

Scholes, Kirklees Metropolitan District

Housing Needs Survey 2021

for

EcoHolmes Community Land Trust

Final Report

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1. Executive Summary

Introduction

arc4 was commissioned by Eco Holmes Community Land Trust to undertake a housing needs survey (HNS).

The survey was conducted in order to inform the trust's investment decisions. It is both a formal housing needs assessment and an evidence base.

The study area is that of the built-up area of Scholes which includes Hepworth (the Scholes Built up Area (BUA), and the HD9 1 post code sector, in the district of Kirklees. All residents in the HD1 9 postcode area were invited to participate in the survey.

What is the affordable housing need in Scholes BUA?

The housing needs survey (HNS) has concluded that:

- need exists for 33 affordable rented dwellings over the next 5-years after taking supply from existing housing and potential new development into account (Local Plan allocated site HS182) and my client's proposed development;
- this need arises from both existing and newly forming households;
- all size and types of dwellings are needed, with an emphasis on 1 or 2-bedroom dwellings.

Why is this?

- this is mostly due to high house prices, and that few affordable or market rented options exist for those unable to afford entry level market housing;
- there is virtually no supply of affordable home ownership housing;
- supply of affordable rented housing is also limited - the proportion of affordable housing locally is less than half of district and national levels;
- 48% of existing households in housing need want to stay in the area;
- 45% of newly forming households plan to leave the area; and
- the most frequent reasons cited for moving home by existing households is 'right-sizing' i.e., needing a larger or smaller dwelling.

What is the need for additional market housing in Scholes BUA?

There is a need for market housing across the board, with the majority being for 3 or 4-bedroom dwellings.

Why is this?

The survey evidence suggests that this is because of older person households needing to downsize to smaller, more suitable dwellings. This would also free up larger homes for

growing families. The survey demonstrates significant levels of need from households seeking to upsize.

House prices and affordability

- on average, Scholes' house prices are higher than for Kirklees district as a whole;
- this is due to the both high demand for housing and because the predominant house type is the 4 or more-bedroom detached house;
- this means that larger amounts of income and capital such as savings and equity are needed to fund house purchase or rents;
- this particularly affects younger households and first-time buyers; and
- it also means that affordable housing in its various forms is needed if younger people and families are to be retained in the area.

What demographic trends are likely to apply to the study area?

- according to government population projections, over the 25 years (2016 to 2041) the population of the district will increase by 25,531 people;
- the population aged 65 and over will grow the most by 29,799 people, or 38.8%.
- this change will impact on the area and future housing need as the population ages.

What other issues are reported on in the HNS?

Respondents were invited to state their views on local amenities, traffic and commuting. Respondents considered that the highest priorities were:

- improvements to footpaths and cycleways and improved internet;
- housing provision for singles or couples, small families, and small homes for older people and first-time buyers;
- changing the speed limit to 20 mph in the villages; and
- a reduction in the level of commuting is likely.

How and when was this evidence collected?

- data was sourced from the Office for National Statistics (ONS); Gov.uk, the Land Registry, Rightmove and Zoopla; and
- data and other information were also collected from a household survey. 156 valid responses were achieved;
- the household survey was conducted in July 2021 and the report was produced in August 2021.

2. Introduction

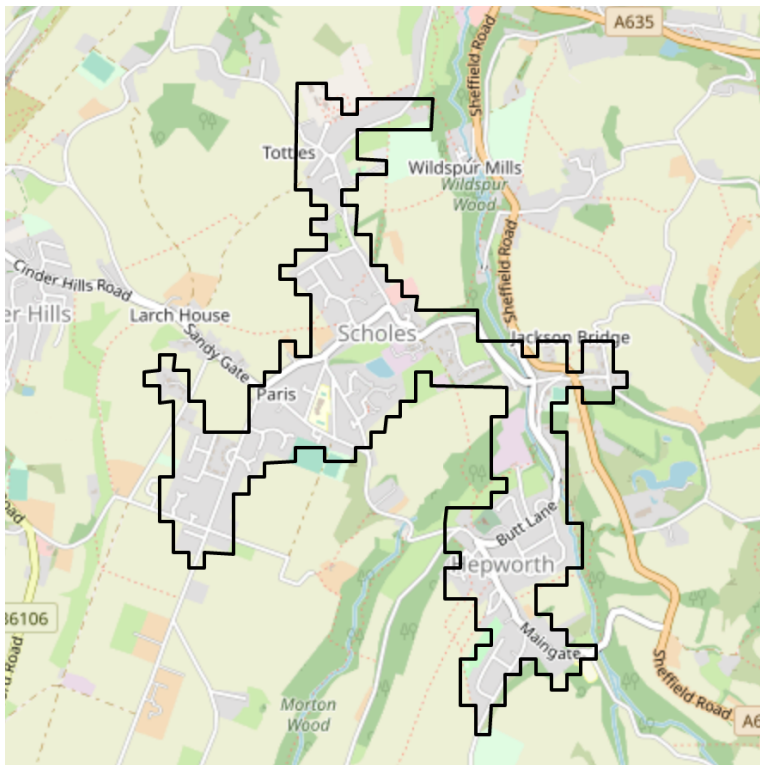
Introduction and summary of this chapter

- 2.1 The aim of this study is to assess the unmet need for housing and the characteristics of need for Scholes, in the Kirklees district in order to inform the trust's investment decisions. As such it is both a formal housing assessment *and* an evidence base which states the characteristics of local housing and households as well as other information from key literature such as the local plan and other relevant research.
- 2.2 The study method involved analysis based on evidence from official data and a household survey. All households resident in the study area were invited to participate in the survey. The study also examines the factors that are driving an unmet need for affordable housing such as local imbalances between local housing and households; affordability of housing and population trends.
- 2.3 Findings are based upon several sources of data all of which contribute to a balanced conclusion in order that the needs of local residents are met in the long term and the area's settlements become increasingly sustainable.
- 2.4 The relevant planning policy of the local planning authority is summarised in order to understand the policy context.

Overview of the study method

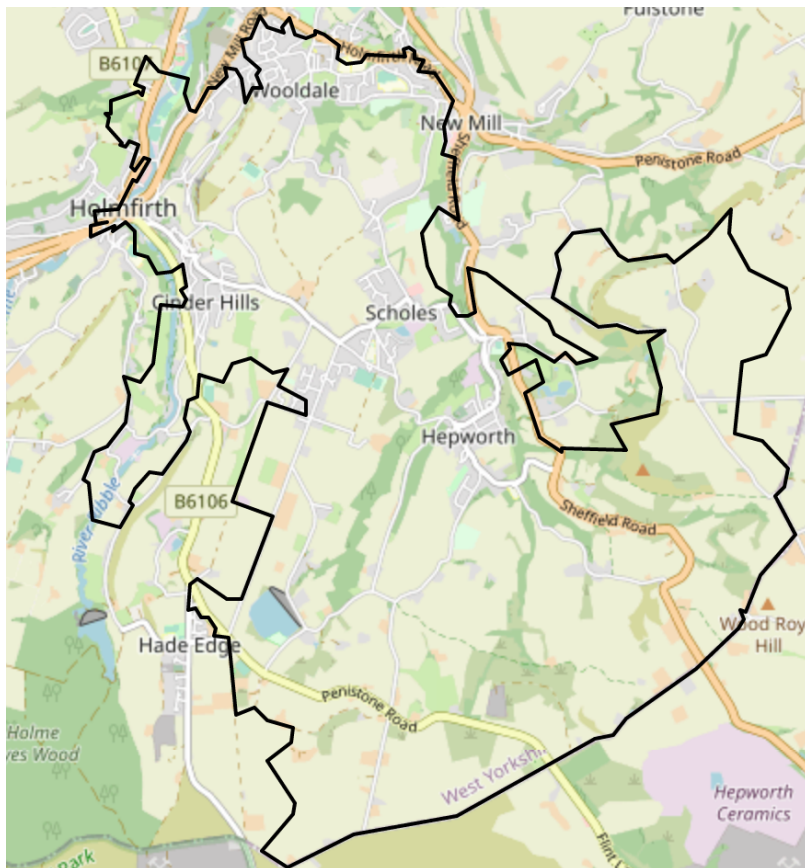
- 2.5 The core study area is the built up area formed of the villages of Scholes and Hepworth. This is an area defined by the ONS - a built up area based upon census standard output geographies. These villages are clearly connected by the road network. The household survey was conducted over a wider area, the HD9 1 postcode area. The reason for this was to capture the housing need in a wider area from households who may have a local connection to the built up area. Study outputs are provided at both levels. HNS studies are normally undertaken at parish level however studying the parish would not have been feasible as it is a very large parish which incorporates the Town of Holmfirth. The essence of a HNS is to measure local need for local housing which is the aim of the study as mandated by local plan policy LP11 and the explanatory text below.
- 2.6 The study area is depicted below in the following maps.

Map 1 **The Scholes Built Up Area (BUA)**



Source: Nomis

Map 2 **HD9 1 Postcode Sector**



- 2.7 In accordance with government practice guidance¹, data from several sources are assembled and analysed to enable us to robustly make a balanced assessment of the additional housing that is required by households resident in the study area:
- Census 2011 to enable us to understand how the profiles of the housing stock and households interact;
 - Land Registry, Rightmove and Zoopla data to understand local house prices and define market housing entry level price points and the affordability of prices to local households;
 - both of the above plus the latest ONS population projections to understand trends;
 - data from a household survey to achieve a fine-grained understanding of the housing requirements of households in need;
 - information from the local authority including planning policy context, district wide housing requirements and data from the housing register;
 - supply side information from government data to understand affordable housing supply and council data to understand potential supply from extant planning consents;
 - use of the basic needs assessment model² (BNAM) used by arc4 and other leading consultants in accordance with the practice guidance to demonstrate demand and supply scenarios based upon different sources of data.
- 2.8 The household survey was available on line only. Paper versions were available however none were requested. Royal mail delivered approximately 3,000 leaflets throughout the HD9 1 postcode area asking households to take the survey. A copy of the leaflet and questionnaire are appended to this report. Paper versions were available to those who had no access to the internet however none were requested.

Government Practice guidance relating to housing needs assessments and the National Planning Policy Framework (NPPF) 2019

- 2.9 It is important that readers recognise that this housing needs survey (HNS) is consistent with the relevant aspects of practice guidance concerning housing needs surveys and the National Planning Policy Framework (NPPF).
- 2.10 The most relevant guidance was published by the government in the year 2000 and is called Housing Need Assessments: A Guide to Good Practice. It describes best practice in designing producing and interpreting data from housing needs assessments and surveys. This HNS report contains many references to guidance on a topic-by-topic basis.

¹ Housing Needs Assessments – a Guide to Good Practice DTER, 2000

² Housing Needs Assessments – a Guide to Good Practice DTER, 2000: paras 2.12-2.24

- 2.11 Consideration of the National Planning Policy Framework (NPPF) June 2019 is important as it defines the term ‘affordable housing’. This definition is crucial to the HNS in order to distinguish between market housing and affordable housing tenures. Annex 2 of the NPPF defines the following tenures to be classed as affordable some of which are affordable home ownership in addition to affordable rented tenures. References to starter homes are likely to be replaced in any updated NPPF due to government introducing the First Homes Scheme in 2021.

Table 2.1 NPPF 2019 Annexe 2, Affordable Housing.

Affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

a) **Affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government’s rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).

b) **Starter homes:** is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household’s eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.

c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

Source: NPPF 2019 (revised June 2019)

- 2.12 The National Planning Policy Guidance (NPPG 2019) is also relevant as it reflects key principles of the good practice guidance upon which this HNS is based.³

The First Homes initiative

- 2.13 The HNS report anticipates the government's emerging First Homes scheme. This was announced by the government in February 2020. It is anticipated that the scheme will become available in 2021, replacing the starter homes initiative described in NPPF. Further information published by government can be found at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/864267/Guide_to_First_Homes.pdf
- 2.14 An extract from this document follows:

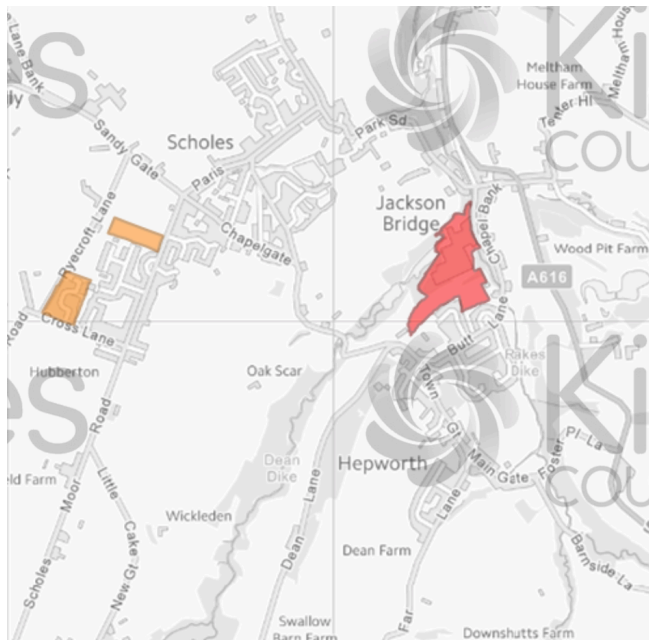
- First Homes are flats and houses built on developments up and down the country. They will be no different from other properties except they will be sold with a discount of at least 30 percent.
- They will be sold to local people who want to stay in the community where they live or work but are struggling to purchase a home at market prices.
- They will be prioritised for first-time buyers, serving members and veterans of the Armed Forces, and key workers, such as nurses, police and teachers.
- The discount will be passed on to future buyers when First Homes are resold so more people can be helped onto the ladder.

Planning policy context

- 2.15 Regarding undeveloped land, the local plan allocated 2 sites for housing development and 1 site for mixed use in Scholes built up area:
- HS181 East of Ryecroft Lane, Scholes (39 units);
 - HS182 South of Sandy Gate, Scholes (28 units); and
 - MSX12 Dobroyd Mills Hepworth (75 homes (1 affordable)).
- 2.16 Housing development is shaded in orange in map 3 below and mixed use red.

³ NPPG 2019 revised June 2019 affordable housing paragraphs 020 to 024

Map 3 Map of undeveloped allocated sites in the Kirklees local plan



Source: Kirklees Council policy map

- 2.17 The following abstracts provide the key information needed if new housing development is to comply with the relevant planning policy of the local planning authority (LPA).

Extract from policy LP11 Housing Mix and affordable policy

Exceptionally, planning permission may be granted for affordable homes on land which would not normally be permitted for housing development, where there is otherwise little prospect of meeting robustly evidenced local needs particularly for housing to rent by people who work locally. Where appropriate, such schemes must include arrangements for the homes to remain affordable in perpetuity.

- 2.18 Paragraph 8.31 of the Kirklees Local Plan expands upon this strand of policy LP11. *“In exceptional circumstances it may be appropriate to accept schemes for affordable provision on land where development would not otherwise be permitted. The exceptional circumstances are where needs have been identified for people with jobs in those settlements, or with strong local connections, which have been difficult to satisfy through lack of development opportunities and may include starter homes. Such local need will need to be supported by robust evidence and may include parish assessments, settlement assessments or similar documents. It is anticipated that arrangements to secure affordability will normally be based on social rents as the principal tenure required to provide the best opportunities to satisfy needs and should, where appropriate, show that the homes will remain affordable in perpetuity.”*
- 2.19 Paragraph 8.35 acknowledges that there is a substantial backlog of affordable housing: *“The Kirklees SHMA considers need for affordable housing by assessing a variety of factors including the relationship between household incomes and house prices. It has identified that there is a substantial backlog of need for affordable housing in Kirklees and that this need exists in all parts of the district.”*

- 2.20 Policy LP11 states that on developments of 10 or more dwellings, 20% should be affordable however we can find no reference to the desired affordable tenure mix between affordable rent and affordable home ownership.

The Holme Valley Neighbourhood Plan 2020-2031

- 2.21 This plan was adopted by the local authority in December 2021 as a development plan document. The following content of the submission draft of the plan are relevant.
- 2.22 Policy 6, Building homes for the future states that: *“in addition to the sites allocated by Kirklees Council in the Allocations and Designations DPD, new housing development will be supported within existing settlements in areas not overwashed by the green belt or is for housing acceptable in terms of national green belt policy.”*
- 2.23 Paragraph 4.5.19 in relation to community right to build expresses support for this approach and references the community land trust.

Mixed and Balanced Communities

- 2.24 The following extract of LP11 is also relevant This is included as it seeks new build housing to help achieve mixed and balanced communities.

All proposals for housing, including those affecting the existing housing stock, will be of high quality and design and contribute to creating mixed and balanced communities in line with the latest evidence of housing need.

- 2.25 The following abstract from the government’s guidance on achieving decent homes is noteworthy as it defines what is meant by a mixed community which is relevant context to this study.

Decent homes and mixed communities

What is a mixed community?

A mixed communities’ approach aims to create better outcomes for the most vulnerable in society and sustainable communities for all. There is no ‘one size fits all’ approach and how mixed communities are developed will depend on the local context. However, **mixed communities** are areas that:

- attract and retain households with a wide range of incomes;
- have good quality housing in attractive environments with access to good local schools and retail/leisure facilities and other services such as health;
- have a mix of housing size, type, and tenure;
- attract and retain households with choice;
- have strong local economies and contribute to strong regional economies;
- are well connected to employment opportunities through neighbourhood design, transport and job access services;
- provide access to other economic and social opportunities for all residents, enhancing their life chances;
- have high quality housing and neighbourhood management; and

- have low levels of crime and provide support services for vulnerable people.

2.26 We believe that a mixed and balanced housing supply is key to attracting and retaining people in the neighbourhood to the benefit of the community. Chapters 3, 4 and 5 of this report draw attention to imbalances between the characteristics of the study area's housing and households.

About arc4

- 2.27 arc⁴ is a leading housing consultancy that operates across England and Wales. The breadth of experience of the company and its people is evident from its website www.arc4.co.uk. It has a division that specialises in Local Housing Need Surveys (LHNS).
- 2.28 The commission was accepted as it is consistent with its mission to ensure that local housing need is assessed as accurately as possible as a foundation for sustainable development and social justice.
- 2.29 arc⁴'s role is limited to the collection and the objective and impartial analysis of data. For the avoidance of doubt, it has no role in community consultation regarding the development process.

3. A profile of the study area

Introduction and summary of the chapter

- 3.1 In Chapter 3, we look closely at specific characteristics of Scholes' housing stock and households.
- 3.2 Using census 2011 household and housing data, alongside population projections, we identify current imbalances that exist and how trends will impact on any imbalances in the future.
- 3.3 As at census day 2011, the predominant house type was the owner occupied, 3 or more-bedroom detached house. Compared to the district and England there are smaller proportions of flats.
- 3.4 The composition of households at census 2011 has a large proportion of married couples without children. In line with district level population projections the proportion of the population aged 65 and over is likely to grow.
- 3.5 The evidence suggests that imbalances exist, and these will become wider as the population ages.

Geography and Population

- 3.6 According to the census 2011 there were 2,317 people living in 963 households within the Scholes Built Up Area. The average household size was 2.41 persons per household in Scholes, which is more than the postcode sector (2.36), less than the average for the district (2.43) and similar to the average for England (2.4).

Dwelling and household characteristics

Evidence from the census 2011

- 3.7 This section summarises data from the census 2011. Data in the following figures is presented as proportions (percentages) as this is the most effective means of comparison between geographies. The numbers from which the percentages are derived are stated in the data appendix.
- 3.8 The following figures show selected housing and household characteristics that are key to understanding the drivers of housing need^{4,5}. The tables also help to define any apparent mismatches between housing and household characteristics that may lead to

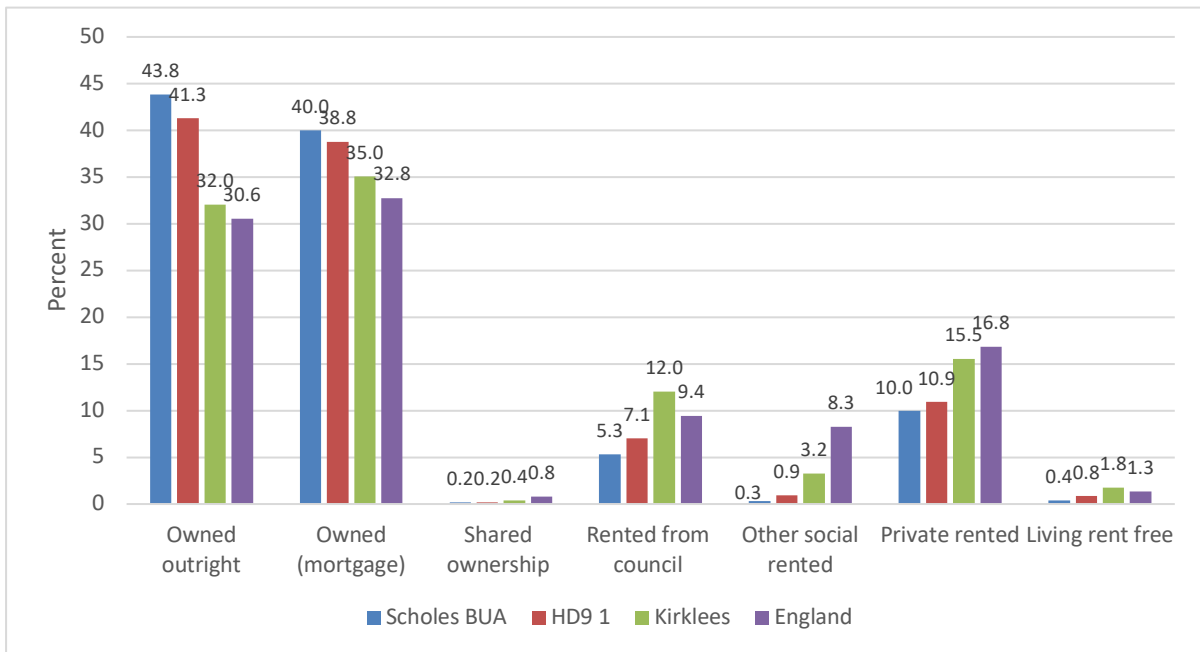
⁴ Local Housing Need Assessment: A guide to good practice (DETR 2000) para.2.6: an assessment of need is not simply a question of going to one source of data.

⁵ Local Housing Need Assessment: A guide to good practice (DETR 2000) para.2.6: it is desirable to draw on additional sources of information to provide a check on the information from particular sources, which may have limitations.

local gaps in housing supply.⁶ The built up area of Scholes (BUA) is compared with the postcode sector HD9 1, the district of Kirklees, and England as a whole.

- 3.9 Figure 3.1 shows that the proportions of private and social rented dwellings in the BUA and in HD9 1 were low compared to the wider geographies.
- 3.10 83.8% of dwellings in the BUA and 81.3% in HD9 1 are owner-occupied, which is a larger proportion than the wider geographies, particularly England as a whole at 64.1%.

Figure 3.1 Tenure

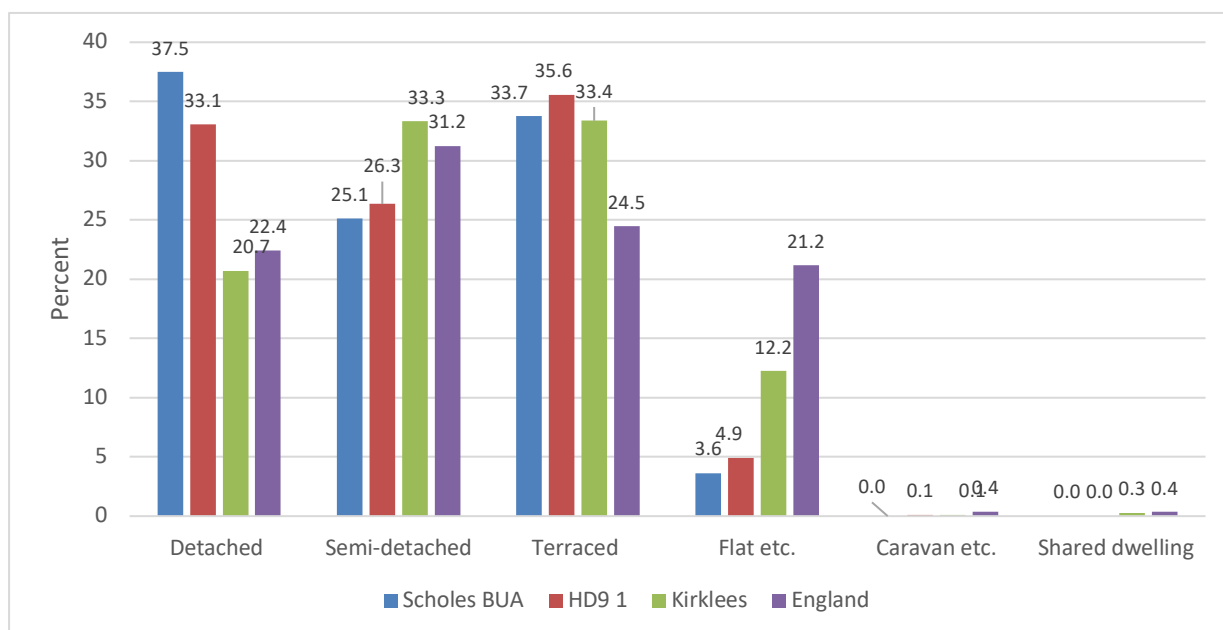


Source: Census 2011

- 3.11 Figure 3.2 shows that there was a larger proportion of detached and terraced homes in the BUA and HD9 1 compared to England and Kirklees. Additionally, there was a smaller proportion of semi-detached dwellings and relatively few flats.

⁶ Local Housing Need Assessment: A guide to good practice (DETR 2000) para. table 4.2 and paras 6.16-9 mismatch as a driver of housing need.

Figure 3.2 House type

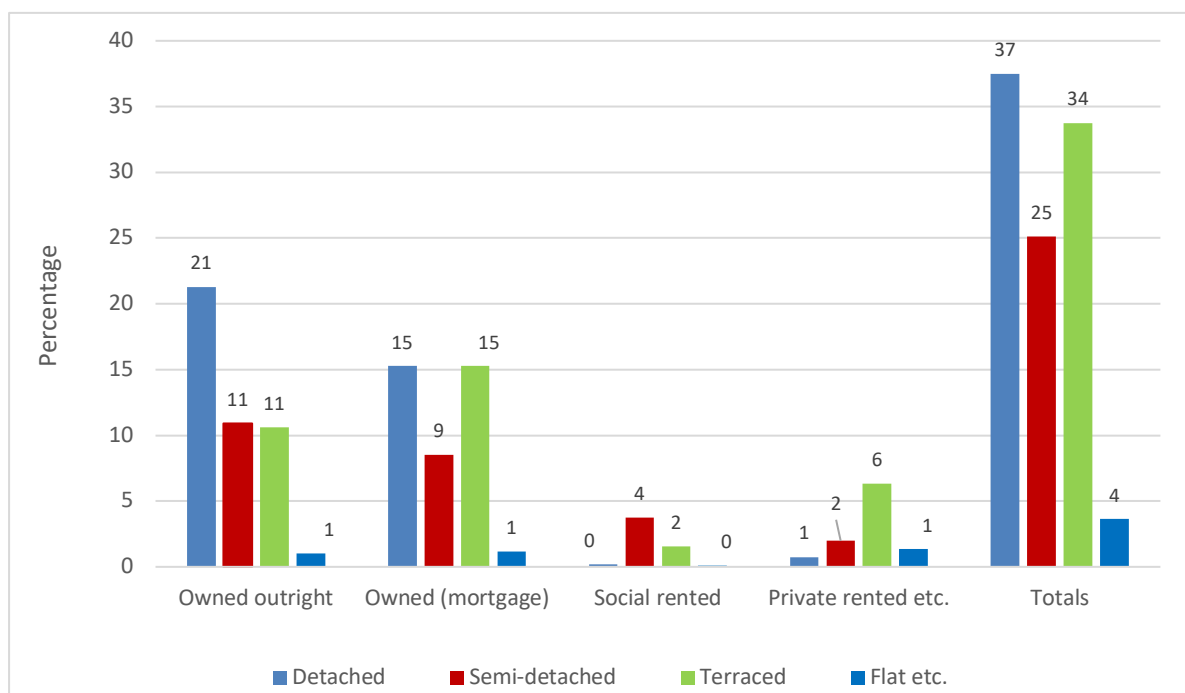


Source: Census 2011

3.12 Figure 3.3 shows how house types vary by tenure within the BUA. Nearly all detached houses and bungalows were owner occupied. Social rented housing was mostly in the form of semi-detached and terraced dwellings. The census does not distinguish between houses and bungalows.

3.13 The small proportion of flats in the BUA were distributed across the market tenures with few available as social rented dwellings.

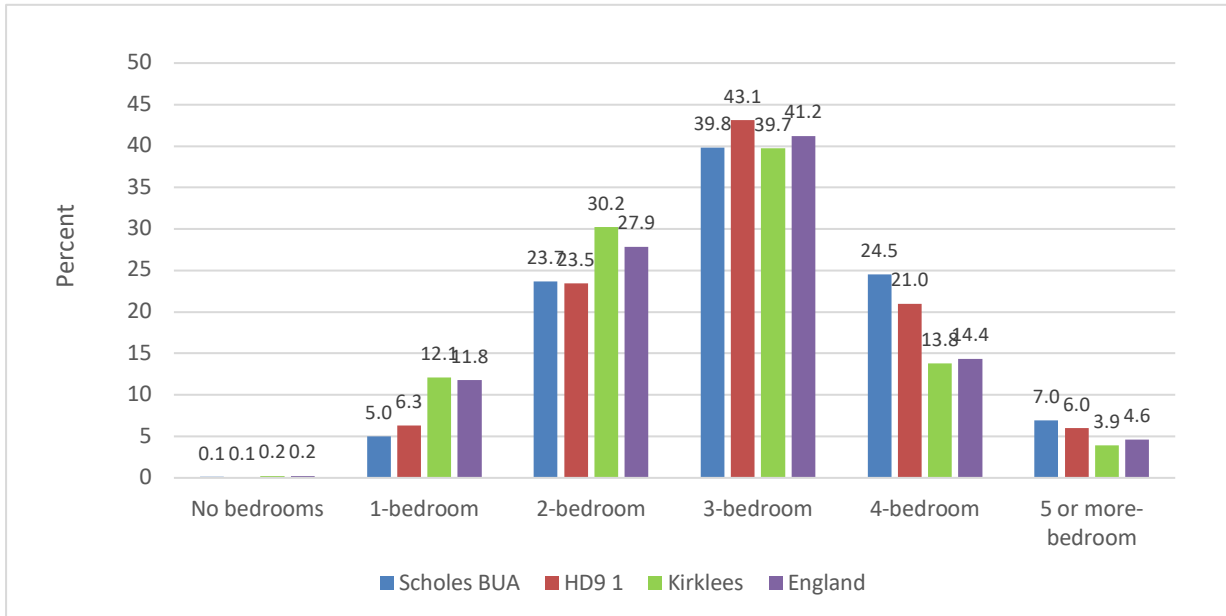
Figure 3.3 House type by tenure (Scholes BUA only)



Source: Census 2011

3.14 Figure 3.4 shows that the bedroom distribution in Scholes is very similar to the wider geographies, with 3-bedroom dwellings accounting for the majority of the housing stock in both Scholes and HD9 1. There is a larger proportion of 4 or more-bedroom dwellings in Scholes, and less 1-bedroom dwellings.

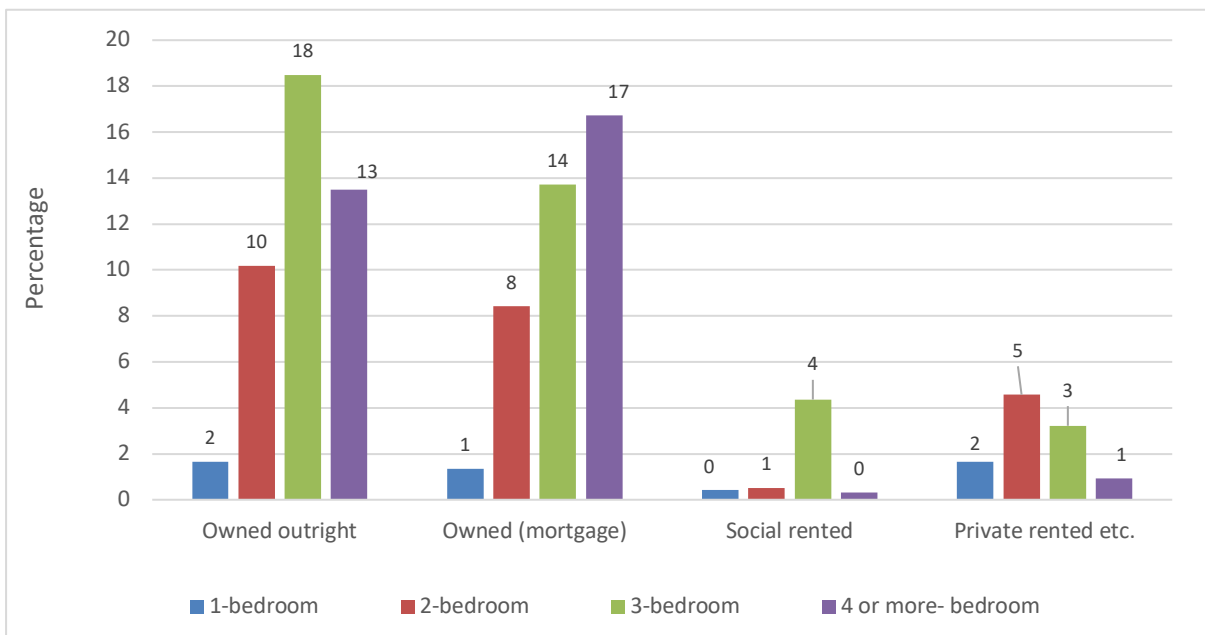
Figure 3.4 Number of bedrooms



Source: Census 2011

3.15 In figure 3.5 below, owner occupied housing was largely comprised of 3 or more-bedroom dwellings with 3-bedroom dwellings being the predominant type. , In the private rented sector, 2-bedroom dwellings were more prevalent.

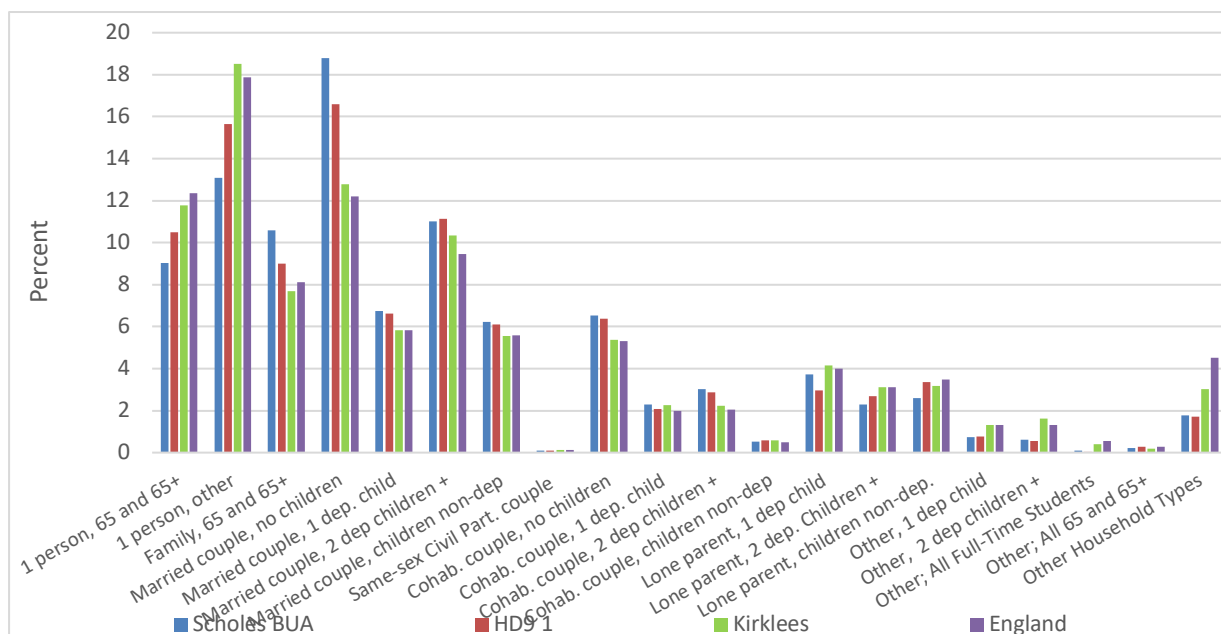
Figure 3.5 Bedrooms by tenure (Scholes BUA only)



Source: Census 2011

3.16 Figure 3.6 shows the household composition in 2011.

Figure 3.6 Household composition



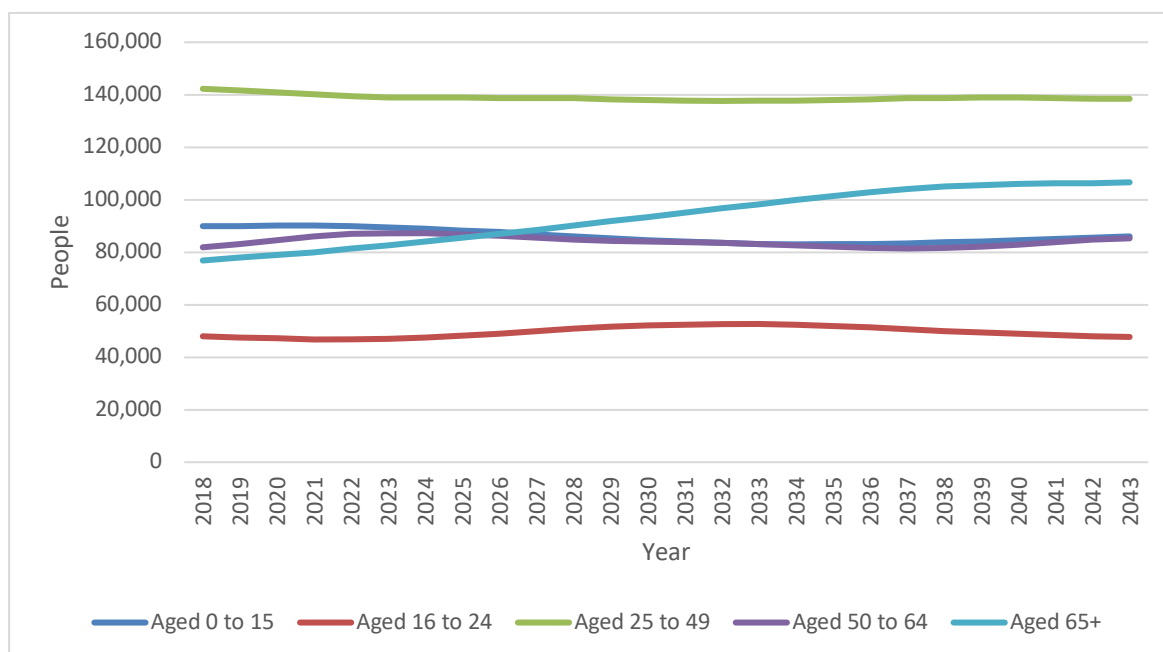
Source: Census 2011 (dep=dependent)

3.17 The most prevalent household type in the BUA and HD9 1 areas was married couples with no children. There were slightly larger proportions of married and cohabitating couples with children in the BUA and HD91 than the wider geographies. There was a smaller proportion of single person households, both under and over 65, compared to the district and England.

Population projections

- 3.18 These projections are only available at district level. They are 2018 based and here show a projected change in the structure of the population between 2020 to 2043. They show that there are changes in the population structure likely to affect the study area and the changing nature of housing need.⁷
- 3.19 Figure 3.7 shows that the proportion of people aged 65 or over is set to grow by 29,799 or 38.8%. The 0-49 age groups are set to decrease over the period. The overall population is likely to increase by 5.8%, (25,531). The data for this can be viewed in the appendix.
- 3.20 This means that over the period 2018 to 2043 there will be specific demands on the housing stock, with a focus on housing for an aging population.

⁷ Local Housing Need Assessment: A guide to good practice (DETR 2000) para 2.2 HNS essential requirements: HNS must project need forward over the strategy period

Figure 3.7 Population projections (district only)

Source: Nomis

Key findings from the Census 2011 and population projections.

- 3.21 The key features of the housing stock is, when compared to wider geographies, the predominance of detached dwellings and terraced dwellings, and a lower proportion of flats. Although the majority of dwellings, similar to the wider geographies, had 3-bedrooms, there was a slightly higher proportion of 4 or more-bedroom dwellings compared to the wider geographies. In the Scholes BUA , there was a large proportion of owned outright dwellings and social rented dwellings. The predominant household composition was 'married without children' who were aged under 65 years.
- 3.22 The population projections for the district reveals an aging population set to increase significantly over the coming years.
- 3.23 The evidence suggests that, to improve the imbalance between housing and households moving forward housing should be delivered partly to enable older person households to downsize within their community. A supply of more affordable housing should be enabled for younger households as many would be unable to afford the 4 or more-bedroom detached housing that will be released by older people downsizing or leaving the area.
- 3.24 In conclusion, this information should provide context and improves the understanding of what is driving housing need trends in the characteristics of need moving forward.

4. Local house prices, rents and affordability

Introduction and summary of the chapter

- 4.1 In Chapter 4, we look closely at the price and affordability of the housing tenures and compare these factors to district and national levels.
- 4.2 This will help us to understand the extent to which house prices and rents drive the need for affordable housing and other options available to households. Data will feed into our assessment of the requirement for affordable and market housing in the next section and provide context for our overall findings⁸.
- 4.3 Key findings are that:
- Lower quartile house prices are more expensive in the study areas than across the district, and therefore entry level prices would generally be unaffordable to many first-time buyer households, including key worker household configurations;
 - whilst affordable home ownership products undoubtedly reduce the price of ownership, these would still be unaffordable to many first time buyers unless there was a second income available to the household.

Benchmark rents and house prices

- 4.4 Many tables in this chapter state prices at benchmark levels. The 25th percentile value is particularly significant as this is widely accepted⁹ as the entry level market level, being the lowest price at which there is a reasonable supply of housing in reasonable condition.
- 4.5 The percentile value is calculated by listing all lettings or sales in a given period in ascending order according to their price or rent. The number of sales or rentals is divided by 100. The percentile price or rent corresponding to each percentile can be read off. The percentiles most frequently used in this study are the 25th (or lower quartile price point) or the 50th (the median price point).

Local rents and the household income required to service a rent

- 4.6 Table 4.1 shows the 25th and 50th the percentile price point for rented housing in the Scholes BUA, and the district of Kirklees.

⁸ Local Housing Need Assessment: A guide to good practice (DETR 2000) paragraphs 4.18 to 4.29

⁹ Local Housing Need Assessment: A guide to good practice (DETR 2000) paragraph 4.22

Table 4.1 Assessment of benchmark rent levels		
	Percentile 25 (lower quartile) £pcm	Percentile 50 (Median) £pcm
Scholes BUA	563	650
Kirklees	451	550

Source: Zoopla 2020

4.7 Table 4.2 states the household income required to service local rents at the main percentile points. This is using an assumed rental to gross income ratio of 25%.

Table 4.2 Average market rents and income required, Scholes BUA		
	Percentile 25	Median
Monthly rental price (£ per calendar month (PCM))	563	650
Annual gross household income required £	27,024	31,200

Source: Zoopla and arc4

4.8 Table 4.3 states the 2021 value of the local housing allowance that applies to the study area, noting that this is the Kirklees BRMA (broad rental market area). This is significant as it is the maximum rent level that is eligible for housing benefit. Any household eligible for housing benefit and seeking a private rental would need to 100% fund any rent above this level.

Table 4.3 Kirklees BRMA local housing allowance rates (July 2021)			
Dwelling type	£ per week	£ pcm	Income needed to service rent £ p.a.
Shared accommodation	56.50	226	10,848
1-bedroom	85.00	340	16,320
2-bedrooms	103.56	414	19,884
3-bedrooms	126.58	506	24,303
4-bedrooms	162.25	649	31,152

Source: VOA

House prices and the income required to service a mortgage

- 4.9 The broad average local lower quartile price across all dwelling types for calendar year 2020 as published by the Land Registry is estimated at £190,000 in Scholes BUA. Similarly, the broad average local median price for 2020 is estimated at £267,000.
- 4.10 Table 4.4 shows that on average, lower quartile and median prices are slightly lower in the district, compared to the Scholes BUA.
- 4.11 Much of the following analysis is based upon this lower quartile value. The lower quartile value is regarded as the entry level price for market housing. This value is taken as the point at which households would require affordable housing if they could

not afford lower quartile prices or higher. The lower quartile point is regarded as the lowest price that a reasonable supply of housing is available in reasonable condition.

	Percentile 25 (lower quartile) £	Percentile 50 (median) £
Scholes BUA	190,000	267,000
Kirklees	111,000	155,250

Source: Land Registry price paid 2020

- 4.12 In table 4.5, using average dwelling prices for the local area, we estimate the income required to service a mortgage or loan based upon standard assumptions of a 10% deposit and 4.5 income multiplier.
- 4.13 Throughout the following affordability analysis, it must be borne in mind that a larger deposit, whether funded through savings, equity or 'the bank of mum and dad' will reduce the size of the loan and the income required to service it.

	Price Level – Scholes BUA		Price Level - Kirklees	
	Lower quartile £	Median £	Lower quartile £	Median £
Purchase price	190,000	267,000	111,000	155,250
Minimum deposit (10%)	19,000	26,700	11,100	15,525
Mortgage required	171,000	240,300	99,900	139,725
Annual gross household income required to service the mortgage	38,000	53,400	22,200	31,050

Source: Land Registry price paid and arc4

- 4.14 We have already noted that lower quartile prices are higher in Scholes compared to the district. The difference in purchase prices is significant, particularly for younger families, with individuals requiring almost £16,000 more income to live in Scholes rather than the wider district.
- 4.15 Table 4.6 estimates the affordability of lower quartile prices for the stated benchmark incomes and household configurations. It is apparent that using the 4.5 income multiplier none of the household types could afford entry level prices. The table also indicates the house price that could be afforded at these household income levels.

Occupation and household configuration	Gross Household Income 2019 (£)	LQ price 2020 (£)	Salary required (£ p.a.)	Maximum price that could be afforded £
Police officer (single person household)	23,124	190,000	38,000	114,463.80
Nurse (single person household)	17,652	190,000	38,000	87,377.40
Fire officer (single person household)	23,862	190,000	38,000	118,116.90
Teacher (single person household)	23,720	190,000	38,000	117,414.00
Minimum wage (single person household)	16,010	190,000	38,000	79,249.50
Minimum wage (1 full-time and 1 part-time)	24,014	190,000	38,000	118,869.30
Minimum wage (two full-time working adults)	32,019	190,000	38,000	158,494.05
Living wage (single person household)	17,550	190,000	38,000	86,872.50
Living wage (1 full-time and 1 part-time)	26,325	190,000	38,000	130,308.75
Living wage (two full-time working adults)	35,100	190,000	38,000	173,745.00

Source: Land Registry, nationally published pay scales and arc4

- 4.16 Finally, in table 4.7 we consider the affordability of low-cost housing home ownership (LCHO) products defined as affordable housing within the NPPF 2019 annexe B definitions. 30% discounted sale would be the most affordable option, requiring an income of £26,600, although this would be unaffordable to a lot of the households configured in table 4.6 unless there was a second income.

Table 4.7 The income required to fund selected low-cost home ownership products	
Discounted sale (20% discount)	Costings/income required
Full price (based on 25th percentile)	£190,000
Starter home price (20% off full price)	£152,000
10% deposit on equity share	£15,200
Mortgaged amount	£136,800
Income required for mortgage	£30,400
Discounted sale (30% discount, potentially the First Home scheme)	Costings/income required
Full price (based on 25th percentile)	£190,000
Starter home price (30% off full price)	£133,000
10% deposit on equity share	£13,300
Mortgaged amount	£119,700
Income required for mortgage	£26,600
Shared ownership 50%	Costings/income required
Full price (based on 25th percentile)	£190,000
Equity 50%	£95,000
10% deposit on equity share	£9,500
Mortgaged amount	£85,500
Service Charge (monthly)	£30
Rent (per month based on 2.75% on remaining equity pa)	£218
Income required for mortgage	£19,000
Income required for rent/service charge	£11,890.00
TOTAL	£30,890
Shared ownership 25%	Costings/income required
Full price (based on 25th percentile)	£190,000
Equity 25%	£47,500
5% deposit on equity share	£2,375
Mortgaged amount	£45,125
Service Charge (monthly)	£30
Rent (per month based on 2.75% on remaining equity pa)	£327
Income required for mortgage	£10,028
Income required for rent/service charge	£17,115.00
TOTAL	£27,143
Help to buy	Costings/income required
Full price (based on 25th percentile)	£190,000
Equity 75%	£142,500
Loan 20%	£38,000
Deposit 5%	£9,500
Mortgaged amount	£142,500
Income required for mortgage	£31,667
Loan fee (1.75% in year 6)	£665

Source: Land Registry and arc4

House Type

- 4.18 Whilst Land Registry price paid averages are quoted above, the only further analysis possible is by house type.
- 4.19 Prices vary considerably by house type (table 4.8) with the difference between detached and semi-detached of particular note.

Type	Percentile 25 £	Median £	Percentile 75 £	Count
Detached	351,250	410,000	443,850	15
Semi-detached	207,500	231,000	275,000	9
Terraced	157,500	186,500	193,500	12
Flat	0	0	0	0

Source: Land Registry 2020

The cost of upsizing

- 4.20 Clearly many households consider the number of bedrooms to needed to be a primary factor in their need to move home. The Land Registry does not publish this information. The following information is taken from the sold price data on the Rightmove website for dwellings within the Scholes BUA. There is enough information to indicate the extent to which price varies by number of bedrooms. The data in table 4.9 contains the last two years of sales.

	1-bedroom	2-bedroom	3-bedroom	4-bedroom	5-bedroom
Lower quartile £	£124,000	£139,500	£181,000	£287,500	£350,000
Median £	£127,000	£158,000	£200,250	£331,500	£387,000
Range from £	£121,000	£87,500	£118,500	£245,000	£269,950
Range to £	£214,995	£246,500	£290,000	£583,000	£725,000
Number	3	12	14	12	5

Source: Land Registry and Rightmove

- 4.21 It is noteworthy that the supply of 1 bedroom dwellings (table 4.9) and flats (table 4.8) is particularly low. This is significant as flats are entry level dwellings for many households.

	Increase in price £	Increase in income required to fund £
1 to 2-bedroom	15,500	3,100
2 to 3-bedroom	41,500	8,300
3 to 4-bedroom	106,500	21,300
4 to 5 or more-bedroom	62,500	12,500

Source: derived from table 4.9

- 4.22 The importance of table 4.10 is the indication of increase in purchase price affecting moving households needing to upsize and the implications for affordability.
- 4.23 The largest jump in house prices occurs at the 3 to 4-bedroom stage, which is likely to impact growing families the most.

Affordable housing ‘bandwidth’

- 4.24 When the definition of affordable housing within the NPPF is taken into account it is clear that the assessment of local need for affordable housing is complex. It is also necessary to distinguish between affordable products for rent and affordable home ownership products. Practice guidance is clear on this point.¹⁰
- 4.25 Selective relevant quotes from the NPPF (February 2019) are (our emphasis):
- Annexe B, definition, affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions (list is selectively reproduced here);
 - Annexe B, definition, affordable housing (C) Discounted market sales housing: is that sold at a discount of at least 20% below local market value. *Eligibility is determined with regard to local incomes and local house price*;
 - Annexe B, definition, affordable housing (D) Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below local market value);
 - paragraph 62: Where a need for affordable housing is identified, planning policies should specify the type of affordable housing required; and

¹⁰ Local Housing Need Assessment: A guide to good practice (DETR 2000) paragraphs 2.23 and 4.48-4.51

- paragraph 71: Local planning authorities should support the development of entry-level exception sites, suitable for first time buyers (or those looking to rent their first home).
- 4.26 So affordable housing applies to households whose needs are not met by the market and this is understood to be in terms of affordability and supply. This is why we use the 25th percentile price (both market sale and market rent) as a proxy for both affordability and supply. Our analysis of affordable need has two components. Firstly, those in need of housing that can only afford social rented prices and secondly those that can afford more than a social rent but not market prices. However, the affordability of market prices differs considerably between market rent and market sale which is illustrated in tables 4.11 and 4.12.

Rented housing

- 4.27 Table 4.11 shows that on average, within Scholes, a household in housing need, seeking rented housing with a combined gross income of up to £27,024 could be regarded as being in affordable need.

Table 4.11 Difference in income needed to service a social rent and a minimum market rent			
	Social rent* £	Minimum Market rent **(Lower Quartile) £	Difference £
Weekly rent	75.22	129.9	54.68
Calendar monthly equivalent	326	563	237
Income required	15,645.76	27,024	11,378.24

Source: *Social Housing Regulator query tool 2019; **Zoopla 2020;

Affordable home ownership

- 4.28 Table 4.12 shows that on average, within Scholes, a household in housing need, with a combined gross income of up to £38,000 seeking affordable home ownership, could be regarded as being in affordable need.

Table 4.12 Difference in income needed to service a social rent and a minimum market			
	Social rent* (£PCM)	Minimum Market price ** (LQ)	Difference £
Price	326	190,000	n/a
Income required	15,645.76	38,000	22,354.24

Source: *Social Housing Regulator query tool 2019; **Land registry 2020;

Key findings: local house prices, rents and affordability

- 4.29 In summary, the housing market has seen a high proportion of detached and semi-detached dwellings with 2-4 bedrooms. Prices in Scholes BUA are more expensive compared to the district.
- 4.30 It is noteworthy that the gap between lower quartile prices of 3 and 4-bedroom homes is significant. Around £21,000 extra income per annum would need to be found by the households and it will be a challenge many growing families to be able to afford to upsize within the area.
- 4.31 House price and income data enables us to define the parameters for the affordable home ownership products locally defined in the NPPF. For the purposes of this HNS, households would need a minimum income of £26,600 per annum income to afford the lowest cost affordable home ownership option (table 4.7). An income of £38,000 per annum would be required to fund the entry level market house price (table 4.5).

5. Assessing housing need

Introduction and summary of the chapter

- 5.1 This section uses data from a household survey and the council's housing register to estimate the demand for additional housing in the study area and the extent to which supply from the existing housing stock might meet that need currently.
- 5.2 The questionnaire content, analysis and modelling closely follows government practice guidance for housing needs assessments and surveys.
- 5.3 Households were asked for information about priorities for improvements to local amenities and the housing supply. Top priorities were for improvements to footpaths and cycleways and improved internet, as well as priority for first time buyers if new build housing was to occur.
- 5.4 Households were asked for information about changes to commuting patterns and working from home. A planned reduction in commuting post Covid was apparent.
- 5.5 **The first part of the housing need analysis focusses on the survey findings that are a snapshot of household circumstances and needs at the time of the survey.** For the avoidance of doubt this is all households irrespective of their existing or preferred future tenure.
- 5.6 Key findings from the snapshot are:
- households in need that intend to move home in the next five-years mostly cited needing to rightsize (i.e. move into a house that is smaller or larger to meet their needs (mostly smaller));
 - 48% of existing households were seeking to remain in the study area, those seeking to leave were mostly moving to give or receive care or support or relocate for employment;
 - 45% of newly forming households wish to remain in the study area. Those seeking to remain were mostly seeking affordable home ownership.
- 5.7 **The second part of the analysis is, in accordance with good practice guidance, the use of models to turn the snapshot of data of need and supply from the survey, the housing register and other data, into an annual flow. The key output is a measure of the imbalance between flows of need and flows of supply.**
- 5.8 The snapshot of affordable need measured by the household survey was 13 households in HD9 1 and 7 households in the Scholes BUA.
- 5.9 This is compared to other sources of data including the housing register. Snapshot data from the survey and the housing register are converted into an annual flow, and if an average of all measures is taken, we conclude that the need in HD9 1 and the BUA is 83 and 25 households per annum respectively. Supply from vacancies, first lettings and sales from committed future development is projected forward to arrive at an estimate of the amount of supply to deduct from the above gross need. The net requirement for additional affordable housing for the BUA is between 17 and 20 dwellings per annum.
- 5.10 Our key finding is that my client's proposal for 10 affordable dwellings is justified. The scale of unmet need in the Scholes BUA would justify a rural exception.

About the household survey

- 5.11 The household survey was conducted during July 2021. All Royal Mail registered addresses in the HD9 1 area were sent a flyer requesting households complete the survey online. Around 3,000 flyers were dispatched, and 156 surveys were completed, all of which were completed online. 88 were received from the Scholes Built Up Area (BUA).
- 5.12 This chapter reports the main outputs of the survey to inform the need for additional affordable and market housing and further information about local households – especially those that are proposing to move home or newly forming households seeking their first home.

Practice guidance and definitions used in the analysis

- 5.13 Firstly the current definition of affordable housing need must be understood to differentiate between the need for market housing and affordable housing. According to the national planning policy framework (NPPF) 2019, Annexe 2, affordable housing need is defined as *'housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more definitions'*. [These are fully listed in chapter 2].
- 5.14 This is why section 4 of this report seeks to understand local house prices and rents in some depth and establish the price and cost of entry level housing to the market. This information has been used in the following analysis.
- 5.15 It is important to appreciate that a substantial body of government guidance exists in the conduct of SHMA, HNS and LHNS.
- 5.16 The most detailed guidance¹¹ was produced in 2000 which is the bedrock of housing needs assessments and is still in use today by the leading consultancies. The principles are reiterated in the NPPG¹².
- 5.17 The practice guidance was written by leading academics and commissioned by the government to ensure that **consultants and clients had a common approach** to undertaking HNAs and interpreting findings.
- 5.18 Household surveys can underestimate levels of housing need unless data is adjusted for non-responses through a statistical method of weighting or 'grossing up' data-in which case error margins should be stated.

¹¹ Housing Need Assessments: A Guide to Good Practice (DETR) 2000.

¹² NPPG 2019 affordable housing paras 020 to 024

Topic based survey findings

- 5.19 It would be impossible to comprehensively report on survey findings as around 50 questions were asked, covering around 450 variables. A variable is an answer given to a specific question from a list of possible answers. Only a limited number of crosstabulations of data variables were undertaken. Each crosstabulation used in this report is explained at the point that it is used.
- 5.20 A simple example of a crosstabulation is as follows. A survey of 50 people was undertaken. Each respondent was asked to state their gender and were asked other questions, in this example, how many pets they owned, if any, and what sort of pet they owned (cat, dog etc). From this information you can simply state the number of pets that were owned in total by adding up the answers. However by using a *crosstabulation* of the data you can find out the answer to more questions such as do more men than women own pets? do more men than women own dogs? etc.
- 5.21 We now report key findings on a topic by topic basis based upon questions used in the questionnaire.
- 5.22 Throughout this section, we focus on two different respondent (household) groups. The first group is all respondents, regardless of where they report to currently live within the HD9 1 area. The second group focuses solely on those that currently live in the Scholes BUA.
- 5.23 As the flyers were dispatched to such a large area (HD9 1), questions at the beginning of the survey identified if the respondent was local to the specific study area, and if not, what local connection they have to the area (i.e. work in the area/have close family or friends in the area etc.). Responses to the household survey where respondents stated they did not live in the area and could not demonstrate a connection to the local area were excluded from the analysis.

Respondent views on amenities, traffic and commuting

- 5.24 At the start of the questionnaire, respondents were asked several questions regarding the amenities respondents feel should be prioritised, housing and household types that should be prioritised, in addition to working from home/commuting patterns and speed limits. In this section, these questions will be taken in turn and reviewed.
- 5.25 Readers should bear the following in mind when interpreting the data in tables 5.1 to 5.5. Not all respondents answered all parts of each question therefore the totals vary row by row. A high percentage of votes cast for a priority should be given more weight if the number of responses is high.
- 5.26 The first question respondents were asked was 'The following amenities are suggestions for improvements within the HD9 1 area. Please tick the level of priority you consider each to have'. Answers given by residents are provided in table 4.1, displayed as both numbers and percentages, with the percentages being calculated row by row due to not every respondent assigning importance to each amenity.

Table 5.1 Q10. The following are suggestions for improvements within the HD9 1 area.

	Priority: Number				Priority: %			
	High	Some	None	Total	High	Some	None	Total
More community facilities	23	69	41	133	17.3	51.9	30.8	100
More shops	10	39	84	133	7.5	29.3	63.2	100
Meeting room	4	33	94	131	3.1	25.2	71.8	100
Community space with Broadband for home/remote working	13	37	83	133	9.8	27.8	62.4	100
Faster internet	63	50	20	133	47.4	37.6	15	100
More sports pitches	15	46	70	131	11.5	35.1	53.4	100
Improvements to footpaths and cycle ways within the area	58	58	19	135	43	43	14.1	100
Improved public transport	45	55	36	136	33.1	40.4	26.5	100
Additional off-street parking for the Post Office and shops	41	53	41	135	30.4	39.3	30.4	100
A cash machine	22	50	63	135	16.3	37	46.7	100
A creche	11	30	92	133	8.3	22.6	69.2	100
Improved mobile phone reception	35	50	50	135	25.9	37	37	100
Improved street lighting	19	50	66	135	14.1	37	48.9	100
Community centre or meeting space with cafe facilities	15	47	70	132	11.4	35.6	53	100
Allotments or community gardens	36	50	47	133	27.1	37.6	35.3	100
Health care centre with pharmacy	28	37	70	135	20.7	27.4	51.9	100
On street electric car charging	34	45	55	134	25.4	33.6	41	100
Business units to encourage more local jobs for the area	14	57	63	134	10.4	42.5	47	100

Source: household survey 2021

- 5.27 Looking at table 5.1, it can be assumed that respondents rate improvements to footpaths and cycleways and improved internet as the most important amenities to improve.
- 5.28 Little to no importance is placed on providing more shops, space for remote working, and the provision of a creche.
- 5.29 The next question respondents were asked was 'If new homes were to be built in the future, which types would you consider a priority?'. Table 5.2 presents the responses.

Table 5.2 Q11. If new homes were to be built in the future, which types would you consider a priority?								
	Priority: Number				Priority: %			
	High	Some	None	Total	High	Some	None	Total
Small homes for singles or couples	47	44	44	135	34.8	32.6	32.6	100
Small family homes (2 or 3-bedroom)	51	43	42	136	37.5	31.6	30.9	100
Larger family homes (4 or 5-bedroom)	5	24	106	135	3.7	17.8	78.5	100
Homes that facilitate working from home	20	67	49	136	14.7	49.3	36.0	100
Smaller homes to enable older people to downsize	41	56	39	136	30.1	41.2	28.7	100
Detached houses	7	39	90	136	5.1	28.7	66.2	100
Terraced houses	18	51	67	136	13.2	37.5	49.3	100
Town houses (3-storey)	7	41	88	136	5.1	30.1	64.7	100
Bungalows	19	60	56	135	14.1	44.4	41.5	100
Semi-detached or terraced houses	22	61	51	134	16.4	45.5	38.1	100
Houses with medium sized gardens	19	74	43	136	14.0	54.4	31.6	100
Flats or apartments	3	34	99	136	2.2	25.0	72.8	100
Houses with workspace for small businesses	6	47	81	134	4.5	35.1	60.4	100

Source: household survey 2021

- 5.30 Table 5.2 reveals that respondents believe importance should be placed on small homes for singles or couples, small families, and small homes for older people. Detached, large dwellings and town houses are not considered to be a priority.

5.31 The next question was 'Which household groups should be considered a priority for new build housing, if any, in future?'. Table 5.3 provides the answers below.

Table 5.3 Q12. Which household groups should be considered a priority for new build housing, if any, in future?								
	Priority: Number				Priority: %			
	High	Some	None	Total	High	Some	None	Total
Homes affordable to first time buyers	64	32	39	135	47.4	23.7	28.9	100
Private landlord rentals	0	19	115	134	0.0	14.2	85.8	100
Social landlord rentals for low-income households	30	27	77	134	22.4	20.1	57.5	100
Housing suited to frail elderly or disabled people	32	64	38	134	23.9	47.8	28.4	100
Shared ownership (part buy/part rent)	17	40	77	134	12.7	29.9	57.5	100
'First Home scheme ' (discounted sale for first time buyers)	40	46	49	135	29.6	34.1	36.3	100
Discounted sale if cannot afford market prices	27	42	63	132	20.5	31.8	47.7	100
Those wishing to build their own homes (self-build)	9	46	80	135	6.7	34.1	59.3	100
None of the above	13	14	69	96	13.5	14.6	71.9	100

Source: household survey 2021

5.32 Based on the above, the main priority in terms of household groups very clearly appears to be first time buyers, with no priority placed on private rentals.

5.33 The next series of questions aimed to understand how many people commute to work on a semi-regular/regular basis, and how many people work from home – both before Covid-19 restrictions, and what they expect to do after the Covid-19 restrictions are lifted. Table 5.4 summarises these results.

Table 5.4 Number of workers per household expecting to commute/work from home.							
Number of commuters in household >>>>:	0	1	2	3	4	5	Total commuters
Commute to work prior to Covid 19 restrictions							
One to two (days per week)	60	25	52	9	4	10	100
Three to five (days per week)	43	29	98	18	4	20	169
Expect to commute to work post Covid 19 restrictions							
One to two	69	24	40	9	8	0	81
Three to five	62	30	58	18	8	0	114
Worked from home prior to Covid 19 restrictions							
One to two	82	35	18	0	0	0	53
Three to five	94	19	26	0	0	0	45
Expect to work from home post Covid 19 restrictions							
One to two	84	30	22	0	0	0	52
Three to five	87	27	20	3	0	0	50

Source: household survey 2021

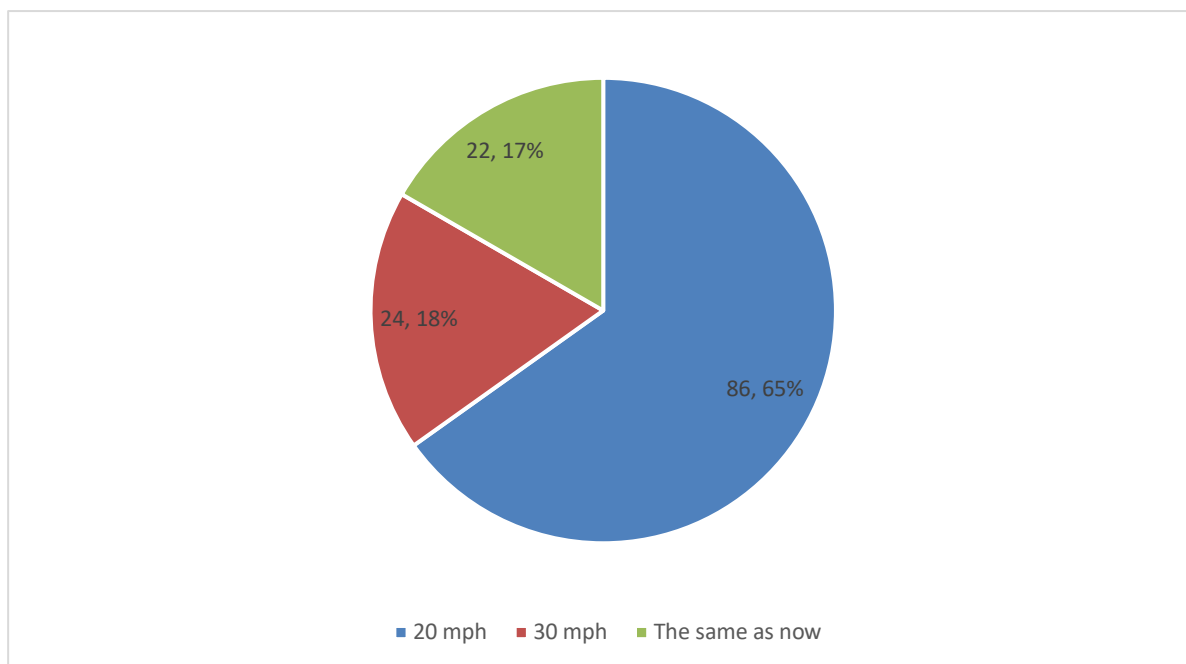
- 5.34 The 'total' column is total number of workers across the households who responded to the question that either work from home or commute to a place of work. There is a decrease in commuting post covid but no corresponding increase in those working from home.
- 5.35 Respondents were also asking about their length of commute, which can be seen in table 5.5. We assumed that a journey of under 15 minutes cannot be classed as a 'commute'.

Table 5.5 Commuter's journey time			
	15-30 minutes	30 minutes-1 hour	Over an hour
Person 1	40	27	40
Person 2	23	13	16
Person 3	2	3	0
Total	65	43	56

Source: household survey 2021

- 5.36 The last question asked respondents if they thought the speed limit should be changed in their village. Responses are presented in Figure 5.1.

Figure 5.1 Respondents preferred speed limits in their village



Source: household survey 2021

- 5.37 It is clear in Figure 5.1 that the majority of respondents believe the speed limit should be changed to 20mph.

The characteristics of moving households

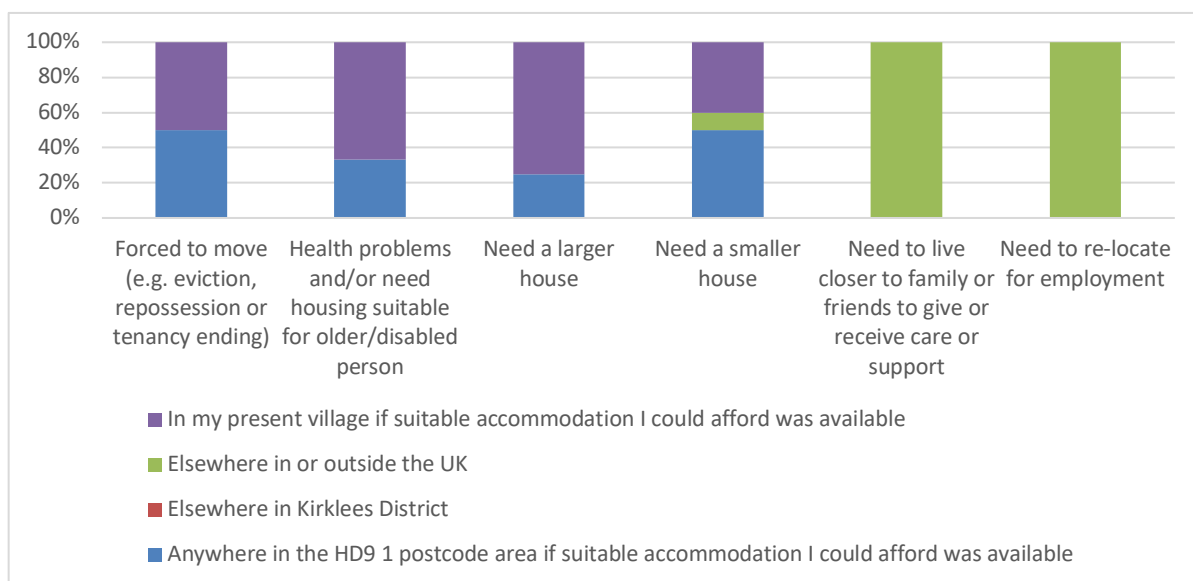
- 5.38 Table 5.6 states the main reason why households need or aspire to move home. The following narrative applies to those living in area HD1 9 as the findings for the BUA are broadly similar. Of the HD1 9 area 32 households told us they plan to move home at some point over the next 5-years. Of these 32 households, when asked '*What is the main reason you want to move home in the next five years*', 21 specified a reason for seeking to move home that shows a need to move, rather than a desire. The factors that describe a need used in the questionnaire were derived from the good practice guidance¹³.
- 5.39 11 respondents then answered the next question '*if none of the above, which of the following would be your main reason to move home*'. These answers are more aspirational – e.g. 'I want a nicer house', although most of these stated 'other'.
- 5.40 The reasons stated are presented in table 5.6.

¹³ Housing Need Assessments: A Guide to Good Practice (DETR) 2000 table 4.2

Table 5.6 Q18 main reason for wanting to move home		
Reason	HD9 1	Scholes BUA
'Need to move' reasons		
Forced to move (e.g. eviction, repossession or tenancy ending)	2	2
Health problems and/or need housing suitable for older/disabled person	3	2
Need a larger house	4	3
Need a smaller house	10	4
Need to live closer to family or friends to give or receive care or support	1	1
Need to re-locate for employment	1	0
Sub total	21	12
'Aspire to move' reasons		
To reduce journey time or distance to work	1	0
Want to live in a nicer house or area	3	3
Other reason	7	3
Sub total	11	6
Grand Total	32	18

Source: household survey 2021

- 5.41 Those wishing to move for aspirational reasons are not considered to be in housing need, so therefore are not included in the remainder of this report.
- 5.42 Not all households that wish to move home wish to remain in the area. Respondents were asked if they would prefer to live within their village, anywhere in HD9 1, elsewhere in the Kirklees district, or elsewhere in or out of the UK. This is an example of a crosstabulation. The information here is based upon households that plan to move, are in some form of housing need, and where they plan to move to.
- 5.43 Regarding area HD1 9, of all the households in housing need that are seeking to move home, 10 households (47.6%) would remain in their current area, 8 (38.1%) would move anywhere in the HD9 1 postcode area, and the remaining 3 (14.3%) would move anywhere in, or outside the UK. For the BUA 12 out of 18 (66%) would seek to remain living in the BUA. For information, the reasons listed in table 5.6 are broken down by where households wish to move to in the following figure. Figure 5.2 shows each reason households are in housing need, with where the households intend to reside shown as a percentage.
- 5.44 The reasons have been abbreviated so that they can be identified clearly and are displayed in the order they are displayed in table 5.6.

Figure 5.2 Reasons households seeking to move home, and where to.

Source: Household survey 2021

- 5.45 This is particularly interesting as it shows what factors are the drivers in why households might be leaving the area. A majority of moving households in housing need wish to remain in the area, and the reasons for moving away are more likely to be due to relocating for work, or needing to live closer to give or receive support than the accommodation being inappropriate in some way.
- 5.46 We will now examine the current accommodation occupied by households moving home in the study area. Those that wish to leave the area are not counted in the requirements for future accommodation. In addition, households wishing to remain in the area but planning to move into a nursing/care home are also not counted in the requirements for future housing accommodation which is why in tables 5.7 and 5.8 the number of households seeking to move home in the BUA falls from 12 to 11.
- 5.47 Table 5.7 summarises the dwellings created by moving households, and illustrates the homes required by those that are in housing need but wish to remain in the area. For the range of dwelling types and number of bedrooms a comparison is made between the households existing and future accommodation. It should be recalled that the majority of movers remaining in the study area wish to right-size (table 5.6).
- 5.48 The evidence suggests for local households there may be a small amount of need for bungalows, and small detached or semi-detached dwellings.

Type	No. of bedrooms	HD9 1 area			Scholes BUA		
		Existing	Future	Difference	Existing	Future	Difference
Bungalow	2	0	4	4	0	2	2
	3	1	1	0	1	1	0
Detached house	3	2	4	2	1	2	1
	4	3	5	2	2	3	1
	5	2	1	-1	0	1	1
Semi-detached house	3	1	2	1	0	1	1
	4	5	0	-5	2	0	-2
Terraced house	2	2	1	-1	2	1	-1
	3	4	0	-4	3	0	-3
	4	1	0	-1	1	0	-1
Total		21	18		12	11	

Source: household survey 2021

- 5.49 It is important to remember that this does not take into account those respondents that do not live locally but wish to move into the area, and newly forming households. Newly forming household are considered in a later section.
- 5.50 Table 5.8 presents survey findings regarding preferred tenure of moving households. For this, we will just look at the tenure of those moving from and remaining in the study area(s). Respondents are asked to state if they are interested in different Affordable Home Ownership (AHO) options, but this is discussed in more detail later on.
- 5.51 Table 5.8 shows a slight shift from private rented sector housing, towards the social rented sector.

	HD9 1			Scholes BUA		
	Existing	New	Difference	Existing	New	Difference
Owner Occupied	13	14	1	9	8	-1
Social Rented	5	2	-3	0	0	0
Private Rented	0	2	2	3	2	-1
Shared Ownership	0	0	0	0	0	0
Total	18	18		12	11	N/A

Source: household survey 2021

The characteristics of newly forming households

- 5.52 Evidence from the household survey suggests 31 people are planning to leave an existing household and find a place of their own over the next 5-years. Of these, 14 (45.2%) plan to remain in the HD9 1 area – and 5 currently reside in the Scholes BUA.
- 5.53 The mean age of these individuals is 32.4, ranging from 18 to 78.
- 5.54 Table 5.9 shows the type of dwelling and number of bedrooms these new households are seeking. The evidence suggests that the bulk of need for newly forming households is 1 to 3-bedroom dwellings.

		HD9 1	Scholes BUA
Type	Number of bedrooms	Quantity	Quantity
Bungalow	3	1	0
Detached house	3	1	0
	4	1	0
Flat	1	1	1
Semi-detached house	2	2	0
	3	1	1
Terraced house	1	1	1
	2	5	2
	3	1	0
	Total	14	5

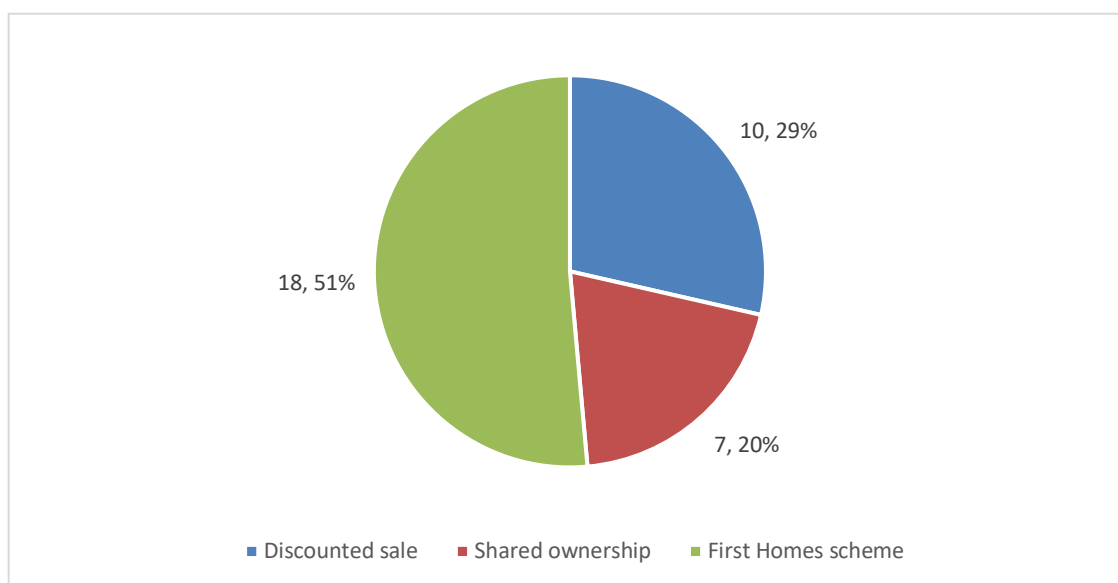
Source: household survey 2021

The level of interest in affordable home ownership

- 5.55 There are a number of affordable home ownership options available. With the Government launching the First Homes scheme, and further options for discounted sale and shared ownership available to households. The new Help to Buy scheme however is not classed as affordable housing by the NPPF. Both First Homes and Help to buy are (now)restricted to first time buyers.
- 5.56 The survey questionnaire asked both existing households that plan to move home, and newly forming households, if they would consider any of these options. Whilst we have already considered tenure for existing households at table 5.8, some households declared they would be interested in these options – even they might not need to rely on them, or they expressed interest in multiple options. Almost all newly forming households stated that they would be interested in affordable home ownership. Figure 5.3. show expressions of interest for affordable home ownership options with a significant amount of interest in the First Home scheme, and shared ownership being

the least popular. Note that this figure is indicative. It adds up all expressions of interest from all households in the sample (existing and newly forming) that plan to move in the next 5-years. Table 5.10 definitively states the number of households that are in housing need and plan to move home within the study area. For those in affordable need, affordable rent and affordable home ownership are disaggregated. Households are counted as needing affordable home ownership if they have responded to q 27 or q 39 that they would *most seriously* consider any type of affordable home ownership and have provided evidence that they could afford to do so.

Figure 5.3 Interest expressed in affordable home ownership options



Source: household survey 2021

- 5.57 In the case of First Homes, we assume that households considered themselves eligible for the scheme as the survey questionnaire was clear about the criteria for it. The evidence certainly suggests firm interest in the First Homes scheme and Shared Ownership.

Summary of current need by tenure and bedrooms required

- 5.58 The following table summarises the five-year housing need for the study area from both existing and newly forming households based solely on the household survey data.
- 5.59 Individual responses have been carefully analysed to ensure that plausible decisions have been made on affordability options. Partially to take into account incomplete answers to some of our questions, and also to ensure that respondents expectations in terms of affordability are realistic. Any assumptions that have been made, are based upon an individual's preference for in affordable housing (affordable rented and homeownership) options commensurate with the income levels they have identified, or what they have told us is affordable to them.

- 5.60 The following data has been derived from crosstabulations of household survey data involving the questions of housing need, intention to move home, whether existing or newly forming household's location of the future home, tenure preferences cross checked with income and savings data.
- 5.61 Table 5.10 shows the number of households that were assessed as requiring and being able to afford either market or affordable housing and the latter has been disaggregated into affordable rented housing and affordable home ownership.

Table 5.10 Summary of the snapshot housing need for HD9 1, and Scholes BUA – tenure required						
Tenure	HD9 1			Scholes BUA		
	Existing households	Newly forming households	Total Households	Existing households	Newly forming households	Total Households
Market sale	12	4	16	7	0	7
Market rent	2	1	3	2	0	2
Affordable rent	2	3	5	0	2	2
Affordable home ownership inc. First Homes and shared ownership	2	6	8	2	3	5
Total	18	14	32	11	5	16

Source: household survey 2021

- 5.62 Bedroom requirements by dwelling type are presented in table 5.11a. Tables 5.11b and c summarise this information. In both Scholes BUA and HD9 1 some 70% of the affordable need is for 1 and 2-bedroom homes. In Scholes BUA 90% of the market need is for 3 and 4-bedroom homes (mostly 3-bedroom). A greater proportion of 2-bedroom market homes are needed in HD9 1 homes and smaller proportion of 3-bedroom homes.

Table 5.11 Summary of the snapshot housing need for HD9 1, and Scholes BUA – dwelling type and bedrooms required

Dwelling Type	No. of bedrooms	HD9 1		Scholes BUA	
		Market no. required	Affordable no. required	Market no. required	Affordable no. required
Bungalow	2	1	3	1	1
	3	1	1	1	0
Detached house	3	4	1	2	0
	4	5	1	2	1
	5	1	0	1	0
Flat	1	0	1	0	1
Semi-detached house	2	2	0	0	1
	3	2	1	1	1
Terraced house	1	0	1	0	1
	2	2	4	0	1
	3	1	0	0	0
Total		19	13	9	7

Source: household survey 2021

Table 5.11b Summary of the snapshot need by bedrooms required (number)

Dwelling Type	HD9 1		Scholes BUA	
	Market no. required	Affordable no. required	Market no. required	Affordable no. required
1-bedroom	0	2	0	2
2-bedroom	6	7	1	3
3-bedroom	8	3	5	1
4-bedroom	5	1	2	1
Total	19	13	8	7

Source: household survey

Dwelling Type	HD9 1		Scholes BUA	
	Market % required	Affordable % required	Market % required	Affordable % required
1-bedroom	0	15	0	29
2-bedroom	32	54	13	43
3-bedroom	42	23	63	14
4-bedroom	26	8	25	14
Total	100	100	100	100

Source: household survey

How accurate is this estimate of need?

- 5.63 Data from the survey cannot be robust if it is not interpreted correctly. There are 2 common misconceptions about interpreting data presented in HNS studies which are addressed if the good practice guidance is followed.
- 5.64 **Firstly, the snapshot of household in need captured by the household survey is not a finite number.** There is a flow of households in need that never stops. This is because the circumstances of people and households are constantly changing. Households will continue to form as children grow up and adults form new relationships. Household needs will change due to factors such as age, birth of children, illness or death of family members, change in economic circumstances. At the same time their current dwelling may fall into disrepair or become unsuitable for their changing needs¹⁴. Our household survey was designed to capture all of these factors affecting households.
- 5.65 Therefore it would be over simplistic and inappropriate to conclude that '*the need is X households*'. We have to employ a model to turn this snapshot of need into an annual rate of flow i.e. '*Y households per annum*'.
- 5.66 **Secondly, future flow of housing supply cannot be accurately predicted** which is why in this report up until table 5.13 we have reported gross need (not taking account of supply).
- 5.67 **Further analysis of the need for affordable housing below, will focus on modelled data using the basic needs assessment model (BNAM) which turns the above snapshot information into annual flows of need and factors in several sources of supply.**

¹⁴ Housing Need Assessments: A Guide to Good Practice (DETR) 2000 table 4.2

Turning snapshot needs data into a flow: the basic needs assessment model (BNAM)

- 5.68 The fundamental concept that sits behind the good practice guidance and the National Planning Practice Guidance (NPPG) 2019¹⁵ is an understanding of how the quantity of housing need should be stated. As alluded to in paragraph 5.65 above, the correct unit of measurement is households per annum, in other words the rate of flow of households in need. The role of the model is to turn snapshots of need from sources such as a housing register or household surveys into annual flows of need. Snapshots are of limited value as they do not reflect a real-world dynamic situation of existing households falling into need as their circumstances change and new households forming as discussed in paragraph 5.64.
- 5.69 The importance of the Basic Needs Assessment Model (BNAM) is that it is the tried and tested method for converting snapshot levels of households in housing need (from household surveys or housing registers) into flows. The concept and the BNAM process has been accepted by innumerable Local Plan inspectors.
- 5.70 The key features of best practice guidance summarised in the NPPG 2019 and incorporated in this HNS are:
- in the assessment of housing need; **no single source of data** should be wholly relied upon (as such multiple sources of data have been considered in this HNS and have been applied);
 - the criteria for a household being regarded as in housing need are defined¹⁶ (and these definitions are adopted in a simplified format in this HNS);
 - household surveys and housing registers take a **snapshot** of the number of households in need at a point in time and these **need to be converted into annual flows** of households (this is done in this HNS);
 - the method for undertaking this conversion is the '**basic needs assessment model**' (BNAM) (the BNAM is used in the HNS and all SHMA and LHNS studies undertaken by arc4 and other leading consultants);
 - **the key output** is the imbalance between annual flow of households in need and flow of supply (not the stock) of affordable housing;
 - Further analysis is needed to disaggregate the key output between the flows affordable rented housing and the affordable home ownership. (The HNS includes this analysis);
 - housing registers can underestimate levels of housing need (the HNS considers this); and

¹⁵ NPPF 2019 affordable housing paras 020 to 024

¹⁶ Housing Need Assessments: A Guide to Good Practice (DETR) 2000 table 4.2

- 5.71 It is a continuous process as household circumstances change as described in paragraph 5.64 above. This continuous process should not be quantified into a finite number such as a count of the number of people on a housing register, it should only be expressed as a rate of flow i.e. households per annum.

Stages of the BNAM

- 5.72 There are 4 main stages to the model:
1. snapshot quantity of existing households in affordable housing need;
 2. snapshot quantity of newly forming households in affordable housing need;
 3. conversion of snapshots of affordable need into annual flows; and
 4. estimation of the flow supply from the existing affordable stock and committed future supply from new build
- 5.73 Because the NPPF 2019 defines several affordable rented and affordable home ownership products we ensure that these are broadly disaggregated at need and supply stages of the model.

Affordable housing need

- 5.74 Snapshots of housing need can be derived from a household survey or the council's housing register. However careful consideration needs to be given to housing register data as its scope is mostly to record existing households in affordable rented need. We need to add in estimates of annual newly forming need and need where households have expressed a preference for affordable home ownership. Only by making these adjustments from the best available data, can we compare findings from different data sources on a like for like basis. Similarly, to compare survey data to housing register and other data on a like for like basis we need to weight the survey data to compensate for non-responses to the survey.
- 5.75 The findings of the **need side** of the model Stages 1,2 and 3 are presented in table 5.12 and 5.13. We compare findings using data from a number of sources in order to comply with the good practice guidance principle that no single source of data should be relied upon:
- household survey snapshot data unweighted;
 - household survey snapshot data weighted;
 - data from applying arc4 national prevalence rates¹⁷.

¹⁷ The prevalence rate method uses proprietary arc4 methodology based upon survey data from strategic studies involving a household survey over the last 5-years representing over 2.5m households when weighted. We have also applied a prevalence rate to estimate the number of newly forming households which is needed to add to housing register data for existing households.

- housing register snapshot data (district level need pro rata); and
- local needs data from the housing register supplied by the council.

5.76 A full description of the BNAM model and the assumptions we have made regarding inputs to the BNAM are contained in the technical appendix at the end of this report.

Table 5.12 Scholes BUA: summary of BNAM stages 1, 2 and 3 to arrive at a comparison of the gross annual affordable need using a number of methods

Model stage	Step	Survey evidence unweighted	Survey evidence weighted	arc4 prevalence rates	Register (district level pro rata)	Register (local resident need)
1	Snapshot quantity of existing households in affordable housing need	2	22	58	72	23
2	Conversion of snapshots of affordable need into annual flows (divide by 5) (households per annum)	0.4	4	12	14	5
3	Quantity of newly forming households in affordable housing need per annum	1	11	11	11	11
4	Uplift to housing register for affordable home ownership need	n/a	n/a	n/a	11	11
5	Total flow of households per annum in affordable need (= rows 2+3+4)	1.4	15	23	37	50

Sources as stated. Rounding errors are present.

5.77 The number 23 on the housing register in the final column was supplied under a freedom of information request. This is the number of households on the register that live in the area. The council qualified that this number might not be accurate. The council could not provide information on those with a connection to the study area but not resident in it, stating that the council defined a local connection as the district.

5.78 We have not used this number in the following table which is the HD9 1 area.

Table 5.13 HD9 1: summary of BNAM stages 1, 2 and 3 to arrive at a comparison of the gross annual affordable need using a number of methods

Model stage	Step	Survey evidence unweighted	Survey evidence weighted	arc4 prevalence rates	Register (district level pro rata)	Register (local need)
1	Snapshot quantity of existing households in affordable housing need	4	62	184	195	N/A at this level
2	Conversion of snapshots of affordable need into annual flows (divide by 5) (households per annum)	0.8	12	37	39	
3	Quantity of newly forming households in affordable housing need per annum	2.8	36	36	36	
4	Uplift to housing register for affordable home ownership need	n/a	n/a		46	
5	Total flow of households per annum in affordable need (= rows 2+3+4)	3.6	56	73	121	

Sources as stated. Rounding errors may be present.

- 5.79 We have carefully considered what flow of affordable need to take forward to stage 4 of the model. We consider that we should only model data for the Scholes BUA. Table 5.12 estimates the flow of affordable need across the comparable columns. However, we consider that they all underestimate local affordable need for different reasons.
- 5.80 Housing registers underestimate need for affordable rented housing as the allocation policy excludes some households in need from joining and others may not wish to join. For example, some will prefer subsidised housing in the private rented sector. Others will not register if they perceive that their need will not be met in a reasonable timescale.
- 5.81 The survey will also underestimate need due to non-responses. This is apparent when comparing those in affordable need according to the survey with prevalence rates. This can be compensated for to some extent by data weighting, but we have applied a relatively low level of weighting. This is fully explained in the technical appendix.
- 5.82 Furthermore, a HNS cannot take account of households with a local connection that live outside the study area. So if we consider that survey data for Scholes BUA is an underestimate for this reason, the fact that housing need numbers are significantly greater for HD9 1 demonstrate that there may be significant numbers of households connected to Scholes that live in HD9 1.

- 5.83 Our pragmatic approach is to take an average of the 3 comparable columns which is 25 households per annum i.e. $(15+23+37)/3=25$ (rounded). This appears in the stage 4 table.

Stage 4 of the model: flow of affordable supply compared to need

- 5.84 Stage 4 of the model assesses **supply side** data and arrives at the net imbalance between supply and demand flows. Arc4 has refined the last stage of the model to distinguish between affordable rented housing and affordable home ownership imbalances.
- 5.85 The last stage of the model deducts the flow of affordable supply from the flow of households in need of affordable housing. The good practice guidance is clear that estimating supply is complex as it varies from year to year and the most reliable data, the CoRe social lettings database is only available at local authority level. It also contains data about first lettings and relets that need to be disaggregated.
- 5.86 We also need to take account of supply from allocated sites and planning applications that have been granted in the last 3-years provided there is evidence that it will be delivered fully or partly within the 5-year horizon of the HNS. Our search of the Council's planning portal revealed no applications for affordable housing or proposals of over 10 dwellings that would require affordable housing to be provided. We are aware that Site HS182 is allocated and it may deliver up to 6 affordable units, however, to the best of our knowledge no planning application has been lodged for this site. We have not taken into account the allocated mixed-use site MSX12 Dobroyd Mills Hepworth (75 homes (1 affordable)) as there are severe doubts that any affordable housing will be delivered over the 5-year life of the HNS. We have seen correspondence suggesting that the contribution of a single affordable unit may take the form of a commuted sum. We are also aware that a much larger housing element is now proposed but this is not yet the subject of a planning application.
- 5.87 Any assumptions that we have used in stage 4 of the model are explained in the technical appendix at the end of this report.
- 5.88 Table 5.14 shows a significant minimum annual shortfall in affordable housing supply of between 17 and 20 dwellings per annum allowing for supply from the allocated site HS182 which may or may not be developed. It has been included in the table as a gesture to show that my client's proposal is needed even if this allocated site is developed or other windfall affordable housing is consented.
- 5.89 The reason for the scale of this flow of unmet need is because most of the need for affordable housing is in the form of affordable home ownership for which there is currently negligible supply locally. A minimum additional 8-dwellings per annum of affordable rented housing is justified.
- 5.90 Table 5.15 shows the impact of my client's proposed scheme assuming it is built and let over 2-years. The table shows a significant shortfall of affordable housing on an annual basis after HS182 and my client's proposal are taken into account.

Table 5.14 Scholes BUA: detailed analysis of the flow of supply and affordable need (average value of BNAM outputs)

	Gross flow of need			Supply flow from vacancies			Supply flow from first lettings and sales			Supply flow from all sources			Imbalance between supply and need		
	Affordable rent	Affordable home ownership	Affordable total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total
Year 1	14	11	25	5	0	5	0	0	0	5	0	5	-9	-11	-20
Year 2	14	11	25	5	0	5	0	0	0	5	0	5	-9	-11	-20
Year 3	14	11	25	5	0	5	1	2	0	6	2	8	-8	-9	-17
Year 4	14	11	25	5	0	5	1	2	0	6	2	8	-8	-9	-17
Year 5	14	11	25	5	0	5	0	0	0	5	0	5	-9	-11	-20

Table 5.15 Scholes BUA: detailed analysis of the flow of supply and affordable need (average value of BNAM outputs) including the 10 affordable units proposed

	Gross flow of need			Supply flow from vacancies			Supply flow from first lettings and sales			Supply flow from all sources			Imbalance between supply and need		
	Affordable rent	Affordable home ownership	Affordable total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total
Year 1	14	11	25	5	0	5	0	0	0	5	0	5	-9	-11	-20
Year 2	14	11	25	5	0	5	5	0	5	10	0	10	-4	-11	-15
Year 3	14	11	25	5	0	5	6	2	0	11	2	13	-3	-9	-12
Year 4	14	11	25	5	0	5	1	2	0	6	2	8	-8	-9	-17
Year 5	14	11	25	5	0	5	0	0	0	5	0	5	-9	-11	-20

Source: Household survey, housing register, CORE lettings data, census 2011.

Notes and Assumptions

In table 5.14 supply from first lettings and sales is assumed to be allocated site HS182 delivering 6 affordable units over 2-years

Table 5.15 includes the 10 affordable rented units proposed by EcoHolmes (construction and letting over 2-years)

Need data is as stated in the BNAM tables 5.9 A and B

A 55%:45% affordable tenure split has been applied to the affordable need total in accordance with the Council's Interim Affordable Housing Policy, January 2020

Rounding errors are present as all data are presented as whole numbers

A negative number in the right 3 columns indicates a shortfall in supply in the year

Further relevant information

The Kirklees SHMA 2016

- 5.91 The following screenshots are the most appropriate comparison with the findings of our HNS. SHMA table 7.7 shows that the Kirklees Rural west area had a gross annual imbalance of 329 households per annum in affordable need, mostly general needs households seeking 1 and 2-bedroom homes.
- 5.92 The gross annual imbalance for the Scholes BUA is 25 households per annum which is 7.6% of the need measured by the SHMA table 7.7. SHMA table 4.1 (not presented here) states that there were 31,129 households in the Rural West area so Scholes BUA has approximately 3.1% of the sub area households (963/31,129). If we multiply the sub area affordable need (329) by 3.1% we arrive at a pro-rata annual flow of affordable need of 10.2 households per annum which is 41% of the affordable need measured by the HNS.
- 5.93 The difference can be easily explained. Small areas such as the Scholes BUA are imbalanced. Chapter 3 of the HNS clearly shows that there is an imbalance between housing and household characteristics and a predominance of certain types of housing stock. This is summarised as (in paras 3.21 and 3.22) *“The key features of the housing stock is, when compared to wider geographies, the predominance of detached dwellings and terraced dwellings, and a lower proportion of flats. Although the majority of dwellings, similar to the wider geographies, had 3-bedrooms, there was a slightly higher proportion of 4 or more-bedroom dwellings compared to the wider geographies. In the Scholes BUA, there was a large proportion of owned outright dwellings and social rented dwellings. The predominant household composition was ‘married without children’ who were aged under 65 years.”* And *“The population projections for the district reveals an aging population set to increase significantly over the coming years.”*
- 5.94 The imbalance is less acute in the Kirklees sub areas and the district as a whole because the stock is more diverse and greater in number. In these larger areas supply from churn and new build will meet a higher proportion of the local need therefore a smaller proportion of households will be in need.
- 5.95 Further the characteristics of the affordable stock as at the census 2011 is noteworthy. Table A2.5 in the appendix shows that 75% of the affordable stock is 3-bedroom houses whereas 75% of the need is for 1 and 2-bedroom affordable housing. Additionally, when we take account the implications of the choice based lettings system (anyone on the register can bid for Scholes BUA vacancies, very few local people will benefit from the available supply even it met their requirements.
- 5.96 This is why my client’s proposal is exceptional. It is the only source of new supply that will contribute to local need and ensure that new build and future vacancies prioritise local people.

Table 7.7 Gross annual affordable housing imbalance by sub-area, property size and designation 2014/15 to 2018/19

Sub-area	General Needs		Older Person	Total
	1/2 Bed	3+ Bed	1/2 Bed	
Batley and Spennings	389	258	51	698
Dewsbury and Mirfield	180	213	11	404
Huddersfield North	261	153	1	415
Huddersfield South	299	179	46	525
Kirklees Rural - East	114	17	9	140
Kirklees Rural - West	276	7	46	329
Total	1519	827	164	2,511

Sources: 2015 Household Survey; RP CORE Lettings and Sales

Note: Numbers may not sum correctly due to rounding

- 5.97 SHMA table 7.9 shows that the district wide preference was around 45% of household in need seeking intermediate affordable housing which would include affordable home ownership. The preference for this was higher from newly forming households at 52% which is consistent with our survey findings.

Table 7.9 Tenure preferences of existing households in need and newly-forming households requiring affordable housing

Tenure	Existing households in need (%)	Newly-forming households (%)	Total (%)
Social/Affordable Rented	61.6	48.1	55.1
Intermediate	38.4	51.9	44.9
Total	100	100	100
<i>Base (annual requirement)</i>	<i>1302</i>	<i>1,209</i>	<i>2,511</i>

Source: 2015 Household Survey

Implications of the unmet need for affordable housing

- 5.98 The scale of unmet need matters as local households in need undercounted by a survey will endure hardship. If the *flow* of affordable need is not met the options facing households are:
- to leave the area in order to find suitable housing they can afford; or
 - to stay put and endure unsuitable housing; or
 - in the case of newly forming households, do not form or continue to share housing.
- 5.99 We have noted that many households told us they plan to leave the area to find suitable housing they can afford. However in reality many will also turn to the private rented sector.

- 5.100 The Survey of English Housing 2020 provides relevant information in respect to the role of the tenures. Annexe Table 1.23 shows the tenure that the sample of new households achieved in 2020 across England, subject to rounding errors:
- Owner occupation 30.2%
 - Social rent 19.4%
 - Private rent 50.1%
- 5.101 It is clear that most new households rely upon rented housing whether market or social rent. Private rented sector housing often ‘takes the strain’ where affordable supply is inadequate, or households are unable to afford local house prices. The HNS demonstrates that the private rented sector cannot fulfil this role due to the small size of the stock and the stock of affordable housing is insufficient to meet the established level of need.
- 5.102 HNS Table A2.1 shows that the proportion of private rented homes in the study area (10%) was a lower proportion of the stock compared to the district and England as a whole. HNS table A2.3 shows that one quarter of the private rented sector stock consists of detached and semi-detached housing. A.2.5 shows that around 40% of the units are 3 or more-bedroom homes. Accordingly, the private rented sector stock will generate relatively few vacancies many of which would not be suitable entry level housing for new households and are likely to cost more than the local housing allowance rates.
- 5.103 The implications of the above is that private rented housing is of such scale as not to present a feasible option for many households unable to meet their needs through home ownership. The current supply of affordable home ownership is small compared to other tenures. These households have little choice but to find suitable housing they can afford outside the study area.

6. Key findings and Conclusions

- 6.1 Our aim is to demonstrate that the scale of unmet affordable housing need in the local area is such that planning consent for a rural exceptions site can be justified. In line with the government's good practice guidance, we draw on many sources of evidence.
- 6.2 Chapter 2 sets the context for this HNS by referencing the National Planning Policy Framework (NPPF) in particular, the current definition of affordable housing. Reference is also made to the importance the government attaches to development enabling mixed communities to retaining a wide range of households and achieve a mix of housing size type and tenure.
- 6.3 Chapters 3 and 4 demonstrate that in many respects the study area cannot be regarded as mixed and balanced when compared to district and national profiles. As at census day 2011, the predominant house type was the owner occupied, 3 or 4 or more-bedroom detached house. Compared to the district and England there are smaller proportions of semi-detached houses and flats. The predominant household composition was 'married without children' who were aged under 65 years.
- 6.4 District level population projections the proportion of the population aged 65 and over is likely to grow significantly over the next few years.
- 6.5 There is a limited amount of private rented dwellings. This factor, coupled with the gap between average prices of 3 and 4-bedroom homes being large will challenge many younger households and growing families to be able to afford to upsize within the study area.
- 6.6 Chapter 4 also demonstrates that much of the housing supply through vacancies consists of 3 or more-bedroom dwellings, and there is potentially little supply of flats and 1-bedroom dwellings. Unless this is addressed through new-build housing, the area will not be able to retain its younger or older population.
- 6.7 In chapter 5, we show that the snapshot of affordable need measured by the household survey was 13 households in HD9 1 and 7 households in the Scholes BUA.
- 6.8 When weighted for non-responses and annualised, this becomes 56 and 15 households per annum respectively.
- 6.9 This is compared to other sources of data including the housing register and if an average of all measures is taken, we conclude that the need is 83 and 25 households per annum respectively. A key finding is that the annual gross flow of households in affordable need is 25 households per annum. Supply from vacancies, first lettings and sales from committed future development is projected forward to arrive at an estimate of the amount of supply to deduct from the above gross need. The net requirement for additional affordable housing is between 17 and 20 dwellings per annum allowing for supply from the allocated site HS182 which may or may not be developed.
- 6.10 Our key finding is that my client's proposal for 10 affordable dwellings is justified. The scale of unmet need in the Scholes BUA would justify a rural exception. Because of mismatches between affordable housing supply or 'churn' and the impact of choice-based lettings system, my client's proposed scheme is the only source of new supply

that will contribute to local need and ensure that new build and future vacancies prioritise local people.

- 6.11 In both Scholes BUA and HD9 1 some 70% of the affordable need is for 1 and 2-bedroom homes. In Scholes BUA 90% of the market need is for 3 and 4-bedroom homes (mostly 3-bedroom). A greater proportion of 2-bedroom market homes are needed in HD9 1 homes and smaller proportion of 3-bedroom homes.

7. Data appendix

7.1 These tables provide the data to support figures 2.1 to 2.6. The source is census 2011 except for the population projections which are published by ONS.

	Scholes BUA		HD9 1		Kirklees		England	
Owned outright	422	43.8	1,268	41.3	55,569	32.0	6,745,584	30.6
Owned (mortgage)	385	40.0	1,191	38.8	60,792	35.0	7,229,440	32.8
Shared ownership	2	0.2	5	0.2	612	0.4	173,760	0.8
Rented from council	51	5.3	217	7.1	20,886	12.0	2,079,778	9.4
Other social rented	3	0.3	29	0.9	5,639	3.2	1,823,772	8.3
Private rented	96	10.0	335	10.9	26,941	15.5	3,715,924	16.8
Living rent free	4	0.4	26	0.8	3,086	1.8	295,110	1.3
Total	963	100	3,071	100	173,525	100.0	22,063,368	100

	Scholes BUA		HD9 1		Kirklees		England	
	Number	%	Number	%	Number	%	Number	%
Detached	361	37.5	1,016	33.1	35,906	20.7	4,949,216	22.4
Semi-detached	242	25.1	809	26.3	57,824	33.3	6,889,935	31.2
Terraced	325	33.7	1,092	35.6	57,911	33.4	5,396,459	24.5
Flat etc.	35	3.6	151	4.9	21,232	12.2	4,668,839	21.2
Caravan etc.	0	0.0	3	0.1	177	0.1	80,964	0.4
Shared dwelling	0	0.0	0	0.0	475	0.3	77,955	0.4
Total	963	100	3,071	100	173,525	100.0	22,063,368	100

	Owned outright		Owned (mortgage)		Social rented		Private rented etc.		Totals	
	Number	%	Number	%	Number	%	Number	%	Number	%
Detached	205	21	147	15	2	0	7	1	361	37
Semi-detached	105	11	82	9	36	4	19	2	242	25
Terraced	102	11	147	15	15	2	61	6	325	34
Flat etc.	10	1	11	1	1	0	13	1	35	4
Totals	422	44	387	40	54	6	100	10	963	100

	Scholes BUA		HD9 1		Kirklees		England	
	No.	%	No.	%	No.	%	No.	%
No bedrooms	1	0.1	2	0.1	432	0.2	54,938	0.2
1-bedroom	48	5.0	195	6.3	21,036	12.1	2,593,893	11.8
2-bedroom	228	23.7	721	23.5	52,440	30.2	6,145,083	27.9
3-bedroom	383	39.8	1,324	43.1	68,889	39.7	9,088,213	41.2
4-bedroom	236	24.5	645	21.0	23,954	13.8	3,166,531	14.4
5 or more-bedroom	67	7.0	184	6.0	6,774	3.9	1,014,710	4.6
Total	963	100	3,071	100	173,525	100.0	22,063,368	100

	Owned outright		Owned (mortgage)		Social rented		Private rented etc.		Totals	
	Number	%	Number	%	Number	%	Number	%	Number	%
1-bedroom	16	2	13	1	4	0	16	2	49	5
2-bedroom	98	10	81	8	5	1	44	5	228	24
3-bedroom	178	18	132	14	42	4	31	3	383	40
4 or more-bedroom	130	13	161	17	3	0	9	1	303	31
All categories	422	44	387	40	54	6	100	10	963	100

	Scholes BUA		HD9 1		Kirklees		England	
	No.	%	No.	%	No.	%	No.	%
One person aged 65 & over	87	9.0	322	10.5	20,412	11.8	2,725,596	12.4
One person other	126	13.1	481	15.7	32,141	18.5	3,940,897	17.9
Family all aged 65 and over	102	10.6	276	9.0	13,326	7.7	1,789,465	8.1
Married couple no children	181	18.8	510	16.6	22,164	12.8	2,691,927	12.2
Married couple 1 dep. child	65	6.7	203	6.6	10,099	5.8	1,285,267	5.8
Married couple 2 or more dep. children	106	11.0	342	11.1	17,942	10.3	2,087,738	9.5
Married couple all children non-dep	60	6.2	187	6.1	9,659	5.6	1,233,748	5.6
Same-sex Civil Partnership couple	1	0.1	3	0.1	221	0.1	30,775	0.1
Cohabiting couple no children	63	6.5	196	6.4	9,319	5.4	1,173,172	5.3
Cohabiting couple 1 dep. Child	22	2.3	64	2.1	3,944	2.3	438,750	2.0
Cohabiting couple 2 or more dep. children	29	3.0	88	2.9	3,851	2.2	452,030	2.0
Cohabiting couple all children non-dep	5	0.5	18	0.6	1,001	0.6	108,486	0.5
Lone parent 1 dep child	36	3.7	91	3.0	7,196	4.1	883,356	4.0

Lone parent 2 or more dep. children	22	2.3	83	2.7	5,397	3.1	689,899	3.1
Lone parent all children non-dep.	25	2.6	103	3.4	5,503	3.2	766,569	3.5
Other with one dependent child	7	0.7	24	0.8	2,263	1.3	290,816	1.3
Other with two 2 or more dependent children	6	0.6	17	0.6	2,812	1.6	293,200	1.3
Other household types; all full-time students	1	0.1	1	0.0	702	0.4	124,285	0.6
Other; all aged 65 and over	2	0.2	9	0.3	323	0.2	61,715	0.3
Other household types	17	1.8	53	1.7	5,250	3.0	995,677	4.5
All households	963	100	3,071	100	173,525	100.0	22,063,368	100

Projected Year	Aged 0 to 15	Aged 16 to 24	Aged 25 to 49	Aged 50 to 64	Aged 65+	All Ages
2018	89,819	48,031	142,260	81,769	76,848	438,727
2019	90,042	47,414	141,638	83,211	78,032	440,338
2020	90,178	47,155	140,811	84,626	79,000	441,772
2021	90,101	46,835	140,077	86,036	80,042	443,088
2022	89,828	46,818	139,437	86,952	81,322	444,356
2023	89,480	47,105	139,053	87,205	82,696	445,538
2024	88,887	47,591	138,941	87,192	84,025	446,636
2025	88,290	48,226	138,873	86,795	85,489	447,671
2026	87,729	48,886	138,782	86,363	86,919	448,678
2027	86,844	49,945	138,790	85,568	88,500	449,643
2028	86,028	50,877	138,704	84,834	90,131	450,575
2029	85,293	51,629	138,341	84,392	91,828	451,481
2030	84,672	52,148	137,959	84,125	93,435	452,340
2031	84,099	52,453	137,777	83,810	95,053	453,194
2032	83,592	52,669	137,641	83,483	96,649	454,035
2033	83,150	52,675	137,710	83,069	98,270	454,870
2034	82,998	52,438	137,836	82,585	99,854	455,710
2035	83,085	51,965	137,927	82,250	101,329	456,556
2036	83,213	51,337	138,225	81,741	102,888	457,405
2037	83,434	50,635	138,642	81,406	104,168	458,286
2038	83,742	50,008	138,733	81,724	104,995	459,204
2039	84,129	49,443	138,910	82,115	105,554	460,152
2040	84,558	48,910	138,850	82,901	105,915	461,132
2041	85,020	48,374	138,675	83,847	106,230	462,146

2042	85,509	47,936	138,595	84,772	106,378	463,193
2043	86,015	47,690	138,495	85,411	106,647	464,258
Change (No)	-3,804	-341	-3,765	3,642	29,799	25,531
Change (%)	-4.2%	-0.7%	-2.6%	4.5%	38.8%	5.8%

Source: Nomis

8. Survey Questionnaire

8.1 The questionnaire used is presented below.



The Occupier

Reference number:

(Please quote the number supplied on the leaflet sent to you recently)

Housing survey of the HD9 1 postcode area on behalf of the EcoHolmes Community Land Trust

Dear resident

We have supplied a paper copy of the survey and prepaid return envelope at your request:

- please complete the attached questionnaire and use the return envelope;
- to be included, your responses must be back with us by **12th July 2021**

Answers to some frequently asked questions appear below, but if you have any other questions or comments, please do not hesitate to contact us on freephone 0800 612 9133

Selected Frequently Asked Questions

Can someone that lives outside the HD9 1 postcode area take the survey?

Yes, using the online survey only if they have a connection to the area (e.g. work in the village, have parents or children that live in the village; were former residents).

Why has arc4 been commissioned to conduct the survey?

arc4 has considerable experience of undertaking such surveys for neighbourhood development plans and parish councils. arc4 is completely independent, ensuring the report will be totally unbiased.

Will my personal data be shared in any way?

arc4 guarantees your privacy and security of the data. arc4 will not pass your data on to anyone. arc4 is registered with the Information Controller's Office (reg no. Z992934X) and complies fully with data protection legislation and GDPR. All information from respondents will be anonymised, combined and summarised in a statistical report which is all the steering committee will see.

Where can I get help with the survey?

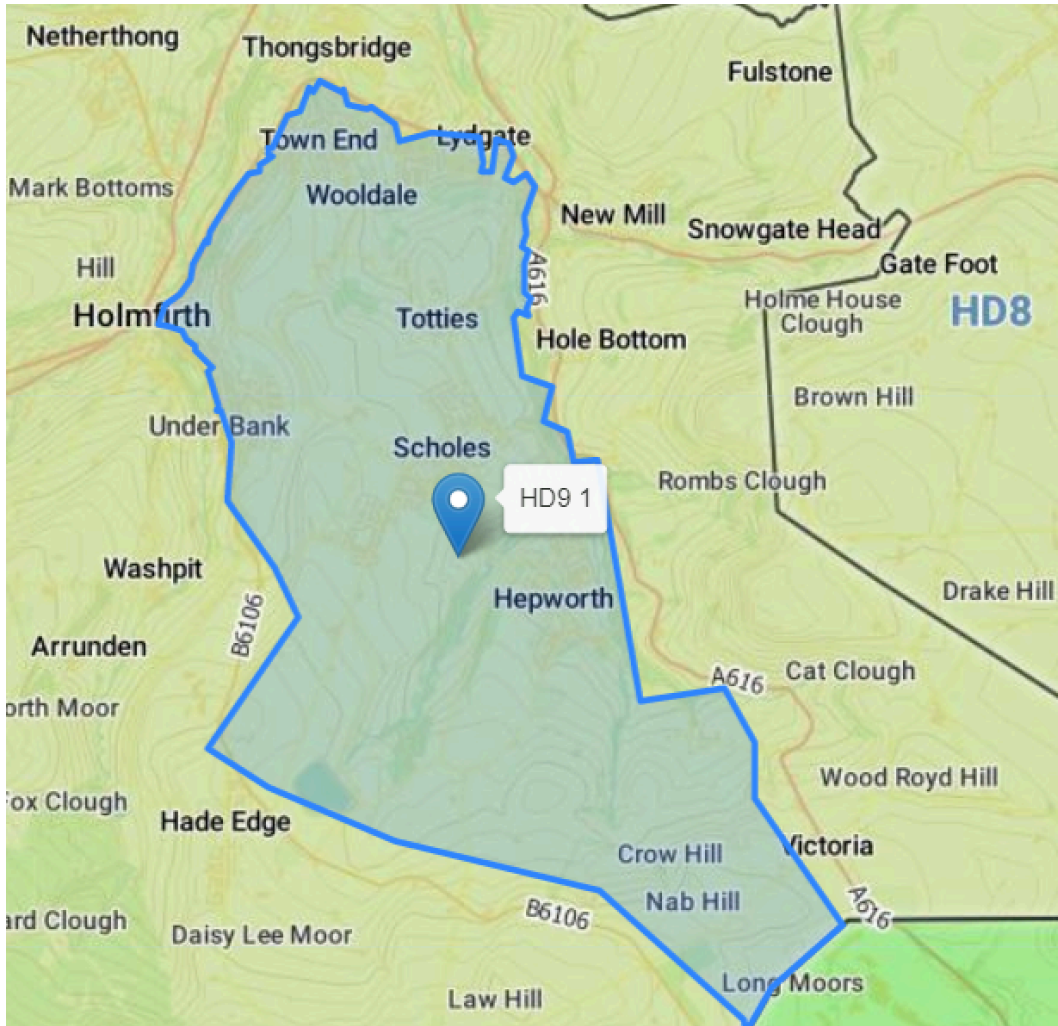
arc4 has further help and information about privacy on its website:

<https://www.arc4.co.uk/household-surveys-faq-and-privacy-information>

arc4 has a helpline – freephone 0800 612 9133

Questionnaire Part 1: About your current home and household and your views on future housebuilding:

The following map shows the HD9 1 postcode area within the solid line



1. Which of the following locations do you consider best describes the area in which you currently live? Please tick one box							
Town End	<input type="checkbox"/>	Wooldale)	<input type="checkbox"/>	Totties	<input type="checkbox"/>	Under Bank	<input type="checkbox"/>
Scholes	<input type="checkbox"/>	Hepworth	<input type="checkbox"/>	Crow Hill	<input type="checkbox"/>	Nab Hill	<input type="checkbox"/>
None of these locations			<input type="checkbox"/>				

2. If in question 1 you have replied 'none of these locations', please provide further information. Otherwise please go to Q.3		
What is the full postcode of where you live currently?	<input type="text"/>	
Do any of the following circumstances apply to you or any member of your household?	Tick if applies	Please state which village

Formerly lived in any of the HD9 1 villages		
Currently work in any of the HD9 1 villages		
Have close family members living in any of the HD9 1 villages		

It is important that we understand the housing needs of both local residents and households not resident in the area that have a connection as defined in question 2. If you know of anyone that has a connection to and is seeking to relocate to the HD9 1 villages, please encourage them to complete the questionnaire online using the above link or QR code.

3. Please tell us how long your household has lived in your present home? Please tick one box

All my life		More than 2-years		Less than 2-years	
-------------	--	-------------------	--	-------------------	--

4. If your household moved to your current home less than 5-years ago, please tick all statements that apply:

We moved here from another address in one of the HD9 1 villages		We moved here from outside the HD9 1 area	
This is our household's first home together		Some or all members of our household previously lived in the HD9 1 area	

5. Please circle how many people currently live in your household in each age group

Children aged 0-15	1	2	3	4	5
Young adults aged 16 to 24	1	2	3	4	5
Adults aged 25 to 49	1	2	3	4	5
Adults aged 50 to 64	1	2	3	4	5
Adults aged 65 to 74	1	2	3	4	5
Adults aged 75 and over	1	2	3	4	5

6. Tick if at least one of the persons that heads this household is aged 65 or over

--	--

7. How would you describe your current home? Please tick one box

Detached house		Studio or bedsit flat	
Semi-detached house		Bungalow	
Terraced house		Caravan or mobile home	
Flat or maisonette		A room in someone's house	

8. How many bedrooms do you have in your current home? State '0' if bedsit/studio

--	--

9. How would you describe the tenure of your current home? Please tick one box

--	--

Owner occupier (outright or with a mortgage or loan)		Rented from the council or a housing association	
Rented privately (private tenancy, tied with employment or living rent free)		Shared ownership, shared equity or discounted home ownership	

10. The following amenities are suggestions for improvements within the HD9 1 area. Please tick the level of priority you consider each to have. (Please tick level of priority for each row)

Amenity	Low priority ✓	Medium priority ✓	High priority ✓
More community facilities			
More shops			
Meeting room			
Community space with Broadband for home/remote working			
Faster internet			
More sports pitches			
Improvements to footpaths and cycle ways within the area			
Improved public transport			
Additional off-street parking for the Post Office and shops			
A cash machine			
A crèche			
Improved mobile phone reception			
Improved street lighting			
Community centre or meeting space with cafe facilities			
Allotments or community gardens			
Health care centre with pharmacy			
On street electric car charging			
Business units to encourage more local jobs for the area			

11. If new homes were to be built in the future, which types would you consider a priority? (Please tick level of priority for each row)

Description		No priority ✓	Some priority ✓	High priority ✓
1	Small homes for singles or couples			
2	Small family homes (2 or 3-bedroom)			
3	Larger family homes (4 or 5-bedroom)			
4	Homes that facilitate working from home			
5	Smaller homes to enable older people to downsize			
6	Detached houses			
7	Terraced houses			
8	Town houses (3-storey)			
9	Bungalows			
10	Semi-detached or terraced houses			
11	Houses with medium sized gardens			
12	Flats or apartments			
13	Houses with workspace for small businesses			

12. Which household groups should be considered a priority for new build housing if any, in future? (Please tick level of priority for each row)

	Description	No priority ✓	Some priority ✓	High priority ✓
1	Homes affordable to first time buyers			
2	Private landlord rentals			
3	Social landlord rentals for low-income households			
4	Housing suited to frail elderly or disabled people			
5	Shared ownership (part buy/part rent)			
6	'First Homes scheme' (discounted sale for first time buyers)			
7	Discounted sale if cannot afford market prices			
8	Those wishing to build their own homes (self-build)			
9	Other groups – please state:			

The following questions relate to commuting and traffic levels in the area

13. Please circle how many members of your household commuted to work prior to the Covid 19 restrictions

One or two days a week	0	1	2	3	4	5
Three to five days per week	0	1	2	3	4	5

14. Please circle how many members of your household expect to commute to work once Covid 19 restrictions are lifted?

One or two days a week	0	1	2	3	4	5
Three to five days per week	0	1	2	3	4	5

15. Please circle how many members of your household worked from home prior to the Covid 19 restrictions

One or two days a week	0	1	2	3	4	5
Three to five days per week	0	1	2	3	4	5

16. Please circle how many members of your household work from home once Covid 19 restrictions are lifted?

One or two days a week	0	1	2	3	4	5
Three to five days per week	0	1	2	3	4	5

17. If members of your household commute to work, how long is their total commuting journey time each way? (Please tick one box per row)

Person:	1	2	3	4	5
Under 15 minutes					
15 minutes to 30 minutes					
30 minutes to 1 hour					
Over 1 hour					

18. If members of your household commute to work, which mode of transport do they use for most of the journey each way? (Please tick one box per row)

Person	1	2	3	4	5
Car					
Car sharing					
Bus					
Train or tram					
Cycle					
A combination of modes					

19. What do you think the speed limit in your village should be? (Please tick one box only)

The same as now	
20 mph	
30 mph	
40 mph	

Part 2: Future house moves involving your entire household

Please complete this section if your entire household plans to move home in the next 5-years

20. Does your entire household plan to move in the next 5-years leaving a vacant house for sale or rent? *(Please tick one box and continue from question as directed)*

Yes		<i>Please continue from Q21</i>
No		<i>Please continue from part 3</i>
I/We would like or need to move but are unable to		<i>Please continue from Q21</i>

21. Where would you ideally like to move to? *(Please tick one box)*

In my present village if suitable accommodation I could afford was available	
Anywhere in the HD9 1 postcode area if suitable accommodation I could afford was available	
Elsewhere in Kirklees District	
Elsewhere in or outside the UK	

22. What is the main reason you are planning to move home within the next 5-years? *(Please tick one box only)*

Need a smaller house	
Need a larger house	
Need more space or an additional room specifically to work from home	
Cannot afford rent or mortgage payments	
Health problems and/or need housing suitable for older/disabled person	
Current house is in severe disrepair	
Need to live closer to shops or doctors or other services	
Need to live closer to family or friends to give or receive care or support	
Living in temporary accommodation and need permanent accommodation	
Need to re-locate for employment	
Forced to move (e.g. eviction, repossession or tenancy ending)	
Suffering harassment, threat of harassment, crime or domestic abuse	
Current house is overcrowded	
Claiming housing benefit and have to move due to the 'bedroom tax'	
None of the above	

23. If none of the above apply, which of the following would be the main reason for you moving home? (Please tick one box only)	
Want to live in a nicer house or area	
Would like to live closer to family or friends	
To reduce journey time or distance to work	
Would like to be in a particular school catchment area	
Would like off street parking or a garage	
Other reason	

24. What type of dwelling would your next home be? (Please tick one box)			
Detached house		Bungalow	
Semi-detached house		Terraced house	
Flat including bedsit or studio		Plan to live in a nursing or care home	
Ground floor, level access dwelling		Caravan or mobile home	

25. How many bedrooms would your next home need to have? (state '0' if a studio or bedsit)	

26. What tenure would your new home be? (Please tick one box)	
Owner occupied (outright or with a mortgage or loan)	
Rented privately (private tenancy, tied with employment or living rent free)	
Rented from a council or housing association	

27. If you wish to become a home owner but cannot afford local house prices, which option would you most seriously consider? (Please tick one box)	
Discounted sale (20-30% discount off market price but also applies to re-sales)	
The new 'First Homes' Scheme (30% discount - first time buyers only)	
Shared ownership (part owned part rented with a housing association)	

28. What amount could you afford to pay for your housing costs? (Please fill in the corresponding box <u>or</u> tick one of the last two options)	
House purchase - purchase price	£
House purchase - deposit amount	£
Private rental - monthly cost	£

None of the above - I could only afford a social rent		None of the above - I could only afford to rent if I claimed housing benefit	
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29. What is the gross annual income of yourself and any partner? * £

* You do not need to answer this question, but the information would help us to estimate house prices and rents of any housing that might be built, to be affordable to local households.

30. Support needs for any member your household(s)? (Please tick any that apply)

Personal care or support will be needed	
Adaptations will be needed in the home (e.g. ramp, stairlift, bathroom adaptations)	
The dwelling must be suitable for wheelchair use	

Part 3: People likely to leave your household

This may be a child, partner, parent friend or lodger moving permanently away from your home in the next 5-years. If there are more than 2 people, please record their details on the online version. **Do not include** people that plan to leave temporarily, or form student households.

31. Do any members of your household plan to move home permanently in the next 5-years?

Please tick one box and continue from question as listed

Yes		Please continue from Q32
They want to move home but are unable to		Please continue from Q32
No		The survey is complete. Thank you.

32. How would you describe the new household?

	New household 1	New household 2
Single person household		
Couple, without children		
Single parent or couple with children		
AND what is the age of the oldest person in the new household?		

33. Will the new household seek a place of their own or move in with someone?

	Household 1	Household 2
He/she will live alone or live with someone who is also seeking a place of their own (if this option is selected, please go to question 34)		

He/she will move in with someone who <i>already has a place of their own. If this option is selected, please do not complete further questions for this household.</i>		
He/she is planning to live in a care home or nursing home. <i>If this option is selected, please do not complete further questions for this household.</i>		

34. Where would the new household(s) ideally like to move home to? Please tick one box per household

	Household 1	Household 2
In their present village of residence if suitable housing they could afford is available		
Anywhere in postcode area HD9 1 if suitable housing they could afford is available		
Elsewhere in Kirklees district		
Elsewhere in or outside the UK		

35. How many bedrooms would their new home need to have? ('0' if a bedsit)

	Household 1	Household 2

36. What type of accommodation would their next home be? Please tick one box per household

	Household 1	Household 2
Detached house		
Semi-detached house		
Terraced house		
Flat		
Bungalow		
Age restricted housing for older people		
Nursing or care home		

37. What tenure would they like their new home to be? Please tick one box per household

	Household 1	Household 2
Home owner		
Rented privately (from a private landlord or employer)		
Rented from a council or housing association		

Renting a room in a shared house, or as a lodger		
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38. Have they registered for an affordable tenancy with the council? (Please tick if yes)	Household 1	Household 2

39. If they wish to become a home owner, but cannot afford local prices, which of the following options would they most seriously consider? Please tick one box per household		
	Household 1	Household 2
Shared ownership with a housing association		
Discounted sale (20-30% discount off market price)		
The new 'First Homes' scheme (30% discount for first time buyers only)		

40. What amount could they afford to pay for their housing costs? Please fill in the corresponding box or tick one of the last two options for each household		
	Household 1	Household 2
House purchase – purchase price:	£	£
House purchase – deposit amount:	£	£
Private rental – monthly cost:	£	£
They could only afford a social rent		
They would need to claim housing benefit		

41. Estimated household income*		
	Household 1	Household 2
What is their estimated annual gross income?	£	£

* You do not need to answer this question, but the information would help us to estimate house prices and rents of any housing that might be built, to be affordable to local households.

42. Support needs of any member of the new household(s)? Please tick any that apply		
	Household 1	Household 2
Care or support in the new home would be needed		
Adaptations would be needed (e.g. for access, stairlift, bathroom)		
The dwelling must be suitable for wheelchair use		

Thank you for completing this questionnaire. Please return it in the envelope provided.

9. Technical Appendix: explanation of key assumptions made in the BNAM.

Gross affordable need.

9.1 The findings of the **need side** of the BNAM model, Stages 1,2 and 3 are presented in table 5.12 (BUA) and 5.13 (HD1). We compare findings using data from a number of sources:

- household survey snapshot data unweighted;
- household survey snapshot data weighted;
- data from applying arc4 national prevalence rates¹⁸.
- housing register snapshot data (district level need pro rata); and
- local needs data from the housing register supplied by the council.

9.2 The following tables are the summary tables presented in the report.

Table 5.12 (COPY) Scholes BUA: summary of BNAM stages 1, 2 and 3 to arrive at a comparison of the gross annual affordable need using several methods

Model stage	Step	Survey evidence unweighted	Survey evidence weighted	arc4 prevalence rates	Register (district level pro rata)	Register (local resident need)
1	Snapshot quantity of existing households in affordable housing need	2	22	58	72	23
2	Conversion of snapshots of affordable need into annual flows (divide by 5) (households per annum)	0.4	4	12	14	5
3	Quantity of newly forming households in affordable housing need per annum	1	11	11	11	11
4	Uplift to housing register for affordable home ownership need	n/a	n/a	n/a	11	11

¹⁸ The prevalence rate method uses proprietary arc4 methodology based upon survey data from strategic studies involving a household survey over the last 5-years representing over 2.5m households when weighted. We have also applied a prevalence rate to estimate the number of newly forming households which is needed to add to housing register data for existing households.

5	Total flow of households per annum in affordable need (= rows 2+3+4)	1.4	15	23	37	50
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Sources as stated. Rounding errors may be present.

9.3 In table 5.12 the number 23 (local resident need on the housing register) in the final column was supplied under a freedom of information request. This is the number of households on the register that live in the area. The council qualified that this number might not be accurate. The council could not provide information on those with a connection to the study area but not resident in it, stating that the council defined a local connection as the district. The questions put to the council under FOI and the council's response arrears at the end of this appendix. We have not used this number in table 9.1.

9.4 Table 5.13 is as reported in chapter 5 of the report.

Table 5.13 (COPY) HD9 1: summary of BNAM stages 1, 2 and 3 to arrive at a comparison of the gross annual affordable need using several methods

Model stage	Step	Survey evidence unweighted	Survey evidence weighted	arc4 prevalence rates	Register (district level pro rata)	Register (local need)
1	Snapshot quantity of existing households in affordable housing need	4	62	184	195	N/A at this level
2	Conversion of snapshots of affordable need into annual flows (divide by 5) (households per annum)	0.8	12	37	39	
3	Quantity of newly forming households in affordable housing need per annum	2.8	36	36	36	
4	Uplift to housing register for affordable home ownership need	n/a	n/a		46	
5	Total flow of households per annum in affordable need (= rows 2+3+4)	3.6	56	73	121	

Sources as stated. Rounding errors may be present.

9.5 The following tables state the BNAM in full. The notes column explains how key data are derived. Table 9.1 is for the Scholes BUA and is the basis for the final conclusions reached in Chapters 5 and 6. Table 9.2 is for the HD 1 area and is for information only.

Row ref.	Step	Household survey	Weighted survey evidence	arc4 prevalence rates	Housing register (district pro rata)	Housing Register (area of choice)	Notes
1	Number of households in the area	N/A	N/A	963	N/A	Not available	Census 2011
2	Existing households in need	11	120.38	96	72		
3	Proportion in affordable need	18.18%	18.18%	60%	100%		Survey: table 5.10
4	Existing households in affordable need	2.00	21.89	57.78	72		
5	Divide by 5 to convert to annual need	0.40	4.38	11.56	14.40		
6	Newly forming households per annum	1.00	10.94	14.93	10.94		Survey table 5.10 otherwise SEH prevalence rate based
7	Proportion in affordable need	100.00%	100%	75%	100%		Survey table 5.10 otherwise SEH prevalence rate based
8	Newly forming household in affordable need	1.00	10.94	11.19	10.94		
9	Uplift to register data for affordable home ownership demand	N/A	N/A	N/A	11.40		=45% of row values 5+8 per interim policy
10	Total GROSS annual flow of households in affordable need	1.40	15.32	22.75	36.75		Sum of rows 5, 8 and 9

9.6 As noted in chapter 5 our key finding is based on the average of the weighted survey data, prevalence rates and housing register. This is fully explained below.

- 9.7 The weighting factor for the household survey for Scholes BUA could not easily be determined due to the relatively low response from the leaflet drop. However it was clear that the responses we received had a higher number of moving households that we would normally get from a postal survey. Weighting was necessary to enable survey data to be compared to register and other data so we applied a multiplier equivalent to number of households (963 as at the census 2011) divided by number of responses i.e. $963/88= 10.94$. This may be considered a high weighting factor however overall affordable need is the lowest of the other factors.
- 9.8 The prevalence rate for newly forming households according to the SEH is 1.55% of existing households.
- 9.9 The household ratio for the Scholes BUA was $963/173,525 =0.00555$ (data appendix table A2.1). This was multiplied by the number on the housing register to estimate the housing register number pro rata i.e. $0.00555 \times 13,112=72$.
- 9.10 Regarding the uplift to register data for affordable home ownership demand, this is added to the housing register quantum as the register counts only households that have registers and qualify for social or affordable rented housing. There is no local or national data available. The uplift is the ratio of affordable rent to affordable home ownership from survey data for Scholes UA and HD9 1 which are different table 5.12.
- 9.11 We have taken forward the average of all but the unweighted data as our preferred measure of annual affordable need for the Scholes BUA. This is because the deficiencies of each method needs to be balanced out:
- the survey cannot count those in affordable need living outside the study area as questionnaires are only sent to households resident in the study area;
 - a previously noted, housing registers will under count affordable need as households may prefer not to live in social housing preferring the private rented sector or are seeking affordable home ownership not counted in the register;
 - the housing register does not record need from newly forming households many of whom would not be considered a priority if they are in good health and have no children;
 - the housing register is 'policy on' as it filters out those that do not meet policy criteria and those that are excluded even if they are in housing need.
- 9.12 We must also note that the number of people living outside the study area with a local connection will not be a small number. The survey shows that around one half of existing households and newly forming households will leave the study area and this number will accumulate over the years to a sizeable number.

BNAM stage 4 supply and net need

- 9.13 Our experience and the good practice guidance tell us that it is very difficult to get an accurate reading of the flow of affordable housing supply:
- stock is often confused with supply;
 - it fluctuates on an annual basis;

- new build housing distorts the background level of supply (and need);
 - published data known as CoRe is only published at the local authority level a scaling factor has been applied to an average of 2-years data;
 - whilst we acknowledge that it is important to take future new build housing into account there is no certainty that sites with planning consent will be developed;
 - in line with the NPPF, supply of social and affordable rented housing must be separated from supply of affordable home ownership such as shared ownership; and
 - there is currently a very small supply of affordable home ownership vacancies in most local authority areas.
- 9.14 Taking all of the above into account, we have developed a supply model that improves upon the basic needs assessment model. This appears as tables 5.10 and 5.11 in this report. We explain the key inputs and assumptions used below.
- 9.15 The district social housing annual relet pro rata ratio for Scholes BUA and HD9 1 was taken from the Governments CoRe data for 2018/19 and 2019/20 multiplied by the household ratio.

An explanation of prevalence data drawn from the arc⁴ national database.

- 9.16 In view of the above statements from the NPPF, the majority of housing consultancies working nationwide do not offer household survey-based assessments. arc⁴ is the only national consultancy to do so and as such undertakes around 8 county, district or borough wide surveys per year from all over the country as well as around 15 local housing needs assessments such as this every year. All such surveys are anonymous and are of a consistent design. With the permission of clients, arc⁴ has merged most recent data into a national database which when weighted represents data from over 2 million households. From this data it is possible to produce prevalence rates relating to households in affordable need, both existing households and newly forming.
- 9.17 This information is provided for the client on the basis that it is an estimate of the level of affordable need that might be revealed by a housing need survey that was designed and carried out in accordance with the best practice outlined in this report. The methodology outlined here is the intellectual property of arc⁴ and is only valid if supported by the arc⁴ national database.
- 9.18 For over a year we have compared these findings to survey based Local housing need survey-based findings and find them to be similar within an acceptable margin.
- 9.19 Prevalence rates are provided in table 5.8 above.

Freedom of information Act: Questions and answers

Dear Mr Broughton

I am writing in response to your request dated 20 July 2021. This has been dealt with under the Freedom of Information Act 2000.

The Council's response to your specific questions is set out below:

A) Separately for the villages of Scholes and Hepworth please tell us:

1. how many applicants are resident in each village that are on the housing register?

There are a total of 23 households on the register with postcodes within this area. Please be aware that information regarding postcodes and addresses is not guaranteed to be accurate.

2. please provide a breakdown of priority and bedrooms required.

The Council can confirm that it does hold information falling within the scope requested, but is refusing to release this information, and I have attached the refusal notice which sets out the reasons why and the process of appeal against this refusal.

B) How many households are on the register as a whole have indicated a preference to be housed in a) Scholes b) Hepworth. Please provide a breakdown of priority and bedrooms required.

Households do not indicate a preference for area. We operate a choice based letting system where applicants register an interest for individual properties.

C) How many households are on the register as a whole have a local connection to a) Scholes b) Hepworth villages in accordance with your allocation policy? Please provide a breakdown of priority and bedrooms required.

The Kirklees Council Housing Allocations Policy defines a local connection as to the district, not to specific areas within the boundary. Therefore we would not hold this information.

D) Does the council have a list of households that are seeking affordable home ownership? If so please provide information of demand within the above areas, preferably indicating the affordable tenure required.

We do not hold this information.