing priorities of local people in future years, thus capturing both statutory housing needs and those that might be better served by the private rental sector and smaller housing types.

Demand/need for smaller dwellings	Census 2001/2011, SHMA17	<p>Between the last two censuses, dwellings in the NPA tended towards both larger and smaller, with fewer mid-sized dwellings of 2-3 bedrooms.</p> <p>Long Stratton itself has seen significant growth of older households, and Central Norfolk will in future see significant growth in families aged 25-34, suggesting a need for 2-3 bedroom homes (3-4 rooms).</p>	<p>This view is supported by the SHMA17, which proposes more than 80% of housing should be 3 bedrooms or smaller in Long Stratton.</p> <p>Furthermore, the figures put forward in the SHMA17 would provide for 358 affordable 1-2 bedroom homes of the 1800 planned for Long Stratton i.e. more than 35% of housing should be 2 bedrooms or fewer, versus approximately 20% for the rest of South Norfolk, thereby meeting some affordable housing needs.</p>
Demographics	Census 2001/2011, SHMA17, Housing LIN Toolkit	<p>There have been significant increases in the elderly population of Long Stratton, particularly those aged 85+, who may be in greater need of specialist housing, sometimes for sufferers of dementia.</p>	<p>This shift will need to be accounted for in the future housing stock of Long Stratton, with a need for both lifetime suitable homes, as well as for more specialist housing types, particularly given the advanced age of such residents. This will result in a need for 126 units over the period 2017-2026, resulting from local need within the population.</p>
Dwelling type	Census 2001/2011, SHMA17, Land Registry PPD, UKHPI, CACI	<p>There are very few flats in Long Stratton, including just 39 at the 2011 census.</p> <p>Flats have the potential to provide affordable rental or owner-occupied forms of housing to local people, and for those on median incomes, flats elsewhere in South Norfolk may be the only affordable for sale housing option.</p>	<p>There is a case, given that the market has not provided flats in Long Stratton, to do so through planning policy, as these provide an invaluable source of potentially affordable housing, as well as typically smaller housing types. Smaller terraced homes also have the potential to meet some of this need.</p>
Family-sized housing	Census 2001/2011, SHMA17, Land Registry PPD, UKHPI, CACI	<p>Young families tend to require less space than older families. Whilst families will naturally age over the period 2017-2026, the vast majority of household formation will be younger families with a need for smaller housing types.</p>	<p>Smaller housing types should continue to be prioritised via the planning process, given that for newly forming households under 25, affordability can be a particular concern, and for those even on median incomes in Long Stratton, housing options are limited.</p>
Plots for self-builders	SNDC	<p>There is evidence of demand for serviced self-build plots within South Norfolk, and it is likely that some of this will be present in Long Stratton.</p>	<p>Whilst the overall number of self-builders may be small, perhaps just one per year, it is worth considering whether, over the entire plan period (2017-2026), the sum total might justify proactive planning to accommodate self-builders, rather than individual plots coming forward and self-builders demolishing existing homes, thereby not increasing the overall housing stock.</p>

Recommendations for next steps

30. This neighbourhood plan housing needs advice has aimed to provide Long Stratton with evidence on housing trends from a range of sources to identify local housing need from within the Neighbourhood Plan Area. We recommend that the parish should, as a next step, discuss the contents and conclusions with South Norfolk District Council with a view to agreeing and formulating draft housing policies, in particular the appropriate approach to identifying the level of need for housing for local people in the NPA, bearing the following in mind:
 - The Basic Conditions that neighbourhood plans need to fulfil in order to pass examination, in particular having regard for national policies and advice contained in guidance issued by the Secretary of State;
 - that its policies contributes to the achievement of sustainable development and are in general conformity with the adopted strategic local policies⁵;
 - the views of South Norfolk District Council –in particular in relation to how planned for growth can accommodate the needs of local people through a local lettings policy forming part of planning conditions;
 - the views of local residents;
 - the views of other relevant local stakeholders, including housing developers;
 - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the South Norfolk District Council, including but not limited to the SHLAA; and,
 - the recommendations and findings of this study.
31. Recent changes to the planning system, forthcoming changes to the NPPF, as well as the implementation of the Housing and Planning Act, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
32. This advice note has been provided in good faith by AECOM consultants on the basis of housing data and national guidance current at the time of writing (alongside other relevant and available information).
33. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by the District Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.
34. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 1 and 2 would be particularly valuable.

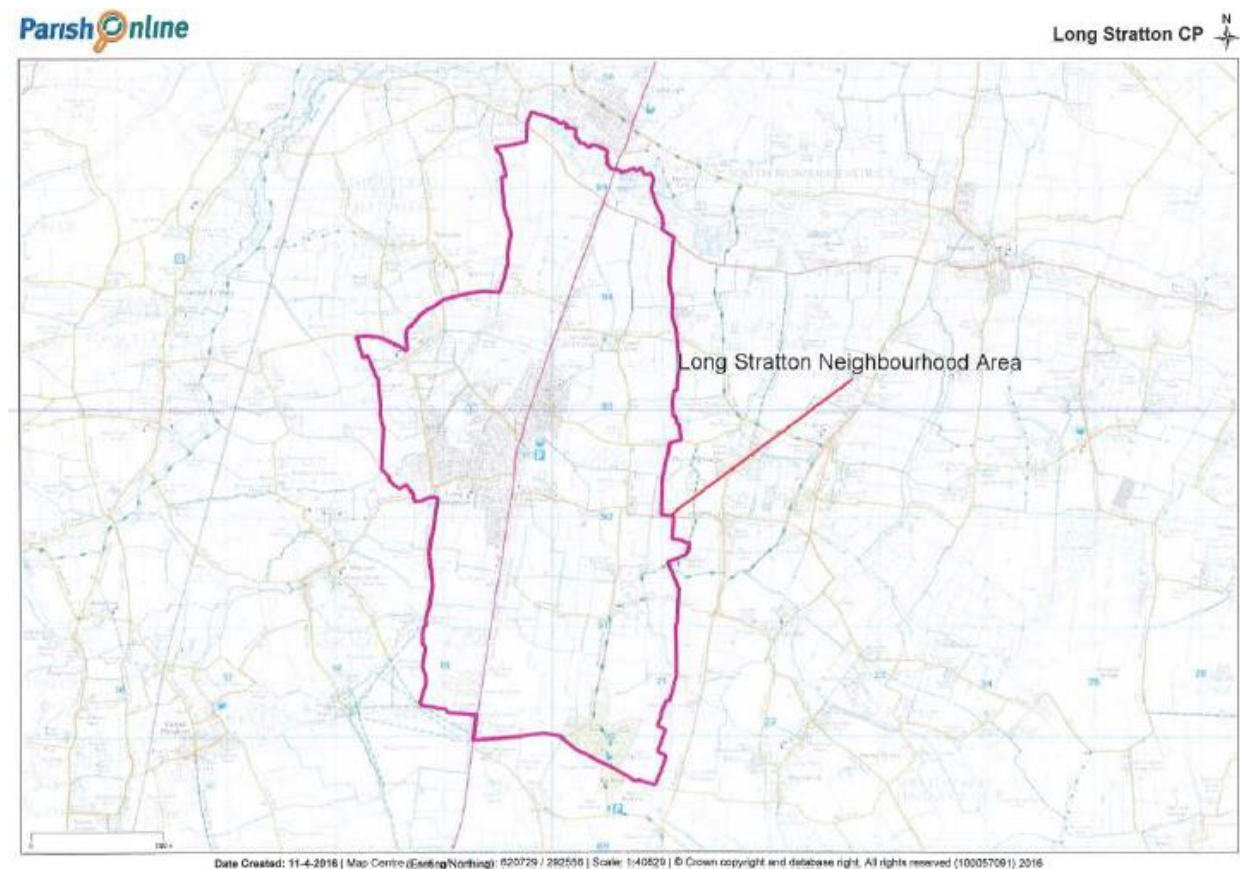
⁵ The five basic conditions and how they should be addressed can be seen in the document 'How to Write a Basic Conditions Statement, <https://mycommunity.org.uk/wp-content/uploads/2016/08/How-to-write-a-basic-conditions-statement.pdf> (visited 19/09/17)

3. Context

3.1 Local context

35. Long Stratton is a large village, and a civil parish, lying approximately 16km to the south of Norwich. The A140 runs directly through the centre of the settlement, which connects Norwich to Ipswich. The possibility of building a bypass for the village is discussed in more detail below in relation to the Long Stratton Area Action Plan, which was adopted by South Norfolk District Council, the relevant Local Planning Authority (LPA) in May 2016.
36. Given the emergence of this local planning document, Long Stratton Parish Council have decided to include parts of Tharston and Hapton Parish within their Neighbourhood Plan Area (NPA), so that the boundary of the area covered by the Neighbourhood Plan corresponds exactly with that of the Area Action Plan produced by the District Council.
37. In addition to being the location of the offices of South Norfolk Council and Saffron Housing Trust, the neighbourhood plan area plays host to a range of businesses located in the Tharston Industrial Estate, three schools, and two small shopping centres. A map of the NPA is provided below.

Figure 1: Map of Long Stratton Neighbourhood Area, including parts of Tharston and Hapton Parish



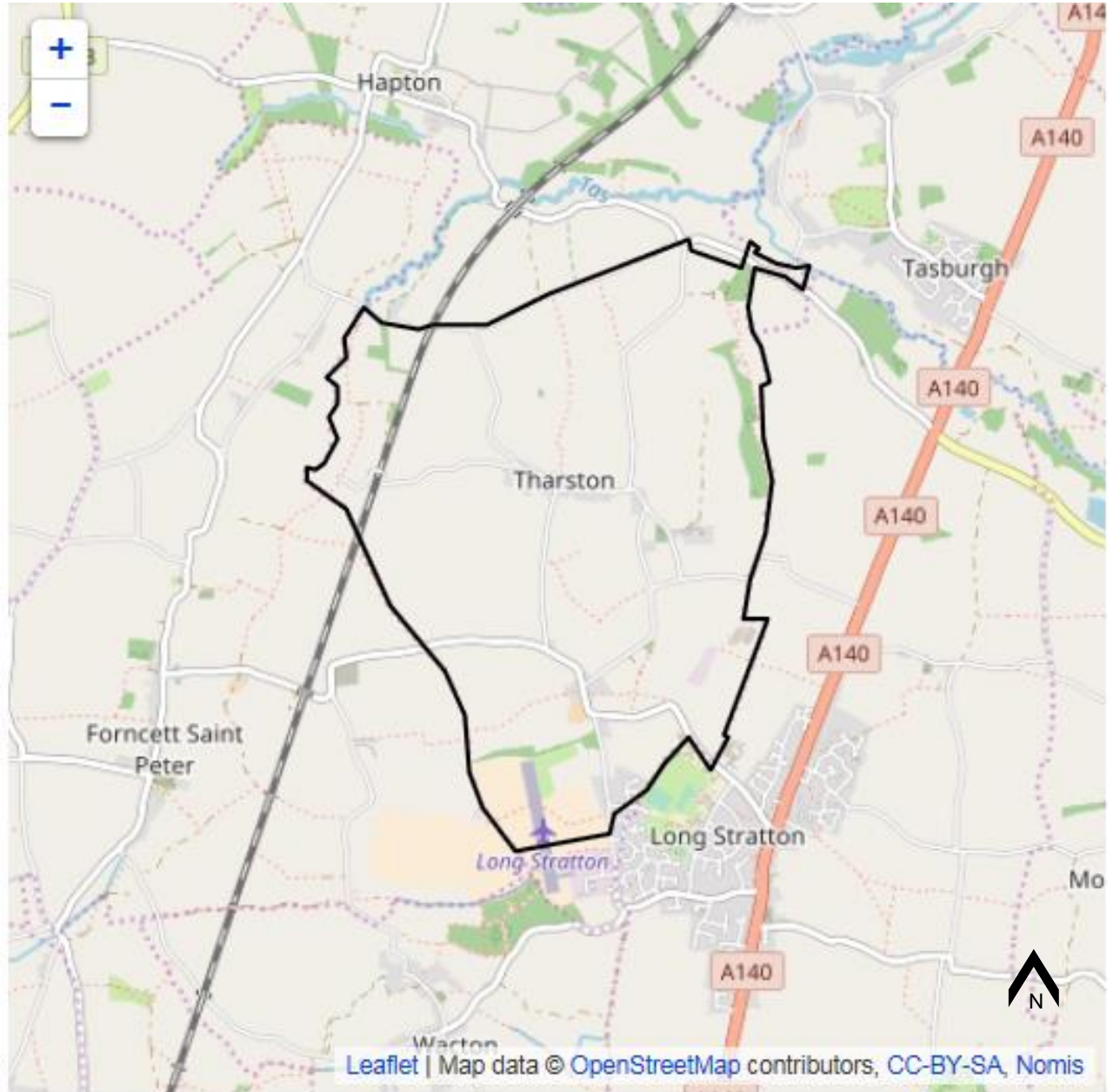
Source: LSPC

3.2 Census Geography

38. For the purposes of this study, census data was downloaded for both 2001 and 2011 Censuses to contribute to an assessment of the housing needs in the area. Whilst the 2011 Census data can be filtered down to the Parish level, thereby ensuring its accuracy at that level, the Long Stratton NPA includes parts of Tharston and Hapton Parish, mainly to reflect the boundary of the area defined by the Local Planning Authority in its Long Stratton Area Action Plan in 2016.

39. As such, it is necessary to collect 2011 census data in a more detailed way, namely, using a group of individual Census Output Areas (OAs). These OAs are the smallest geography for which census data is collected, however, one OA, E00137032, is partially included within the NPA, but includes further areas of Tharston and Hapton. For the purposes of this study, the population of this OA has been included in all of the census data used throughout this study as no smaller geographies exist for data collection. .

Figure 2: Map of OA E00137032



Source: nomisweb.co.uk

3.3 Local Planning Policy Context

3.3.1 Joint Core Strategy for Broadland, Norwich and South Norfolk, Adopted March 2011, amendments adopted January 2014

40. **The Spatial Vision**, which sets out that Long Stratton is a Key Service Centre, which would generally accommodate small to moderate new housing allocations (between 50 and 200 dwellings) in accordance with their infrastructure and facilities capacity. However, it goes on to make clear that Long Stratton will see more

major growth, resulting in enhanced services and improvements to quality of life as a result of the new bypass that will be delivered to accompany growth. Specific, policies relevant to this HNA are summarised below.

41. **Policy 4: Housing delivery**, which sets out allocations for 36,820 homes across all three local authorities between 2008 and 2026, of which approximately 33,000 will be in the Norwich Policy Area. It further states that housing should be of an appropriate mix to meet the needs of the area, that a proportion should be affordable housing on sites of more than 5 dwellings or 0.2 hectares, with varying criteria for the exact percentage of affordable housing depending on the size of site, subject to market conditions. It goes on to suggest that housing with care provision will be required in major growth areas including in Long Stratton.
42. **Policy 6: Access and transportation**, which states that access to rural areas will be improved via enhanced transportation system achieved by, amongst other initiatives, the provision of an A140 Long Stratton bypass.
43. **Policy 7: Supporting communities**, which notes that “An expansion of care home provision specialising in dementia care will be required with particular needs in...Long Stratton...Additional care homes with nursing provision are mostly required in Norwich ... with some provision needed in...Long Stratton.”
44. **Policy 9: Strategy for growth in the Norwich Policy Area**, which allocates 1,800 dwellings to be built over the plan period to address housing need, and to deliver growth and support the local economy via the Long Stratton Bypass.
45. **Policy 10: Locations for major new or expanded communities in the Norwich Policy Area**, which states that to ensure the delivery of the Long Stratton bypass, at least 1,800 dwellings will be built, alongside improvements to the village centre and other infrastructure, expanded school provision, and investment in strategic and green infrastructure and local employment opportunities, which will be detailed through an Area Action Plan.

3.3.2 Long Stratton Area Action Plan, Adopted May 2016

46. The Long Stratton Area Action Plan has been prepared by South Norfolk District Council, in consultation with local communities and other key stakeholders via five formal consultation periods, to guide future development in the area, and sets out a vision for a minimum of 1,800 new homes which will enable the A140 bypass to be delivered. Other objectives include supporting a mixture of job opportunities, village centre improvements, and landscape, environmental, recreational and transport objectives.
47. Whilst the boundaries proposed by the AAP have been set to accommodate the fact that both housing and employment uses linked to Long Stratton already extend into Tharston and Hapton Parish, this does not constitute a formal change to the parish boundaries. The individual policies in the plan that are relevant to this HNA are described in more detail as follows:
48. **Policy LNGS1**, which sets out the allocation of 140.1 hectares of land for housing and other uses, primarily employment land and land to accommodate the new bypass. In addition it sets out numerous specific conditions relating to the masterplanning of and access to the site, employment opportunities and economic growth, enhanced facilities, open space and green infrastructure, design principals, transport, and site conditions and constraints, and developer contributions.

4. Approach

4.1 Research Questions

49. Housing Needs Assessment at the neighbourhood plan level can be focused either on the quantity of housing needed, the type of housing required, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place. Estimations of the quantity of housing needed may also be appropriate where the local plan is soon to be replaced. In addition however, the concerns of local people often relate to the tenure, type and size of housing in their area, as well as the needs of specialist groups such as the elderly. Thus these issues are incorporated into this HNA's approach.
50. Specific Research Questions relating to local housing needs, abbreviated to 'RQ,' are arrived at during the start of the project, through discussion with the qualifying body, in this case Long Stratton Parish Council (LSPC). They serve to direct our research and provide the structure for the HNA. Below we set out the RQs relevant to this study, as discussed and agreed with LSPC.

4.1.1 Quantity

51. The existing adopted Local Plan (adopted 2011, and updated 2014) includes the Long Stratton Area Action Plan (LSAAP) which supports the delivery of a minimum of 1,800 new dwellings over the Plan Period to 2026 for the area covered by the neighbourhood plan; this number has been arrived at in part as a means of generating the necessary developer contributions to finance a proposed bypass, as well as to meet strategic need at the wider South Norfolk level. Therefore, this HNA seeks to understand what proportion of this need might be related to local people both in terms of quantity and types of housing.
52. In addition, the council is in the process of developing a new Local Plan. Once adopted, this will supersede the 2014 plan, including the LSAAP. This document is scheduled for adoption in December 2020⁶. As a means of feeding into this document and assessing the validity of the 1,800 figure, LSPC wish the HNA to establish appropriate housing targets and policies for the NPA.
53. *RQ1. What quantity of housing is appropriate to meet the specific needs of the NPA?*

4.1.2 Tenure

54. LSPC has expressed an interest in seeing more affordable housing in the NPA so as to enable newly formed households and first time buyers to establish themselves in the area. This study will therefore explore tenure mix with a particular focus on affordable housing including the role of discounted market housing.
55. *RQ2. What affordable housing (social housing, affordable rented, shared ownership, intermediate rented) and market tenures should be included in the housing mix?*

4.1.3 Type and size

56. LSPC hope that new development provides a mix of dwellings in terms of type and size suited to the household types described in 'tenure' and to people wishing to downsize.
57. *RQ3. What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate?*

4.1.4 Housing for specialist groups

58. LSPC has suggested that an assessment of the needs of older residents is relevant to their plan.
59. *RQ4. What provision should be made for specialist housing for older residents within the NPA?*

⁶ Local Development Scheme for South Norfolk 2016-17, page 13

4.3 Study Objectives

60. The objectives of this report can be summarised as:
 - The collation of a range of data with relevance to housing need in Long Stratton (and parts of Tharston and Hapton Parish) in relation to South Norfolk as a whole.
 - Analysis of that data to determine patterns of housing need and demand;
 - Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.
61. The remainder of this report is structured around the objectives set out above, save for the section below, which describes the data sources which the report has drawn on in more detail.

4.4 Relevant Data

4.4.1 SHMA17

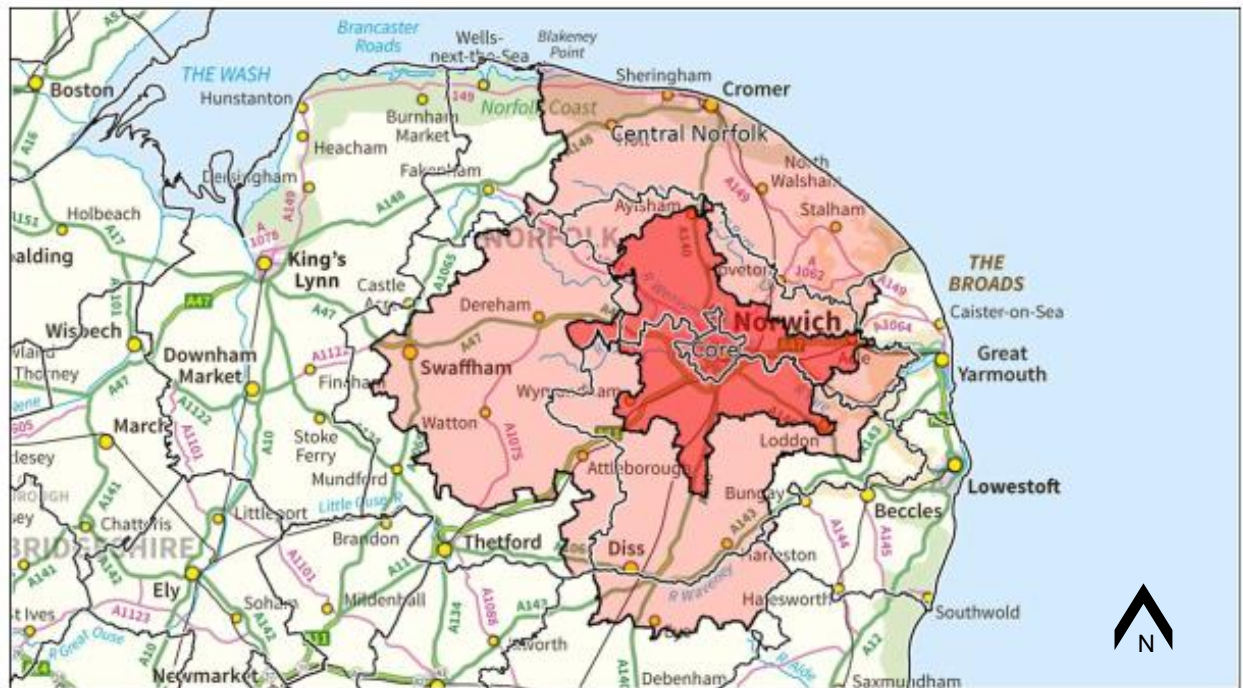
62. To answer the above research questions, we describe here the sources we have accessed that provide the evidence on which our responses are based. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.
63. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal 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. Discussions with the local planning authority, the Parish Council's planning consultant, and Cambridgeshire ACRE, who have completed previous study work on housing needs, have informed our assessment.
64. The PPG also states that neighbourhood planners can refer to existing housing needs assessment prepared by the local planning authority as a starting point. In the case of Long Stratton, we therefore turn to the wider Central Norfolk Strategic Housing Market Assessment Report of Findings (June 2017), henceforth the SHMA17, which covers the housing market area and informs emerging housing policies at a local authority level, including affordable housing policy.
65. This document was jointly commissioned by the Central Norfolk local authorities (South Norfolk, North Norfolk, Norwich City, Broadland, Breckland, and the Broads Authority Executive Area) to identify and define the extent of the housing market area and establish an Objectively Assessed Need (OAN) for housing across the area. Norfolk County Council was also a non-commissioning partner.
66. The SHMA17 draws upon a range of data including population projections, housing market transactions and employment scenarios to derive the objectively-assessed housing need for each local authority contained within. As such, it contains a number of points of relevance when determining the degree to which the housing needs context of Long Stratton itself differs from the South Norfolk-wide picture, and indeed that of the wider housing market area of Central Norfolk.
67. PPG defines a HMA as 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."⁷ It goes on to remark that "establishing the assessment area may identify smaller sub-markets with specific features, and it may be appropriate to investigate these specifically in order to create a detailed picture of local need".
68. The SHMA17 Supplementary Note: Geographic definition of HMAs makes clear that the area covered by the Long Stratton Neighbourhood Plan is contained within what it defines as the Core Market Area, as shown in the figure on the following page. This area was previously referred to, in the Joint Core Strategy for Broadland, Norwich and South Norfolk, as the Norwich Policy Area, "used to ensure that growth needs arising from the Norwich urban area are addressed as close to it as possible."⁸ As a result, where available, data from the Core

⁷ Planning Practice Guidance Paragraph: 010 Reference ID: 2a-010-20140306 Revision date: 06 03 2014

⁸ JCS14, pp. 42

Market Area specifically, rather than the whole of South Norfolk, has been used to reflect more nuanced projections for Long Stratton, and understandings of its demographics.

Figure 3: Housing Market Area in and around Greater Norwich



Source: SHMA17

4.4.2 Sub-National Population Projections (SNPP) and Household Projections

69. This data source allows consideration of the potential growth in population, measured in households. The data is calculated by the Department for Communities and Local Government (CLG) on a regular basis, and takes as its starting point subnational population projections (SNPP), which are published by the Office for National Statistics (ONS) every two years. The 2014-based were published by the ONS in May 2016, and following on from this, in July 2016, CLG published new 2014-based household projections. To take account of this update, a new SHMA update was produced in 2017, "taking account of the impact of 2014 based CLG household projections, 2015 ONS mid-year population estimates and more general updates to best practice in relation to the calculation of OAN. This study also produces new estimates for affordable housing need across Central Norfolk."⁹ As such, this HNA also uses the most recent available projections, i.e. the 2014-based households from CLG.

4.4.3 Documents provided by South Norfolk District Council

70. A range of information relevant to housing needs assessment is only collected at the level of the LPA itself. Therefore, data acquired directly from South Norfolk District Council, including annual dwelling completions monitoring data, affordable housing register data and self-build register data, has been used in preparing this HNA report.

4.4.4 Documents provided by Long Stratton Parish Council

71. Some information and research has already been compiled by and on behalf of Long Stratton Parish Council. This included Demographic & Socio-Economic Review of Long Stratton (Parish) developed by Cambridgeshire ACRE, which has also been used in the preparation of this HNA report.

⁹ SHMA17 pp.6

5. RQ1: What quantity of housing is appropriate to meet the specific needs of the NPA?

72. We have estimated the quantity of housing needed in NPA according to six different sources; these are,

1. Local Plan (LP) 2008-2026 / Long Stratton Area Action Plan 2016
2. SHMA17 - proportional share drawn from OAN 2015-2036
3. DCLG Household projections
4. Net home completion rates 2001-2011
5. Net home completion rates 2011-2017
6. Objectively Assessed Need Methodology Proposed in September 2017

These calculations are set out below.

5.1 Local Plan / Long Stratton Area Action Plan 2016

73. The Local Plan for South Norwich, the Joint Core Strategy for Broadland, Norwich and South Norfolk puts forward a total housing requirement for 36,820 new homes to be delivered across all three local authorities between 2008 and 2026, and in reference specifically to the Norwich Policy Area, in which Long Stratton falls, approximately 33,000 homes to be delivered across those areas of all three local authorities. No housing figures are given for the individual local authorities included under the plan.
74. However, both the JCS14, and the more recent Long Stratton Area Action Plan, adopted in May 2016, set out an exact figure of **1,800 new homes over the period 2008-2026, which equates to 100 homes per annum**. As discussed in the executive summary above, this figure represents a strategic allocation by the local planning authority which pre-empts and in practice over-rides any figure we might conclude as to the overall level of housing to be delivered in the NPA. The purpose of the calculations above is thus to understand how much of this housing might be able to meet local needs arising from Long Stratton itself.

5.2 SHMA17

75. It is important to remember that the SHMA17 presents a demand-side only, or 'unconstrained' assessment of need (often identified as Objectively Assessed Need, or OAN¹⁰), as opposed to a final housing target. The final housing target will take into account a number of other factors, including for example the availability of land, viability, infrastructure and environmental constraints and the results of consultation.
76. The SHMA17 presents an appropriate starting point for deriving need at the NP level, because it is the most up-to-date evidence available, and importantly, because it takes into account the latest population and household projections, as set out in the 2014 Sub-National Population Projections on which the Household Projections are based, which the PPG guidance suggests should be taken as a 'starting point' in determining need at the local authority level.
77. The previous version of the SHMA, published in 2016, identified an OAN of 19,153 homes (or 798 homes per annum rounded) for the whole of South Norfolk¹¹ between 2012 and 2036. This reflected a 'policy on' estimate taking into account the jobs and growth planned for via the Norwich City Deal. This was based on the preferred methodology which adopts long-term 10-year migration trends provides the most robust and reliable basis for projecting the future population.
78. The updated SHMA17 however identifies an OAN for the period 2015 - 36 of 16,072 homes, or 765 homes per annum, reflecting a downwards revision of some 33 homes per annum for the whole of South Norfolk.¹² This was also based on the preferred methodology which adopts long-term 10-year migration trends provides the most robust and reliable basis for projecting the future population.

¹⁰ The OAN includes the baseline demographic need, plus any adjustments made to official forecasts to account for projected rates of household formation post 2021, past suppression of the formation of new households, the effect of past under-supply, employment forecasts, market signals and affordable housing need (as set out in paragraph ID2a-004 of the PPG). This is sometimes described as 'policy off' because it does not take account of final policy responses as a result of taking into account capacity, environmental and infrastructure constraints.

¹¹ SHMA15.1, pp. 145

¹² SHMA17,

79. To calculate the NPA's 'fair share' of this target, it is again possible to use LSPC's proportion of all housing in the district (3.87%). This produces a figure of 622 dwellings (rounded) from 2015-2036, or **30 dwellings per annum (rounded)**.
80. Furthermore, it is necessary to take into consideration homes built in the NPA from 2015-2017, which data provided by the local planning authority suggests was 29 dwellings, producing a final target of **593 dwellings to 2036, or 31 dwellings per annum (rounded). This can be equated to 279 dwellings up to 2026.**

5.3 DCLG Household Projections

81. The Department for Communities and Local Government (DCLG) periodically publishes household projections. The PPG recommends that these household projections should form the starting point for the assessment of housing need.
82. The most recent (2014-based) household projections were published in July 2016¹³, and extend to 2039. Although these projections are only available at a local authority level, a calculation of the share for the NPA is nevertheless possible for the household projections based on the NPA's household numbers in the 2011 Census.
83. At the 2011 Census, South Norfolk had 52,809 households and Long Stratton had 2,063 households, or 3.9% of the total (rounded).
84. In the 2014-based household projections, the projection for 2026 is **for 63,923** households in South Norfolk. Assuming that Long Stratton continues to form 3.9% of the district total, the NPA's new total number of households would be 2,497 (rounded), that is, **a growth of an additional 434 households by 2026** from the 2011 total of 2,063 households, **or a rate of growth of approximately 29 households per year.**
85. Number of households does not, however, equate precisely to number of homes, with the latter slightly higher in most places. Long Stratton is no exception; in the 2011 Census, there were 2,063 households but 2,115 actual dwellings. This gives a ratio of 0.97 households per dwelling. In the case of Long Stratton then, a projection of 434 new households by 2026 translates into a need for 447 homes (rounded to the nearest whole number), or 50 per annum.
86. These figures are based on the assumption that 2014-based government projections as to household growth at the Local Authority level are accurate. As the annual mid-year population estimates have now been released for 2016, the 2014-based household projections may need to be 'rebased' for accuracy. The mid-2016 population estimates give the actual number of people in the NPA at that point, meaning the difference between the estimated and the previously projected number of households can to be taken into account in future projections.
87. The 2014-based household projections were based on the 2014-based Sub-National Population Projections, which estimated that by 2016 there would be 132,400 people in South Norfolk. However, the mid-2016 Estimates show that based on the latest information there were in fact estimated to be 132,837 people, which is higher than the initial 2014-based projections by 437 people. Assuming average household sizes in South Norfolk remain constant (in 2011 there were an average of 2.4 people per household, obtained by dividing population by number of households) this equates to 186 more households (rounded) across South Norfolk by mid-2016.
88. Taking these additional households that have already formed and adding them to the 2026 total of 63,923 gives a revised total household projection for South Norfolk at 2026 of 64,109, which proportionally would equate to 2,500 households in Long Stratton (rounded) for the same year. This produces a revised growth in the number of households between 2011 and 2026 of 437 (up from 434 prior to rebasing). Taking into account the disparity between household numbers and dwelling numbers (0.97 households per dwelling), this produces figure of 451 homes (up from 447 prior to rebasing). Finally, netting off the 48 dwellings completed since 2011, **we arrive at a re-based household projections-derived dwellings of 44 dwellings per annum or 399 dwellings (rounded) over the period 2017-2026.**
89. 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 the District and hence any difference between this figure and a future Local Plan-derived figure.

¹³ See 2014-based DCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

5.4 Home growth 2001 – 2011

90. Consideration of home growth 2001-2011 provides a projection based on the rate of delivery of net new homes between the two censuses. As we have seen, there was an increase of 355 homes in the NPA between these two dates, or an average annual rate of increase of 36 homes (rounded). Multiplying this annual figure by the number of years remaining of the period from 2017 - 2026, **produces a gross need for 324 homes.**

5.5 Home growth since 2011

91. It is also helpful to consider a projection based on the rate of delivery of net new homes since the last census (2011), using data gathered and monitored by the LPA. As we have seen, between 1st April 2011 and the 31st March 2017, 48 new dwellings were completed¹⁴. This equates to an annual rate of delivery of 8 homes (48 divided by 6, the number of years elapsed). If this rate of delivery was continued to 2026, this would equate to a **projection of 72 homes over the period of 2017-2026.**
92. It is important to note the disparity between the two 'home growth' figures reflects the susceptibility of the development industry to fluctuations in demand and costs of development, among other factors. To allow for these peaks and troughs, and provide a more realistic picture of the quantum of development could be delivered over the period 2017-2026, we have taken the aggregate of the homes growth between 2001 and 2017; this comes to 403 (355+48) dwellings. Expressed as an annual average rate, **this is 25 dwellings per year (rounded), producing a projection derived from homes growth between 2001 and 2017 of 225 homes over the remaining period of 2017-2026.**

5.6 The Standard Methodology

93. On September 14th, 2017, the Department for Communities and Local Government (DCLG) published "Planning for the right homes in the right places: consultation proposals", a consultation on a new proposed methodology for arriving at an Objectively Assessed Housing Need (OAN) for individual local authorities, , thus avoiding both the expense of producing complex SHMAs and the disagreements surrounding their methodologies. DCLG has stated that "This consultation sets out a number of proposals to reform the planning system" including "how neighbourhood planning groups can have greater certainty on the level of housing need to plan for".¹⁵
94. Whilst the document is currently being consulted on at the time of this HNA report, it is important to consider the implications of this emerging policy guidance for potential housing need calculations in the Long Stratton NPA. Therefore, what follows is an assessment of the NPA's housing need based on the new proposed methodology, which should the policy be put in place in its current form, will be the preferred figures for housing need in the area. This projection is included *for information only*, bearing in mind that the consultation makes clear that LPAs will have the option of using alternative methods of calculating their OAN, so long as the number that they arrive at exceeds that produced by the new standard methodology.
95. Alongside the consultation, DCLG has published preliminary calculations using its methodology for every local authority in England. These figures show an indicative assessment of housing need in South Norfolk based on the proposed formula of 922 dwellings per annum, up from the 765 dwellings per annum projected by the Local Plan as noted above. This represents an increase of approximately 21% (rounded) in dwelling projections.
96. The new methodology hinges on whether the LPA in question has an up to date local plan, i.e. one that is less than 5 years old. Where such a plan is in place, increases in housing need will be capped at 40% of the existing calculation. This cap would not apply in the case of South Norfolk, as the increase is less than 40%.
97. With regards to the impacts of the new methodology on neighbourhood planning specifically, the document suggests that:
- "The proposed formula is simply to take the population of the neighbourhood planning area and calculate what percentage it is of the overall population in the local planning authority area. The housing need figure in the neighbourhood planning area would then be that percentage of the local planning authority's housing need."*¹⁶
98. Building on this proposed approach, we can estimate that the annual requirement for Long Stratton NPA, based on the proportion of the population of South Norfolk falling into the NPA, would be **37 dwellings per annum (rounded), or 333 dwellings by the end of the period from 2017-2026.**

¹⁴ SNDC

¹⁵ <https://www.gov.uk/government/consultations/planning-for-the-right-homes-in-the-right-places-consultation-proposals>

¹⁶ Planning for the Right Homes in the Right Places, pp. 32

5.7 Conclusions

99. This chapter has considered various sources of data and put forward a range of different housing need projections in terms of quantity for Long Stratton Parish Council to consider. Whilst it is clear from the Local Plan and Area Action Plan that a minimum of 1800 homes have been allocated for development in the village to meet the needs of the Norwich Policy Area, or Core Housing Market Area as it is now known, it is relevant for the Parish Council to consider what housing needs will arise from within its own community. To consider this issue in more detail, we turn to the next research question, which concerns the tenure of dwellings that might be appropriate to meet future needs in Long Stratton.

6. RQ2: What affordable housing (social housing, affordable rented, shared ownership, intermediate rented) and market tenures should be included in the housing mix?

100. The PPG states that HNAs should investigate household tenure in the current stock and recent supply, and make an assessment, based on a reasonable interpretation of the evidence gathered, whether continuation of these trends would meet future needs or whether, on account of significant misalignments between supply of housing falling into different tenure types and local need/demand, policies should support a change to the profile of tenure within the NPA's housing stock.¹⁷

6.1 Definitional issues

101. It is necessary at this stage of the study to make clear the distinction between affordable homes as a piece of planning terminology and the colloquial meaning of the phrase. In the course of this study, we refer to Affordable Housing, abbreviated to 'AH'. We mean by this those forms of housing tenure that fall within the definition of Affordable Housing set out in the National Planning Policy Framework (NPPF): social, affordable rented and various forms of intermediate housing. To distinguish this from the colloquial definition, i.e. market housing for sale which is affordable for typical buyers, we refer to the latter as Affordable Market Housing (AMH).
102. In this paragraph we briefly review the proposed reforms to the definition of AH set out in the Government's Housing White Paper published in February 2017. These reforms make clear its commitment to home ownership but recognised the important role of affordable rent for those not currently seeking home ownership. The changes proposed would broaden the definition of affordable housing, supporting 'present and future innovation by housing providers in meeting the needs of a wide range of households who are unable to access market housing'. This would include 'products that are analogous to low cost market housing or intermediate rent, such as discount market sales or innovative rent to buy housing. Some of these products may not be subject to 'in perpetuity' restrictions or have recycled subsidy'.
103. The Housing and Planning Act 2016 made provision for a new simplified definition of affordable housing as 'new dwellings...to be made available for people whose needs are not adequately served by the commercial housing market'¹⁸. Secondary legislation is required to implement this definition, necessitating further parliamentary debate¹⁹.
104. The Housing White Paper²⁰ confirms that a revised definition of AH will be brought forward through changes to the NPPF later this year, proposing a definition as 'housing that is provided for sale or rent to those whose needs are not met by the market (this can include housing that provides a subsidised route to home ownership' and which 'meets the criteria' for one of the following models²¹:
- **Social rented housing**, defined as currently and owned by local authorities and private registered providers with guideline target rents determined through the national rent regime. It may be owned by other persons and provided under equivalent rental arrangements, as agreed with the local authority or Homes and Communities Agency;
 - **Affordable rented housing**, defined as currently and let by local authorities or private registered providers of social housing to households eligible for social rented housing. Affordable rent is controlled at no more than 80% of the local market rent including service charges where applicable;
 - **Starter Homes**, as defined in the Housing and Planning Act 2016 and subsequent secondary legislation with an income restriction of £80,000 outside London. These homes are expected to provide a new low cost market housing product for first time buyers between the ages of 23 and 40 with a mortgage, sold for no more than 80% of open market value and capped at £250,000 outside London;

¹⁷ PPG Paragraph: 021 Reference ID: 2a-021-20160401

¹⁸ Housing and Planning Act 2016, part 6, section 159 (4)

¹⁹ Section 159(2) of the Act inserts '(3ZB) No regulations may be made under section 106ZB [which contains the updated definition of affordable housing] unless a draft of the instrument containing the regulations has been laid before, and approved by a resolution of, each House of Parliament'

²⁰ DCLG (2017) Fixing our Broken Housing Market (para A.120)

²¹ Ibid (p100)

- **Discounted market sales housing**, sold at a discount of at least 20% below market value with provision to remain at a discount for future eligible households. Eligibility is to be determined with regard to local incomes and house prices;
- **Affordable private rent housing**, made available for rent at a level which is at least 20% below local market rent with provision to ensure that rent remains at a discounted level or alternative affordable housing provision is made if the discount is withdrawn. This is viewed as particularly suited to the provision of affordable housing in Build to Rent schemes; and
- **Intermediate housing**, defined to include discounted market sales and affordable private rent housing – as outlined above – and other housing that is 'provided for sale and rent at a cost above social rent, but below market levels'.

105. A transition period is proposed to enable a review of local policies, with the revised definitions intended to apply from April 2018. The Government also intends to introduce a requirement for sites of 10 units or more to ensure that at least 10% of all homes are affordable home ownership products, including Starter Homes, shared ownership homes and homes available for discount market sale.

6.2 Current tenure profile

106. The PPG states that HNAs should investigate household tenure in the current stock and recent supply, and make an assessment, based on a reasonable interpretation of the evidence gathered, whether continuation of these trends would meet future needs or whether, on account of significant misalignments between supply of housing and local need/demand, policies should support a change to the profile of tenure within the NPA's housing stock.²²

107. The table below presents Census data from 2011, which shows that owner occupiers make up the vast majority of households in the NPA, broadly in line with the figures for the district as a whole, but somewhat higher than the percentage of owner occupier households in England.

Table 3: Tenure (households) in Long Stratton, 2011

Tenure	Long Stratton NPA	South Norfolk	England
Owned; total	72.1%	74.9%	63.3%
Shared ownership	2.2%	1.0%	0.8%
Social rented; total	12.6%	11.3%	17.7%
Private rented; total	11.1%	11.2%	16.8%

Source: Census 2011, AECOM Calculations

108. In Table 4 on the below we review the way this tenure split has altered between the 2001 and 2011 Censuses. While there has been growth across all tenures, shared ownership and the private rented sector (PRS) have experienced the sharpest increases, albeit from a very low base of 34 shared ownership properties in 2001, and 83 private rented properties in 2001. It is important to note that shared ownership seeks to offer a realistic route to home ownership for those on lower incomes, whilst the private rental sector may in fact be the only option for households unable to buy. Thus, the significant growth in these two tenures shown below reflects the worsening affordability of market, for-sale housing.

Table 4: Rates of tenure change in Long Stratton, 2001-2011

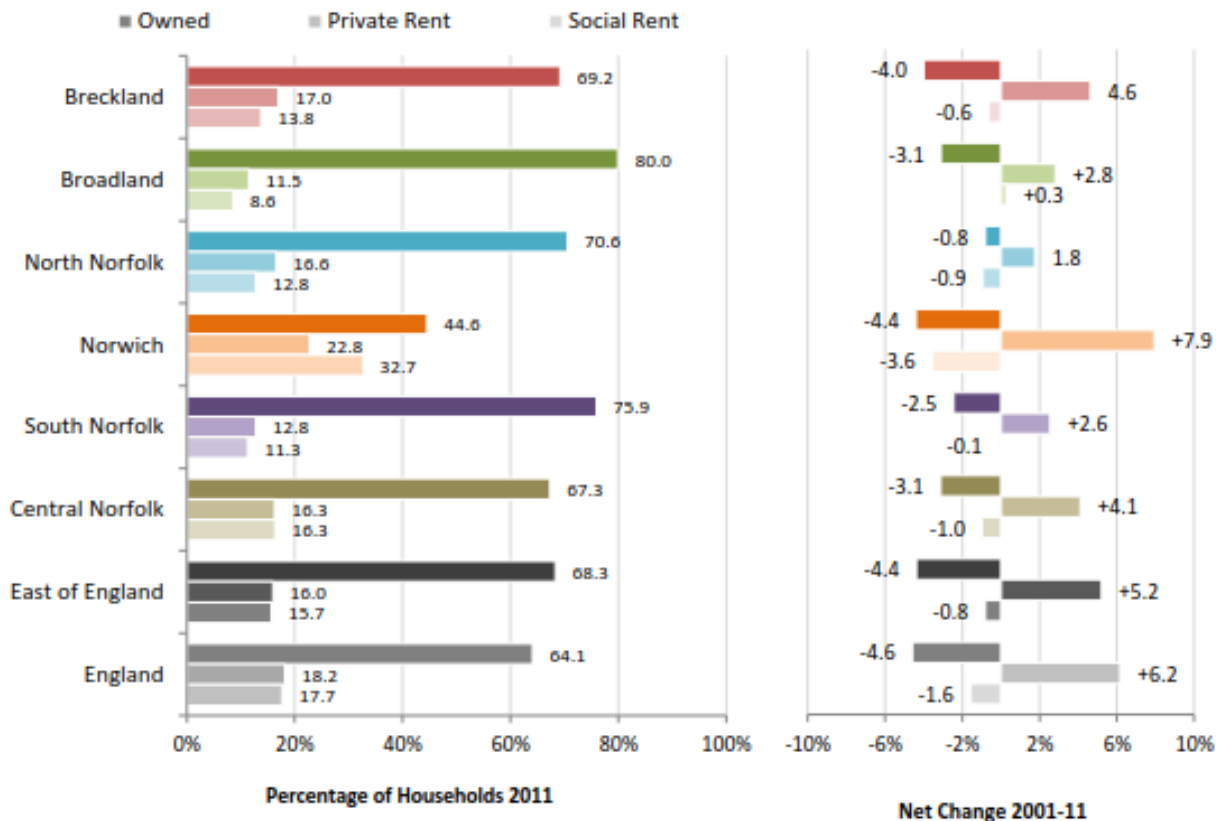
Tenure	Long Stratton NPA	South Norfolk	England
Owned; total	12.4%	9.3%	-0.6%
Shared ownership	32.4%	64.7%	30.0%
Social rented; total	23.8%	12.3%	-0.9%
Private rented; total	175.9%	90.3%	82.4%

²² PPG Paragraph: 021 Reference ID: 2a-021-20160401

Source: Census 2001 and 2011, AECOM Calculations

109. Indeed, similar data for a range of local authorities in the wider housing market area is presented in Figure 4 on the below, which reproduces Figure 116 of SHMA17, and shows that the growth in the Private Rental Sector in South Norfolk as a whole has been relatively low compared to other parts of the HMA. However, as is clear from the table above, this change was more pronounced in Long Stratton, with the share of the total stock in the private rental sector more than doubling, rising from 4.8% to 11.1% of total stock (from 83 dwellings of a total of 1760 in 2001, to 229 dwellings out of a total of 2,115 in 2011). This net change put Long Stratton towards the higher end of the range in PRS growth across various parts of the HMA seen in the figure below, and was similar to the change experienced across the whole of England (6.2%).

Figure 4: Household Tenure by Area



Source: SHMA17

110. The SHMA17 goes on to show, in Table 5 on the below, which reproduces Figure 86 of SHMA17, the typical cost of a shared ownership property, based on a standard model, and finds that these are likely to be much lower than the equivalent costs of renting. This demonstrates the potential for shared ownership properties to provide an affordable form of tenure for those in need.

Table 5: Shared ownership costs

	Property Value	40% Equity Share	5% Deposit	Weekly Costs			
				Mortgage	Rent	Service Charge	TOTAL
1 bedroom	99,950	39,980	1,999	56.98	31.63	10.00	98.61
2 bedrooms	130,000	52,000	2,600	74.11	41.14	10.00	125.25
3 bedrooms	200,000	80,000	4,000	114.02	63.29	10.00	187.31
4+ bedrooms	300,000	120,000	6,000	171.03	94.93	10.00	275.96

Source: SHMA17

111. Bringing the evidence relating to current tenure together, three key trends emerge: the dominance of owner-occupation, the growth of PRS, and the growth in Shared Ownership properties, pointing towards the worsening

affordability of for sale housing. We are now in a position to consider evidence relating affordability and what this tells us about whether the current trends in tenure profile are likely satisfy current and future community needs.

6.3 Affordability

111. The Affordability Ratio is a standard measure of affordability based on household incomes. Affordability considers the relationship between price of a good, and the money to which the individual has access to purchase it. While providing only a crude measure of affordability, one that does not take into account mortgage interest rates or access to deposit, it is helpful in highlighting the proportion of the population that are able to access AMH for sale.
112. In considering affordability, it is useful to consider evidence relevant to housing need that has already been compiled LSPC, namely, the Demographic and Socio-Economic Review of Long Stratton (LSDSER) produced by Cambridgeshire ACRE in September, 2017. The study provides a comprehensive review of available housing data, incorporating data from the District Council, Census, and the Valuations Office Agency.
113. In particular, it considers the existing type and tenure of the housing stock in Long Stratton, the stock of housing association rented property, house prices and affordability of housing in Norfolk, house prices in Long Stratton and South Norfolk, Local Housing Allowance (LHA) rates in the Central Norfolk and Norwich Broad Rental Market Area, and the South Norfolk District Council Housing Register entries for Long Stratton, which is separate by number of bedrooms required by the family in question.
114. Table 6 below is reproduced from the LSDSER, and shows the ratio of prices to incomes in a range of comparison local authorities, drawing on data contained in Home Truths 2016/17- 'The housing market in the East of England', National Housing Federation. This data indicates that South Norfolk falls into the mid-range of affordability ratios in the wider region, although its high average house prices mean that the income required for a typical mortgage would require a higher income than all comparator areas save North Norfolk.

Table 6: House prices, affordability ratio and typical income requirements for mortgages in Norfolk

Local Authority	Average (mean) house prices in 2016	Mean annual earnings in 2015	Ratio of prices to incomes	Income required for 80% mortgage 2016 (80% at x3.5)
Norfolk	£216,248	£22,906	9.4	£49,428
Breckland	£209,043	£21,185	9.9	£47,781
Broadland	£236,759	£23,629	10.0	£54,116
Great Yarmouth	£162,463	£20,686	7.9	£37,134
King's Lynn &	£208,898	£23,098	9.0	£47,748
North Norfolk	£243,953	£20,160	12.1	£55,761
Norwich	£195,865	£23,270	8.4	£44,769
South Norfolk	£241,537	£26,156	9.2	£55,208

Source: LSDSER/Home Truths 2016/17

115. The affordability ratios above indicate that house prices are approaching 10 times average household income. In the wake of the financial crisis of 2008, many financial institutions tightened their lending criteria; as a result, the maximum salary multiple generally considered achievable when applying for a mortgage is around 4.5 times, and in some cases is significantly lower. For the purposes of the LSDSER, the figure used was 3.5, a conservative estimate that reflects the likely minimum income required to be granted a mortgage on a property while at the same time leaving households with enough resources after mortgage payments to enjoy an acceptable standard of living. This ratio has been continued into AECOM's own calculations for the purposes of comparability.
116. Indeed, the LSDSER goes on to consider how house prices in Long Stratton relate to those in South Norfolk as a whole, using House Price Statistics for Small Areas data released by the ONS. This data is reproduced in the figure on the following page, and shows that prices for Long Stratton are broadly in line with those in South Norfolk as a whole. It should be noted that the prices are for Middle Super Output Area E02005603 which includes Long Stratton and a number of neighbouring villages. It is also important to note the need for house prices to be separated by

type, as this reflects the way that data on actual housing sales is collected by the Land Registry. In considering these mix-adjusted prices, a more sophisticated view of prices can be achieved.

Table 7: Comparison of mean house prices between the Long Stratton area and South Norfolk, 2015

	All	Detached	Semi-detached	Terraced	Flats/ maisonettes
Long Stratton	£200,000	£249,950	£185,000	£166,950	n/a
South Norfolk	£195,000	£250,000	£179,950	£162,000	£117,500

Source: LSDSER, House Price Statistics for Small Areas, ONS (released 24 June 2015)

117. Given that these prices date to June 2015, a comparison with average prices for the year 2016, collected using Price Paid Data and the UK House Price Index, both published by the Land Registry is detailed in the table below. This data shows higher prices across most types saved terraced homes than above, although it is not directly comparable to the table above as it comes from a different source. The data also shows the relative affordability of housing in Long Stratton, which, in spite of the lack of flats and maisonettes in Long Stratton (representing less than 1% of all dwellings, or a total of 39 units), which tend to be cheaper in price, houses were on average just 88% of the price of those in South Norfolk as a whole.

Table 8: Comparison of annual mean house prices between the Long Stratton area and South Norfolk, 2016

	All	Detached	Semi-detached	Terraced	Flats/ maisonettes
Long Stratton	£212,120	£264,107	£187,217	£157,615	n/a
South Norfolk	£242,201	£315,445	£209,354	£178,863	£134,301
Percentage	88%	84%	89%	88%	n/a

Source: PPD, UKHPI, AECOM Calculations

118. However, it is crucial to consider actual household incomes in Long Stratton and the resulting affordability ratios for housing. Were incomes comparatively lower in the NPA than in the district as a whole, the lower house prices seen above would not necessarily translate into greater affordability. In terms of income, it is possible to use CACI data to consider household incomes within Long Stratton itself (note, due to the availability of this data, only incomes within the Parish of Long Stratton itself have been considered).
119. This data suggests that for the 1,939 households contained within the study area, the mean income was £36,808, but the median household income was £31,508. Based on this figure, it is possible to calculate the ratio of median income to mean house price, where mean house price is used in place of median due to the relatively small size of the dataset (30 sales in 2016).
120. Table 9 below makes clear that median incomes in Long Stratton are relatively high, with prices in 2016 being relatively low against the average for the district; housing is on the whole relatively affordable in Long Stratton. However, given that the upper quartile household income in Long Stratton was £49,805 in 2016, it is clear from the figure below that fully 75% of households would be unable to afford a typical mortgage for a property in Long Stratton, unless they already own their home and/or have further equity to reduce their mortgage costs. Indeed, for the lowest 25% of earners, those earning less than £18,354, there is little chance of being able to afford any properties on such terms, given that the lower quartile house price was not significantly lower than mean or median, at £166,500 in 2016, producing a lower quartile house price to income ratio of 9.07.

Table 9: Affordability ratio in Long Stratton in 2016

Area	Average (mean) house prices in 2016	Median annual earnings in 2015	Ratio of mean prices to incomes	Income required for 80% mortgage 2016 (80% at x3.5)
Long Stratton	£212,120	£31,508	6.73	£48,485

Source: PPD, CACI Data, AECOM Calculations

121. The table below further considers potential for-sale housing options for those on a median income in Long Stratton. Given the lack of flats available in the village, with just 49 as mentioned above, housing options are quite limited for those on median incomes (greater than half of the population of the village), with the only reasonable option being to buy a flat elsewhere in South Norfolk. In all likelihood, some of these households are finding appropriate housing in the private rental sector in the village, whilst some are leaving, given that just 11% of housing in the NPA is in this sector and there are likely constraints on its supply.

Table 10: Housing Options for those on Median Incomes in Long Stratton

	Detached house Long Stratton	Semi-detached house	Terraced House Long Stratton	Flat elsewhere in South Norfolk
Price	£264,107	£187,217	£157,615	£134,301
Income required for 80% mortgage 2016 (80% at x3.5)	£60,367.31	£42,792.46	£36,026.29	£30,697.37
Affordable?	No	No	No	Yes

Source: PPD, UKHPI, AECOM Calculations

122. It is interesting to put the affordability ratios detailed in this section into recent policy context, specifically, DCLG's consultation proposals on housing need, as outlined above in Section 5.6 on the Standard Methodology. These proposals hinge on the principal of adjusting housing projections based on the ratio of house prices to earnings, i.e. their affordability, as the only relevant market signal. In particular, they suggest that, "each 1 per cent increase in the ratio of house prices to earnings above four results in a quarter of a per cent increase in need above projected household growth²³ⁿ.
123. The result of this formula is to suggest an increase of 25% in household need figures where house prices are eight times local average earnings. Whilst these proposals are still out for consultation, and have therefore not been put in place, it is still informative to consider how they would impact Long Stratton and South Norfolk. South Norfolk's affordability was found by LSDSER to be 9.2, thus implying an increase in projected dwelling numbers of 32.5%. Long Stratton's affordability ratio was found to be 6.73, implying an increase of 17% of local need. It should be noted that this increase does not refer specifically to affordable housing need, but rather to overall quantities of housing needed, and helps to put the affordability ratio in Long Stratton into a wider context of policy surrounding the issue.
124. It is also useful to contextualise the understanding of affordability developed above against that included in SHMA17. Table 11 below reproduces Figure 59 from that document, which uses a proprietary model to consider the percentage of each household type (broken down further by age group) who will be unable to afford market housing based on statutory definitions of such need, including those claiming housing benefit, those in affordable housing, and concealed families and those experiencing overcrowding.

Table 11: Assessing affordability by household type and age in Central Norfolk

	Under 25	25-34	35-44	45-54	55-64	65+
Percentage unable to afford market housing						
Single person household	34%	19%	28%	30%	29%	26%
Couple family with no dependent children	13%	6%	10%	9%	8%	12%
Couple family with 1 or more dependent children	58%	31%	16%	12%	13%	28%
Lone parent family with 1 or more dependent children	82%	79%	56%	42%	46%	65%
Other household type	14%	17%	27%	22%	22%	12%

Source: SHMA17/ ORS Housing Model based on Census 2011/Department for Work and Pensions

²³ Planning for the Right Homes in the Right Places, pp. 32

125. This data makes clear that more than a third of the population of three key groups, according to this model, will not be able to afford market housing in Central Norfolk: single person households aged under 25, couple family with 1 or more dependent children aged under 25, and lone parent families with one or more dependent children of all ages. Indeed, the model is based on how such age groups' typical incomes apply to typical housing types for their household, and demonstrates
126. Furthermore, SHMA17 considers the percentage of newly forming households unable to afford their housing costs according to the same model, shown in Table 12: Affordability of new households over the initial 5-year period 2015-20 in Central Norfolk below. This data shows the slightly higher affordable housing need of newly forming households in Central Norfolk in comparison with those migrating to the area.

Table 12: Affordability of new households over the initial 5-year period 2015-20 in Central Norfolk

	All households (annual average)	Households able to afford housing costs	Households unable to afford housing costs	% unable to afford housing costs
Newly forming households	5,937	4,422	1,512	25%
Households migrating in to the area	15,488	11,930	3,559	23%
All new households	21,423	16,351	5,071	24%

Source: SHMA17

6.4 Housing Register data

127. So far, we have considered housing need based on a statistical understanding of affordability based on household income. It is relevant to also review Housing Register data provided by the LPA to understand the demand for AH based on actual enquiries lodged with the LPA, as show in the table below. This approach is based on PPG advice, which emphasizes that "projections of affordable housing need...will need to estimate the number of households and projected households who lack their own housing or live in unsuitable housing and who cannot afford to meet their housing needs in the market."²⁴

Table 13: Affordable housing need in Long Stratton, 2017

Type of property	1 bed	2 bed	3 bed	3+ bed	Total
Gold	1	0	0	1	2
Silver	5	2	3	1	11
Bronze/ Low Need	5	7	1	1	14
Total	11	9	4	3	27

Source: SNDC

6.5 Other types of affordable housing need

128. It is also relevant to consider other types of affordable housing need local to Long Stratton. These could include overcrowded households, that is those households experiencing a mismatch between the housing needed and the actual dwelling they occupy, or concealed and sharing households, that is those households who do not have sole use of basic facilities such as a kitchen or bathroom, either living with a host household, often made up of family members, or living with other households.
129. The 2011 Census showed Long Stratton as having **12 households experiencing overcrowding**, defined here as those households with more than one person per room. These households represent compelling evidence of local housing need.

²⁴ PPG: Paragraph 022 ID 2a-022-025

130. The same data also identifies 12 families considered to be concealed. Whilst there may be some overlap between these households and those experiencing overcrowding, this is not necessarily the case. Therefore, there may be evidence of **a further 12 households in local housing need.**
131. Adding these two figures to the affordable housing register, which again, might contain overlap with either Census measure, would yield **a total affordable housing need of 51 households, based on a combination of the 2011 census figures and housing register data from 2017.** Whilst those categorised as low need are not considered a priority in affordable housing needs assessments, given the scale of development likely in Long Stratton, it is likely that such needs will be met in future.

6.6 Conclusions

132. The SHMA17 establishes that, based on a series of adjustments for factors including vacated housing, newly forming households, household dissolutions and current housing need, there will be an annual need of 17,450 affordable homes needing to be delivered across the Central Norfolk HMA between 2015-2036. The same document apportions 16,072 dwellings of its Full Objectively Assessed Need for Housing 2015-36 to South Norfolk, or 26.6% of the total of 60,339 for all five local authorities included in the Housing Market Area.
133. Based on this proportional share, South Norfolk would provide 4,648 affordable homes over the same period, and of these, Long Stratton would provide 182 affordable homes between 2015-36, **or 9 dwellings per annum. This would translate to a need of 132 affordable homes to 2026: 9 homes per year from 2017-2026, totally 81, plus 51 affordable homes as a result of existing needs as described above.** This provides a useful starting point for understanding the potential affordable housing need in Long Stratton in comparison with the rest of the housing market area, and would more than meet the needs of the up to 51 potential households in need identified above.
134. Whilst the Long Stratton Area Action Plan does not consider affordable housing needs in the area, JCS14 makes clear that for planning applications for sites over 16 homes or 0.6 ha, a target proportion of affordable housing to meet demonstrated needs will be 33%, with approximately 85% of those being social rented and 15% of intermediate tenures. Based on the allocation of 1800 homes, and assuming these are on large scale sites, this would yield a projection of **600 affordable homes over the period 2017-2026.**
135. However, it is also possible to conclude from the data presented above that any discussion of tenure in the NPA is significantly linked to a discussion of type and size of dwellings. This is reinforced by the approach to assessing housing needs taken by the SHMA17, which focuses on a range of housing types and affordable tenures. Further investigation of how these proportions may filter down to the level of the Long Stratton NPA is discussed in more detail in the following chapter on type and size of dwellings.

7. RQ3: What type (terrace, semi, bungalows, flats and detached) and size (number of habitable rooms) of housing is appropriate?

136. As identified earlier in this study, PPG recommends a consideration of the existing housing provision and its suitability, having regard for demographic shifts in age and household composition as well as affordability, to address future as well as current community need. For this reason, we start with a consideration of the existing housing stock.
137. In order to understand the terminology surrounding size of dwellings, it is important to note the number of rooms recorded in Census excludes kitchen, bathrooms and toilets. In the market segments table that follows, 'dwelling size' should be translated as follows:
- 1 room = Bedsit
 - 2 rooms = flat/house with one bedroom
 - 3 rooms = flat/house 2 bedrooms
 - 4 rooms = flat/house with 2 bedroom and 2 reception rooms, or 3 bedrooms and 1 reception room
 - 5 rooms = flat/house with 3 bedrooms and 2 reception rooms
 - 6 rooms = house with 3 bedrooms and 3 reception rooms or 4 bedrooms and 2 reception rooms
 - 7+ rooms = house with 4, 5 or more bedrooms house

7.1 Existing Housing Stock

138. Changes in the existing housing stock in Long Stratton are shown in Table 14 on the following page. What is clear from this data is that the only size of household actually decrease in number in the NPA is that with 4 rooms, which could equate to both a 2 bedroom 2 reception room, or 3 bedroom 1 reception room home. Such dwellings dropped from 25% of all households in the NPA in 2001 to 20% in 2011, a fairly significant reduction. This suggests that dwellings are becoming more unequally sized, with more larger dwellings and more smaller dwellings, but less medium sized dwellings of 2-3 bedrooms.
139. This reflects the affluence of some households as well as demand for smaller dwellings from newly formed households and older people seeking to down-size. These mid-sized dwellings could be considered to be the most affordable option for a young family, thereby reinforcing the picture established in the previous chapter of a lack of affordable options for families and older people wishing to downsize.

Table 14: Number of Rooms per Household (including living spaces), and rates of change, 2001-2011

Number of Rooms	2001	2011	2001	2011	%Growth	
	Long Stratton	Long Stratton	South Norfolk	South Norfolk	Long Stratton	South Norfolk
1 Room	0	1	94	60	0.0%	-36.2%
2 Rooms	6	17	431	554	183.3%	28.5%
3 Rooms	63	70	2080	2448	11.1%	17.7%
4 Rooms	424	415	8127	8062	-2.1%	-0.8%
5 Rooms	486	533	12441	12118	9.7%	-2.6%
6 Rooms	337	388	9513	10761	15.1%	13.1%
7 Rooms	159	245	5371	7158	54.1%	33.3%
8 Rooms or more	218	210	8550	5272	80.7%	36.2%

Source: Census 2001/2011, AECOM Calculations

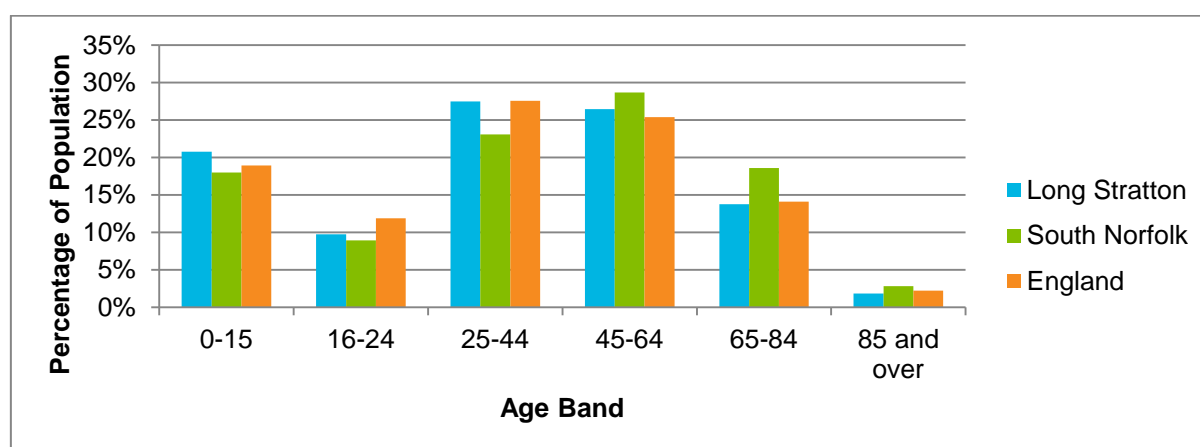
7.2 Key indicator data

141. The evidence assembled to answer RQ3 seeks to populate a series of 'key indicators'; these are the age structure of the population and household composition both now and how they are likely to change in future years. Through a consideration of these trends and how they interrelate to each other, it is possible to arrive at recommendations as to how the type and size should be influenced through planning policy.

7.2.1 Age structure

142. From Figure 5 below, it is possible to discern some very clear trends; firstly, the relatively high proportion, of children in the NPA, and the low proportion of the very elderly, those aged over 85, although this is likely due to the availability of specialist housing in the NPA rather than as a result of natural occurrence. Overall, those of working age constitute over 50% of the population; this, combined with the proportion of the population of school age, suggests a family orientated community. In general, the picture in Long Stratton is one that is more similar to the rest of England as a whole in terms of age groups, than to South Norfolk, which generally contains more elderly people and fewer young people.

Figure 5: Age Structure in the NPA



Source: Census 2001 and 2011, AECOM Calculations

143. Table 15 on the following page provides an understanding of how the age structure has changed between the 2001 and 2011 Census. Again, a clear picture emerges of Long Stratton becoming increasingly family oriented, with those 85 and over leaving the area, likely due to a lack of specialist or appropriately sized housing there;

with the largest amount of growth in the 45-63 age group, admittedly from a relatively low base. Indeed, considering the data in the figure above, it is clear the relatively low growth in those aged 25-44 has been from a very high base, such that Long Stratton has a higher proportion of people of that age than South Norfolk as a whole, with a similar picture for those aged 0-15. This again points to the family orientation of the community.

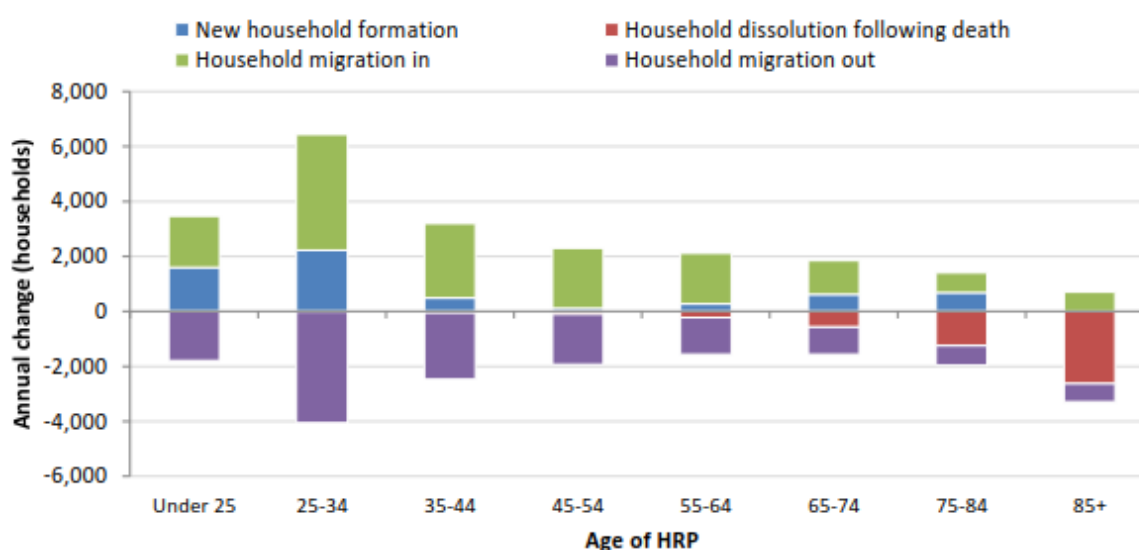
Table 15: Rate of change in the age structure of the population of Long Stratton, 2001-2011

Age group	Long Stratton	South Norfolk	England
0-15	23.5%	7.9%	1.2%
16-24	24.1%	21.2%	17.2%
25-44	6.0%	0.7%	1.4%
45-64	44.8%	14.0%	15.2%
65-84	25.5%	22.9%	9.1%
85 and over	-12.4%	33.4%	23.7%

Source: Census 2011, AECOM Calculations

144. Figure 6 below, which reproduces Figure 61 of SHMA17, shows how the picture seen in the table above in Long Stratton differs significantly from the data across the entire HMA of Central Norfolk, for which the greatest annual increase in households projected for the five years between 2015-2020 will be those age 25-34. What is clear from the data shown above however is that this group has been unable to access appropriate housing in Long Stratton in the past, likely due to cost, and so this group will be particularly underserved by the NPA's housing market between 2015 and 2020 due to their growth in numbers over that period.

Figure 6: Annual change in household numbers in each age cohort by age of HRP in Central Norfolk (projection, 2015-2020)



Source: SHMA17

7.2.2 Household composition

145. In Table 16 on the following page we set out data from the Census that records household composition in the NPA; this shows the relatively low proportion of solo households compared with the national figure, although this is more in line with that for South Norfolk as a whole. It also captures the family orientation of the neighbourhood, with over 30% of all households having dependent children. There are also slightly fewer one person households in Long Stratton than in South Norfolk, although this is not seen as highly significant.

Table 16: Household composition in Long Stratton, 2011

Type		Long Stratton	South Norfolk	England
One person household	Total	25.3%	26.3%	30.2%
	Aged 65 and over	11.3%	13.5%	12.4%
	Other	13.9%	12.8%	17.9%
One family only[1]	Total	70.7%	69.5%	61.8%
	All aged 65 and over	8.6%	12.5%	8.1%
	With no children	22.2%	22.8%	17.6%
	With dependent children	30.5%	25.4%	26.5%
	All children Non-Dependent	9.3%	8.8%	9.6%
Other household types	Total	4.1%	4.3%	8.0%

Source: Census 2011, AECOM calculations

146. It is also revealing to consider changes in household composition in the NPA between the 2001 and 2011 census, as the PPG makes clear that such changes should be used to determine whether, should such trends continue, future housing needs will be met by the housing stock. Table 17 below shows this data for the NPA. What is clear is that those with children, including both dependent and non-dependent children, account for the most significant increases in household types in the NPA when compared with district and national averages, save for other categories of one-person and multifamily households. This follows similar patterns observed above in the age structure of the population of Long Stratton.

Table 17: Rates of change in household composition in Long Stratton 2001-2011

Type	Percentage change, 2001-2011	Long Stratton	South Norfolk	England
One person household	Total	14.8%	15.0%	8.4%
	Aged 65 and over	1.3%	5.7%	-7.3%
	Other	28.7%	26.8%	22.7%
One family only	Total	21.2%	11.6%	5.4%
	All aged 65 and over	15.6%	8.7%	-2.0%
	With no children	15.3%	13.2%	7.1%
	With dependent children	26.1%	11.3%	5.0%
	All children Non-Dependent	26.3%	12.6%	10.6%
Other household types	Total	50.0%	34.5%	28.9%

Source: Census 2011, AECOM calculations

7.3 Market Segmentation

147. Bringing together the evidence from our consideration of age structure and household composition, in line with PPG, we have sought to identify the different market segments in the population of Long Stratton. We then use this understanding to put forward recommendations for policy relating to the size and tenure of dwelling.
148. Table 18 on the following page indicates the different market segments, and the degree to which they are a growing, stable or declining group within the local population. One 'up' arrow indicates this grouping is growing modestly in the NPA; two 'up' arrows indicates strong growth, three 'up' arrows suggests very rapid growth in years to come. Where segments are falling in numbers, or not growing, neutral or down arrows are shown.

Table 18: Housing Market Segments in Long Stratton

Market segments	Income range	Tenure	Presence in Plan Area	Size of home
Young family where parents are aged 24-44 with two children aged 0-15	Median	PRS, Social housing, Intermediate	↑	5 rooms
Professional Head of Household Young family where parents are aged 24-44 with two children aged 0-15	Mean	PRS, Intermediate (shared equity and discounted market housing for sale or rent)	↑ ↑ ↑	4 rooms
Professional Head of Household family where parent are aged 44-64 with non-dependent children living at home	>Mean (equity rich)	Market Housing	↑	6+ rooms
Lone parent with two children	Lower Quartile (equity poor)	Social Housing	↔	3 rooms
Solo household aged under 65	Median (equity poor)	PRS, Intermediate (shared equity and discounted market housing for sale or rent)	↑ ↑	2 rooms
Solo household aged over 65 with wealth	Median (equity rich)	Market Housing	↑ ↑	2-3 rooms
Solo household aged over 65 with little wealth	Lower Quartile (equity poor)	Social Housing	↑ ↑	2 rooms
Young couple w/o Children aged under 34	>Mean (equity poor)	Market Housing, PRS, Intermediate (shared equity and discounted market housing for sale or rent)	↑	4+ rooms
Concealed households	Lower Quartile (equity poor)	Social Housing	↔	1-3 rooms

Source: AECOM

7.4 Housing Market Context

149. Given the detailed housing projections set out in the recent SHMA17, it is helpful to compare the broad understanding of the Long Stratton Housing Market captured above with that of the wider housing market area to see where the NPA falls within its spectrum of housing needs.
150. SHMA 17 also breaks down a potential housing mix for South Norfolk itself, describing the mixture of market and affordable housing required across flats and houses of varying sizes, as shown in Table 19 below, which reproduces a portion of Figure 83 from the document. It should be noted that the figures in the SHMA17 use the proprietary ORS housing model, which considers only the number of bedrooms in a given property, rather than the number of other living spaces.

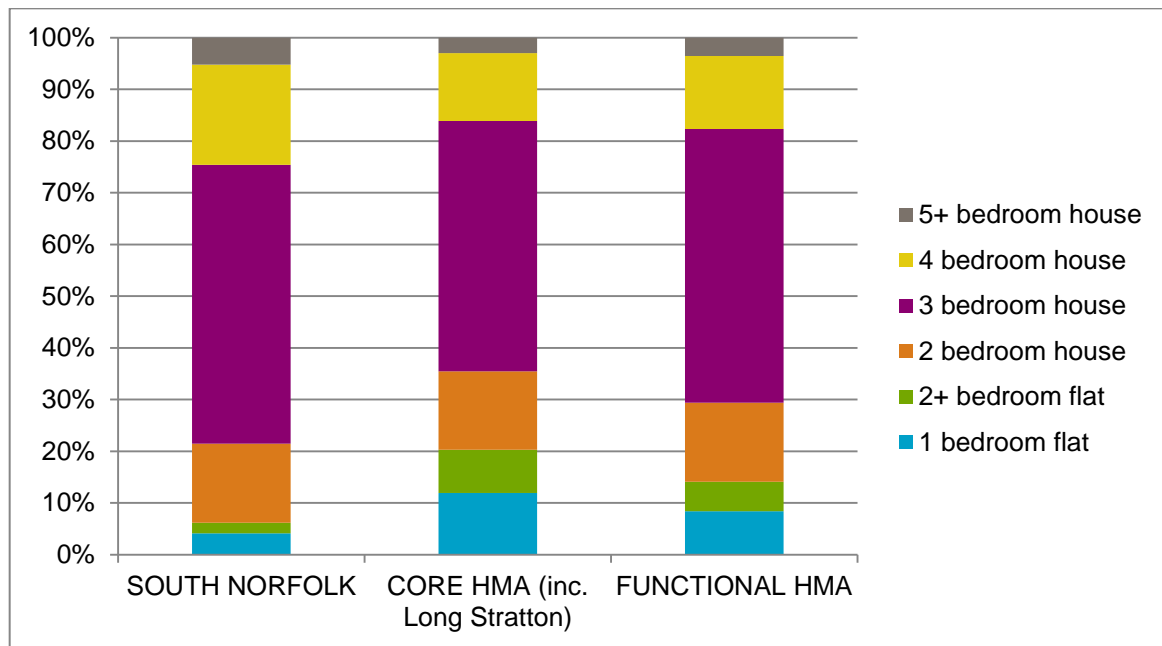
Table 19: Housing mix of OAN for market and affordable housing (policy off)

		Market Housing	Affordable Housing	TOTAL
SOUTH NORFOLK				
Flat	1 bedroom	188	475	663
	2+ bedrooms	175	149	324
House	2 bedrooms	1,245	1,216	2,461
	3 bedrooms	7,521	1,145	8,666
	4 bedrooms	2,950	165	3,115
	5+ bedrooms	797	45	842
TOTAL		12,877	3,195	16,072

Source: SHMA17

151. However, SHMA17 also sets out similar projections for the key region of the Core Market Area, which Long Stratton is a part of. Building on this data, it is possible to compare the overall levels of each housing type which the document puts forward for South Norfolk, the Core Market Area, and the HMA as a whole, as shown in Figure 7 on the following page. Note that data for the Norwich Policy Area and Central Norfolk HMA have not been included due to their similarity to the Core Market Area and Functional Market Area respectively.
152. This data shows the extent to which the housing needs of the more urban Core Market Area, including Norwich itself and its immediate surroundings, tend towards smaller housing types, with a particular emphasis on 1 and 2 bedroom flats, and a reduced emphasis on 4 bedroom houses, when compared to the rest of the HMA, or indeed South Norfolk, where the emphasis is very much on larger housing types in the context of less urban locales.
153. Long Stratton is clearly one of the less urbanised parts of the Core Market Area, given that it sits on the edge of this part of the HMA. Therefore, housing need in Long Stratton is likely to tend as much towards the need for small dwellings types specified by the SHMA17 for the Core Market Area as towards larger housing types specified for the rest of South Norfolk.
154. This is further reinforced by the fact that as discussed earlier and shown in Table 7 earlier in this document, house prices in Long Stratton are broadly very similar to those of South Norfolk as a whole, suggesting that the housing market in Long Stratton is more, rather than less, similar to South Norfolk. Given this, it is unlikely that Long Stratton's housing needs for smaller housing types would exceed those of the Core Market Area as a whole, as defined by the SHMA17.

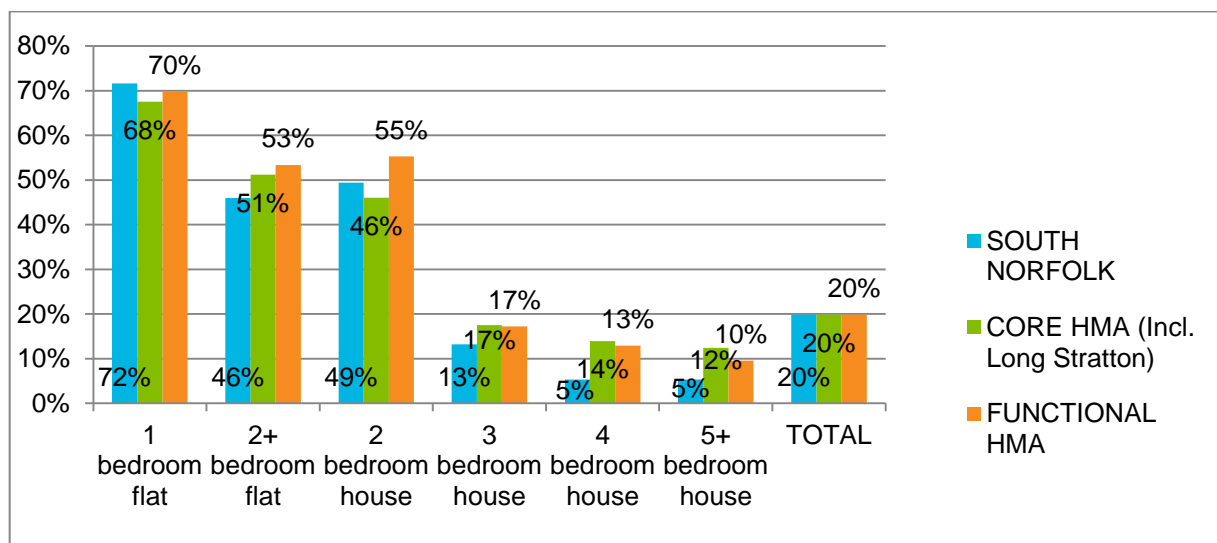
Figure 7: Sizes of housing needed in different geographies in Central Norfolk



Source: SHMA17, AECOM Calculations

155. For clarity, the figure above implies that more than 80% of housing should be 3 bedrooms or under, and approximately 70% 2-3 bedrooms, whilst 37% of housing should be 1-2 bedrooms in the Core Housing Market Area versus 30% across the functional HMA, and 23% in South Norfolk. This is deemed to be appropriate for Long Stratton, given the general need for more affordable housing options and the role that such smaller housing types can play in providing for this need, in spite of any potential similarities between Long Stratton and other parts of South Norfolk.
156. Furthermore, it is possible to consider the percentage of housing in each category which the data suggests should be affordable to meet local needs, SHMA17 for the various geographical areas, as shown in Figure 8 below. The figure clearly demonstrates how those areas in the Core Market Area differ from the needs of South Norfolk and of the entire Functional HMA as a whole.

Figure 8: Percentage of housing need relating to affordable housing, by size of dwelling



Source: SHMA17, AECOM Calculations

157. This data shows that affordable housing need is relatively similar for all three areas across all types of housing, with no consistent pattern in terms of affordable home sizes across any one area. What is clear is that affordable housing need is focused on smaller housing types across all parts of the HMA, with only slightly higher levels of affordable housing need in the Core Market Area for larger housing types (i.e. 3+ bedrooms).

158. Translating this figure for further clarity suggests that that 54% of 1-2 bedrooms in the Core Housing Market Area should be affordable, alongside 53% in South Norfolk, versus 59% of such properties across the functional HMA. It is useful to consider these statistical variations in the context of the 1800 homes planned for Long Stratton. By applying the ratios of smaller to larger housing and affordable to market housing in the SHMA17 for the Core Housing Market Area, we arrive at a figure of 358 1-2 bedroom affordable homes (rounded). In comparing this figure for the corresponding ratios for the functional HMA, we arrive at a figure of 324 1-2 bedroom affordable homes. This is as a result of the smaller overall proportion of 1-2 bedroom homes needed across the Functional HMA. Therefore, it is clear that the existing designation of Long Stratton within the Core HMA geography yields a higher number for housing need for smaller affordable housing units.

7.5 Self and Custom-Build Homes and Community-led Housing

159. It is worth considering the importance attached by current government policy to those wishing to build their own homes, and in some cases this may include other innovative forms of tenure and delivery including the use of community land trusts. Since 2015, Local Planning Authorities have been required by government to keep a register of individuals or associations of individuals seeking to acquire serviced plots of land to build housing for themselves.
160. According to data collected by South Norfolk District Council, there are 254 people wishing to build their own housing within the district. Taking a proportional amount of this, according to the percentage of Long Stratton's population falling into Long Stratton yields 10 potential self-builders within the village. It is important for Neighbourhood Plans to consider how to plan positively for these self-builders to enable serviced plots of land (i.e. those with appropriate utility connections) to come forward over the period 2017-2026.

7.6 Conclusions

161. This chapter has considered what type and size of housing might be appropriate for the neighborhood plan area, drawing on a range of data sources to see how the continuation of existing trends in the housing stock, age profile and household composition in the population will allow for local housing needs to be met.
162. The data suggests an overwhelming trend towards family housing types, which is likely to continue. However, as established in the previous chapter, the size and tenure of housing is unquestionably linked to its price, and therefore its affordability. The recent SHMA17 provides a detailed explanation of potential housing need within the Core Market Area of Central Norfolk, and it is likely that the housing need experienced by Long Stratton is more similar to this profile than to that of South Norfolk as a whole. This best-fit model is therefore deemed broadly correct in terms of its projections of housing need regarding type and size.
163. Whilst the parish council has expressed its concern over the needs of elderly people in Long Stratton wishing to downsize into appropriately sized homes, the Council may also wish to consider that specialist housing, in some cases providing varying levels of care and support, may be more appropriate for elderly people than simply smaller housing types, for which there is a high need across many age groups and household types. As such, the following chapter considers in more detail specialist housing for the elderly, particularly given that in planning policy terms, such housing is specially defined and may form a separate part of negotiations between the local planning authority and developers from affordable or specifically sized housing.

8. RQ4: What provision should be made for older residents within Long Stratton?

8.1 Sheltered and extra-care housing

164. Whilst the population of Long Stratton aged 65-84 was shown in Figure 5 to be relatively lower than that in the District as a whole, considering those aged 75 or over, what might reasonably be defined as those potentially requiring specialist housing for the elderly (e.g. sheltered and extra care housing, as defined in Appendix A),

Table 20 below makes clear that the percentage of the population falling into this category in Long Stratton is still relatively high and likely to increase from 9% to 14% of the total population. This figure is the starting point for this investigation.

Table 20: Change in the population of over 75s between 2011 and 2026

Age band	2011			2031		
	Population (Long Stratton)	Population (South Norfolk)	Percentage of population	Population (South Norfolk)	Population (Long Stratton)	Projected 75+ population (Long Stratton)
All ages	5,021	124,012	4%	148,300	6,004	
75+	352		9%	21,100	14%	854

Source: 2014-based Sub-national population projections, DCLG and Census 2011 (ONS)

165. In arriving at an appropriate level of housing for older people of different types, we have applied the Housing Learning and Improvement Network's suggested numbers per 1,000 of the 75+ population²⁵.

Table 20 makes a projection for the elderly population in Long Stratton over the period 2017-2026, based on this percentage, showing a potential uplift of 502 (854-352) elderly people over that period. This will result, over the period, in a need for a total of 126 specialist housing units for the elderly, broken down as follows:

- additional conventional sheltered housing units = 60 x 50% = 30 (rounded)
- additional leasehold sheltered housing units = 120 x 50% = 60 (rounded)
- additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale = 20 x 50% = 10 (rounded)
- additional extra care housing units for rent = 15 x 50% = 8 (rounded)
- additional extra care housing units for sale = 30 x 50% = 15 (rounded)
- additional specialist dementia care homes = 6 x 50% = 3 (rounded)

166. It is important to note that there is no obligation for these all to be provided within the NPA itself and clearly in some cases, such as providing a single specialist dementia care dwelling, it would not be economically feasible to do so. As such, these 126 specialist dwellings need not be thought of as all needing to be provided within the neighbourhood plan housing target- rather, there will be some overlap between these dwellings and the target, depending on the number that could be provided within the NPA itself.

8.2 Retirement villages

167. Projects that involve the delivery of multiple homes satisfy the desire on the part of many older people to live in an environment with people facing similar challenges; retirement villages are often a cost-effective means of delivering sheltered and extra care housing together with the facilities and services these settlements imply.

²⁵ 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

Given the numbers of units that result from the LIN analysis, it would be appropriate to consider this approach to the delivery of housing for the elderly in Long Stratton.

8.3 Senior Co-housing

168. Co-housing has been identified as being particularly suited to the needs of older residents as well as families. Co-housing fosters intentional communities and offers a way for a group of people with similar interests and needs to come together to create an environment suited specifically to their requirements. Moreover, it can be designed to help address one of the most important issues for older people: isolation and loneliness. A number of successful case studies exist of both projects developed specifically with the needs of older people in mind, and others that encourage multi-generational housing, such as Featherstone Lodge in Forest Hill²⁶ and LILAC in Leeds²⁷. In the first example, the design facilitated the creation of public areas that encouraged social interaction between members of the community, moreover, a 'common house' was built in the grounds of the scheme that provided a shared space in which people could come together for meeting, shared meals and shared activities.

8.4 Multi-generational homes

169. Multi-generational living has been identified as a possible solution not only for older people, but all generations where it makes financial sense to share accommodation, particularly younger people who are struggling to set up their own households. This gives rise not only to designs for new homes, but conversions to existing dwellings, introducing internal subdivisions and peripheral extensions to create internal layouts that balance the private needs of different generations with the benefits of over-lapping, shared communal spaces.²⁸
170. The phenomenon of the aging population has an up-side; with increases in the quality of health-care, older people are able to live active lives for longer, the so-called 'third age' after retirement when people still want to live fully active lives. Within a household or community where tasks and facilities are shared, they are in a good position to take on both voluntary and paid work, for example looking after grandchildren or taking care of the elderly.

8.5 Lifetime Homes

171. Many local authorities incorporate policy into their Local Plans that a proportion of new homes should be built according to 'lifetime homes' principles; these are ordinary homes incorporating a number of design criteria that can be universally applied to new homes at minimal cost, for example parking that makes getting in and out of the car as simple and convenient as possible and ensuring movement in hallways and through doorways should be as convenient to the widest range of people, including those using mobility aids or wheelchairs, and those moving furniture or other objects.²⁹

8.6 Right-sizing

172. As we have identified earlier, there is a need for a greater number of the type of dwellings that facilitate 'right-sizing' for older people. It is important to note, this does not necessarily imply moving to a smaller home. Many older people have the wealth (and the choice that comes with it) to create a home suited to having visitors and accommodating care staff, who may need to make over-night stays.
173. For this reason, it is important to recognise that different ages have different needs, thus in the provision of housing, choice is critical, catering for those with relatively modest requirements, to those who are more dependent on help. The provision of choice that responds to need is part of creating a smoothly operating local housing market in which older people are able move out of family homes when they wish, thus freeing up these properties for others.³⁰

²⁶ <http://www.featherstonecohousing.co.uk/> (visited 12/04/17)

²⁷ <http://www.lilac.coop/> (visited 12/04/17)

²⁸ RIBA, *Silver Linings, The Active Third Age and the City*, Page 17-18

²⁹ <http://www.lifetimehomes.org.uk/pages/about-us.html>

³⁰ Housing LIN, *New Approaches to Housing for Older People*, June 2014, page 6

8.7 Planning flexibility

174. Planning policy can be mobilized to help properties to become more adaptable in the context of an increasingly elderly population. This includes allowing the conversion of conventional dwellings or groups of dwellings (for example terraced housing) into multiple homes, particularly where additional features are included to address 'lifetime homes' criteria and to encourage interaction with the wider community. This can incorporate bigger community open space as a result of joining up different gardens.³¹ This is not dissimilar to the practice of 'alley-gating' where alleyways between the backs of terraced housing have been gated off, and turned into shared community spaces.

8.8 Lifetime neighbourhoods

175. Creating an environment in which older people feel both welcome and comfortable does not end at the front door. Research exists that considers life-time neighbourhoods, in which the public realm is designed to address the needs of older people, and activates the benefits they can bring in supporting local businesses and encouraging improved public realm for everyone, for example providing more greenery and more walkable, better connected places.
176. Given the expanded role of neighbourhood planning around design outlined in the Housing White Paper of 2017³², a compelling notion is that of 'the amplification of impact of micro-environmental features' to describe that particular way in which we become more sensitive to the ordinary, smallest features of urban space as we age. This places a particular emphasis on care and reflection in how we design, for example paths and public seating; this, in turn, calls for the participation of older people in the process of design.
177. Design approaches exist that provide a starting point for locally informed policy development in this area, these include Manchester's Design for Access 2 and the work of Inclusive Design for Getting Outdoors (IDGO); IDGO have identified material features that make everyday negotiation of urban space that much easier for older people; these include wide and flat tarmac footways, easy transition level changes, clear, simple and visible signage, frequent warm and supportive seating and well-maintained, safe and open toilets.³³
178. In addition, the notion of 'pensioner play-grounds,' 'green-gyms,' community gardens and various forms of guerrilla gardening (for example the Edible Todmorden project) encourage active use of public space and facilities on the part of an older demographic.

8.9 Age-friendliness

179. Since the millennium policy at the international level has been directed towards a more holistic appreciation of what an 'age-friendly' urban environment looks like. It has been remarked this should extend beyond physical installations, such as public seating and access to WCs, but embrace means mobilising civic agency among older group to forestall incipient marginalisation, enabling them to continue to make a full and active contribution to community life.³⁴
180. In 2006 the World Health Organisation (WHO) began developing the 'Age-Friendly Cities' movement, now a worldwide network of over 200 member cities around the world. They have produced a guide that offers a way of analysing the city from the perspective of older people, using a framework of inter-related domains: transportation, housing, social participation, respect and social inclusion, communication and information, civic participation and employment, health and community services.
181. Considering the housing domain, the WHO study identifies a check list of attributes necessary to foster a sense of belonging and well-being among older people. In addition to affordability and designing accommodation with the needs of older people in mind, the adaptability of dwellings is important, for example their capacity to accommodate chair-lifts that enable older people to continue to live in two-storey homes³⁵.
182. The WHO also identified access to services, particularly those that become increasingly important as people get older, such as places of worship and community centres.³⁶ Moreover, optimising well-being has much to do with being able to maintain links with existing networks, which is best achieved by enabling people to remain in their

³¹ Gobber, S, *A Bright Grey Future*, Urban Design Group Journal, Spring 2016, page 29

³² HMG, *Fixing our broken housing market*, page 29

³³ RIBA/Age UK, *An Alternative Age-Friendly Handbook*, page 54/55

³⁴ RIBA/Age UK, *An Alternative Age-Friendly Handbook*, page 16

³⁵ World Health Organisation: *Global age-friendly cities: a guide*, page 32

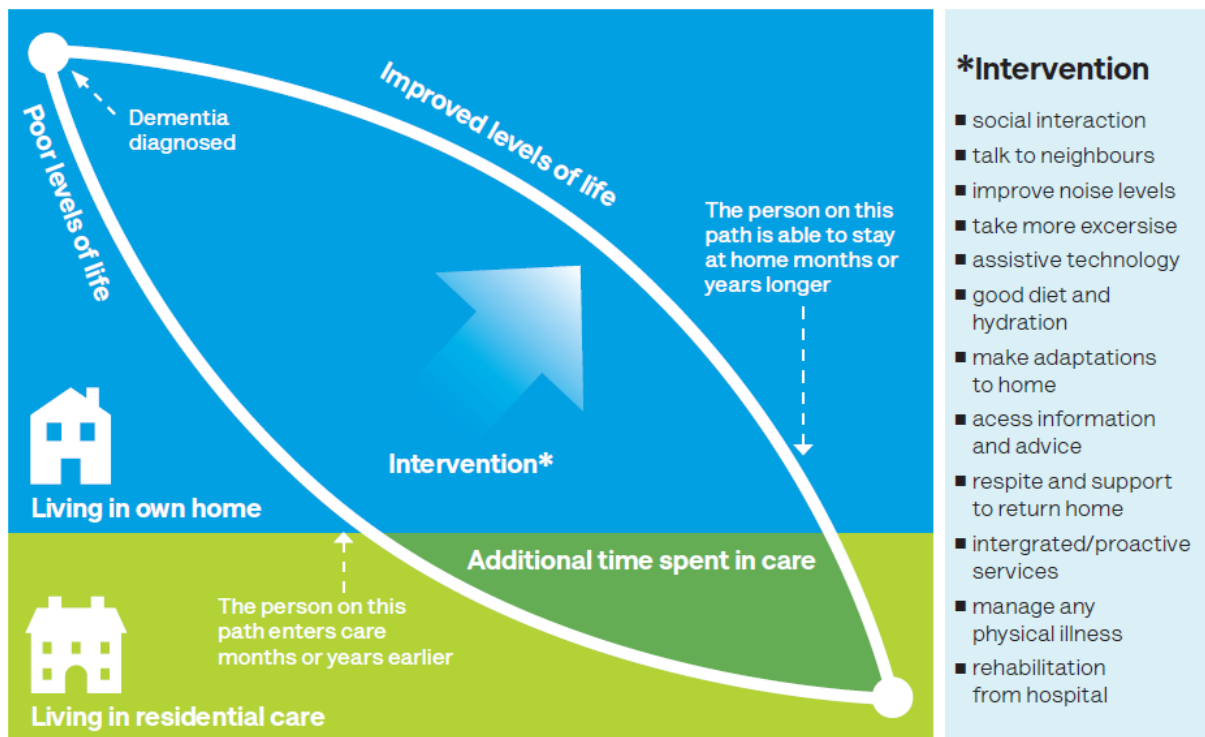
³⁶ Ibid, page 33

existing communities for as long as possible. In the Australian city of Melville small clusters of senior's housing with small gardens are made available throughout the city, so that older people are not isolated from the community and particularly from children.³⁷

8.10 Housing for people with Dementia

183. Enabling people with dementia to live in their own homes for longer is critical to their quality of life as a result of the familiarity of surroundings and the help with retaining memories this facilitates³⁸. The challenge with this is two-fold; firstly the lack of appropriate adaptations in properties and, secondly, the support required to ensure a home is safe and suitable.
184. Selwood Housing in the South West has pioneered approaches that help overcome these, for example the installation of property exit sensors to inform a monitoring centre when tenants leave their home and then not return within a pre-determined time.
185. In Figure 9 below we reproduce a chart showing the impact that early and appropriate intervention can have on the prospect of people with dementia remaining in their own home for longer.

Figure 9: Dementia care chart



Source: Dementia Services Development Centre, 2013

8.11 The role of the Local Authority

186. As suggested above, it is appropriate for the neighbourhood group to work closely with the LPA to develop policy and approaches to addressing the need for housing for elderly people in the area. The LPA is under an obligation through national policy to address the needs of older people,³⁹ it is therefore appropriate they should play the strategic role in co-ordinating new efforts by housing providers, adult care services, primary care and health trusts, private and third sector organisations to meet the housing needs of older people across the district.

³⁷ Ibid, page 35

³⁸ Alzheimer's Society, *Dementia-friendly housing charter*, page 13

³⁹ NPPF, Paragraph 50

9. Market Signals

187. The PPG highlights the importance of taking market signals into account when assessing housing need, given they provide an indication of the balance between demand and supply. This is particularly important to consider given the significant and well-documented changes in the housing market over recent years, which were exacerbated by the economic downturn and subsequent issues in obtaining mortgage finance.

188. The PPG states:

The housing need number suggested by household projections (the starting point) should be adjusted to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings. Prices rising faster than the national/local average may well indicate particular market undersupply relative to demand.⁴⁰

189. These market signals relate to trends discernible within the housing market, and broader economic trends that have an impact on the housing market.

190. The PPG goes on to assert that where there is evidence of an imbalance in supply and demand, an uplift in planned housing numbers – compared to those derived solely from household projections – is required in order to increase the supply of housing to meet demand and tackle affordability issues:

This includes comparison with longer term trends (both in absolute levels and rates of change) in the: housing market area; similar demographic and economic areas; and nationally. A worsening trend in any of these indicators will require upward adjustment to planned housing numbers compared to ones based solely on household projections.

In areas where an upward adjustment is required, plan makers should set this adjustment at a level that is reasonable. The more significant the affordability constraints (as reflected in rising prices and rents, and worsening affordability ratio) and the stronger other indicators of high demand (e.g. the differential between land prices), the larger the improvement in affordability needed and, therefore, the larger the additional supply response should be.⁴¹

191. In discussions with Long Stratton Parish Council and South Norfolk District Council as to the appropriate levels of market dwellings in the Plan Area it will necessary to consider factors that suggest either an uplift or reduction. This study considers the following market signals:

- Employment and commuting trends;
- Migration
- Housing Market (Prices);
- Housing Market (Volume);
- Concealed Households
- Overcrowding; and
- Rate of Development (changes in housing stock).

9.1 Employment and Commuting Trends

192. Local employment trends can greatly influence housing needs as employment opportunities can stimulate demand in the plan area. It is therefore important to establish the employment sphere of influence experienced by the residents of the Long Stratton NPA.

193. In defining the Housing Market Area for Central Norfolk, ORS has taken into account PPG which states that HMAs should reflect “the key functional linkages between places where people live and work”⁴² In the case of Long Stratton therefore, the NPA is considered to be a settlement “with the strongest connections to the Norwich Urban Area”. Indeed, the SHMA15.1 identifies that almost the same percentage of workers work in Norwich (28%) as in Long Stratton itself (29%). This was the 7th highest percentage of workers commuting to Norwich in the entire HMA.

⁴⁰ PPG Paragraph: 019 Reference ID: 2a-019-20140306

⁴¹ PPG Paragraph: 020 Reference ID: 2a-020-20140306

⁴² PPG Paragraph: 010 Reference ID: 2a-010-20140306

194. Given these links to Norwich, it is appropriate to consider both the economy of Long Stratton itself as well as the economy of Norwich as indicators of economic growth, and thus of housing demand, in Long Stratton.
195. Long Stratton had a significantly higher percentage of economically active residents at the 2011 Census, totally 74.5% of the population, than South Norfolk as a whole, with just 70.7%. This suggests that the economy of the village itself has a strong base from which to grow. Indeed, as part of the Norwich City Deal in 2013, an additional 13,000 jobs were planned for across Broadland, Norwich and South Norfolk, thereby indicating the scale of potential future economic growth in the area.
196. Furthermore, in addition to the existing industrial space at Tharston Industrial Estate, covering approximately 6 ha, the AAP allocates land for an additional 9.5 ha of employment land in the village plus a 2.4 ha extension to the Tharston Estate, which together will more than double the existing provision of the Industrial Estate. This will likely lead to significant additional demand for housing in the village due to employment growth.
197. Considering growth in Norwich itself, the 2012 Economic Assessment for Greater Norwich, commissioned by Norfolk County Council as part of their Greater Norwich Economic Strategy 2009-2014, showed that 25% of South Norfolk's employment was in the Health Sector⁴³, by far the highest in the wider economic area. This is likely as a result of the location of Norwich Research Park, which "leads the world in research in agrifood, health and environmental sciences according to independent analysis"⁴⁴, with over 2,700 scientists concentrated there. The park recently received £26 million to support job growth of around 5,000 jobs up to 2022/24 as part of the Norwich City Deal, as noted above. This employment growth is likely to lead to increased demand for housing in Long Stratton.

9.2 Migration

198. Given that Long Stratton NPA has experienced significant population growth in recent years, it is pertinent to consider the role of international migration and the extent to which this may have impacted the population of the village. Table 21 below however demonstrates that only a very small part of the population of Long Stratton, 3.1% was born outside of the UK, significantly lower than that of South Norfolk as a whole, which was 4.9%. Indeed, the vast majority of these people have lived in the UK for 10 years or more (2.2%). Whilst the census does not consider the actual length of time of residence in a given locale, it is clear that international migration is not a significant factor which might indicate increased demand for housing.

Table 21: Country of birth and length of residence Long Stratton 2011

Population breakdown		Long Stratton	South Norfolk	England
Born in the UK	Total	96.9%	95.1%	86.2%
Born outside the UK	Total	3.1%	4.9%	13.8%
	EU	1.3%	2.1%	3.7%
	Other	1.8%	2.8%	9.4%
	Length of residence	Less than 2 years	0.2%	1.8%
		2-5 years	0.2%	2.2%
		5-10 years	0.5%	2.9%
		10 years or more	2.2%	7.0%

Source: Census 2011, AECOM Calculations

9.3 Housing Market (Prices)

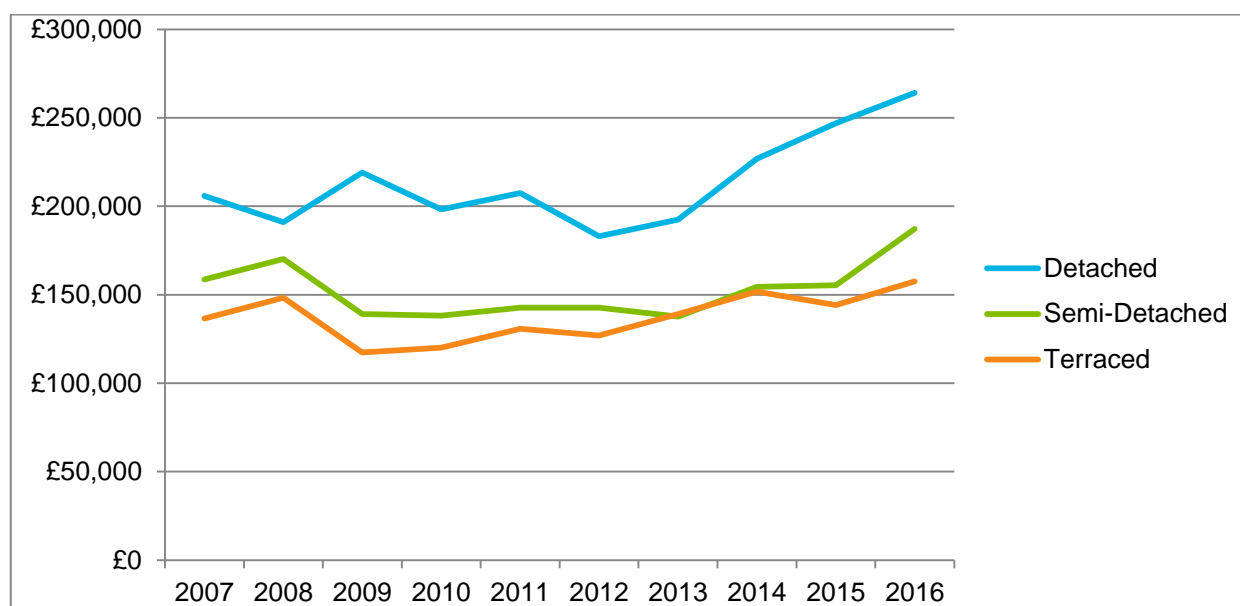
199. The PPG advises that house prices should be used as an indication of the strength of demand for housing, and the adequacy of supply to meet that demand. To assess the housing market in the Long Stratton data from the Land Registry was analysed. This data provides price paid, housing type and date of transaction information which allows housing market trends to be identified. Data was downloaded for the period of January 2007 to December 2016 and is presented annually in the figure on the following page.

⁴³ Economic Assessment for Greater Norwich, 2012, pp. 20

⁴⁴ Economic Assessment for Greater Norwich, 2012, pp. 24

200. To replicate the NPA area, relevant post code data for the sub-postcode NR15 was used for the analysis, and was compared with UK House Price Index Data for the same period covering the whole of South Norfolk. One sale was excluded from the data set, Corfe Cottage, Ipswich Road, Long Stratton, Norwich, Norfolk NR15 2TA (which records suggest was sold for £6,514,470, 23 February, 2009), as this was either an extreme outlier or incorrectly recorded by the Land Registry.
201. Furthermore, given that in all years under consideration the sales of flats in the NPA were very low or none, these have not been included in the data. The data collected is presented in Figure 10 below which clearly shows the significantly higher average sales prices of detached houses compared to other house types, as well as the recent convergence in the price of semi-detached and terraced houses, and their subsequent divergence.

Figure 10: House Prices in Long Stratton NPA, by type, 2007-2016



Source: Land Registry PPD/AECOM Calculations

202. In addition, the figure shows the significant increase in house prices since 2013, likely reflecting a recovery from the national recession of 2007-2012. To further understand this dramatic increase in average house prices, including absolute price growth of close to an average of £60,000 for detached houses over the period (or 28%), it is necessary to further contextualise these rises against house prices in South Norfolk as a whole. The UK House Price Index shows that South Norfolk also experienced the same price growth for detached houses of 28% over the period.
203. However, as Table 22 below makes clear, the price of semi-detached and terraced houses grew less in Long Stratton than in South Norfolk as a whole. This represents reduced demand for these housing types in the NPA compared with the district as a whole, with this reflected even in absolute prices, i.e. prices for housing in Long Stratton grew less than in South Norfolk and were lower to start with (by approximately 6% for these smaller house types in 2007, rising to 12% in 2016). However prices are significantly above their pre-crisis peak, for detached homes, which represent the most common type of housing sold in the NPA (42% over the period in question).

Table 22: Price Growth in Long Stratton versus South Norfolk, by type, 2007-2016

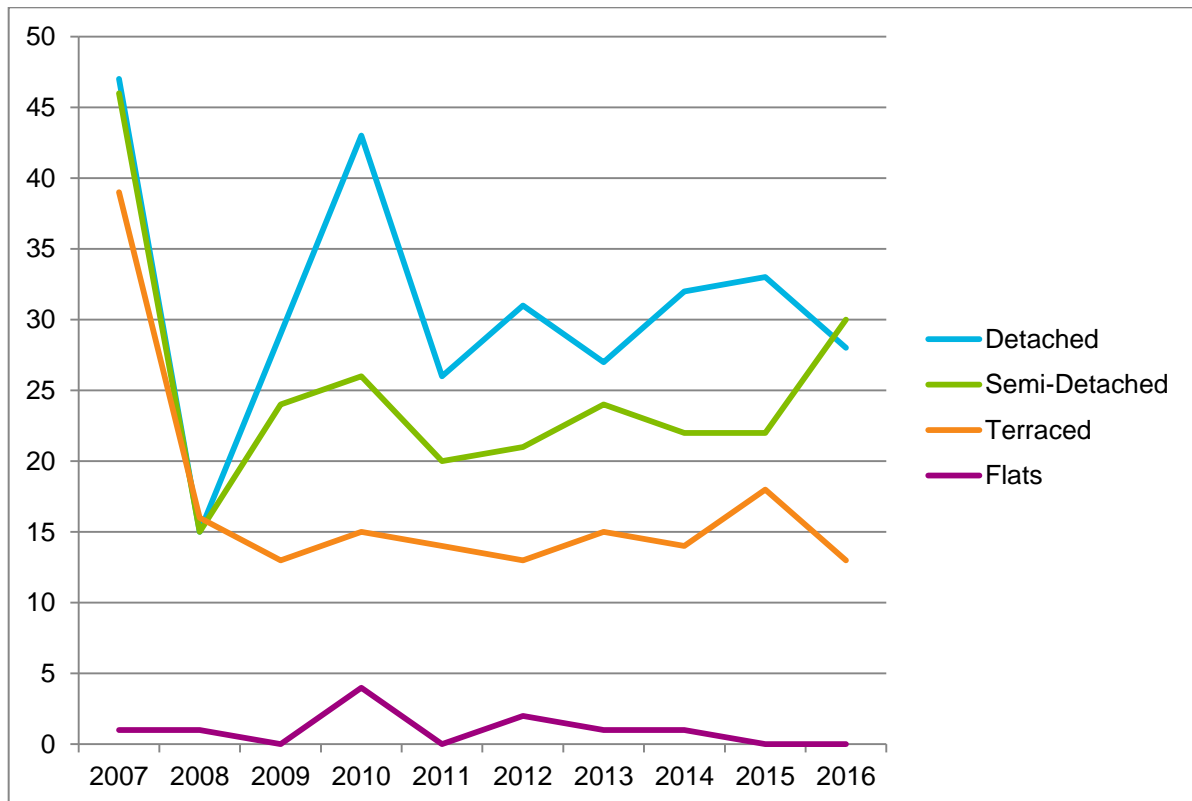
	Percentage Price Growth Long in Stratton NPA	Percentage Price Growth South in Norfolk
Detached	28%	28%
Semi-Detached	18%	25%
Terraced	15%	23%
Flats	N/A	9%

Source: Land Registry PPD/UKHPI/AECOM Calculations

9.4 Housing Transactions: Volume

204. Indeed, the relative lack of demand for smaller house types is further supported by the relatively low number of sales for these housing types, as shown in Figure 11 below. Whilst demand for detached houses quickly recovered after the crisis, in 2009, and then dropped about midway back, demand for semi-detached housing did not recover to the same extent, with demand for terraced housing not recovering whatsoever in terms of sales volumes. It is important to contextualise this by looking again at the overall number of dwellings sold in the NPA, which only reached a post-crisis peak of 73 dwellings in 2015, versus a pre-crisis peak of 133 dwellings in 2007. As such, the volume of housing transactions suggests a relative lack of demand for dwellings in the NPA, although this is increasing

Figure 11: Dwelling sales in Long Stratton by type, 2007-2016



Source: Land Registry PPD/AECOM Calculations

205. Another approach to benchmarking whether sales volumes represent a clear market signal indicating inflated or depressed demand across different housing types is to compare the proportion of sales of each type of housing (excluding any new builds, which would introduce supply side factors) with the proportion of the existing housing stock that falls into each category. This allows conclusions to be drawn about whether the sale of homes of each type is occurring proportional to their availability, or there whether there is unmet demand. This comparison is presented in Table 23 below, with figures for the housing stock in South Norfolk as a whole presented alongside for reference.

Table 23: Sales volumes versus stock of different housing types in Long Stratton and South Norfolk

	Sales in Long Stratton NPA, 2007-2016	Housing Stock in Long Stratton NPA, 2011	Housing Stock in South Norfolk, 2011
Detached	42%	44%	51%
Semi-Detached	34%	40%	30%
Terraced	23%	14%	12%
Flats	1%	2%	6%

Source: Census 2001/2011, Land Registry PPD, AECOM Calculations

206. The table shows that whilst slightly fewer detached and semi-detached houses were sold than are available within the stock a much larger number of terraced houses were sold than were available in the existing stock. This suggests that in spite of the relatively low demand for terraced houses indicated by both the sales price and sales volume figures above, there is still a significant mismatch between the demand for these houses and the available supply. It may also reflect the important role of terraced housing (and smaller dwellings generally) for young people entering the housing market and then relatively soon stair-casing up to a larger home.

9.5 Overcrowding and Concealment

207. Another indicator of demand in the housing market is shown by the prevalence of overcrowding in the NPA. This is because demand for housing in the area can manifest itself in the over-occupation of housing stock. .
208. One of the most reliable indicators of overcrowding is the 'persons per room' data collected at the household level during the Census. The relative proportion of households occupying different amounts of space in the NPA and the district is shown in the table below, which demonstrates that Long Stratton has seen a significant decrease in the number of households experiencing the most overcrowded conditions (over 1.5 persons per room) but a corresponding increase in those experiencing slightly less crowded but still overcrowded conditions of more than 1 person per room.

Table 24: Trends in number of persons per room in Long Stratton, 2001-2011

Persons per room	Long Stratton	South Norfolk	England
Up to 0.5 persons per room	24.2%	15.6%	7.9%
Over 0.5 and up to 1.0 persons per room	12.5%	4.7%	7.0%
Over 1.0 and up to 1.5 persons per room	116.7%	18.7%	27.3%
Over 1.5 persons per room	-83.3%	-18.6%	2.5%

Source: Census 2001/2011, AECOM Calculations

209. Indeed, when considering the actual number of households experiencing such conditions, in 2011 there were 14 households with more than 1 person per room, versus 12 in 2001. This represents an increase of two households, who are living in inappropriate conditions. This is set against relatively insignificant changes within the district as a whole, and so, although from a very low base, these numbers suggest an increase in the levels of overcrowding in the NPA.
210. A further indicator of increased demand in the NPA could be the presence of concealed families. A concealed family is one living in a multi-family household in addition to the primary family, such as a young couple living with parents.⁴⁵ ONS data shows that there were 12 concealed families in Long Stratton in 2011, or 0.8% of all families, slightly lower than the average for Fenland, 1.6%, but lower than the average for South Norfolk as a whole (0.9%), and significantly lower than that for England (1.9%). As such, this is not seen as a highly significant indicator of increased demand, although concealed families do indicate that there is unmet additional demand for housing in the area from those already living there, that is, local demand.

Table 25: Concealed families in Long Stratton, 2011

Concealed families	Long Stratton	South Norfolk	England
All families: total	1,522	38,487	14885145
Concealed families: total	12	362	275954
Concealed families as % of total	0.8%	0.9%	1.9%

Source: Census 2011, AECOM Calculations

⁴⁵ <http://webarchive.nationalarchives.gov.uk/20160105222245/http://www.ons.gov.uk/ons/rel/census/2011-census-analysis/what-does-the-2011-census-tell-us-about-concealed-families-living-in-multi-family-households-in-england-and-wales/sty-what-does-the-2011-census-tell-us-about-concealed-families.html> (visited 01/09/17)

9.6 Rate of Development

211. Planning Practice Guidance suggests that “If the historic rate of development shows that actual supply falls below planned supply, future supply should be increased to reflect the likelihood of under-delivery of a plan”.⁴⁶ Thus, it is relevant to consider the delivery rates, as monitored by the LPA, for Long Stratton, as set out in the table below. Given the high level of homes planned for the area of Long Stratton since at least the Joint Core Strategy, it is clear that there has been significant under-delivery in the NPA. Furthermore, the fluctuations in the rate of development seen above are indicative of a relatively weak housing market which is unable to deliver steadily over a longer period.

Table 26: Completions in Long Stratton, 2001-2016

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
Net completed dwellings	6	0	0	13	7	22
Cumulative net completed dwellings	6	6	0	19	26	48

Source: South Norfolk Council

212. Whilst no data is available from any of the SHMA documents on the overall performance of the housing market area in this matter, however the LPA's own Annual Monitoring Report for 2015-16 makes clear that “overall the level of delivery of new housing remains considerably below target”⁴⁷ Indeed, the report goes on to make clear that within the Norwich Policy Area, which is broadly equivalent to the Core HMA, both of which Long Stratton falls under, there have been significant shortages in the rate of development, as shown in Table 27 below.

Table 27: Housing completions in the Norwich Policy Area

Year	Actual/Projected Completions	Required Completions	Shortfall/Surplus
2008/09	1,193	1,825	-632
2009/10	923	1,825	-902
2010/11	910	1,825	-915
2011/12	915	1,825	-910
2012/13	882	1,825	-943
2013/14	992	1,825	-833
2014/15	1,143	1,825	-682
2015/16	1,164	1,825	-661
Total 2008-15	8,122	14,600	-6,478

Source: AMR15/16







⁴⁶ PPG 019 Reference ID: 2a-019-20140306

⁴⁷ AMR15/16, pp. 14

10. Conclusions

10.1 Overview

Table 28: Summary of factors specific to Long Stratton with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 9)	Possible impact on future housing need	Rationale for judgement
Employment trends	EAGN12, LSAAP16 EGS16, SHMA17, Census 2001/11		Both Long Stratton itself and Norwich are likely to see significant increases in employment over the next 5-10 years, particularly in the Health Sector which is significant in South Norfolk in particular. The high rates of commuting into Norwich mean that this will increase demand for housing in the NPA. As such, three up arrows has been deemed appropriate to account for this growth.
Housing transactions (Prices)	Land Registry Price Paid Data for 2007-2016, UKHPI		The Long Stratton NPA has been shown to have experienced significant price rises of between 20% and 30% across most housing types between 2007-2016. In particular, detached houses, which represent more than 40% of sales in the area during that period, have risen at the same rate as in South Norfolk, and are significantly above their pre-crisis peak, although prices are relatively lower in Long Stratton than in South Norfolk as a whole.
Housing Transactions (Volume)	Land Registry Price Paid Data for 2007-2016, Census 2001/2011 data		Housing transaction levels in the NPA have not recovered to pre-crisis levels for any housing type as prices have above. Indeed, based on an initial analysis, the data suggests that demand is relatively low, particularly for smaller housing types. However, when sales volumes are considered in the context of the available housing stock, it is clear that there is still a mismatch in demand for such smaller housing types. Therefore, a diagnosis of one up arrow is considered appropriate.
Migration	Census data 2001, 2011		Migration is not seen as significant factor in determining housing need, given the small number of residents born abroad who have arrived in the last 10 years.
Overcrowding and Concealment	Census Data 2001, 2011		There is some evidence of increased overcrowding in Long Stratton, though this is from a low base when compared with South Norfolk as a whole and England. Conversely, Long Stratton has lower rates of concealment than both the district and England. Therefore one up arrow is deemed appropriate.
Rate of development	SNDC, AMR15/16		There is significant evidence of under-delivery in both Long Stratton and South Norfolk as a whole, and this is also true for the Norwich Policy Area. Therefore, three up arrows is deemed appropriate.

Source: AECOM

Table 29: Summary of local factors specific to Long Stratton with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapters 6 and 7)	Possible impact on housing needed	Conclusion
Affordable Housing	PPG, Housing and Planning Act, Fixing our Broken Housing Market 2017, Census 2001/2011, SHMA17, PPD, UKHPI, CACI, LSDSER, SNDC	<p>The share of all tenures accounted for by the Private Rented Sector is growing within the Plan Area, and is now close to figure for those in social rented properties.</p> <p>Even those on median incomes have been limited to not for-sale housing options within Long Stratton, and are more likely to be able to afford a flat outside of the village, elsewhere in South Norfolk, or a rental property. This is compounded by the lack of flats and/or terraced houses for sale in the village, which are usually the most affordable type of housing, in spite of lower prices across other housing types compared with the district.</p> <p>Those on lower quartile household income are restricted to social and intermediate housing, and this particularly affects those under 25 and lone parent households. As such, in broad terms, 50% of the population of Long Stratton cannot afford for-sale housing, but only 26% of existing housing in the NPA is available in other, more affordable tenures, including the private rental sector.</p>	<p>Current Affordable Housing policy suggests that up to 600 of the allocated homes in Long Stratton will be affordable. However, there is a case to be made that 81 affordable homes, or 19% of these, should be made available for local people.</p> <p>Affordable Private Rented Housing should be considered as a means of generating more affordable housing in the Plan Area in future years, and given the context of large scale development in Long Stratton, it is worth considering how this might serve the needs of local people.</p> <p>Type and size of dwelling has a significant impact on its affordability, with smaller housing types such as flats, of which there are very few in the village (39 in total), creating de-facto affordable housing options for people.</p> <p>A local register of housing need should be established to record housing priorities of local people in future years, thus capturing both statutory housing needs and those that might be better served by the private rental sector and smaller housing types.</p>
Demand/need for smaller dwellings	Census 2001/2011, SHMA17	<p>Between the last two censuses, dwellings in the NPA tended towards both larger and smaller, with fewer mid-sized dwellings of 2-3 bedrooms.</p> <p>Long Stratton itself has seen significant growth of older households, and Central Norfolk will in future see significant growth in families aged 25-34, suggesting a need for 2-3 bedroom homes (3-4 rooms).</p>	<p>This view is supported by the SHMA17, which proposes more than 80% of housing should be 3 bedrooms or smaller in Long Stratton.</p> <p>Furthermore, the figures put forward in the SHMA would provide for 358 affordable 1-2 bedroom homes of the 1800 planned for Long Stratton i.e. more than 35% of housing should be 2 bedrooms or fewer, versus approximately 20% for the rest of South Norfolk, thereby meeting some affordable housing needs.</p>
Demographics	Census 2001/2011, SHMA17, Housing LIN Toolkit	There have been significant increases in the elderly population of Long Stratton, particularly those aged 85+, who may be	This shift will need to be accounted for in the future housing stock of Long Stratton, with a need for both

in greater need of specialist housing, sometimes for sufferers of dementia.

lifetime suitable homes, as well as for more specialist housing types, particularly given the advanced age of such residents. This will result in a need for 126 units over the period 2017-2026, resulting from local need within the population.

Dwelling type	Census 2001/2011, SHMA17, Land Registry PPD, UKHPI, CACI	<p>There are very few flats in Long Stratton, including just 39 at the 2011 census.</p> <p>Flats have the potential to provide affordable rental or owner-occupied forms of housing to local people, and for those on median incomes, flats elsewhere in South Norfolk may be the only affordable for sale housing option.</p>	<p>There is a case, given that the market has not provided flats in Long Stratton, to do so through planning policy, as these provide an invaluable source of potentially affordable housing, as well as typically smaller housing types. Smaller terraced homes also have the potential to meet some of this need.</p>
Family-sized housing	Census 2001/2011, SHMA17, Land Registry PPD, UKHPI, CACI	<p>Young families tend to require less space than older families. Whilst families will naturally age over the period 2017-2026, the vast majority of household formation will be younger families with a need for smaller housing types.</p>	<p>Smaller housing types should continue to be prioritised via the planning process, given that for newly forming households under 25, affordability can be a particular concern, and for those even on median incomes in Long Stratton, housing options are limited.</p>
Plots for selfbuilders	SNDC	<p>There is evidence of demand for serviced self-build plots within South Norfolk, and it is likely that around 10 will be required in Long Stratton.</p>	<p>Whilst the overall number of self-builders may be small, perhaps just one per year, it is worth considering whether, over the entire period 2017-2026, the sum total might justify proactive planning to accommodate self-builders, rather than individual plots coming forward and self-builders demolishing existing homes, thereby not increasing the overall housing stock.</p>

Source: AECOM

10.2 Recommendations for next steps

213. This neighbourhood plan housing needs advice has aimed to provide Long Stratton with evidence on housing trends from a range of sources to identify local housing need from within the Neighbourhood Plan Area. We recommend that the parish should, as a next step, discuss the contents and conclusions with South Norfolk District Council with a view to agreeing and formulating draft housing policies, in particular the appropriate approach to identifying the level of need for housing for local people in the NPA, bearing the following in mind:
- The Basic Conditions that neighbourhood plans need to fulfil in order to pass examination, in particular having regard for national policies and advice contained in guidance issued by the Secretary of State;
 - that its policies contributes to the achievement of sustainable development and are in general conformity with the adopted strategic local policies⁴⁸;
 - the views of South Norfolk District Council – in particular in relation to how planned for growth can accommodate the needs of local people through a local lettings policy forming part of planning conditions;
 - the views of local residents;
 - the views of other relevant local stakeholders, including housing developers;
 - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the South Norfolk District Council, including but not limited to the SHLAA; and,
 - the recommendations and findings of this study.
214. Recent changes to the planning system, forthcoming changes to the NPPF, as well as the implementation of the Housing and Planning Act, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
215. This advice note has been provided in good faith by AECOM consultants on the basis of housing data and national guidance current at the time of writing (alongside other relevant and available information).
216. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by the District Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.
217. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 1 and 2 would be particularly valuable.

⁴⁸ The five basic conditions and how they should be addressed can be seen in the document 'How to Write a Basic Conditions Statement, <https://mycommunity.org.uk/wp-content/uploads/2016/08/How-to-write-a-basic-conditions-statement.pdf> (visited 19/09/17)

Appendix A : Definitions of Specialist Housing

A.1 Sheltered Housing

Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They usually contain between 15 and 40 properties, and range in size from studio flats (or 'bedsits') through to 2 and 3 bedroomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden. Source: <http://www.housingcare.org/jargon-sheltered-housing.aspx> (accessed 11/11/17)

A.2 Extra Care Housing

New forms of sheltered housing and retirement housing have been pioneered in recent years, to cater for older people who are becoming more frail and less able to do everything for themselves. Extra Care Housing is housing designed with the needs of frailer older people in mind and with varying levels of care and support available on site. People who live in Extra Care Housing have their own self-contained homes, their own front doors and a legal right to occupy the property. Extra Care Housing is also known as very or enhanced sheltered housing, assisted living, or simply as 'housing with care'. It comes in many built forms, including blocks of flats, bungalow estates and retirement villages. It is a popular choice among older people because it can sometimes provide an alternative to a care home. In addition to the communal facilities often found in sheltered housing (residents' lounge, guest suite, laundry), Extra Care often includes a restaurant or dining room, health & fitness facilities, hobby rooms and even computer rooms. Domestic support and personal care are available, usually provided by on-site staff. Properties can be rented, owned or part owned/part rented. There is a limited (though increasing) amount of Extra Care Housing in most areas and most providers set eligibility criteria which prospective residents have to meet. <http://www.housingcare.org/jargon-extra-care-housing.aspx> (accessed 11/11/17)

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