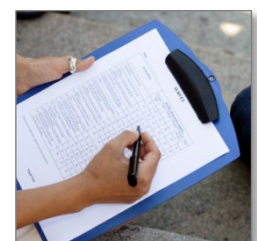
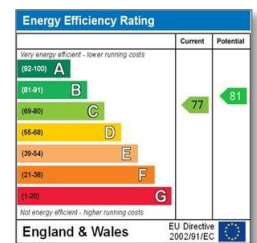




# North Somerset Local Housing Need Assessment

Report of Findings  
September 2025





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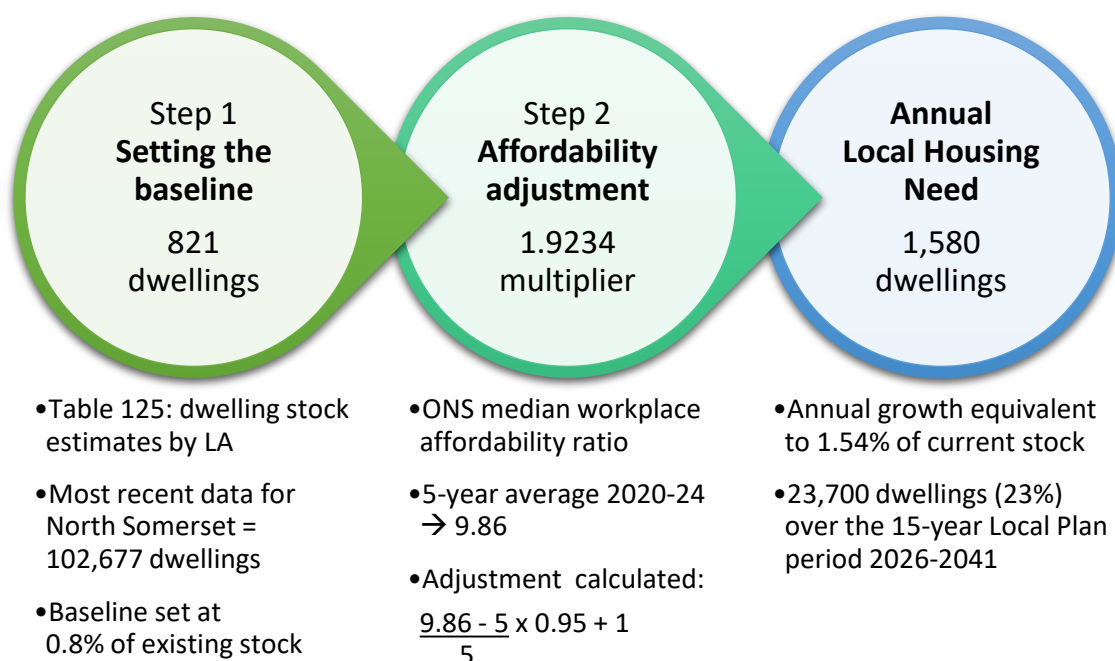
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# Executive Summary

1. The National Planning Policy Framework (NPPF, December 2024) sets out the Government's objective of significantly boosting the supply of homes, with the aim of meeting each area's identified housing need with an appropriate mix of housing types for the local community. To determine the number of homes needed, the NPPF states that strategic policies should be informed by a local housing need assessment (LHNA) conducted using the standard method in national planning guidance.
2. North Somerset Council commissioned Opinion Research Services (ORS) to prepare an LHNA to inform the Local Plan strategic policies as required by the NPPF. The standard method sets out a formulaic approach to determine the Local Housing Need (LHN) figure, using dwelling stock estimates to set the Step 1 baseline and the workplace-based house price to earnings ratio to calculate the Step 2 affordability adjustment (Figure 1).

**Figure 1: Annual Local Housing Need for North Somerset based on the Government's standard method calculation**  
(Source: Dwelling stock estimates by local authority district, MHCLG May 2025; House price to workplace-based earnings ratio, ONS March 2025)

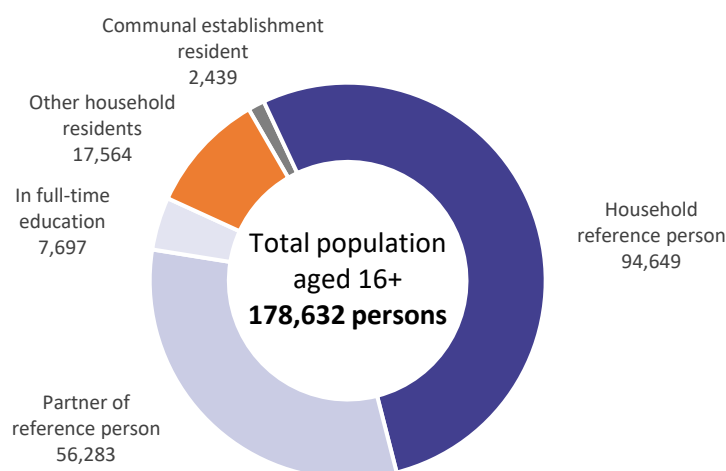


3. The standard method identifies that the annual LHN figure for North Somerset is currently 1,580 dwellings per year. **The LHNA has therefore been prepared on the basis that 23,700 dwellings will be planned for in North Somerset over the 15-year Local Plan period 2026-2041.**
4. Housing supply in North Somerset has averaged around 900 net additions per year based on Government data for the last 10 years (2014-15 to 2023-24) so there will need to be a step-change in future delivery to respond to housing market pressures which may have suppressed migration and household formation. If the Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities under the Duty to Co-operate. However, when determining the overall amount of housing to be planned for, the Council will also have to consider any needs that cannot be met within neighbouring areas.

## Growth of the Local Community

5. The number of households in North Somerset was 94,600 at the time of the 2021 Census, an increase of 6,400 (7%) over the period 2011 to 2021. Over the same period, the number of adult children living with their parents increased by 2,100 (16%) to a total of 14,700 in 2021, and the number of concealed families increased by over 300 (45%) to a total of around 1,100.
6. Figure 2 shows the 178,600 residents aged 16 or over on Census Day segmented into different categories. *“Other household residents”* include adult children living with parents and concealed family representatives.

**Figure 2: Segmentation of resident population aged 16 or over on Census Day 2021 (Source: Census data, ONS)**



7. Whilst many *“other household residents”* would not plan to move, including some that have chosen to live in multi-generational households, data from the English Housing Survey (EHS) data suggests that two fifths would prefer to live independently, and the majority would be the reference person for the new household. Applying age-specific EHS rates to the Census data for North Somerset identifies that around 6,400 of the *“other”* residents would want to live independently forming 5,700 potential households.
8. Given this context, the LHNA has considered two scenarios for future population growth over the Local Plan period 2026-2041. Both scenarios are based on the 23,700 dwellings identified by the standard method and assume that the housing need will provide for household growth based on past trends, but the assumptions then diverge as follows:
  - » **Scenario A** is based on past household formation trends and assumes that the increase to housing supply will enable additional population growth (above recent migration trends). The number of people moving to the area is therefore increased until household growth aligns with the identified housing need
  - » **Scenario B** is based on increased household formation and assumes that the increase to housing supply will enable the 5,700 potential households identified who want to live independently to form separate households. This scenario also assumes additional population growth with the number of people moving to the area increased, but with a smaller uplift.
9. Both scenarios identify a faster rate of population growth than the sub-national population projections (which assume that recent migration trends continue) although the projected population in 2041 is much higher in Scenario A (269,900 persons) than in Scenario B (254,600). Based on Scenario A there is a projected growth of 44,300 persons, which is 53% more than the growth of 29,000 persons identified by Scenario B.

10. Figure 3 provides a summary of key outputs based on the projected growth, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2041 and the change from 2026-2041.

**Figure 3: Population growth by resident type, household growth and average household size, 2026-2041 (Source: ORS Model)**

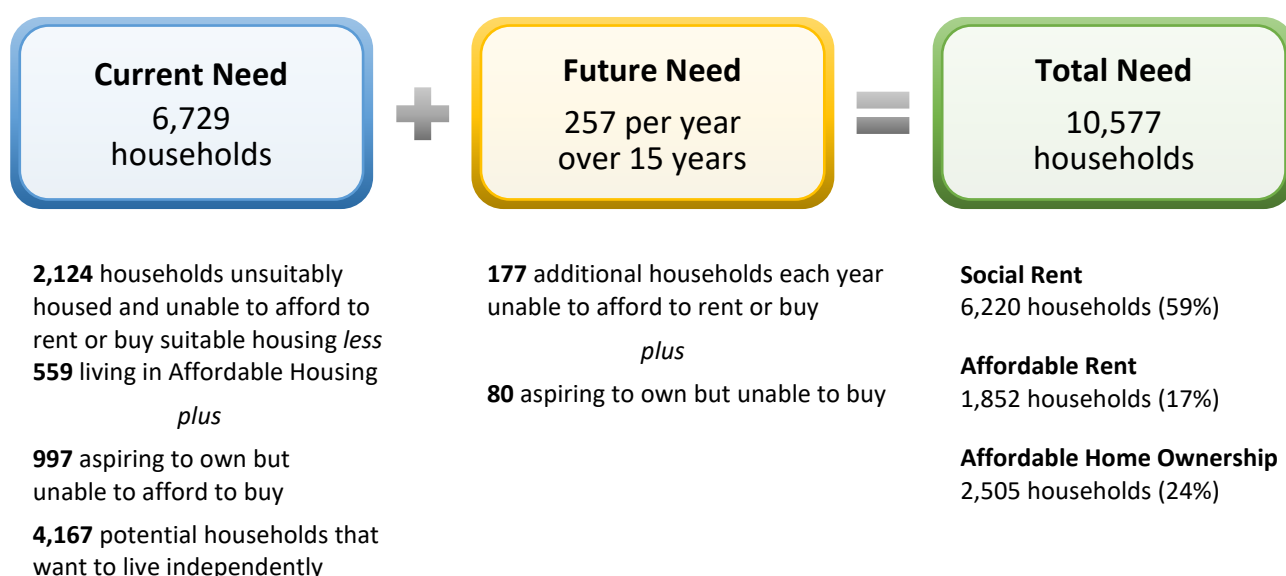
	Baseline 2026	Scenario A 2041	Change 2026-2041	Scenario B 2041	Change 2026-2041
<b>HOUSING NEED</b>					
Total households	99,248	121,166	+21,918	121,218	+21,970
Unoccupied dwellings	5,535	6,756	+1,221	6,759	+1,224
<b>Dwellings in Use Class C3</b>	<b>104,783</b>	<b>127,922</b>	<b>+23,139</b>	<b>127,977</b>	<b>+23,194</b>
Additional communal establishment bedspaces in Use Class C2 (equivalised to dwellings)	-	-	+561	-	+506
<b>TOTAL HOUSING NEED</b>	<b>-</b>	<b>-</b>	<b>+23,700</b>	<b>-</b>	<b>+23,700</b>
<b>RESIDENT POPULATION</b>					
Household residents	222,951	266,241	+43,290	251,056	+28,105
<i>Average household size (persons)</i>	<i>2.246</i>	<i>2.197</i>	<i>-0.049</i>	<i>2.071</i>	<i>-0.175</i>
Communal establishment residents	2,648	3,656	+1,008	3,556	+908
<b>TOTAL POPULATION</b>	<b>225,599</b>	<b>269,897</b>	<b>+44,298</b>	<b>254,612</b>	<b>+29,013</b>

11. Both scenarios reflect the 23,700 dwellings identified by the standard method calculation for the Local Plan period 2026-2041, but population growth in Scenario A is higher than in Scenario B due to the lower average number of persons resident in each household given the assumed increase in household formation.
12. Whilst both scenarios identify an increase of around 22,000 additional households, far more young residents aged under 35 would form households under Scenario B than under Scenario A resulting in a larger number of younger one-person households and couples without children.
- » **Scenario A** identifies growth across all household types, with one-person households and couples without children increasing by 8,100 and 6,900 respectively, families with children increasing by 4,400 and other household types increasing by 2,500
  - » **Scenario B** identifies a larger growth of one-person households (13,200) and couples without children (7,000) but a lower growth of families with children (3,100) and a reduction in other household types due to fewer concealed families and adult children living with parents.
13. Having considered the two scenarios in detail, it is evident that Scenario B (i.e. providing the homes needed for local residents who want to form separate household and live independently) better aligns with the Government's objectives of addressing the impact of past undersupply, but more Affordable Housing will need to be provided (as many potential households have not formed as they cannot afford suitable housing) which will need to be tested in the context of economic viability.
14. Scenario B also provides a more credible demographic projection (albeit still far higher than past trends) particularly in the context of jobs growth, which broadly aligns with the number of resident workers needed based on established commuting patterns.

## Affordable Housing Need

15. The NPPF states that those groups who require Affordable Housing should be identified when assessing need, and Planning Practice Guidance confirms that *“all households whose needs are not met by the market can be considered in affordable housing need”* and that *“strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market”*.
16. Household affordability is therefore a key consideration in determining both the need for Affordable Housing and the type and tenure of homes likely to be needed by households that are unable to afford.
17. For the base date of the Plan, the LHNA identifies a current unmet need from around 2,100 households that are unable to afford to rent or buy suitable housing. Some of these households occupy Affordable Housing and taking account of the properties they would vacate reduces the net need.
18. In addition to the households unable to afford to rent or buy, there are around 1,000 households currently renting their homes who aspire to own but cannot afford to buy. Finally, of the potential households identified that want to live independently, almost 4,200 have been unable to form as they cannot afford to rent or buy suitable housing. Whilst Scenario A does not count the needs from these households, they are included in Scenario B.
19. Over the 15-year Plan period, there will be additional need from new and existing households who will be unable to afford to rent or buy suitable housing and also from new households that will aspire to own but cannot afford to buy. The future need equates to an average of 257 households each year under Scenario B, an additional 3,800 households over the 15-year period.
20. Figure 4 summarises the LHNA analysis, which identifies a need to provide Affordable Housing for a total of 10,600 households over the 15-year Local Plan period 2026-2041, an average of around 705 per year.

**Figure 4: Households needing Affordable Housing in North Somerset 2026-2041 (Source: ORS Model. Note: Figures may not sum due to rounding)**





## Future Housing Mix

21. Figure 5 sets out the overall housing need identified for Market Housing and Affordable Housing based on the current inputs to the standard method calculation. The outputs identify the mix of general needs housing by number of bedrooms and the specialist older person housing need by type of housing.

**Figure 5: Overall Market Housing and Affordable Housing need by property type and number of bedrooms 2026-2041**  
(Source: ORS Model. Note: Figures may not sum due to rounding)

	Scenario A			Scenario B		
	Market Housing	Affordable Housing	TOTAL 2026-2041	Market Housing	Affordable Housing	TOTAL 2026-2041
<b>General Needs Housing</b>						
1 bedroom	642	1,012	1,655	2,977	2,680	5,657
2 bedrooms	5,106	2,153	7,258	3,108	4,759	7,867
3 bedrooms	5,598	2,288	7,886	3,497	2,185	5,682
4+ bedrooms	3,957	849	4,806	1,707	912	2,619
<b>Specialist Older Person Housing</b>						
Housing with Care	193	157	350	175	142	317
Housing with Support	626	558	1,184	565	488	1,053
<b>Dwellings in Use Class C3</b>	<b>16,123</b>	<b>7,016</b>	<b>23,139</b>	<b>12,028</b>	<b>11,166</b>	<b>23,194</b>
Bedspaces in Use Class C2 (equivalised to dwellings)			561			506
<b>TOTAL HOUSING NEED</b>			<b>23,700</b>			<b>23,700</b>
<b>General Needs Housing</b>						
1 bedroom	2.8%	4.4%	7.2%	12.8%	11.6%	24.4%
2 bedrooms	22.1%	9.3%	31.4%	13.4%	20.5%	33.9%
3 bedrooms	24.2%	9.9%	34.1%	15.1%	9.4%	24.5%
4+ bedrooms	17.1%	3.7%	20.8%	7.4%	3.9%	11.3%
<b>Specialist Older Person Housing</b>						
Housing with Care	0.8%	0.7%	1.5%	0.8%	0.6%	1.4%
Housing with Support	2.7%	2.4%	5.1%	2.4%	2.1%	4.5%
<b>All Dwellings</b>	<b>69.7%</b>	<b>30.3%</b>	<b>100.0%</b>	<b>51.9%</b>	<b>48.1%</b>	<b>100.0%</b>

22. Whilst both scenarios are based on the 23,700 dwellings identified by the standard method, there are notable differences in the overall housing mix:
- » **Scenario A** identifies a need for 7,000 affordable homes (30% of the total dwellings) with 16,100 homes for market sale or rent (70%)
  - » **Scenario B** identifies a need for 11,200 affordable homes (48%) as a consequence of many of the potential households that are assumed to form being unable to afford suitable housing, with 12,000 homes for market sale or rent (52%).
23. Both scenarios identify a need for around 1,400-1,500 self-contained specialist older person housing units, comprising both Housing with Care and Housing with Support. There is also an identified need for additional bedspaces in purpose-built residential care or nursing homes.
24. Whilst the LHNA forms an important part of the wider evidence base to inform the development of housing and planning policies, it is important to recognise that these findings should not be considered in isolation. The LHNA does not seek to determine rigid policy conclusions but instead provides a key component of the evidence required to develop and support a sound policy framework.

# 1. Introducing the Study

- 1.1 The National Planning Policy Framework (NPPF, December 2024) sets out the Government's objective of significantly boosting the supply of homes, with the aim of meeting each area's identified housing need with an appropriate mix of housing types for the local community:

*61. To support the Government's objective of **significantly boosting the supply of homes**, it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without unnecessary delay. The overall aim should be to meet an area's identified housing need, including with an appropriate mix of housing types for the local community.*

*62. To determine the minimum number of homes needed, strategic policies should be informed by a **local housing need assessment**, conducted using the **standard method** in national planning guidance. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.*

**National Planning Policy Framework, December 2024 (emphasis added)**

- 1.2 North Somerset Council commissioned Opinion Research Services (ORS) to establish a robust evidence base about the need for housing in their local area through preparing a Local Housing Needs Assessment (LHNA) to inform their strategic policies as required by the NPPF and associated Planning Policy Guidance (PPG).
- 1.3 The "standard method in national planning guidance" sets out a formulaic approach to determine the minimum Local Housing Need (LHN) figure and prescribes the use of specific data for the calculation. Therefore, whilst the responsibility for establishing housing need continues to rest with the local planning authority, this is constrained to a minimum LHN figure that is determined centrally by the Government.

## Overview of the LHNA

- 1.4 The LHNA provides robust evidence about the need for housing (Market Housing and Affordable Housing) and the housing needs of different groups across the local area.
- 1.5 Using a wide range of secondary data and administrative data sources, the LHNA:
- » Determines the local housing need figure using the standard method in national planning guidance
  - » Establishes the minimum number of homes needed over the 15-year period 2026-2041
  - » Identifies the resident population and households that are likely to occupy these homes
  - » Provides evidence about the appropriate mix of housing types needed for the local community
  - » Considers the appropriate balance between Market Housing and Affordable Housing.
- 1.6 It is important to recognise that the core evidence from the LHNA should not be considered in isolation, but forms part of a wider evidence base to inform the development of housing and planning policies. The LHNA does not seek to determine rigid policy conclusions, but instead provides a key component of the evidence required to develop and support a sound policy framework.

## Duty to Co-operate

- 1.7 The Duty to Co-operate was introduced in the 2011 Localism Act and is a legal obligation.
- 1.8 The NPPF sets out an expectation that public bodies will maintain effective cooperation with others on issues with any cross-boundary impact, in particular in relation to strategic priorities such as the homes and jobs needed in the area. This co-operation will need to be demonstrated as sound when plans are submitted for examination.

*24. Effective strategic planning across local planning authority boundaries will play a vital and increasing role in how sustainable growth is delivered, by addressing key spatial issues **including meeting housing needs**, delivering strategic infrastructure and building economic and climate resilience. Local planning authorities and county councils (in two-tier areas) continue to be under a duty to cooperate with each other, and with other prescribed bodies, on strategic matters that cross administrative boundaries.*

**National Planning Policy Framework, December 2024 (emphasis added)**

- 1.9 The LHNA methodology and emerging findings were discussed with officers of neighbouring local authorities under the Duty to Co-operate.

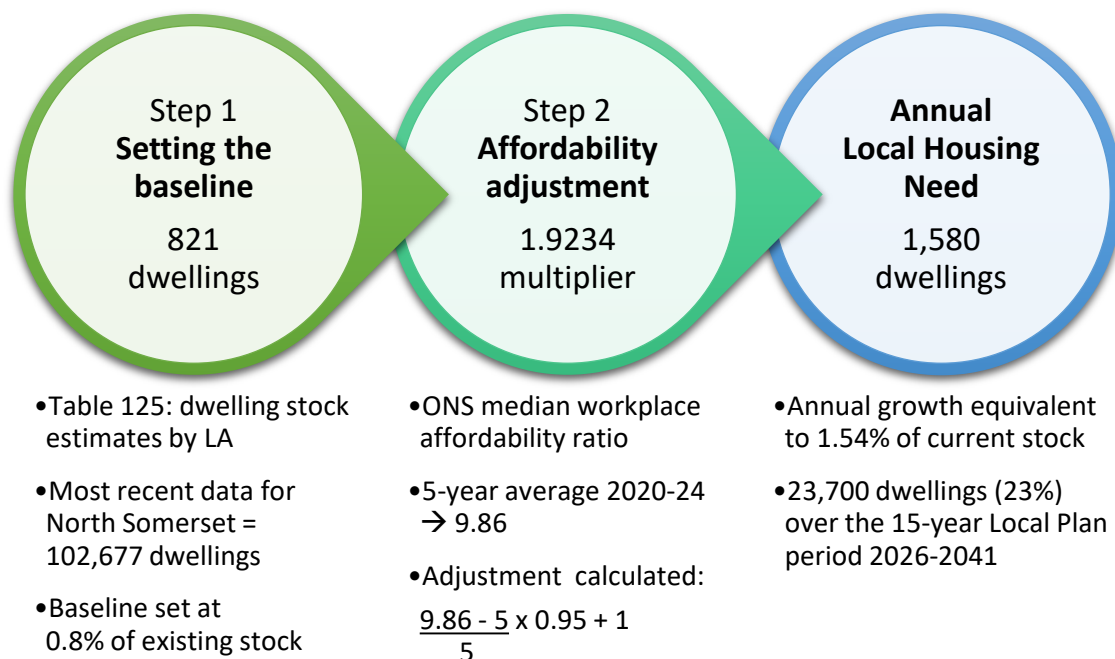
## 2. Establishing Local Housing Need

- 2.1 The NPPF confirms that planning authorities should normally use the standard methodology to establish a minimum Local Housing Need (LHN) figure.

### Standard Method

- 2.2 The process set out in Planning Practice Guidance (PPG) for Housing Need Assessment establishes the annual LHN figure as follows, using dwelling stock estimates published by the Ministry of Housing, Communities and Local Government (MHCLG) to set the Step 1 baseline, and the house price to workplace-based earnings ratio published by the Office for National Statistics (ONS) to calculate the Step 2 affordability adjustment.<sup>1</sup>

**Figure 6: Annual Local Housing Need for North Somerset based on the Government's standard method calculation**  
(Source: Dwelling stock estimates by local authority district, MHCLG May 2025; House price to workplace-based earnings ratio, ONS March 2025)



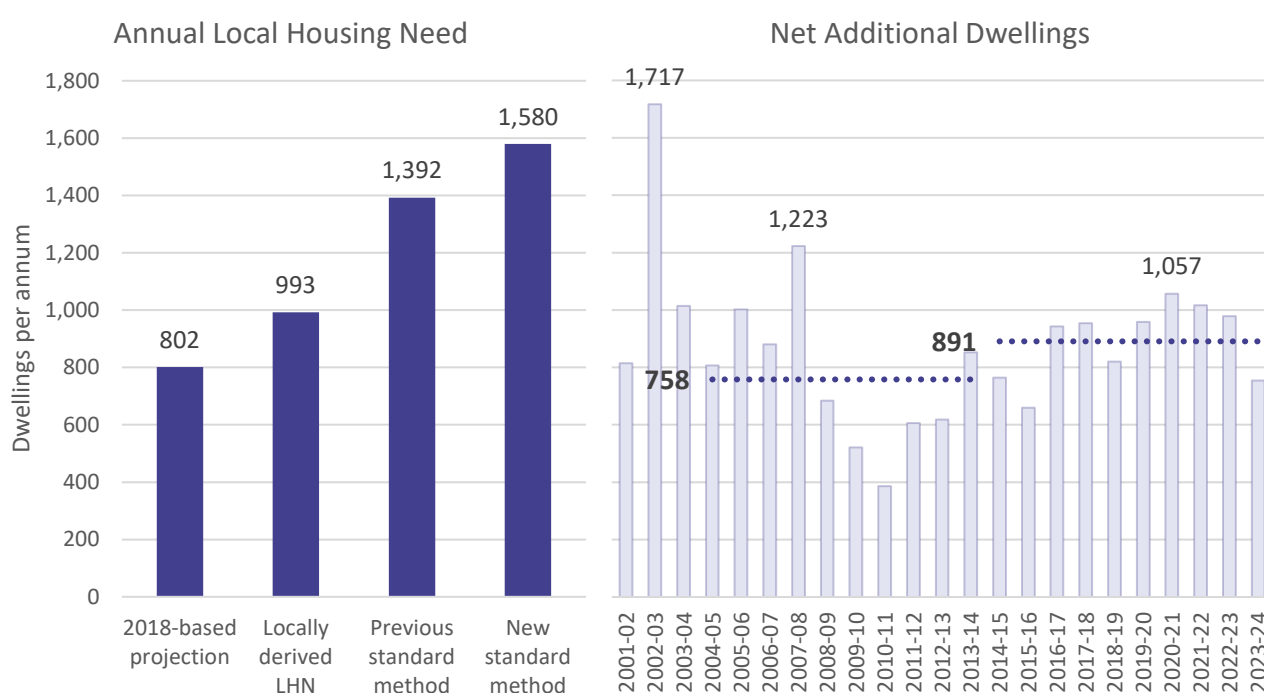
- 2.3 Based on the latest inputs for North Somerset, the standard method calculation identifies that the minimum LHN figure for the local area is currently 1,580 dwellings per year. On this basis, the minimum amount of housing to be planned for in North Somerset over the 15-year period 2026-2041 is 23,700 dwellings.
- 2.4 **The LHNA has been prepared on the basis that 23,700 dwellings will be planned for in North Somerset over the 15-year Local Plan period 2026-2041.**
- 2.5 If the Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities under the Duty to Co-operate. However, when determining the overall amount of housing to be planned for, it will also be important for the Council to take into account any needs that cannot be met within neighbouring areas.

<sup>1</sup> PPG ID 2a-004-20241212

## Setting the Housing Need in Context

- 2.6 Although the Government's standard method calculation now uses dwelling stock estimates (and not household projections) to set the baseline at Step 1, it is important to recognise that new homes will continue to be occupied by new households.
- 2.7 The most recent official household projections for North Somerset are the 2018-based figures. Based on current trends, these project a growth of around 11,400 households over the 15-year period 2026-2041. Taking account of the projected growth of older residents living in residential or nursing care and dwellings without a usually resident household (which would normally be vacant, second or holiday homes) these projections identify a household projection-based local housing need of 802 dwellings per annum (dpa).
- 2.8 The household projection-based need was much lower than the LHN figure identified by the standard method calculation under the previous NPPF (1,392 dpa). Given this context, North Somerset Council previously commissioned ORS to establish a locally derived LHN figure based on the available evidence. That analysis assumed that established rates of net migration should be maintained in future years as a percentage of the overall population and that household formation returned to previous rates, which led to a locally derived annual local housing need of 993 dpa.
- 2.9 Figure 7 summarises these assessments of Local Housing Need in the context of recent housing delivery. Based on the new standard method calculation, the Council is going to have to plan for a step-change in future housing delivery to provide the minimum number of homes needed. This increase is designed to help respond to housing market pressures which may have suppressed past rates of migration and household formation. Given this context, delivering this number of homes is likely to result in a much larger population increase than identified by past trends – but the overall number will depend on the balance between homes provided for the local population and homes provided for population growth.

**Figure 7: Previous assessments of annual Local Housing Need compared with annual Net Additional Dwellings 2001-2024**  
(Source: Household projections for England 2018-based, ONS; North Somerset LHNA, ORS October 2023;  
Net additional dwellings by local authority district, MHCLG)



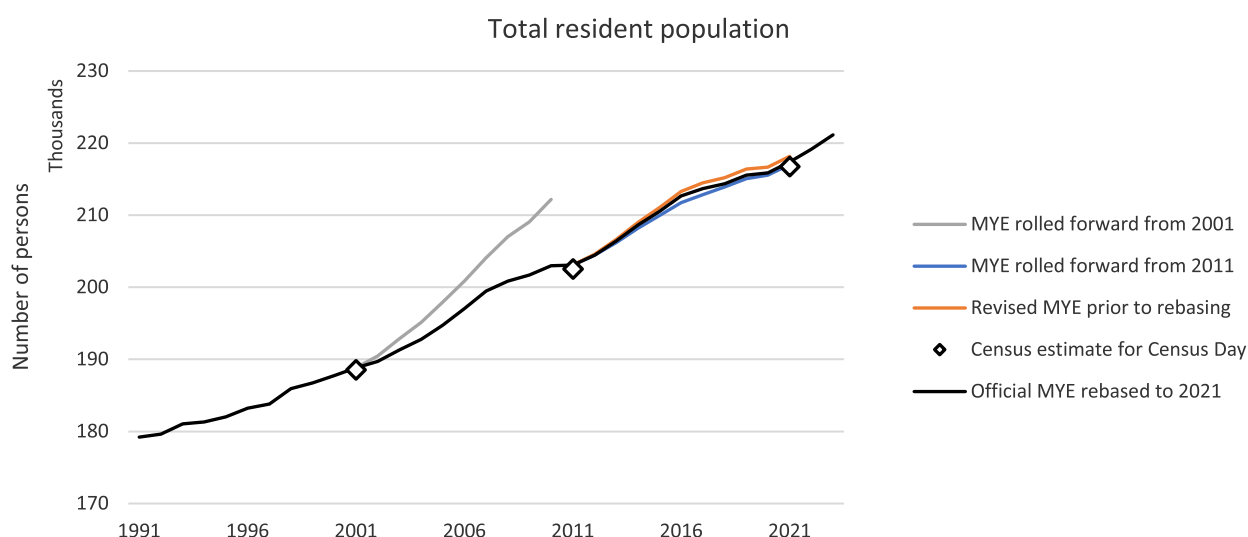
## 3. Growth of the Local Community

- 3.1 The following demographic analysis identifies the resident population and households that currently live in the local community and considers how these could change in future. On this basis, it is possible to establish the type of households that are likely to occupy homes in the area based on the identified housing need.

### Population Trends

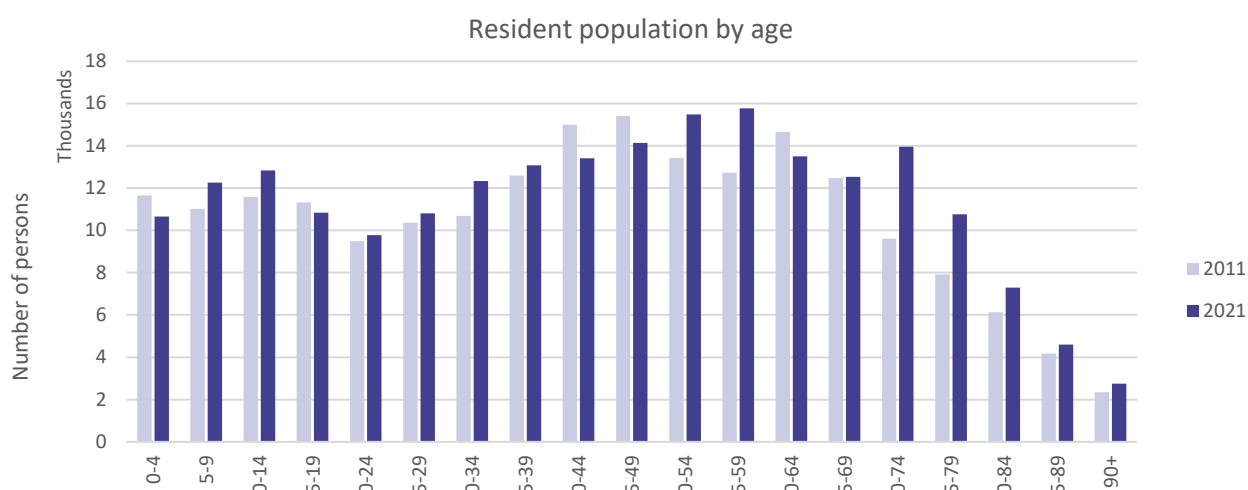
- 3.2 Figure 8 shows that the population of North Somerset has increased consistently, with recent growth averaging 1,500 persons per year and an estimated population of around 221,100 persons in mid-2023. Whilst 2011 Census data showed that mid-year estimates had overstated population growth from 2001, more recent estimates were consistent with the 2021 Census and it is likely that this data can be relied upon.

**Figure 8: Official population estimates 2001-2023 (Source: Census data, ONS; Mid-year population estimates, ONS)**



- 3.3 Figure 9 shows the population by age on Census Day in 2011 and 2021. There has been an increase across most age groups with the largest growth being those residents aged 70 or over, where the population has increased from around 30 thousand persons in 2011 to nearly 40 thousand by 2021.

**Figure 9: Total resident population 2011 and 2021 by 5-year age group (Source: Census data, ONS)**



- 3.4 The mid-year estimate data provides further details about changes in the population over the same period. Figure 10 summarises the 10-year population change by age group (people of the same age) and by age cohort (people born in the same year).

**Figure 10: 10-year change in resident population by age group and age cohort** (Source: Mid-year population estimates, ONS.  
Note: darker and lighter shading used to identify 2011 population age groups aged on by age cohort)

	Total population 2021	2011 population by age group	10-year change by age group	2011 population by age cohort	10-year change by age cohort	Natural change	Net migration and other change
Aged 0-15	<b>38,140</b>	36,699	+1,441	14,054	+24,086	+21,358	+2,728
Aged 16-24	<b>18,466</b>	18,585	-119	20,272	-1,806	-32	-1,774
Aged 25-34	<b>23,171</b>	21,024	+2,147	20,958	+2,213	-97	+2,310
Aged 35-44	<b>26,527</b>	27,454	-927	21,024	+5,503	-198	+5,701
Aged 45-54	<b>29,545</b>	28,935	+610	27,454	+2,091	-467	+2,558
Aged 55-64	<b>29,338</b>	27,347	+1,991	28,935	+403	-1,044	+1,447
Aged 65-74	<b>26,408</b>	22,339	+4,069	27,347	-939	-2,444	+1,505
Aged 75-84	<b>18,318</b>	14,146	+4,172	22,339	-4,021	-4,769	+748
Aged 85 or over	<b>7,472</b>	6,562	+910	20,708	-13,236	-14,224	+988
<b>TOTAL</b>	<b>217,385</b>	<b>203,091</b>	<b>+14,294</b>	<b>203,091</b>	<b>+14,294</b>	<b>-1,917</b>	<b>+16,211</b>

- 3.5 When considering the change by age group, it is evident that largest increases have been in the older age groups. For example, the population aged 65-74 increased from around 22,300 to 26,400 over the decade (an increase of 4,100 persons) and the population aged 75 or over increased from around 20,700 to 25,800 (a further increase of 5,100 persons).
- 3.6 However, when considering changes by age cohort, it is evident that the number of residents in older cohorts has reduced. For example, the cohort of 22,300 residents aged 65-74 in 2011 would be 10 years older (therefore aged 75-84) by 2021. There were around 18,300 persons aged 75-84 resident in 2021, which represents 4,000 fewer persons over the decade. This is a consequence of natural change (4,800 deaths) offset against a net gain of around 700 persons born in the same years as this cohort having moved to the area.

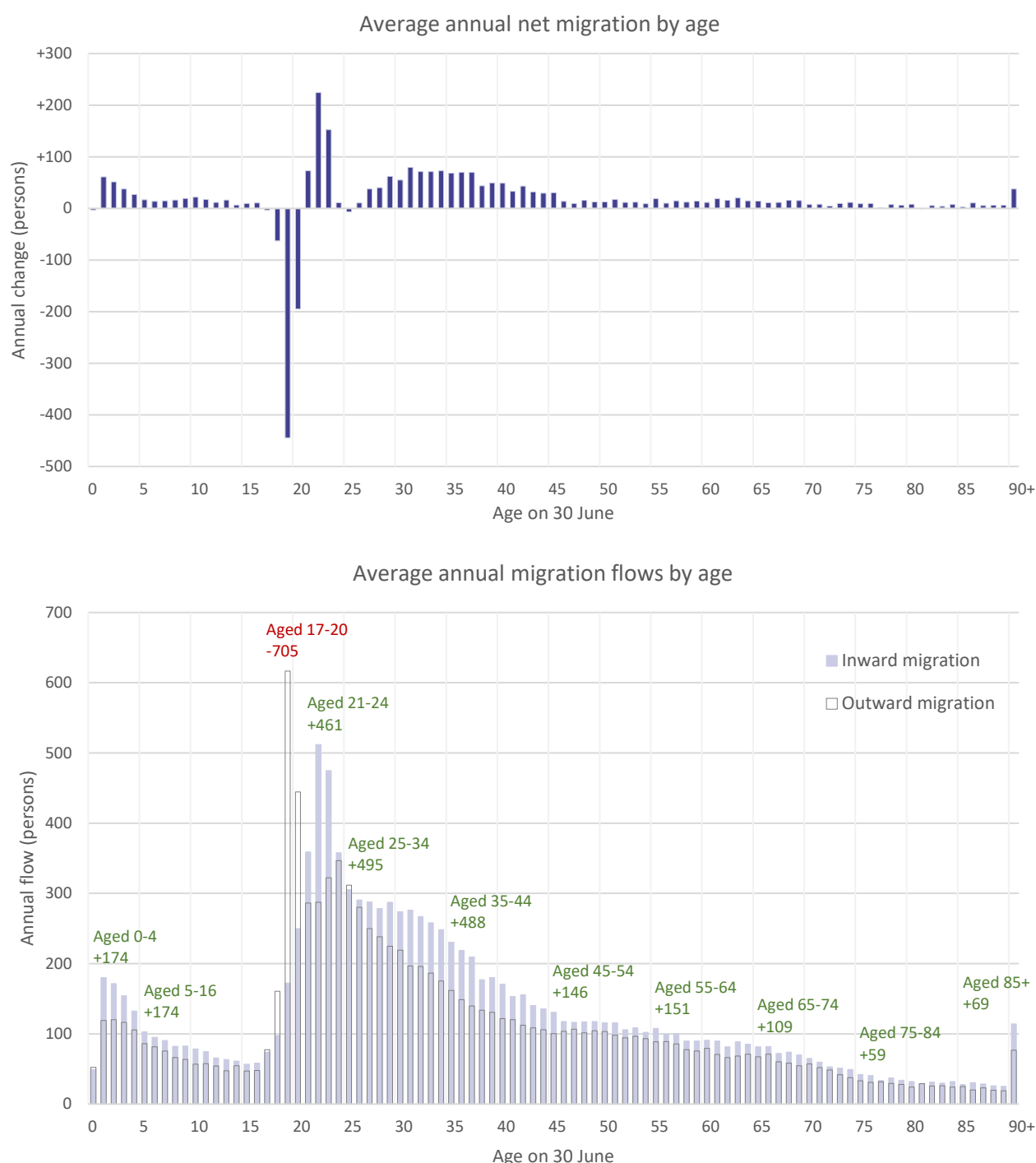
## Components of Population Change

- 3.7 Considering population change across all ages, it is apparent that natural change accounted for a net loss of 1,900 residents over the decade – i.e. there were 1,900 fewer births than deaths recorded. Therefore, population growth was due to people moving from elsewhere to live in the area. A total of 16,200 persons resident in 2021 had moved to the area over the decade, mainly people in their twenties, thirties and forties (including families with young children).
- 3.8 The overall level of inward migration to the area was actually higher than this, given that the net migration figure took account of a loss of older teenagers or young adults moving away from the area to live elsewhere. However, this analysis is based on the age of the population at the end of the 10-year period in 2021, and it is important to recognise that some individuals would have been younger at the time of their move.

3.9 Figure 11 shows trends in annual migration flows to and from the area (and the associated net migration) based on all moves over the years from 1 July 2011 to 30 June 2012 through to 1 July 2020 to 30 June 2021. This shows the age of migrants at the end of the year in which they moved (i.e. their age on 30 June) which is helpful to understand the population moving to live in the area.

3.10 Whilst the average net change for most ages is fewer than 100 persons each year, there are large net outward flows of those aged 17-20 years (an average loss of 705 persons each year) as adult children leave their parental home and move to live elsewhere, including many that will be studying as full-time students. This is offset to some extent against inward flows of those aged 21-24 (an average gain of 461 persons) which will include some adult children returning to the parental home after concluding their studies.

**Figure 11: Average annual net migration and migration flows by age 2011-2021 (Source: Mid-year population estimates, ONS)**

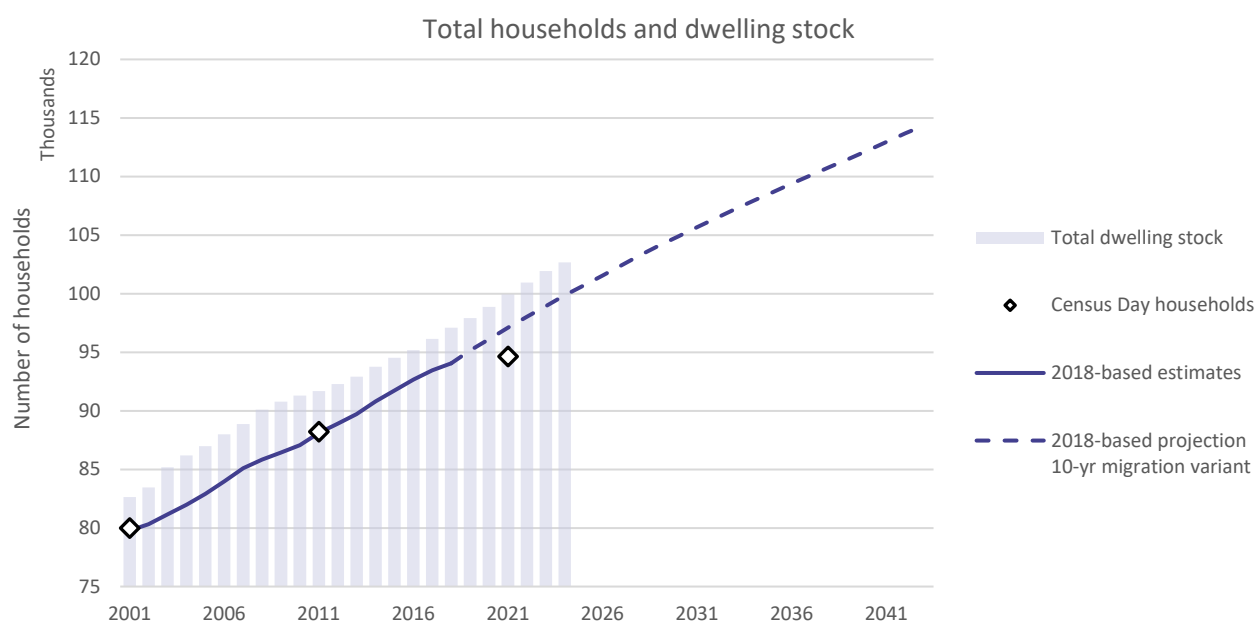




## Household and Dwelling Estimates

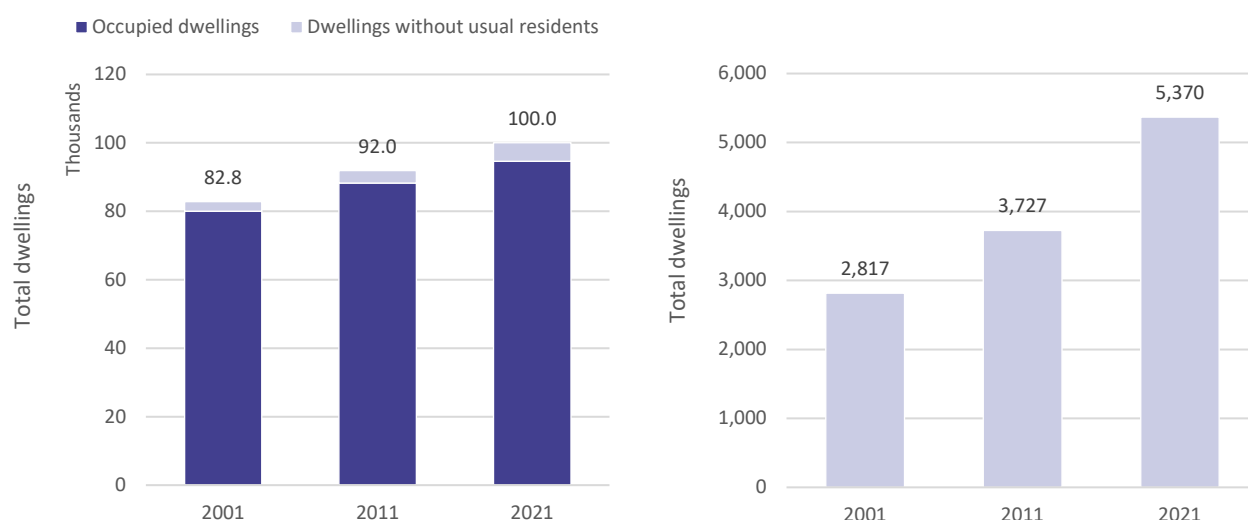
<sup>3.11</sup> Figure 12 shows that the latest official household projections estimated there to be around 94,100 households in North Somerset at the 2018 base date, which was projected to increase to around 114,400 households over the 25-year period 2018-2043 representing an average growth of just over 800 households each year. However, the 2021 Census identified around 94,600 households on Census Day, approaching 2,500 fewer than the 97,100 households that had been projected.

**Figure 12: Household estimates and projections 2001 to 2043 and Dwelling estimates 2001 to 2024 for North Somerset**  
(Source: Census data, ONS; Household projections for England 2018-based, ONS; Dwelling stock estimates by local authority district, MHCLG)



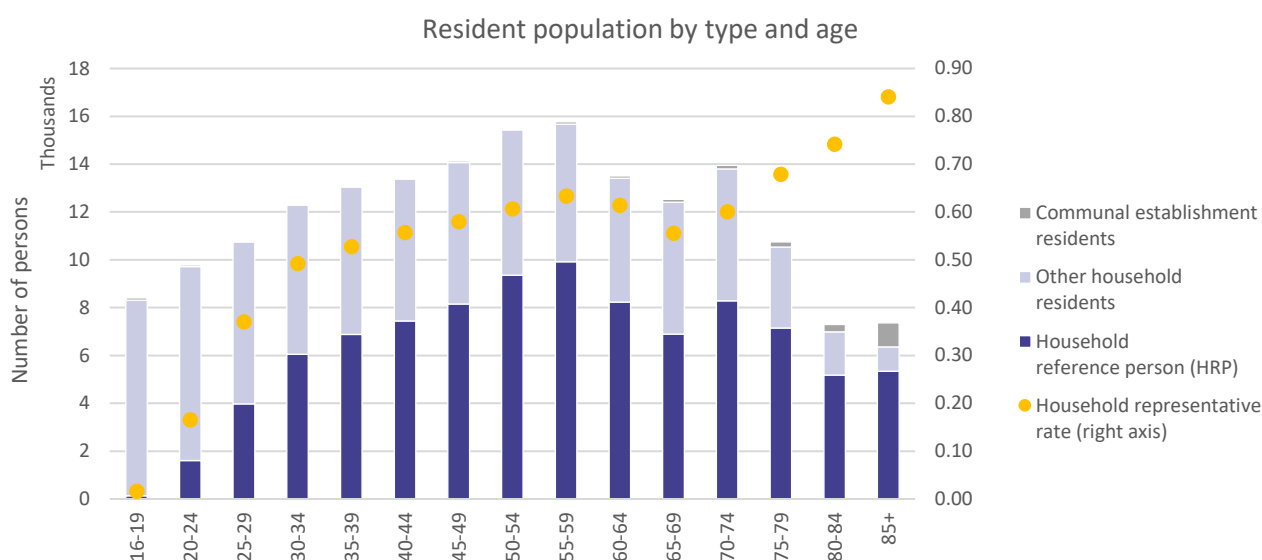
<sup>3.12</sup> Figure 13 shows that the number of dwellings without a usually resident household on Census Day was notably higher in 2021 than it had been in previous Census years, with almost 5,400 dwellings identified without residents. This represents an increase of over 1,600 dwellings (44%) over the 10-year period 2011-2021.

**Figure 13: Estimates of occupied dwellings and dwellings without usual residents 2001 to 2021** (Source: Census data, ONS)



- 3.13 Figure 14 shows the age distribution of household and communal establishment residents aged 16 or over. For the household population, the Household Reference Person (HRP) is identified separately from other household residents. There is one reference person in each household (mainly based on economic activity) so the number of HRP residents will equal the number of households.
- 3.14 The Household Representative Rate (HRR) identifies the proportion of household residents that are reference persons within each group. Fewer than half of residents aged under 35 are reference persons, so the HRR for these groups is lower than 0.5, whereas more than half of residents aged 35 or over are reference persons, so the HRR for these groups is above 0.5 and is highest for older age groups.

**Figure 14: Resident population aged 16 or over by resident type and age, household representative rate by age, 2021**  
(Source: Census data, ONS)



- 3.15 Figure 15 identifies the number of household residents and reference persons in 2011 and 2021. Based on this data, we can see how the household representative rates have changed over the 10-year period.

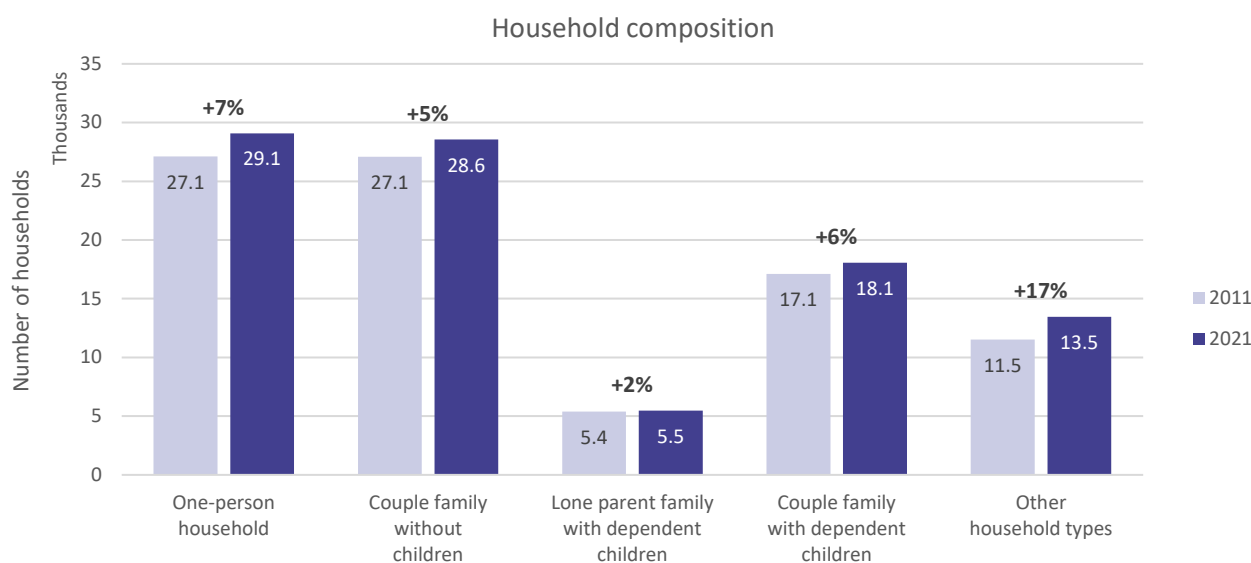
**Figure 15: Household residents, household reference persons, and household representative rate by age, 2011 and 2021**  
(Source: Census data, ONS)

	Household residents		Household reference persons (HRP)		Household representative rate (HRR)	
	2011	2021	2011	2021	2011	2021
Aged 0-15	36,621	<b>38,135</b>	2	<b>34</b>	0.0001	<b>0.0009</b>
Aged 16-24	18,112	<b>18,026</b>	2,108	<b>1,743</b>	0.1164	<b>0.0967</b>
Aged 25-34	20,911	<b>23,043</b>	9,621	<b>10,027</b>	0.4601	<b>0.4351</b>
Aged 35-44	27,452	<b>26,408</b>	15,583	<b>14,315</b>	0.5676	<b>0.5421</b>
Aged 45-54	28,627	<b>29,498</b>	17,474	<b>17,517</b>	0.6104	<b>0.5938</b>
Aged 55-64	27,161	<b>29,084</b>	16,181	<b>18,152</b>	0.5957	<b>0.6241</b>
Aged 65-74	21,792	<b>26,214</b>	13,146	<b>15,179</b>	0.6032	<b>0.5790</b>
Aged 75-84	13,430	<b>17,528</b>	9,777	<b>12,334</b>	0.7280	<b>0.7037</b>
Aged 85 or over	5,119	<b>6,361</b>	4,335	<b>5,347</b>	0.8468	<b>0.8406</b>
<b>TOTAL</b>	<b>199,225</b>	<b>214,297</b>	<b>88,227</b>	<b>94,648</b>	-	-

## Household Composition

- 3.16 Over the 10-year period 2011 to 2021, the number of households increased from around 88,200 to 94,600 which represents an increase of 7% overall.
- 3.17 Figure 16 shows the change over the same period based on household composition. There was a 7% increase in one-person households, consistent with overall household growth. However, single-family households had lower rates of growth: couples without children 5%, couples with dependent children 6%, lone parents with dependent children 2%. In contrast, there was a 17% increase in other household types, which increased from around 11,500 to 13,500 households over the 10-year period.

**Figure 16: Household composition, 2011 and 2021 (Source: Census data, ONS)**



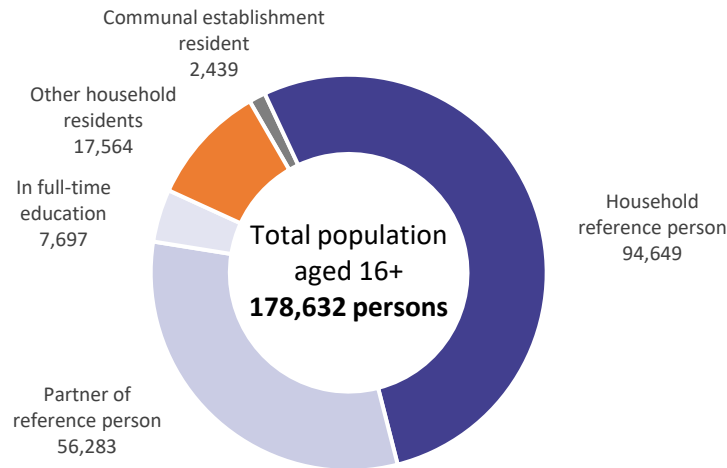
- 3.18 Other household types include student households or other groups of adults living together, households with more than one family living together, single families living with other adults, and single-family households with only non-dependent (adult) children.
- 3.19 Figure 17 provides some further details about residents and families that would form other household types. Almost 8,600 of the 13,500 other households (64%) were single-family households with only adult children, and of the remainder around 1,100 (8%) were multi-family households with one or more concealed families. Whilst data about the number of multi-family households is not available from the 2011 Census, the number of concealed families increased by over 300 (45%) whilst there was an increase of almost 2,100 adult children living with parents (16%) over the decade.

**Figure 17: Non-dependent children, concealed families, and multi-generational households (Source: Census data, ONS)**

	2011	2021	Change 2011-2021	% change 2011-2021
Single-family households with all children non-dependent	7,293	8,554	+1,261	+17%
Multi-family households	-	1,070	-	-
Concealed families	745	1,081	+336	+45%
Multi-generational households	-	1,435	-	-
Families with non-dependent children	10,383	12,065	+1,682	+16%
Non-dependent children	12,622	14,700	+2,078	+16%

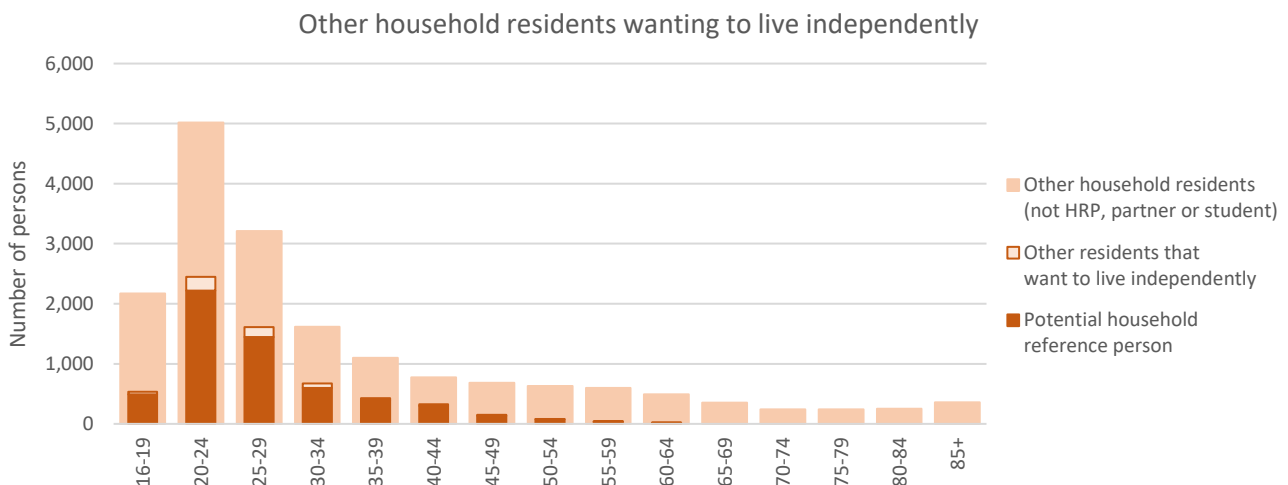
- 3.20 Using Census data, the resident population can be segmented into different categories. Figure 18 shows the breakdown for the 178,600 residents aged 16 or over on Census Day 2021.

**Figure 18: Segmentation of resident population aged 16 or over on Census Day 2021 (Source: Census data, ONS)**



- 3.21 It is apparent that most residents were living as established households that already had a separate home at the time of the Census. 94,600 residents (53%) were the household reference person, 56,300 residents (32%) were the reference person's partner, and 7,700 residents aged 16 or over (4%) were in full-time education, the majority of these being dependent children attending school or sixth form college. Of the remainder, around 17,600 residents (10%) were not students and lived in a household where they were not the reference person or their partner, whilst 2,400 (1%) lived in a communal establishment.
- 3.22 The "other" household residents identified would include many adult children living in their parental home, as well as the representatives of concealed families previously identified. Many of these residents would have chosen to live in their current household, including some living in multi-generational households. However, it is likely that others would want to live independently if they were able to do so.
- 3.23 English Housing Survey (EHS) data identifies that around two fifths (38%) of "other" household residents would prefer to live independently and the majority of these (87%) would be the reference person for the new household. Applying age-specific EHS rates to the Census data for North Somerset identifies that around 6,400 of the "other" residents would want to live independently forming 5,700 potential households.

**Figure 19: Residents wanting to live independently and potential household representatives by age (Source: ORS Model)**



## Baseline Population

- 3.24 The LHNA forms part of the evidence base that will inform the emerging Local Plan, which will plan for the development needs of the district over the 15-year period 2026-2041. Given this context, it is necessary to establish the baseline population at the base date of the Plan in 2026.
- 3.25 The Census identified a stock of around 100,000 dwellings in 2021 (Figure 13) and the current inputs to the standard method calculation estimated a stock of around 102,700 dwellings in 2024 (Figure 6). Based on the Council's latest housing trajectory, the stock is expected to increase to around 104,800 dwellings at the start of the Plan period, of which 99,200 are likely to be occupied by established households with 223,000 residents. A further 2,600 residents will live in communal establishments which yields an overall population of around 225,600 persons at the base date, including around 114,500 economically active residents.

**Figure 20: Summary of baseline demographics at the start of the Plan period, 2026 (Source: ORS Model)**

	Baseline 2026
Total dwellings	104,783
Established households	99,248
Household residents	222,951
Communal establishment residents	2,648
<b>TOTAL POPULATION</b>	<b>225,599</b>
Economically active residents	111,474

- 3.26 Figure 21 provides a detailed breakdown of the baseline households by age of household reference person, identifying the number of established households by household composition and the further 5,700 potential households that want to live independently but do not occupy a separate home at the base date of the Plan.

**Figure 21: Baseline number of households by household composition and age of household reference person, 2026 (Source: ORS Model)**

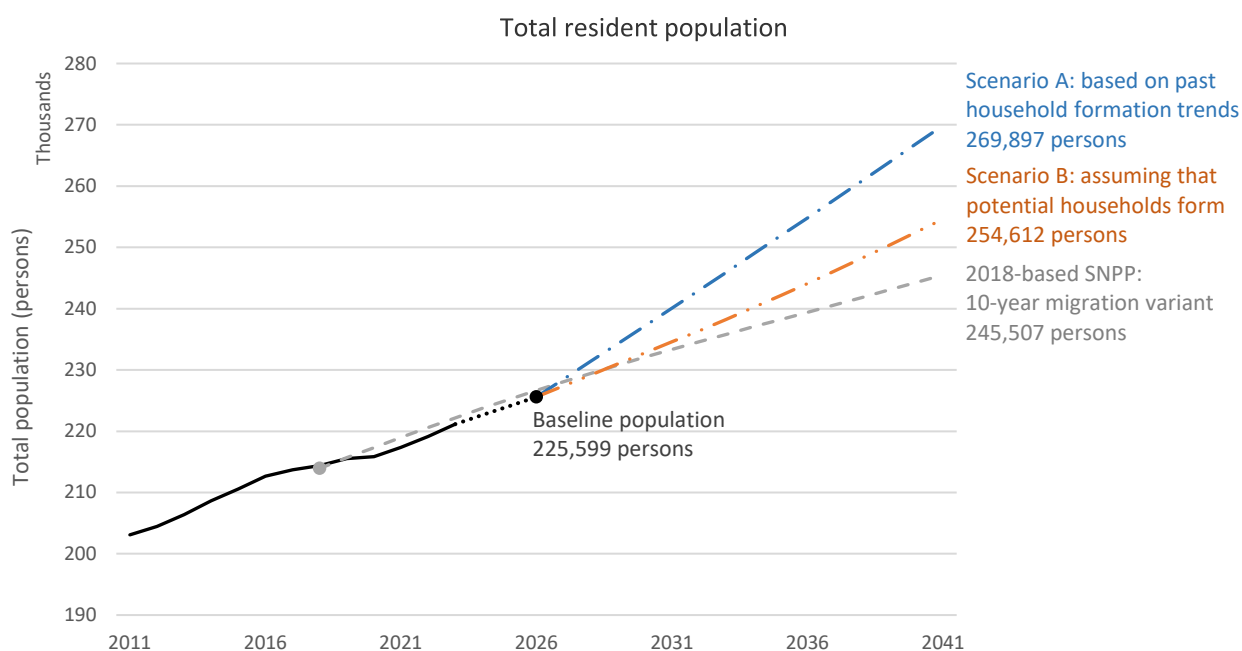
Households 2026	16-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	Total
One-person household	654	2,077	2,554	3,582	5,689	5,738	6,855	3,761	<b>30,910</b>
Couple family without children	341	2,781	1,835	2,534	6,993	7,146	6,969	1,661	<b>30,260</b>
Couple family with dependent children	117	2,808	7,834	6,144	1,524	107	11	2	<b>18,548</b>
Lone parent family with dependent children	244	1,429	2,112	1,507	268	19	7	0	<b>5,586</b>
Other household types	306	886	1,224	3,115	5,082	1,740	1,183	407	<b>13,944</b>
<b>TOTAL HOUSEHOLDS</b>	<b>1,662</b>	<b>9,981</b>	<b>15,560</b>	<b>16,883</b>	<b>19,556</b>	<b>14,750</b>	<b>15,026</b>	<b>5,831</b>	<b>99,248</b>
<i>Potential households that want to form independently</i>	<i>2,710</i>	<i>2,049</i>	<i>698</i>	<i>212</i>	<i>60</i>	<i>-</i>	<i>-</i>	<i>-</i>	<b>5,728</b>

## Future Population Growth

- 3.27 Based on the Government's standard method calculation (Figure 6) there is a need to plan for a minimum of 23,700 dwellings over the 15-year Local Plan period 2026-2041. In assessing the appropriate mix of housing, it is necessary to establish demographic projections that align with this number of homes.
- 3.28 The population and household projections for the LHNA are based on the official projections and cover the 15-year period 2026-2041. The LHNA projections use fertility and mortality rates from the official projections and the latest migration trends for the local area, taking account of the latest ONS mid-year population estimates (for the period to mid-2023) and outputs from the 2021 Census.
- 3.29 Whilst recent trends provide the starting point, the dwelling-led projections seek to align household growth with the LHN figure through aggregating key assumptions:
- » The starting population is based on ONS population estimates for mid-2023, projected forwards to 2026 based on the Council's trajectory of actual and forecast dwelling completions
  - » Household growth is established for the 15-year period 2026-2041 using trend-based projections based on the 2018-based 10-year migration trend variant scenario
  - » Institutional population growth needing communal accommodation over the projection period is established using estimates and rates from the 2021 Census
  - » Dwellings without a usually resident household either vacant homes, second homes or holiday lets are estimated based on rates from the 2021 Census. This includes any properties which are temporarily vacant due to households moving out before a new household moves in, as well as properties which have no usual resident due to them being second homes or holiday lets
  - » Household formation rates are based on 2021 Census data for the proportion of household residents that are representatives of either established households or potential households (concealed families or individuals that would prefer to live independently)
  - » To align with the dwelling targets, the rate of inward domestic migration is increased to ensure that population and household growth aligns with the number of dwellings identified by the LHN figure.
- 3.30 The LHNA has considered two scenarios based on the 23,700 dwellings identified by the standard method for the 15-year Plan period. Both scenarios assume that the identified housing need will initially provide for household growth based on past trends. However, the assumptions then diverge as follows:
- » **Scenario A** is based on past household formation trends and assumes that any further dwellings will enable additional population growth (above past net migration trends). On this basis, the number of people moving to the area is increased to the point that the uplifted household growth aligns with the housing need (with allowances for vacant homes, second homes, and residents living in C2 bedspaces).
  - » **Scenario B** is based on increased household formation and assumes that the identified potential households (i.e. people living in the local area but as part of another household, and who want to live independently) would form separate households. These potential households only represent a proportion of the overall housing need, so this scenario also assumes additional population growth (above past net migration trends) but with a smaller uplift.
- 3.31 It is important to note that both scenarios are based on and consistent with the Local Housing Need figure identified by the Government's standard method calculation.

<sup>3.32</sup> Figure 22 shows the total resident population, including the projected growth over the period 2026-2041 based on the two scenarios. Whilst population growth is higher than the trend-based projections in both of the dwelling-led scenarios, the projected population in 2041 is much higher in Scenario A (269,900 persons) than in Scenario B (254,600). Based on Scenario A there is a projected growth of 44,300 persons, which is 53% more than the growth of 29,000 persons identified by Scenario B.

**Figure 22: Population estimates and projections 2011 to 2041 (Source: Mid-year population estimates, ONS; Sub-national population projections for England 2018-based, ONS; ORS Model)**



<sup>3.33</sup> Figure 23 provides a summary of the projected growth, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2041 and the change from 2026-2041.

**Figure 23: Population growth by resident type, household growth and average household size, 2026-2041 (Source: ORS Model)**

	Baseline	Scenario A		Scenario B	
	2026	2041	Change 2026-2041	2041	Change 2026-2041
Total population	225,599	269,897	+44,298	254,612	+29,013
Communal establishment residents	2,648	3,656	+1,008	3,556	+908
Household residents	222,951	266,241	+43,290	251,056	+28,105
Total households	99,248	121,166	+21,918	121,218	+21,970
Average household size (persons)	2.246	2.197	-0.049	2.071	-0.175

<sup>3.34</sup> Scenario A population growth is higher than Scenario B due to the average number of persons resident in each household. Scenario A projects an average of 2.197 persons in 2041, whilst Scenario B projects 2.071. Both represent a reduction on the average of 2.246 persons estimated for the start of Plan period in 2026 due to the population ageing (as most older residents either live as couples without children or live alone). However, Scenario B also reflects the assumed increase in household formation. As the potential households identified would form from within the existing population, these additional households do not result in any additional residents, thereby reducing the average number of residents per household overall.

- 3.35 Figure 24 confirms that both scenarios reflect the 23,700 dwellings identified by the standard method calculation for the 15-year Local Plan period 2026-2041. Scenario A shows an increase of 23,139 dwellings, plus additional bedspaces which equalise to the remaining 561 dwellings. Scenario B shows an increase of 23,194 dwellings, plus 506 based on the equalised bedspaces.

**Figure 24: Total Housing Need over the 15-year Plan period 2026-2041 (Source: ORS Model)**

	Baseline	Scenario A		Scenario B	
	2026	2041	Change 2026-2041	2041	Change 2026-2041
Total households	99,248	121,166	+21,918	121,218	+21,970
Unoccupied dwellings	5,535	6,756	+1,221	6,759	+1,224
<b>Dwellings in Use Class C3</b>	<b>104,783</b>	<b>127,922</b>	<b>+23,139</b>	<b>127,977</b>	<b>+23,194</b>
Communal establishment residents	2,648	3,656	+1,008	3,556	+908
Additional communal establishment bedspaces in Use Class C2 (equalised to dwellings)	-	-	+561	-	+506
<b>TOTAL HOUSING NEED</b>	<b>-</b>	<b>-</b>	<b>+23,700</b>	<b>-</b>	<b>+23,700</b>

- 3.36 With regard to the two scenarios, on balance Scenario B (i.e. providing the homes needed for local residents who want to form separate household and live independently) better aligns with the Government's objectives of addressing the impact of past undersupply, and also provides a more credible demographic projection (albeit still far higher than past trends). Nevertheless, delivering Scenario B is likely to need more Affordable Housing to be provided (as the majority of the potential households have not formed due to them being unable to afford to buy or rent suitable housing in the local area). This is considered further when assessing the need for Affordable Housing, and will need to be tested in the context of economic viability.

## Aligning Jobs and Workers

- 3.37 Figure 25 identifies the growth in economically active residents, with the baseline estimates for 2026 set out alongside the Scenario A and Scenario B outputs for 2041 and the associated change from 2026-2041.

**Figure 25: Change in economically active residents over the 15-year Plan period 2026-2041 (Source: ORS Model)**

	Baseline	Scenario A		Scenario B	
	2026	2041	Change 2026-2041	2041	Change 2026-2041
Economically active residents	111,474	134,277	+22,803	125,882	+14,409
Jobs growth supported	-	-	+20,973	-	+13,252

- 3.38 Based on established commuting patterns, the growth of resident workers identified by Scenario A would support an additional 21,000 jobs, whereas the Scenario B growth would support around 13,300 extra jobs. This compares to an additional 7,800 jobs forecast by Cambridge Econometrics over the period 2025-2040 and 5,100 jobs forecast by Oxford Economics for the same period, although the North Somerset ESPRE concluded a growth of 9,800 jobs was likely to be more realistic.<sup>2</sup> The 2025 Update identifies a higher growth of 15,000 jobs as a consequence of the increased Housing Need identified by the new standard method.<sup>3</sup> This broadly aligns with Scenario B, but is lower than the jobs growth needed to align with Scenario A.

<sup>2</sup> North Somerset Employment Sites and Premises Requirements Evidence (ESPRE) report (Hardisty Jones Associates, 2023)

<sup>3</sup> North Somerset Employment Sites and Premises Requirements Evidence Update (Hardisty Jones Associates, 2025)



## Future Households

3.39 Figure 26 provides a breakdown of the projected household composition, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2041 and the change from 2026-2041.

**Figure 26: Household growth by household composition, 2026-2041 (Source: ORS Model)**

	Baseline	Scenario A		Scenario B	
	Households 2026	Households 2041	Change 2026-2041	Households 2041	Change 2026-2041
One-person household	30,910	39,015	+8,106	44,095	+13,185
Couple family without children	30,260	37,115	+6,854	37,307	+7,047
Couple family with dependent children	18,548	21,915	+3,367	20,791	+2,243
Lone parent family with dependent children	5,586	6,646	+1,060	6,480	+894
Other household types	13,944	16,474	+2,530	12,545	-1,398
<b>TOTAL HOUSEHOLDS</b>	<b>99,248</b>	<b>121,166</b>	<b>+21,918</b>	<b>121,218</b>	<b>+21,970</b>

3.40 Both scenarios identify a similar increase overall, with total growth of around 22,000 additional households. However, there are notable differences in the household composition.

- » **Scenario A** identifies growth across all household types, with one-person households and couples without children having the largest increases (8,100 and 6,900 respectively), families with dependent children increasing by 4,400 (including 3,400 couples and 1,100 lone parents) and the number of other household types increasing by 2,500 to a total of 16,500 by 2041
- » **Scenario B** identifies a larger growth of one-person households (13,200) and couples without children (7,000) on the basis that potential households have been able to form independently, but a lower growth of families with dependent children (3,100) as fewer are projected to move to the area, and the number of other household types reducing by 1,400 to a total of 12,500 by 2041 as a consequence of fewer concealed families and adult children living with parents.

3.41 Figure 27 provides a further breakdown of the projected household growth based on household composition and the age of the household representative. It is evident that many more young residents aged under 35 would form households under Scenario B than under Scenario A (7,000 cf. 2,700) with a larger number of one-person households and couples without children aged 16-34 and also aged 35-54. However, these are inevitably offset against a lower household growth across other age groups.

**Figure 27: Household growth by household composition and age of household reference person, 2026-2041 (Source: ORS Model)**

Change 2026-2041	Scenario A				Scenario B			
	16-34	35-54	55-74	75+	16-34	35-54	55-74	75+
One-person household	+634	+1,248	+1,927	+4,297	+5,119	+2,145	+1,941	+3,979
Couple without children	+752	+871	+2,393	+2,838	+1,086	+1,144	+2,366	+2,451
Couple with children	+690	+2,553	+120	+4	+527	+1,656	+57	+4
Lone parent with children	+395	+640	+23	+2	+351	+518	+23	+1
Other household types	+278	+972	+711	+570	-108	-829	-778	+317
<b>TOTAL CHANGE</b>	<b>+2,749</b>	<b>+6,284</b>	<b>+5,174</b>	<b>+7,711</b>	<b>+6,974</b>	<b>+4,634</b>	<b>+3,610</b>	<b>+6,752</b>

## 4. Affordable Housing Need

- 4.1 The NPPF sets out that within the context of establishing need, those groups who require Affordable Housing should be identified, and that the size, type and tenure of Affordable Housing needed for different groups in the community should be assessed and the minimum proportion of Social Rent homes identified:

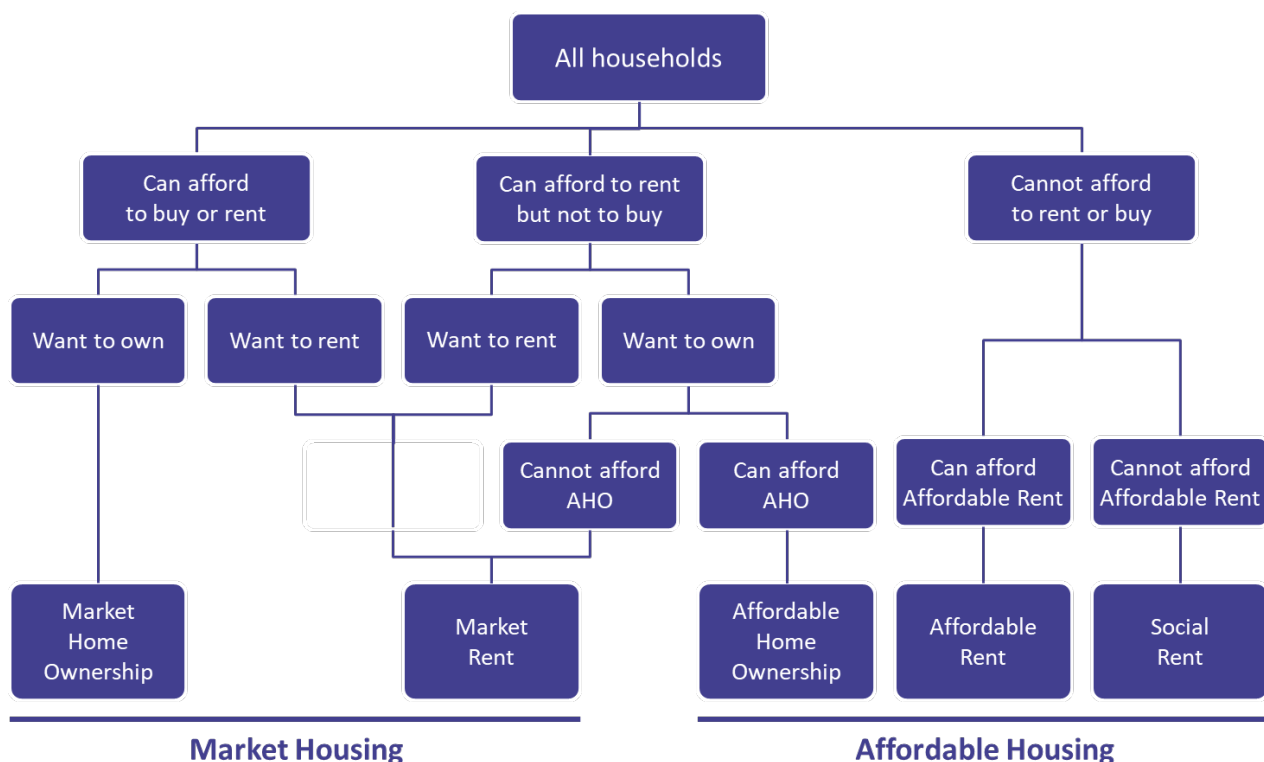
63. Within this context of establishing need, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies. These groups should include (but are not limited to) **those who require affordable housing (including Social Rent)** ...

64. Where a need for affordable housing is identified, planning policies should specify the **type of affordable housing required** (including the minimum proportion of Social Rent homes required)

National Planning Policy Framework, December 2024 (emphasis added)

- 4.2 Given this context, PPG sets out that “all households whose needs are not met by the market can be considered in affordable housing need” and that “strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market”.<sup>4</sup>
- 4.3 Household affordability is therefore a key consideration in determining both the need for Affordable Housing and the type and tenure of homes likely to be needed by households that are unable to afford. Figure 28 identifies the way in which affordability is considered when assessing the need for Affordable Housing in the context of households’ aspiration to own.

Figure 28: Considering affordability when establishing the need for Market Housing and Affordable Housing



<sup>4</sup> PPG ID 2a-018-20190220 and ID 2a-019-20190220

## House Prices and Rents

- 4.4 Figure 29 shows lower quartile house prices for existing and newly built dwellings in North Somerset based on the number of bedrooms. Newly built dwellings generally attract a premium, and the difference in values is likely to be down to a range of factors which include the location of newbuild housing, the relative size of properties, gardens, the availability of parking, comparative quality and condition of existing stock, and other intangible issues such as character.
- 4.5 When considering rented housing, it is important to reflect on the range of different options available.
- » Private Rent is based on the lower quartile of rents recorded by the Valuation Office Agency (properties rented by Housing Benefit claimants are not included in the sample) and the Price Index of Private Rents published by the Office for National Statistics
  - » Social Rent and Affordable Rent are based on the gross rent (including any service charges) for general needs housing (which excludes supported housing and housing for older people) for the year ending March 2024 based on information published by the Regulator of Social Housing.

**Figure 29: House prices and weekly rent thresholds in North Somerset (Source: Price Paid Data, HM Land Registry; House Price Statistics, Price Index of Private Rents, ONS; Statistical Data Return, Regulator of Social Housing)**

House Prices and Rents	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
<b>HOMEOWNERSHIP</b>				
Lower quartile house price for existing dwellings	£172,363	£192,710	£272,428	£419,952
Lower quartile house price for newly built dwellings	£194,883	£225,907	£293,860	£371,776
Equity based on 50% of house price for newly built dwellings	£97,441	£112,954	£146,930	£185,888
<b>WEEKLY RENT</b>				
Lower quartile private rent	£147.88	£198.24	£239.02	£331.57
Affordable Rent	£118.02	£139.86	£164.05	£188.31
Social Rent	£94.00	£108.47	£123.44	£145.67

## Income Needed for Home Ownership

- 4.6 The income needed to purchase Market Housing will depend on the house price together with the mortgage income multiplier and the available deposit (or percentage loan-to-value). For example, if we consider a property costing £200,000, and assume the buyer could afford a deposit of 10%. The outstanding mortgage requirement would be £180,000. Using a typical income multiple of 3.5x we can calculate an income of just over £51,400 would be needed ( $51,429 \times 3.5 = £180,000$ ).
- 4.7 Whilst some households will have higher deposits available and others will seek to extend their borrowing as far as possible, the initial assumptions of a 10% deposit and a 3.5 x mortgage multiplier provides a reasonable indication of the income that first-time buyer households are likely to need to buy a home in this area. Based on these assumptions, Figure 30 shows the household income levels needed to buy an existing dwelling at the current lower quartile house price for each property size, though households will tend to have higher deposits when purchasing larger homes (often including equity from the sale of another property) so it is relatively artificial to consider incomes in isolation. Figure 30 also shows the income needed for a 50% equity share in a newly built dwelling, which is assumed to be the threshold for Affordable Home Ownership.

## Income Needed to Rent Housing

- 4.8 The income needed to rent housing will depend on the monthly rent together with the income multiplier allowed for housing costs. The previous CLG Strategic Housing Market Assessments Practice Guidance (Version 2, August 2007)<sup>5</sup> stated:

*“A household can be considered able to afford market house renting in cases where the rent payable was up to 25 per cent of their **gross** household income” (page 42)*

- 4.9 However, this previous Guidance was rescinded in 2014 following the publication of the NPPF and PPG. Although the PPG does not propose a specific multiplier for assessing housing costs, it notes that *“care should be taken ... to include only those households who cannot afford to access suitable housing in the market”*.<sup>6</sup>
- 4.10 The English Housing Survey (EHS) provides information about the percentage of gross household income that households spent on their housing costs.<sup>7</sup> In 2023-24, households renting privately spent an average of 34% of their income on rent. This is based on income from all income earners in the household (irrespective of whether they contribute to the housing cost) and includes income received from housing benefit.
- 4.11 The proportion of household income allocated to housing costs is necessarily based on a judgement. At the lower end of the range, the previous CLG Practice Guidance sets out a percentage of 25%. However, as the EHS identifies that households renting privately spend 34% of their gross income on average, there must be many households currently spending more than 34% of their income on housing costs (which will be offset against others spending lower proportions). Furthermore, the proportion of income spent on housing costs would be considerably higher without housing benefit support being provided. This leads to our judgement that **35% of household income** (excluding any contribution from housing benefit) provides a reasonable basis for assessing the absolute **maximum** that households should expect to pay for their housing costs.

## Housing Affordability Thresholds

- 4.12 Based on the above assumptions, Figure 30 shows the annual incomes needed to afford Market and Affordable Home Ownership, as well as Market Rent, Affordable Rent and Social Rent.

**Figure 30: Annual household income thresholds for housing options in North Somerset by number of bedrooms**  
(Note: Calculated based on the house prices and rents set out in Figure 29)

Annual Household Income Affordability Thresholds	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
<b>ANNUAL INCOME TO AFFORD TO OWN</b> <i>based on 10% deposit and 3.5x mortgage multiplier</i>				
Market Home Ownership	£50,113	£58,090	£75,564	£95,599
Affordable Home Ownership	£25,056	£29,045	£37,782	£47,800
<b>ANNUAL INCOME TO AFFORD TO RENT</b> <i>based on 35% of gross income (without housing benefit)</i>				
Market Rent	£22,047	£29,553	£35,634	£49,431
Affordable Rent	£17,595	£20,851	£24,457	£28,073
Social Rent	£14,014	£16,171	£18,403	£21,717

<sup>5</sup> <https://www.gov.uk/government/publications/strategic-housing-market-assessments-practice-guidance>

<sup>6</sup> PPG ID 2a-020-20190220

<sup>7</sup> <https://www.gov.uk/government/statistics/english-housing-survey-2023-to-2024-experiences-of-the-housing-crisis/english-housing-survey-2023-to-2024-experiences-of-the-housing-crisis>

## Current Unmet Need

- 4.13 In terms of establishing the current unmet need for Affordable Housing, the PPG draws attention to those types of households considered to be in housing need; whilst emphasising the need to avoid double-counting and including only those households unable to afford their own housing.

### *How can the current unmet gross need for affordable housing be calculated?*

*Strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market.*

*The unmet (gross) need for affordable housing by assessing (sic) past trends and current estimates of:*

- » *the number of homeless households;*
- » *the number of those in priority need who are currently housed in temporary accommodation;*
- » *the number of households in over-crowded housing;*
- » *the number of concealed households;*
- » *the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and*
- » *the number of households from other tenures in need and those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.*

*Care should be taken to avoid double-counting, which may be brought about with the same households being identified on more than one transfer list, and to include only those households who cannot afford to access suitable housing in the market.*

**Planning Practice Guidance, ID 67-006-20190722**

- 4.14 To assess the current need for Affordable Housing, the number of households who are not suitably housed and who are unable to afford Market Housing must be identified. Figure 31 sets out the current need for Affordable Housing based on the latest available data. This identifies 2,153 households living in unsuitable housing and unable to afford suitable housing in North Somerset, which provides a reasonable assessment of current housing need at the base date of the Local Plan.

**Figure 31: Assessing current unmet need for Affordable Housing in North Somerset (Sources: Census data, ONS; Homelessness statistics, Local Authority Housing Statistics, MHCLG)**

Current unmet housing need from households unable to afford to rent or buy	Source	Without a separate home	Occupying Market Housing	Occupying Affordable Housing
<b>Homeless households in priority need</b> Currently living in temporary accommodation	Homelessness statistics	<i>B&amp;B or Hostel</i> 0	<i>PRS or PSL</i> 45	<i>LA or RSL stock</i> 31
<b>Homeless households in priority need</b> Households accepted as homeless but without temporary accommodation provided	Homelessness statistics	1	-	-
<b>Households living in overcrowded housing</b> Households living in overcrowded housing	Census data	758	393	332
<b>Other households in unsuitable housing</b> Needing to move on medical or welfare grounds or where failure to meet the identified need would cause hardship	LAHS data	-	550	43
<b>Sub-total</b>		<b>759</b>	<b>988</b>	<b>406</b>
<b>TOTAL CURRENT UNMET NEED</b>				<b>2,153</b>

## Households that Aspire to Homeownership

- 4.15 When considering the number of households from other tenures in who aspire to homeownership, data from the English Housing Survey shows that over half (56.6%) of households who rent privately and a fifth (21.1%) of those in social rented housing plan to own in the long-term.

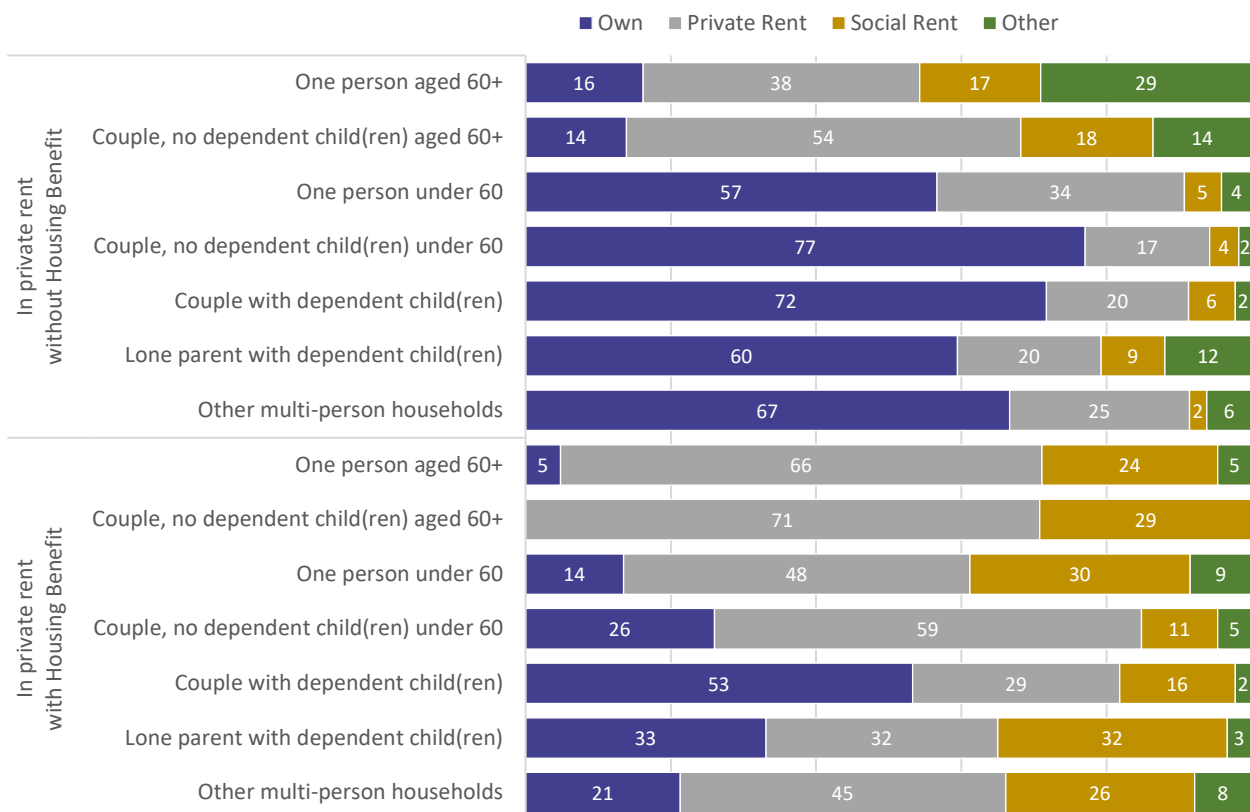
**Figure 32: Long-term tenure aspirations (Source: English Housing Survey, MHCLG)**

Current tenure	Long-term plan			
	Owner occupier	Rent from private landlord	Rent from social landlord	Other
Owner occupied	97.1%	0.3%	0.5%	2.1%
Rent from private landlord	56.6%	29.2%	9.5%	4.7%
Rent from social landlord	21.1%	1.4%	74.2%	3.3%

- 4.16 These figures relate to aspirations only and there is no test within the data as to whether this aspiration is affordable. It is therefore worth considering the responses of those currently in private rent in more detail with a view to understanding the types of household aspiring to buy.
- 4.17 Figure 33 shows long-term tenure aspirations of different types of households currently renting privately either with or without Housing Benefit.

**Figure 33: Long-term tenure expectation for those renting from a private landlord with and without Housing Benefit support (Source: English Housing Survey, MHCLG. Note: Own includes shared ownership)**

### Long-term tenure expectations of those currently in private rent



- 4.18 Through combining data on the number of households of each type in each age group living in private rented housing and paying their own rent with the aspiration data from the EHS, Figure 34 establishes the number of existing households that aspire to homeownership. It is important to recognise that all of these households can afford to rent Market Housing and therefore none would have previously been counted as needing Affordable Housing.

**Figure 34: Existing households renting from a private landlord without Housing Benefit that aspire to homeownership by household composition and age of household reference person (Source: ORS Model. Note: Figures may not sum due to rounding)**

Household composition	15-24	25-34	35-44	45-54	55-64	65+	Total
One-person household	273	766	490	210	202	36	1,978
Couple family without children	201	1,014	276	178	161	86	1,917
Families with dependent child(ren)	42	638	589	168	0	0	1,436
Other household types	159	359	304	174	153	0	1,149
<b>TOTAL HOUSEHOLDS</b>	<b>675</b>	<b>2,778</b>	<b>1,658</b>	<b>730</b>	<b>517</b>	<b>122</b>	<b>6,480</b>

- 4.19 We can therefore conclude that there are around 6,500 households currently resident in North Somerset who do not own their own home but aspire to do so. Of these households, most (79%) are aged under 45 including around 2,800 (43%) aged 25-34.
- 4.20 It is important to recognise that the figures for those who aspire to homeownership are based upon those households who can afford to rent Market Housing without Housing Benefit support. But not all of these households would necessarily choose to buy Affordable Home Ownership, and others may not need Affordable Home Ownership if their circumstances change to such a degree that they can afford to buy without financial assistance. Furthermore, it is also important to recognise that the identified demand could only be realised if Affordable Home Ownership products could be delivered at prices that were genuinely affordable in the area based on local incomes.
- 4.21 Neither the NPPF nor PPG identify that any affordability criteria should be applied to those households who aspire to homeownership but cannot afford to buy their own home. However, it is appropriate to consider the extent to which these households could plausibly afford Affordable Home Ownership products if they were provided.
- 4.22 Figure 35 sets out the key stages of the analysis, which identifies that around 1,000 currently renting from a private landlord aspire to homeownership, and whilst they couldn't afford Market Housing they are likely to form an effective demand for Affordable Home Ownership.

**Figure 35: Need from households that aspire to homeownership but cannot afford to buy Market Housing in North Somerset (Source: ORS Model. Note: Figures may not sum due to rounding)**

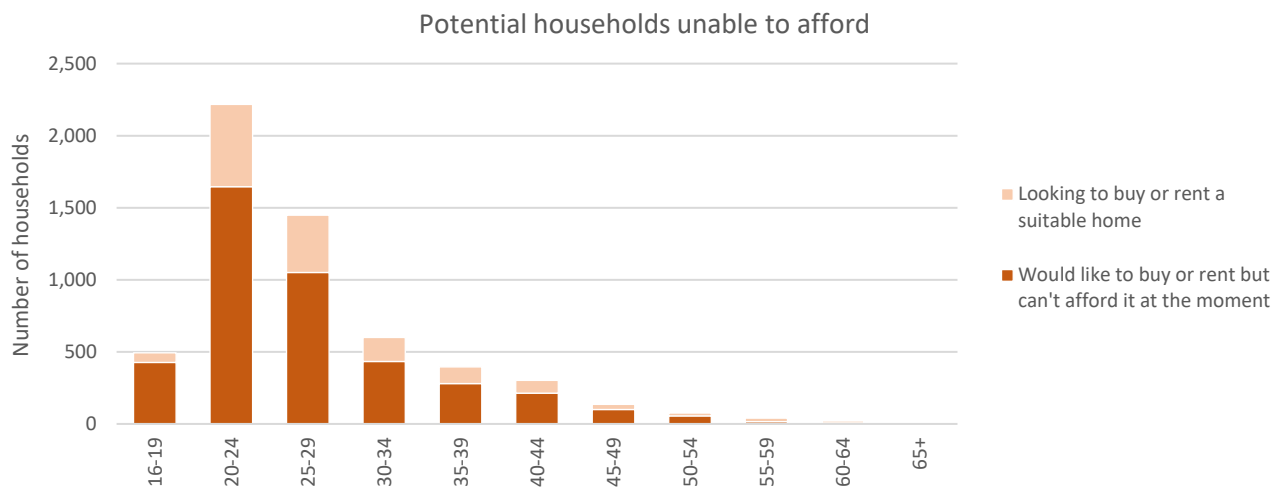
Projected future need from households that aspire to homeownership but cannot afford to buy	Number of households
Households renting privately that aspire to homeownership	6,480
Less households that could afford to buy an existing dwelling at the lower quartile price	891
Less households unable to afford based on 50% of the lower quartile price for newly built dwellings	1,734
Less households with savings of less than £5,000	2,859
<b>HOUSEHOLDS THAT ASPIRE TO OWN BUT CANNOT AFFORD TO BUY that are likely to form an effective demand for AHO products</b>	<b>997</b>



## Need from Potential Households

- 4.23 The previous analysis established that there were around 5,700 potential households in the area that want to live independently but do not occupy a separate home at the base date of the Plan in 2026 (Figure 21). Many of these potential households have not been able to form a new household as they are unable to afford to rent or buy suitable housing.
- 4.24 Applying age-specific EHS rates to the identified potential households shows that around 4,200 would not be able to afford suitable housing. Whilst these households would not be counted under Scenario A it would be important to include them when assessing Affordable Housing need under Scenario B.

**Figure 36: Potential household unable to afford suitable housing (Source: ORS Model)**



## Newly Arising Need

- 4.25 In terms of establishing the newly arising need for Affordable Housing in future years, the PPG draws attention to new household formation (in particular the proportion of newly forming households unable to buy or rent in the market area) as well as the number of existing households falling into need.

***How can the number of newly arising households likely to be in affordable housing need be calculated (gross annual estimate)?***

*Projections of affordable housing need will have to reflect new household formation, the proportion of newly forming households unable to buy or rent in the market area, and an estimate of the number of existing households falling into need. This process will need to identify the minimum household income required to access lower quartile (entry level) market housing (strategic policy-making authorities can use current costs in this process, but may wish to factor in anticipated changes in house prices and wages). It can then assess what proportion of newly forming households will be unable to access market housing.*

**Planning Practice Guidance, ID 2a-021-20190220**

- 4.26 To assess the projected future Affordable Housing need, it is necessary to consider need from new households (in particular the proportion of newly forming households unable to rent or buy Market Housing) as well as the number of existing households falling into need. It is also necessary to consider the number of additional households that aspire to homeownership that cannot afford to buy.



- 4.27 The ORS Model establishes future Affordable Housing need based on the dwelling-led household projections together with a range of secondary data sources to profile how the stock will have to change to meet the needs of the future population. The Model provides robust and credible evidence over the full Plan period and recognises how housing market trends and drivers are likely to impact on the appropriate housing mix.
- 4.28 The Model recognises that the proportion of households unable to buy or rent in the market area will not be the same for all households, so the appropriate proportion is determined separately for each household type and age group. The affordability percentages in Figure 37 are calculated using detailed information on existing households living in North Somerset from Census data, alongside administrative data published by DWP about housing benefit claimants. For each type of household in each age group, the table identifies the percentage of households that are unable to afford their housing costs based on them either occupying Affordable Housing or receiving housing benefit to enable them to afford Market Housing.

Figure 37: Assessing affordability by household type and age (Source: Census data, ONS; Housing Benefit claimants, DWP)

Percentage of households unable to afford to rent or buy	16-24	25-34	35-44	45-54	55-64	65+
One-person household	18%	7%	25%	28%	24%	24%
Couple family without children	6%	2%	3%	5%	4%	7%
Couple family with dependent children	64%	73%	58%	44%	41%	58%
Lone parent family with dependent children	31%	17%	9%	7%	7%	18%
Other household types	11%	13%	15%	18%	16%	13%

- 4.29 Based on the dwelling-led projections, the LHNA analysis identifies the annual need from new households unable to afford to rent or buy and existing households falling into need. This increase must be offset against changes to households previously identified as being in need.
- » **Scenario A** identifies annual need from 1,151 new and 257 existing households that cannot afford and 43 additional households that want to own, which is offset against 411 household dissolutions, 544 previously counted households leaving the area, and better circumstances for 224 households
  - » **Scenario B** identifies annual need from 1,288 new and 304 existing households that cannot afford and 80 additional households that want to own, which is offset against 377 household dissolutions, 694 households previously counted leaving the area, and better circumstances 344 households.

Figure 38: Summary annual components of household growth 2026-41 (Source: ORS Model. Note: Figures may not sum due to rounding)

Projected future need from households needing Affordable Housing	Scenario A	Scenario B
Need from new households unable to afford to rent or buy	1,151	1,288
Need from existing households falling into need	257	304
Need from additional households aspiring to homeownership that cannot afford to buy	43	80
<b>ANNUAL PROJECTED NEW NEED</b> from new and existing households unable to afford to rent or buy	<b>1,451</b>	<b>1,672</b>
Household dissolutions following death	411	377
Households moving out of the area	544	694
Improved circumstances for existing household which have enabled them to afford suitable Market Housing	224	344
<b>NET ANNUAL NEED</b> based on the increase in households needing Affordable Housing	<b>272</b>	<b>257</b>

## Overall Need for Affordable Housing

- 4.30 For the base date of the Plan, the LHNA identifies a current unmet need from around 2,100 households that are unable to afford to rent or buy suitable housing. Some of these households occupy Affordable Housing and taking account of the properties they would vacate reduces the net need. In addition to the households unable to afford, there are around 1,000 households currently renting their homes who aspire to own but cannot afford to buy. Finally, of the potential households identified that want to live independently, around 4,200 have been unable to form as they cannot afford to rent or buy suitable housing. Whilst Scenario A does not count the needs from these households, they are included in Scenario B.
- 4.31 Over the 15-year Plan period, there will be additional need from new and existing households who will be unable to afford to rent or buy suitable housing and also from new households that will aspire to own but cannot afford to buy:
- » **Scenario A** identifies an annual new need from approaching 1,500 households each year, but this must be offset against projected changes to the previously identified need and on this basis the future need is likely to total around 4,100 households over the 15-year period
  - » **Scenario B** identifies an annual new need from approaching 1,700 households each year, but once this is offset against changes to the previously identified need the overall future need is likely to total around 3,800 households over the 15-year period 2026-2041 on this scenario.
- 4.32 Figure 39 brings together the information to identify that there will be a need to provide Affordable Housing for around 6,600 households (443 per year) under Scenario A and 10,600 (705 per year) under Scenario B.

**Figure 39: Current unmet need and future need from households needing Affordable Housing in North Somerset 2026-2041**  
(Source: ORS Model. Note: Figures may not sum due to rounding)

Total need from households needing Affordable Housing	Step	Source	Scenario A	Scenario B
<b>CURRENT NEED</b>				
Current unmet need from households unable to afford	A	Figure 31	2,124	2,124
Less households occupying Affordable Housing	B	Figure 31	559	559
Existing households aspiring to own who cannot afford to buy	C	Figure 35	997	997
Potential households that want to live independently	D	Figure 36	-	4,167
<b>Net current need in 2026</b>	<b>E</b>	<b>A - B + C + D</b>	<b>2,562</b>	<b>6,729</b>
<b>FUTURE NEED</b>				
Annual projected new need	F	Figure 38	1,451	1,672
Net annual need	G	Figure 38	272	257
<b>Net future need over the 15-year period 2026-41</b>	<b>H</b>	<b>G × 15</b>	<b>4,085</b>	<b>3,848</b>
<b>TOTAL NEED 2026-41</b>	<b>I</b>	<b>E + H</b>	<b>6,646</b>	<b>10,577</b>
Average annual need	J	I ÷ 15	+443	+705

- 4.33 The total need identified by the LHNA analysis is a net figure and therefore any future losses from the current stock (such as demolition, or sales through Right to Buy) would increase the number of affordable dwellings needed by an equivalent amount. The analysis also assumes that the level of Housing Benefit support provided to households living in the private rented sector remains constant.
- 4.34 Private rented housing (with or without Housing Benefit) does not meet the definitions of Affordable Housing and is not counted as Affordable Housing supply; however, households in receipt of Housing Benefit are

assumed to be able to afford their housing costs, so they are not counted towards the need for Affordable Housing – but if Housing Benefit support was no longer provided (or if there was not sufficient private rented housing available at a price they could afford) then this would increase the need for Affordable Housing. As policy decisions about housing benefit support provided to households living in the private rented sector are determined by the Government, it will be necessary for the LPA to consider the possible impact of any changes when determining the most appropriate Affordable Housing targets for the area.

- 4.35 Given the net current need from up to around 6,700 households needing Affordable Housing at the start of the Plan period, it would seem appropriate to seek to maximise Affordable Housing delivery in the early years of the Plan and ensure that the Affordable Housing needs assessment is routinely updated, providing that this does not unduly compromise overall levels of housing delivery in the area.

## Types of Affordable Housing

- 4.36 Figure 40 provides a breakdown of the identified households needing Affordable Housing on the basis of affordability framework previously set out (Figure 28) and the number of bedrooms needed.
- » **Scenario A** identifies around 1,600 households that aspire to own but cannot afford to buy who could afford Affordable Home Ownership, and of the households unable to afford to rent around 1,500 could afford Affordable Rent (without Housing Benefit, and spending no more than 35% of their income on rent) whilst the remaining 3,500 would need Social Rent.
  - » **Scenario B** identifies around 2,600 households that aspire to own but cannot afford to buy who could afford Affordable Home Ownership, and of the households unable to afford to rent around 1,900 could afford Affordable Rent (without Housing Benefit, and spending no more than 35% of their income on rent) whilst the remaining 6,200 would need Social Rent.

**Figure 40: Total households needing Affordable Housing by type of Affordable Housing and number of bedrooms 2026-2041**  
(Source: ORS Model. Note: Figures may not sum due to rounding)

	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms	Total
<b>SCENARIO A</b>					
Social Rent	895	1,279	1,038	335	3,547
Affordable Rent	213	467	559	219	1,458
Affordable Home Ownership	495	648	420	78	1,641
<b>TOTAL HOUSEHOLDS</b>	<b>1,603</b>	<b>2,394</b>	<b>2,017</b>	<b>632</b>	<b>6,646</b>
<b>SCENARIO B</b>					
Social Rent	2,128	2,906	877	308	6,220
Affordable Rent	379	913	386	174	1,852
Affordable Home Ownership	622	1,016	658	210	2,505
<b>TOTAL HOUSEHOLDS</b>	<b>3,129</b>	<b>4,836</b>	<b>1,920</b>	<b>692</b>	<b>10,577</b>

- 4.37 This includes all households unable to afford to rent or buy suitable housing, but assumes that the number of households in receipt of Housing Benefit to enable them to afford Market Rent will not change. It also includes all households who want to own but cannot afford to buy where Affordable Home Ownership provides a suitable housing option, but there may be other households that want to own that do not have a high enough income or sufficient savings for Affordable Home Ownership.

## 5. Housing Needs of Specific Groups

- 5.1 The NPPF (December 2024) requires that local planning authorities consider the needs of a range of groups within the population.

*63. Within this context of establishing need, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies. These groups should include (but are not limited to) those who require affordable housing (including Social Rent); families with children; looked after children; older people (including those who require retirement housing, housing with-care and care homes); students; people with disabilities; service families; travellers; people who rent their homes and people wishing to commission or build their own homes*

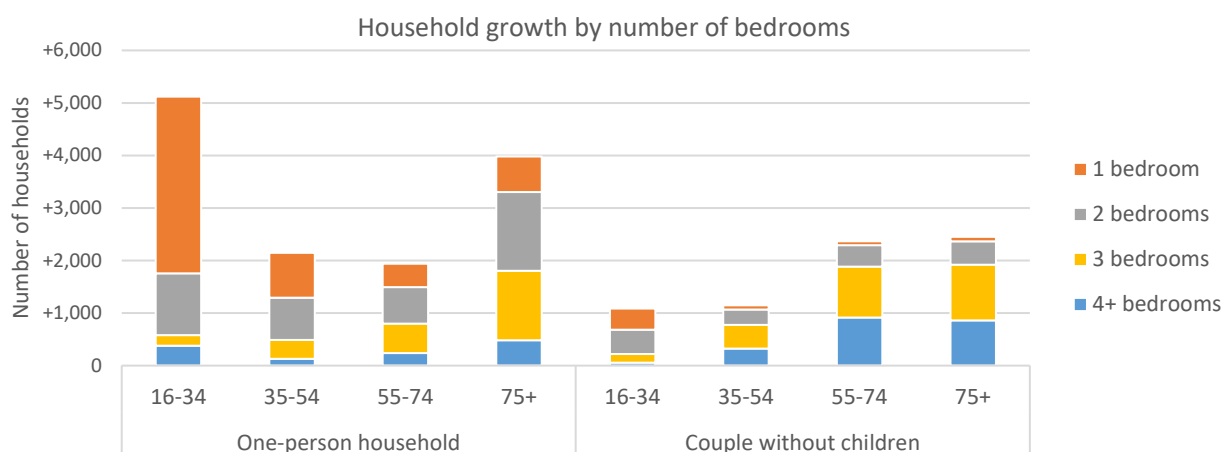
**National Planning Policy Framework, December 2024**

- 5.2 The needs of those who require Affordable Housing (including Social Rent) have already been established. This chapter considers the specific housing needs of the other identified groups in turn, except for:
- » Service families, as they are likely to have a minimal impact on the local housing market given that there is no military base in the local area
  - » Travellers, as a separate Gypsy and Traveller Accommodation Assessment has considered their needs as set out in Planning Policy for Traveller Sites.

### Housing for Families with Children

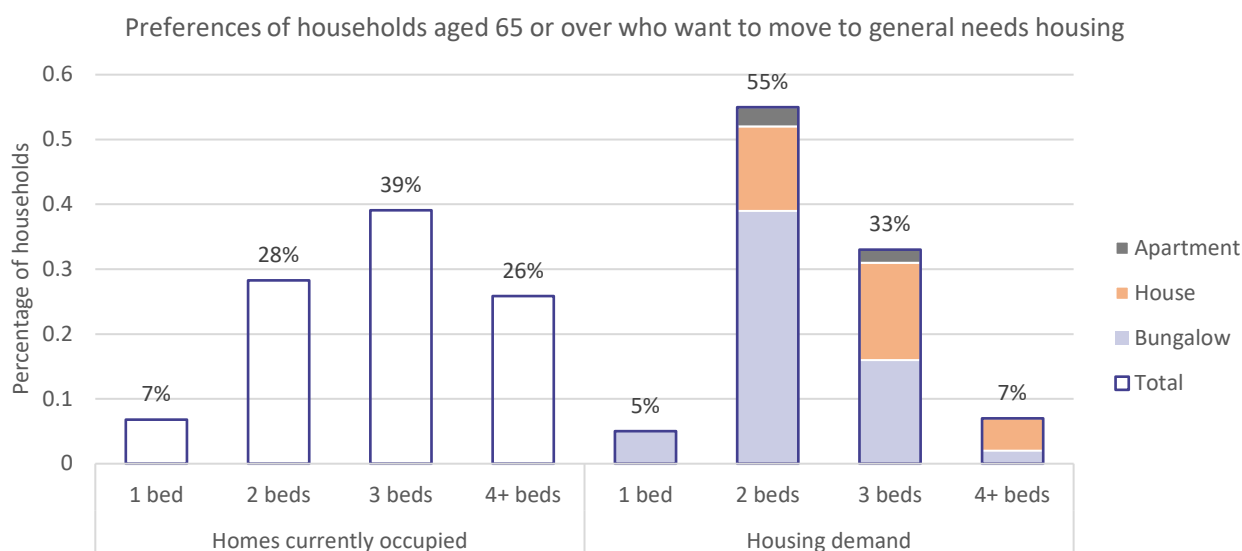
- 5.3 Figure 26 previously identified a projected increase of 4,400 single families with children under Scenario A (20% of the household growth) and an increase of 3,100 under Scenario B (14%) over the 15-year period 2026-2041. Under both scenarios, around three quarters of these households were couple families and the remaining quarter were lone parent families. Nevertheless, whilst families with children represent up to 20% of the projected household growth, when considering the need for additional family housing it is important to recognise that many couples without children and one-person households will also occupy family housing.
- 5.4 Figure 41 illustrates the mix of housing by number of bedrooms that the additional couples without children and one-person households are likely to occupy, assuming that current occupancy trends continue.

**Figure 41: Household growth and number of bedrooms based on current occupancy trends by household composition and age of household reference person, 2026-2041 (Source: ORS Model)**



- 5.5 On the basis of current occupancy trends, it is likely that many older couples without children and one-person households will continue to occupy larger homes after their adult children have left to live independently. Where the current occupiers of family housing choose not to move, these existing properties will not be vacated and will therefore not be available for new families with children, so it will be necessary to provide additional family housing for these new families.
- 5.6 The analysis identifies that in addition to the family homes needed to accommodate the projected increase of up to 4,400 families with children, there would also be need to provide an additional 6,400 family homes (3,900 with 3 bedrooms and 2,500 with 4 or more bedrooms) given the increase in households without children who are likely to stay in their current family home based on current trends. It will therefore be necessary to provide family housing for around 10,800 households (equivalent to 49% of the projected household growth) without any change to current occupancy patterns.
- 5.7 Although many older households do not want to leave their family home and are unlikely to move, around 8% households aged 65 or over are likely to consider moving to specialist older person housing and a further 17% of households aged 65 or over would not want to move to older person housing but would choose to move within the general housing stock if there were suitable homes available that better met their needs. Given that the number of households aged 65 or over is projected to increase to 45,900 households by the end of the Plan in 2041 of which around 38,400 are likely to occupy Market Housing, there is therefore the potential for up to 6,600 existing family homes to be vacated if the right type of general needs housing could be provided for these households.
- 5.8 Figure 42 provides a breakdown of the size of homes that older households living in Market Housing currently occupy, and the likely housing demand for the type and size of homes that those willing to move.

**Figure 42: Preferences of household aged 65 or over who want to move to general needs housing (Source: ORS Model)**



- 5.9 From the data, it is evident that of those older households living in Market Housing, the majority (65%) currently occupy homes with at least three or four bedrooms. Therefore, providing suitable housing for these households would be likely to lead to a large number of family homes being vacated.
- 5.10 Most households are seeking two bedrooms (55%) although there is also a reasonable demand for three bedroom homes (33%) often from households currently living in properties with four bedrooms or more. There is a clear preference for bungalows, with over three fifths (62%) identifying that this would be their

choice, and also the expectation for most. On this basis, if there weren't enough bungalows available, it is likely that many of these households would not vacate their existing family home. It is evident that there is very little demand for apartments from these households, which may be part of the reason for them not choosing specialist older person housing but wanting to remain in the general housing stock.

- 5.11 Figure 43 identifies the net difference between the housing currently occupied and the homes sought by these households. Whilst it is important to recognise that many older person households plan to stay in their current home and some would never want to move, the evidence shows that there are many thousands of older person households who will be looking to move to suitable homes within the general housing stock in North Somerset if the right type of homes could be provided.

**Figure 43: Impact of providing general needs housing to meet demand from households aged 65 or over (Source: ORS Model)**

Number of bedrooms	Homes currently occupied	Housing demand	Net difference
1 bedroom	450	332	-118
2 bedrooms	1,879	3,654	+1,776
3 bedrooms	2,598	2,193	-405
4+ bedrooms	1,718	465	-1,253
<b>TOTAL</b>	<b>6,644</b>	<b>6,644</b>	<b>-</b>

- 5.12 Over the 15-year Plan period 2026-41, providing suitable general needs housing for older persons could release up to 4,300 family homes (around 2,600 3-bedroom homes, and 1,700 with 4 bedrooms or more). However, this would depend on providing general needs housing that older households would choose – and whilst these homes would typically smaller than the properties currently occupied (with a net reduction of 400 homes needed with 3 bedrooms and around 1,300 fewer homes with 4 bedrooms or more) the likely mix would need to include around 2,900 bungalows with up to two bedrooms and 1,200 larger bungalows for those households downsizing from family homes with four or five bedrooms or more.

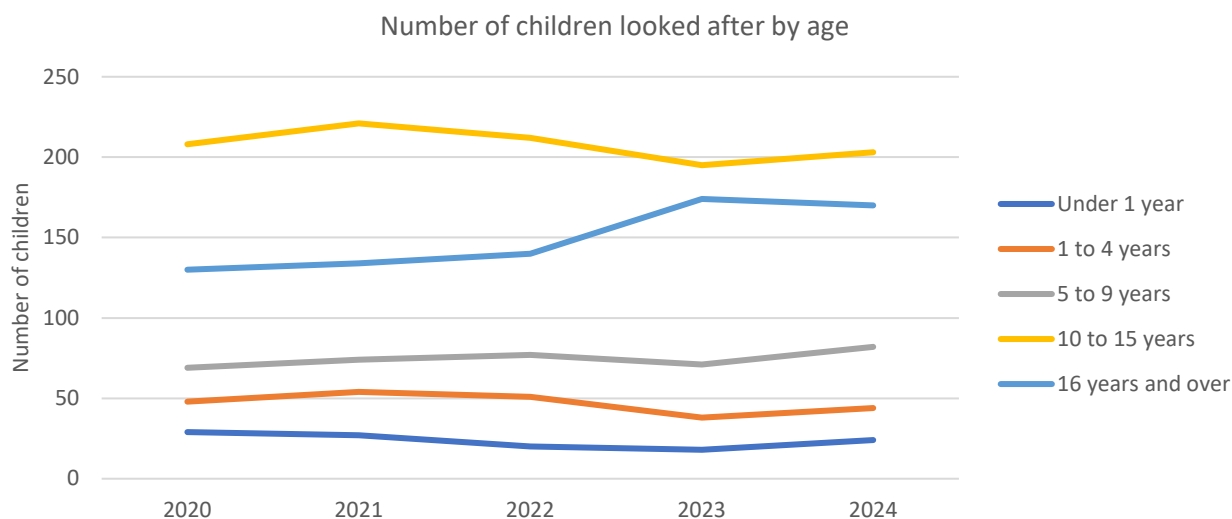
## Looked After Children

- 5.13 The Government issued a Written Ministerial Statement in May 2023 which stressed the importance of providing accommodation for looked after children, referring to the NPPF requirement to consider the needs of different groups in the community and stating that Local Planning Authorities should “*consider whether it is appropriate to include accommodation for children in need of social services care*” as part of their LHNA.
- 5.14 The December 2024 NPPF now states at Footnote 26 that “*Evidence of need for looked after children can be found in the relevant local authority’s Children’s Social Care Sufficiency Strategy*”. North Somerset has compiled a Sufficiency Strategy for Children in Care and Care Experienced Young People 2025-2028 report to facilitate the care and protection of vulnerable children and young people.<sup>8</sup>
- 5.15 The Sufficiency Strategy records that in England, the number of looked after children in care has increased from around 47,600 children in 1994 to 83,600 in 2024, an increase of around 36,000 over a 30-year period. Considering the numbers for North Somerset, the number of looked after children in care has increased from 220 children in 2022 to 281 in March 2025, which now includes 23 unaccompanied asylum-seeking children. These numbers put North Somerset below the regional and national levels per 10,000 people, however the rate is higher than their statistical neighbours.

<sup>8</sup> <https://n-somerset.moderngov.co.uk/documents/s7505/>

- 5.16 Figure 44 summarises the latest information on the overall number of children in care by age group over the last five years. Those aged 10-15 years have remained the largest group, but the number aged 16 or over notably increased in 2023.

**Figure 44: Number of children in care by age group, 2020-2024 (Source: Education Statistics, Department for Education)**



## Care Leavers

- 5.17 Interpreting the ministerial statement of May 2023 in an inclusive sense would also include assessing the need for young people leaving care. Figure 45 shows the accommodation arrangements and suitability of accommodation for young people currently aged 17 to 25 who were looked after children when aged 16.

**Figure 45: Accommodation arrangements and suitability of accommodation for young people currently aged 17 to 25 who were looked after children when aged 16 by age group, 2024 (Source: Education Statistics, Department for Education)**

	Aged 17-18	Aged 19-21	Aged 22-25
Independent living	0	45	-
Semi-independent, transitional arrangements	28	33	-
With parents or relatives	6	10	-
With former foster carers	6	0	-
Other type of accommodation	4	25	-
<b>TOTAL</b>	<b>44</b>	<b>113</b>	<b>126</b>
Accommodation considered suitable	44	103	93
Accommodation considered not suitable	0	10	5
No information available	0	0	28

- 5.18 Based on this information, we can establish that 283 young people currently aged 17 to 25 were looked after when aged 16, equivalent to an average of 31 in each individual year of age. On this basis, it is expected that approximately 31 young people leaving care each year will require accommodation, representing a total of between 450 and 500 individuals over the 15-year period 2026-2041. Although these needs will already be included within the overall need for Affordable Housing (Figure 39), more detailed planning and coordination with children and young people's social care services will be necessary to ensure that care leavers are appropriately and suitably housed.



## Housing for Older People

- 5.19 The UK population is ageing, and people can expect to live longer healthier lives than previous generations, so the older population living in England is forecast to grow significantly over the next 20 years. Given this context, PPG recognises the importance of providing housing for older people.
- 5.20 Figure 46 identifies the type of dwellings occupied by households aged 75 or over resident in North Somerset based on 2021 Census data. The Census does not provide details about specialist older person housing, but information about this stock is maintained by the Elderly Accommodation Counsel.

**Figure 46: Existing dwelling stock occupied by households aged 75+ (Source: Census data, ONS; Specialist Older Person Housing based on data published by the Elderly Accommodation Counsel for 2024)**

	Owner occupied	Rented from private landlord	Rented from social landlord	TOTAL
<b>DWELLINGS OCCUPIED BY HOUSEHOLDS AGED 75+</b>				
1 bedroom	827	317	684	1,828
2 bedrooms	4,602	473	546	5,621
3 bedrooms	6,306	177	183	6,666
4 or more bedrooms	3,506	47	14	3,567
<b>TOTAL HOUSEHOLDS</b>	<b>15,241</b>	<b>1,014</b>	<b>1,427</b>	<b>17,682</b>
<b>SPECIALIST OLDER PERSON HOUSING UNITS</b>				
Housing with Support	1,200	98	1,414	2,614
Housing with Care	340	0	291	631
<b>TOTAL SPECIALIST OLDER PERSON HOUSING UNITS</b>	<b>1,540</b>	<b>98</b>	<b>1,705</b>	<b>3,245</b>

- 5.21 It is notable that the number of social rent specialist older person housing units (1,705 homes) is higher than the number of households aged 75 or over living in one- and two-bedroom housing rented from a social landlord at the time of the Census (1,230 households) which suggests that a number of these homes are likely to have been occupied by households aged under 75.
- 5.22 The owner-occupied stock of specialist older person housing (1,540 homes) represents over a quarter (28.4%) of all one- and two-bedroom dwellings occupied by owner occupiers aged 75 or over. Nevertheless, as many older owner occupiers live in properties with three bedrooms or more, the specialist older person housing stock represents only 10.1% of households when considering all owner occupiers aged 75 or over.
- 5.23 PPG for “Housing for older and disabled people” was published in June 2019. This states:

*The future need for specialist accommodation for older people broken down by tenure and type (e.g. sheltered housing, extra care) may need to be assessed and can be obtained from a number of online tool kits provided by the sector ... Evidence from Joint Strategic Needs Assessments prepared by Health and Wellbeing Boards can also be useful. The assessment of need can also set out the level of need for residential care homes.*

Planning Practice Guidance, ID 63-004-20190626



- 5.24 The Housing Learning and Improvement Network (LIN) has published a number of different online toolkits that have provided standardised rates for estimating demand for specialist older person housing products. These have been based on applying prevalence rates per 1,000 people aged 75 or over, as summarised in Figure 47.<sup>9, 10</sup> The table also presents baseline rates from a model developed by Sheffield Hallam University Centre for Regional Economic and Social Research (CRESR).<sup>11</sup>
- 5.25 These rates provide a useful framework for understanding the potential demand for different forms of older person housing, but there is limited detail about the derivation of the figures published by the Housing LIN.
- 5.26 The More Choice, Greater Voice toolkit recognises that the suggested framework simply:
- “...represents an attempt to quantify matters with explicit numerical ratios and targets. It is contentious, but deliberately so, in challenging those who must develop local strategies to draw all the strands together in a way that quantifies their intentions.” (page 44)*
- 5.27 Similarly, the SHOP resource pack acknowledged that the framework simply provides a baseline, which extrapolates *“...crude estimates of future demand from existing data”* (page 36) and the 2016 Review acknowledged that the Housing in Later Life report had *“suggested a large increase in leasehold housing for older people which were not substantiated at the time”* (page 4).
- 5.28 In contrast, the baseline rates for the CRESR model were established based on:
- “the level and composition of supply of age-exclusive housing, specialist housing, and care beds across the 100 English local authorities with the highest overall provision of each broad type of older person housing per 1,000 older people (aged 75 years or older).” (page 26)*

Figure 47: Benchmark Figures for Specialist Older Person Housing

Form of Provision <i>Demand per 1,000 persons aged 75+</i>	More Choice, Greater Voice Toolkit 2008	Housing in Later Life SHOP Resource Pack 2011	SHOP@ National Benchmark 2016	Housing LIN Review Proposals 2016	Sheffield Hallam CRESR Model 2017
<b>Housing with Support:</b> Retirement Living or Sheltered Housing	125	180	100	100	153.2
<b>Housing with Care:</b> Extra Care or Enhanced Sheltered	45	65	14	35 “Proactive” rate	19.5
<b>Sub-total</b>	<b>170</b>	<b>245</b>	<b>114</b>	<b>135</b>	<b>172.7</b>
Residential care	65	-	43	40	-
Nursing care	45	-	45	45	-
<b>Sub-total</b>	<b>110</b>	<b>-</b>	<b>88</b>	<b>85</b>	<b>110.8</b>
<b>OVERALL TOTAL</b>	<b>280</b>	<b>-</b>	<b>202</b>	<b>220</b>	<b>283.5</b>

- 5.29 The Housing LIN 2016 Review identified the following benchmarks for tenure mix based on the relative affluence or deprivation of the local authority area (Figure 48). Given that the English indices of deprivation ranked North Somerset in the second highest quartile of all local authorities,<sup>12</sup> the relevant tenure mix benchmark would be that proposed for the “Affluent” areas.

<sup>9</sup> [http://www.housinglin.org.uk/library/Resources/Housing/Support\\_materials/Reports/MCGVdocument.pdf](http://www.housinglin.org.uk/library/Resources/Housing/Support_materials/Reports/MCGVdocument.pdf)

<sup>10</sup> <http://www.housinglin.org.uk/library/Resources/Housing/SHOP/SHOPResourcePack.pdf>

<sup>11</sup> <https://www.shu.ac.uk/centre-regional-economic-social-research/projects/all-projects/older-peoples-housing-care-and-support-needs-in-greater-cambridge-2017-2036>

<sup>12</sup> <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019>

**Figure 48: Proposed tenure mix for 2035 influenced by the affluence/deprivation ratio from the Housing LIN 2016 Review**

SHOP@ MARKET SPLIT 2035 OPTIONS - DEPRIVATION/AFFLUENCE SPLIT								
	Most Deprived		Deprived		Affluent		Most Affluent	
	% Rented	% Leasehold	% Rented	% Leasehold	% Rented	% Leasehold	% Rented	% Leasehold
Sheltered, Age Exclusive	80	20	67	33	50	50	33	67
Housing with Care	75	25	50	50	33	67	25	75
Split based on quantiles of ONS deprivation index								
It can be expected that the % of public sector sheltered, age exclusive accommodation will retain a higher % than housing with care as there already exists a substantial level of current service provision.								

- 5.30 In contrast, the CRESR Model determined the tenure mix for each type of housing based on the proportion of residents aged 75 or over living in owner occupation, and the “above median” benchmarks apply for North Somerset. These give rented-to-owned ratios of 69:31 for Sheltered Housing and 71:29 for Extra Care. However, as the CRESR Model is based on the mix of current provision, these benchmarks may not always reflect the most appropriate distribution when planning for additional provision.

*“These tenure splits reflect current provision, which is significantly skewed towards social rented provision. If there is a desire to expand the provision of older people’s housing beyond current levels, this is likely to require disproportionate increases in ownership forms of supply. This is in part due to demand being focused on these ownership forms, particularly in areas with high levels of existing older homeowners.”*

- 5.31 The population projections underlying the Local Housing Need figure for North Somerset show a substantial increase in the older population over the projection period. It is important to recognise that many of these extra residents will be aged 85 or over and likely to have increasingly complex care and support needs, including dementia, but also mental health needs and frailty related needs. It will therefore be necessary to consider the associated changes in the profile of housing need.
- 5.32 The household projections assume that the population aged 75 or over living in communal establishments will remain constant as a proportion for each 5-year age group, based on the rates identified by the 2021 Census. On this basis, Scenario A projected an increase of 1,008 and Scenario B projected an increase of 908 residents that would need bedspaces provided in residential or nursing care homes (Figure 29). Bedspaces provided in Use Class C2 (residential institutions) will form part of the overall housing need and the allowance for C2 provision can be equivalised using the calculation set out in the Housing Delivery Test measurement rule book.<sup>13</sup> The projected increase yields a need for between 506 and 561 dwellings once equivalised.
- 5.33 Figure 49 considers the need for specialist older person housing for older households in North Somerset over the 15-year period 2026-2041. This uses baseline rates based on existing supply and considers appropriate target rates taking account of the range of different benchmarks identified by the toolkits.
- » The target rates are based on the average of (i) the baseline rate for the local authority, and (ii) the mid-point of the benchmark range; except for Affordable Housing with Support (which excludes the rate from the CRESR Model) and Affordable Housing with Care (which excludes the Housing LIN rate) as neither of these benchmarks seem appropriate for the local area
  - » Based on the identified target rates, the projected number of residents aged 75 or over at the end of the 15-year period in 2041 is used to establish the overall gross need
  - » The existing supply is then offset to identify the net housing need for the period to 2041.

<sup>13</sup> <https://www.gov.uk/government/publications/housing-delivery-test-measurement-rule-book>

**Figure 49: Need for Specialist Older Person Housing to 2041 (Source: ORS Model. Note: Figures may not sum due to rounding)**

Form of provision	Existing supply	Baseline rate	Benchmark range	Target rate	Scenario A 2041	Change 2026-2041	Scenario B 2041	Change 2026-2041
<b>Market Housing</b>	<b>1,540</b>	<b>51</b>	-	<b>57</b>	<b>2,359</b>	<b>819</b>	<b>2,280</b>	<b>740</b>
Housing with Care	340	11	6 - 23	13	533	193	515	175
Housing with Support	1,200	39	47 - 50	44	1,826	626	1,765	565
<b>Affordable Housing</b>	<b>1,803</b>	<b>59</b>	-	<b>61</b>	<b>2,518</b>	<b>715</b>	<b>2,433</b>	<b>630</b>
Housing with Care	291	10	12	11	448	157	433	142
Housing with Support	1,512	50	50	50	2,070	558	2,000	488
<b>TOTAL</b>	<b>3,343</b>	<b>110</b>	-	<b>118</b>	<b>4,877</b>	<b>1,534</b>	<b>4,713</b>	<b>1,370</b>
<i>Housing with Care</i>	631	21	-	24	981	350	948	317
<i>Housing with Support</i>	2,712	89	-	94	3,896	1,184	3,765	1,053

- 5.34 On this basis, there would be need to provide an additional 1,400-1,500 specialist older person housing units over the 15-year period 2026-2041 (equivalent to an average of around 100 dwellings per year) of which nearly half (47% in Scenario A; 46% in Scenario B) would need to be provided as Affordable Housing.
- 5.35 This analysis assumes a continuation of current types of housing although it is unclear if older people will aspire to these types of specialist housing in the future. Some types of specialist housing are already experiencing lower demand, and other, newer types of provision may appear to meet changing aspirations in the future. The policy aim of supporting people at home for longer and the provision of newer types of accessible and adaptable housing, along with assistive technology, could also alter patterns of demand. However, it is important to recognise that the provision of specialist older person housing schemes will form an important part of the overall housing mix.
- 5.36 The delivery of specific schemes for specialist older person housing need should be considered in partnership with other agencies, in particular those responsible for older person support needs. It will be important to consider other factors and constraints in the market:
- » **Demographics:** the changing health, longevity and aspirations of Older People mean people will live increasingly healthy longer lives and their future housing needs may be different from current need;
  - » **New supply:** development viability of schemes, and the availability of revenue funding for care and support services, need to be carefully considered before commissioning any new scheme. It will also be important for the Council and its partners to determine the most appropriate types of specialist older person housing to be provided in the area;
  - » **Existing supply:** this may be either inappropriate for future households or may already be approaching the end of its life. Other forms of specialist older person housing may be more appropriate than conventional sheltered housing to rent when considering future needs; and
  - » **Other agencies:** any procurement of existing supply needs to be undertaken with other agencies who also plan for the future needs of Older People, particularly local authority Supporting People Teams and the Health Service.

## Housing for Students

- 5.37 PPG includes specific reference to identifying the needs of students:

*Strategic policy-making authorities need to plan for sufficient student accommodation whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus ... Local Planning Authorities will also need to engage with universities and other higher educational establishments to ensure they understand their student accommodation requirements*

Planning Practice Guidance, ID 67-004-20190722

- 5.38 When considering student housing needs, it is necessary to consider those young people that would have normally been resident in the area separately from those choosing to move to the area specifically for study. Given this context, it is reasonable to assume that any full-time students aged 16 or 17 (as well as some already aged 18 on Census-day) would have been attending schools or sixth form colleges in the area, with most continuing to live with their parents or other family.
- 5.39 Although there are no major Higher Education Institutions based in North Somerset, the Census identified a total of 4,600 full-time students aged 18 or over resident in the local area in 2021, a small increase from the 4,300 identified in 2011.
- 5.40 Figure 50 identifies the type of accommodation occupied and the change over the 10-year period.

**Figure 50: Full-time students aged 18 or over resident in North Somerset in 2011 and 2021 by type of residence (Source: Census data, ONS)**

Type of Residence	Total students 2011	Total students 2021	Overall change 2011-2021	Annual average change
Living with parents	2,570	2,725	+155	+16
Living in a communal establishment	113	99	-14	-1
Living in an all student household	565	448	-117	-12
Living alone	184	308	+124	+12
Living in another household type	841	1,034	+193	+19
<b>TOTAL</b>	<b>4,273</b>	<b>4,614</b>	<b>+341</b>	<b>+34</b>

- 5.41 It is apparent that the majority of students resident in North Somerset in 2021 were living with parents (59%). The 2021 Census only identified 89 multi-adult households where all residents were in full-time education (less than 0.1% of all households) and therefore we can conclude that housing for students has very limited impact on the general needs housing stock in North Somerset.

## Housing for People with Disabilities

- 5.42 The Government's reform of Health and Adult Social Care is underpinned by a principle of sustaining people at home for as long as possible, and Part M of the Building Regulations for new developments covers the required standards for accessibility, adaptability and wheelchair housing based on three categories.<sup>14</sup>
- 5.43 Requirement M4(1) Visitable Dwellings is mandatory for all new homes, whereas the Local Plan will identify the proportion of new homes in the local area that must comply with Requirement M4(2) Accessible and Adaptable Dwellings and Requirement M4(3) Wheelchair User Dwellings. PPG confirms that it will be for the LPA to set out how they demonstrate the need for these higher standards, and provides further details on the evidence that should be used:

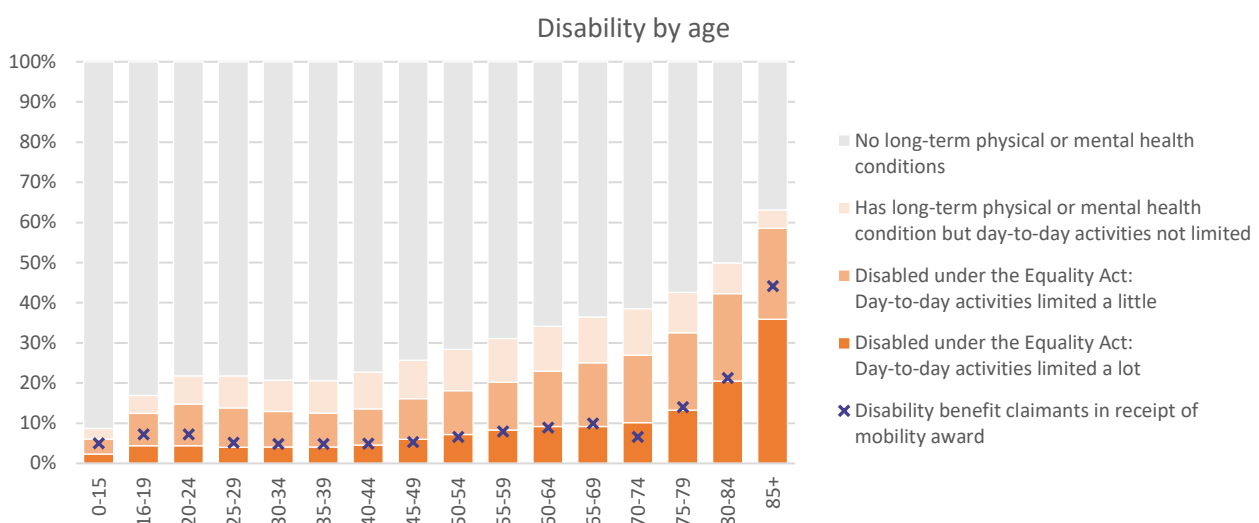
***What evidence should local planning authorities use to demonstrate a need to set higher accessibility, adaptability and wheelchair housing standards?***

*Based on their housing needs assessment and other available datasets it will be for local planning authorities to set out how they intend to approach demonstrating the need for Requirement M4(2) (accessible and adaptable dwellings), and/or M4(3) (wheelchair user dwellings), of the Building Regulations ... To assist local planning authorities in appraising this data the government has produced a summary data sheet. This sets out in one place useful data and sources of further information which planning authorities can draw from to inform their assessments ...*

Planning Practice Guidance, ID 56-007-20150327

- 5.44 The summary data sheet that is referenced is the "Guide to available disability data" (DCLG, March 2015).<sup>15</sup> This provides a general indication of the situation on disabled housing need at that time based on information on the demographics and housing stock across England. It also identifies various local authority data sources including population estimates and projections, Census data on long-term health problems and disabilities, and benefit claimant data. The LHNA has considered population estimates and projections in detail, and Figure 51 presents the disability data for North Somerset based on the latest available data.

**Figure 51: Disability status by age, 2021; and disability benefit claimants in receipt of mobility award by age, 2024**  
(Source: Census data, ONS; Benefit claimant data, DWP)

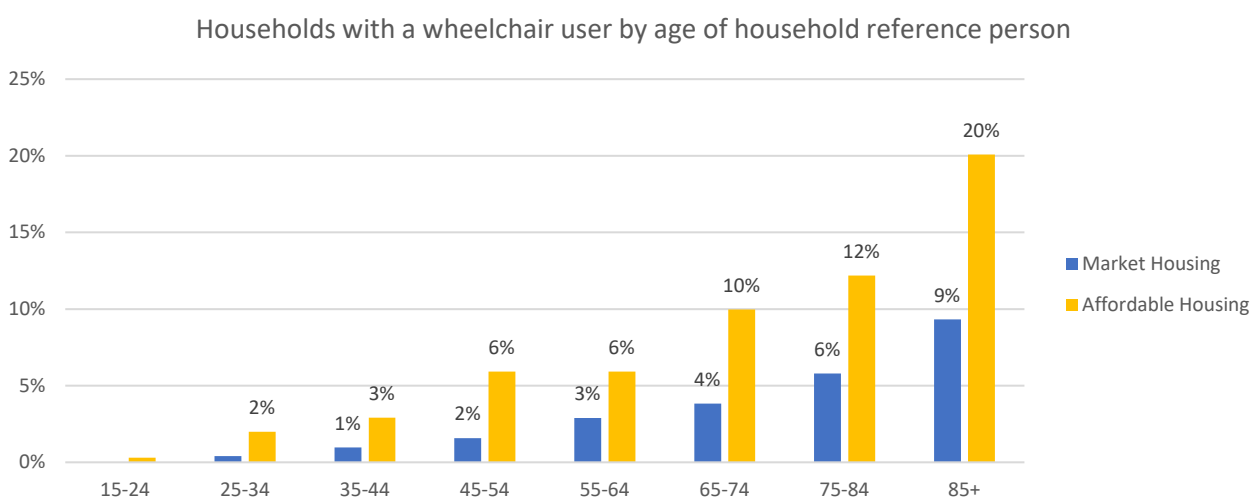


<sup>14</sup> <https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

<sup>15</sup> <https://www.gov.uk/government/publications/building-regulations-guide-to-available-disability-data>

- 5.45 The DCLG data sheet showed that around one in thirty households in England (3.3%) had at least one wheelchair user, although the rate was notably higher for households living in Affordable Housing (7.1%). English Housing Survey (EHS) data provides further details based on the proportion of households by age, and combining this national data with local data on disability benefit claimants in receipt of mobility award provides the basis for deriving age-specific rates for North Somerset (Figure 52).

**Figure 52: Households with a wheelchair user in Market Housing and Affordable Housing by age (Source: ORS Model)**



- 5.46 Figure 53 identifies the number of households with a wheelchair user based on applying the derived rates to the dwelling-led household projections. The baseline estimates for 2026 are set out alongside the Scenario A and Scenario B outputs for 2041 and the associated change from 2026-2041.

**Figure 53: Households needing wheelchair housing (Source: ORS Model. Note: Figures may not sum due to rounding)**

Households with a wheelchair user	Baseline 2026	Scenario A 2041	Change 2026-2041	Scenario B 2041	Change 2026-2041
Market Housing	2,558	3,164	+605	3,034	+475
Affordable Housing	1,078	1,730	+652	1,753	+675
<b>TOTAL HOUSEHOLDS</b>	<b>3,636</b>	<b>4,894</b>	<b>+1,257</b>	<b>4,787</b>	<b>+1,150</b>
Households aged 75 or over	1,661	2,464	+803	2,372	+712

- 5.47 Both scenarios identify an increase of around 1,200 additional households with a wheelchair user over the 15-year period, which is equivalent to 5% of the 23,700 dwellings identified by the standard method. On this basis, it would be appropriate for **5% of homes on all new developments to comply with Requirement M4(3) Wheelchair User Dwellings**.
- 5.48 The evidence shows need for **a higher proportion of Affordable Housing to comply with Requirement M4(3)** but the proportion of households likely to have a wheelchair user differs between the two scenarios:
- » **Scenario A** identifies an increase of 652 households with a wheelchair user that need Affordable Housing, equivalent to 10% of all households needing Affordable Housing (6,646)
  - » **Scenario B** identifies a slightly larger increase of 675 households with a wheelchair user that need Affordable Housing, but this represents a lower proportion (6%) of all households needing Affordable Housing in this scenario (10,577) given that much of the additional need was potential households who tend to be younger and therefore less likely to have wheelchair users.

- 5.49 It is notable that approaching two thirds of the projected increase in households with a wheelchair user are aged 75 or over (64% in Scenario A; 62% in Scenario B) which equates to an additional 700-800 households over the 15-year period. This would include some households needing specialist older person housing.
- 5.50 Whilst not all households aged 75 or over that need wheelchair adapted housing will live in specialist older person housing, it is likely that many households that choose specialist older housing will need wheelchair adapted homes either at the time that they move, or at a later stage due to a deterioration in their health. It therefore seems appropriate for **all specialist older person housing to comply with Requirement M4(3)** where it is practical for this to be achieved.
- 5.51 When considering the proportion of new homes in the local area that should comply with Requirement M4(2) Accessible and Adaptable Dwellings, it is appropriate to note that the Government launched a consultation on raising accessibility standards of new homes in September 2020 and their formal response to the feedback stated that:<sup>16</sup>

*Government proposes that the most appropriate way forward is to mandate the current M4(2) (Category 2: Accessible and adaptable dwellings) requirement in Building Regulations as a minimum standard for all new homes – option 2 in the consultation. M4(1) will apply by exception only, where M4(2) is impractical and unachievable. Subject to a further consultation on the draft technical details, we will implement this change in due course with a change to building regulations.*

- 5.52 Despite this commitment, there has been no specific timeframe published for the further work that would be needed to implement this change, and the LPA must still demonstrate the need for the higher standard and identify the proportion of new homes that must comply in the local area through the Local Plan. Nevertheless, the Government proposal to mandate that all new homes comply with Requirement M4(2) provides a relevant context for this analysis.
- 5.53 To establish the need for homes to comply with Requirement M4(2) Accessible and Adaptable Dwellings, Figure 54 identifies the number of households with one or more persons with a long-term physical or mental health condition that limits their day-to-day activities and are disabled under the Equality Act 2010 based on data from the 2021 Census and the dwelling-led household projections. Based on this overall number of households, the number of households that are likely to need adaptations or to move to a more suitable home is estimated using national data from the EHS.

**Figure 54: Households with one or more persons that are disabled under the Equality Act 2010 where this affects their housing need, 2026 (Source: ORS Model. Note: Figures may not sum due to rounding)**

Households with one or more persons with a long-term physical or mental health condition that limits their day-to-day activities	Number of households
Households with one or more persons that are disabled under the Equality Act 2010	31,293
Less households where their disability does not affect their housing need	22,003
<b>Total households where a disability affects their housing need</b>	<b>9,290</b>
Current home is suitable for their needs	7,675
Current home requires adaptation	831
Need to move to a more suitable home	783

<sup>16</sup> <https://www.gov.uk/government/consultations/raising-accessibility-standards-for-new-homes/outcome/raising-accessibility-standards-for-new-homes-summary-of-consultation-responses-and-government-response#government-response>



- 5.54 Figure 54 identifies that of the 31,300 households in the area with one or more persons that are disabled, around 9,300 have a disability that affects their housing needs. Most of these households (7,700; 83%) already live in a home that is suitable for their needs. However, the analysis identifies 831 households needing adaptations to their current home and 783 households that need to move to a more suitable home which represent a current unmet need for accessible housing.
- 5.55 Based on the dwelling-led household projections, we can establish the future need for accessible housing based on the projected household growth and the changing demographics of the area. Figure 55 identifies that there is likely to be around 11,000 households either needing adaptations to their existing housing or suitable new housing to be provided by 2041.

**Figure 55: Current unmet need and future need from households needing accessible housing in North Somerset 2026-2041**  
(Source: ORS Model. Note: Figures may not sum due to rounding)

	Scenario A	Scenario B
<b>EXISTING HOUSEHOLDS</b>		
Current unmet need from households needing to move to accessible housing	783	783
Households likely to develop health problems that will affect their housing need within the next 10 years	2,769	2,769
<b>Total need from existing households in 2026</b>	<b>3,552</b>	<b>3,552</b>
<b>FUTURE POPULATION GROWTH</b>		
Additional households in 2041 likely to experience health problems that affect their housing need or likely to develop health problems within 10 years	7,106	7,383
<b>TOTAL NEED 2026-41</b>	<b>10,659</b>	<b>10,935</b>
Total household growth	21,918	21,970
<i>Need for accessible housing as percentage of household growth</i>	<i>49%</i>	<i>50%</i>

- 5.56 The analysis identifies that around 10,700-10,900 households are likely to need accessible housing over the 15-year period 2026-2041. This represents around half of the overall household growth (49% in Scenario A; 50% in Scenario B). It is important to recognise that these percentages represent the combined need for M4(2) Accessible and Adaptable Dwellings and M4(3) Wheelchair User Dwellings; for households with a wheelchair user would evidently be included within those households counted as having a health problem that affects their housing need.
- 5.57 In determining the proportion of new homes in the local area that should comply with the higher standards, it is important to recognise that not all households will want to move to new developments. Some will seek to adapt their current home, and others will move to another dwelling more suitable for adaptation. Nevertheless, EHS data identifies that many existing homes are not suitable for adaptation to meet the standards and others would require major works, so many households needing accessible housing are likely to consider new homes even if that may not be their first choice. It is also important to recognise that not every new home that is built to meet the higher accessibility standards will be occupied by households with health problems that affect their housing needs – so more homes that meet the higher accessibility standards would need to be provided than the absolute number of households identified above.
- 5.58 Based on the evidence, it would be appropriate for at least **45% of homes on new developments to comply with Requirement M4(2) Accessible and Adaptable Dwellings and 5% to comply with Requirement M4(3) Wheelchair User Dwellings**. However, the LPA could consider a higher target to ensure sufficient choice and flexibility for households, but this would need to be tested in the context of economic viability.



## Housing for People who Rent

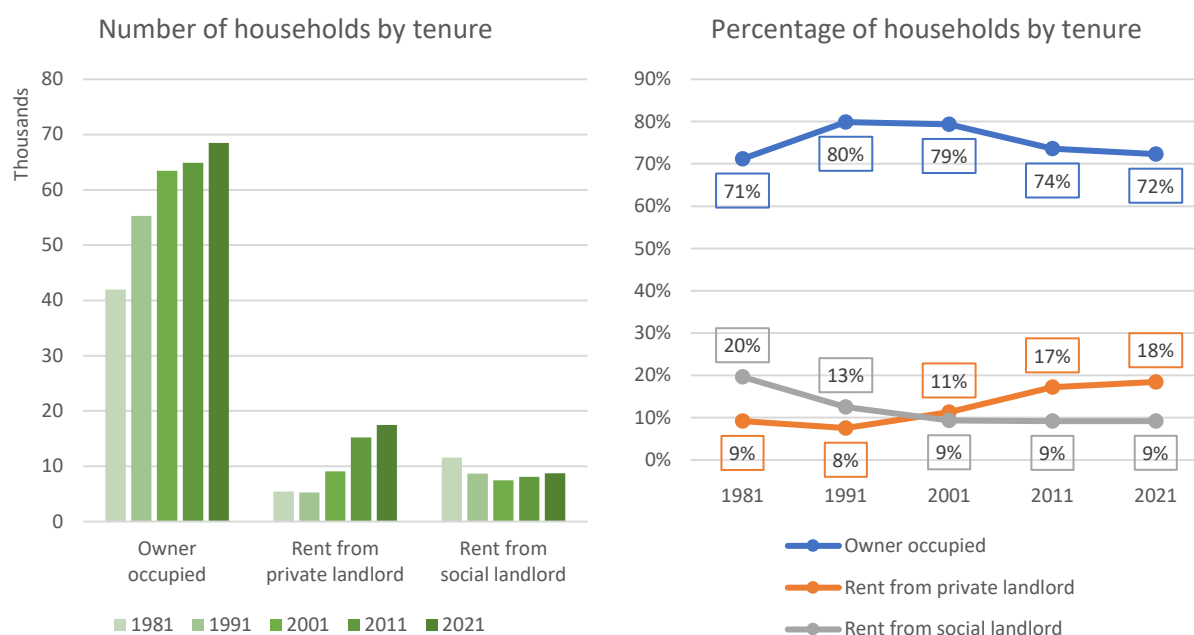
- 5.59 The PPG recognises the importance of understanding the likely future role of the private rented sector (PRS).

*Tenure data from the Office for National Statistics can be used to understand the future need for private rented sector housing. However, this will be based on past trends. The level of changes in rents, (known as “market signals”), may reflect the demand in the area for private rented sector housing. Evidence can also be sourced from the English Housing Survey, Office for National Statistics Private Rental Index, the Valuation Office Agency, HomeLet Rental Index and other commercial sources.*

Planning Practice Guidance, ID 67-002-20190722

- 5.60 When considering the local housing market, it is worth noting the historic changes to tenure in the local area, as recorded by past Census data (Figure 56).

Figure 56: Households by tenure 1981-2021 (Source: Census data, ONS)



- 5.61 Around 26,200 households in the local area (28%) rented their home in 2021, so the current balance between renting and owner occupation (28:72) is comparable to the balance at the time of the 1981 Census (29:71). That was shortly after the Housing Act 1980 introduced the Right to Buy scheme, which gave local authority tenants the right to purchase their council houses at a discounted price. The scheme led to more households owning their home, with the percentage of owner occupiers increasing from 71% in 1981 to 80% in 1991 whilst the proportion renting from a social landlord reducing from 20% to 13%.
- 5.62 Although the balance between renting and owner occupation has reverted to previous levels, there has been a notable shift in the mix for households that rent. Whilst around two thirds rented from a social landlord in 1981 with a third renting privately, that balance has now reversed with a third of tenants renting from a social landlord (8,700; 9%) and two thirds renting privately (17,500; 18%). Notably, many households now renting privately rely on Housing Benefit support to enable them to afford their housing costs, and it is not seen as the long-term tenure option for many households (Figure 32).

- 5.63 The LHNA analysis identified a significant number of households currently renting privately who aspire to homeownership but cannot afford to buy, including around 1,000 households assessed as being able to afford Affordable Home Ownership (Figure 35). Over the 15-year period 2026-2041, the analysis identified a need to provide Affordable Housing for up to 2,500 households who would like to own but cannot afford to buy (Figure 40). The analysis also recognised that there were likely to be additional households who want to own but do not have sufficient income or savings to access existing Affordable Home Ownership products.
- 5.64 Providing sufficient Affordable Housing to meet this need is likely to reduce the number of households relying on the private rented sector. However, demand for private rented accommodation is likely to continue, particularly among younger households who have limited other options available should they wish to form their own household and live independently. It is therefore unlikely that the overall number of households renting privately will reduce significantly without a substantial shift in long-term trends.
- 5.65 The Government recognises the importance of the private rented sector, but it is committed to developing a fairer, more stable rental market with greater accountability for landlords. To support this objective, the Renters' Rights Bill was introduced and passed its final parliamentary stage in July 2025. The Bill seeks to strengthen tenant protections and improve housing standards across the sector. Key provisions include:
- » The abolition of Section 21 “no-fault” evictions
  - » A move towards periodic tenancies
  - » Restrictions on rent increases and a cap of one month’s rent in advance
  - » Prohibition of discrimination against tenants in receipt of benefits or those with children
  - » An extension of Awaab’s Law, requiring landlords to promptly address serious hazards.
- 5.66 The Bill also introduces a national Decent Homes Standard, a private rented sector database, and a new ombudsman to support more efficient dispute resolution and ensure stronger enforcement of tenants’ rights.

## Build to Rent

- 5.67 In seeking to improve housing options within the private rented sector, the Government has encouraged institutional investors to consider Build to Rent developments as part of their portfolios. The NPPF defines Build to Rent as purpose-built housing that is typically 100% rented, offering longer tenancy agreements (usually three years or more) and professionally management under single ownership and control.
- 5.68 Build to Rent has the potential to offer a more secure and flexible long-term housing option for households currently renting privately. These schemes typically provide longer tenancy agreements, fewer restrictions, and greater flexibility in how homes are occupied and used. To further support growth in this sector, the Government has introduced reforms to pension fund regulations aimed at encouraging longer-term investment, which could include Build to Rent property portfolios.
- 5.69 Savills publish regular reviews of the Build to Rent market.<sup>17</sup> These highlight that the sector now comprises over 132,000 homes, with an additional 51,000 under construction and 110,000 in the planning pipeline, which will bring the total stock to approximately 293,000 homes nationally. Build to Rent accounted for 8% of all new-build completions across England and Wales in 2024, up from 5% in 2019. With increasing institutional investment and reforms promoting longer-term funding strategies, the sector is expected to play an even more significant role in housing delivery across the UK.

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<sup>17</sup> [https://www.savills.co.uk/research\\_articles/229130/376156-0](https://www.savills.co.uk/research_articles/229130/376156-0)

## Housing for People Wishing to Build their Own Homes

- 5.70 Self-build and custom housebuilding currently represents less than 10% of housing completions in the UK, which compares to rates of around 40% in France and 70 to 80% elsewhere in Europe.
- 5.71 Given this context, the Government introduced the Self-Build and Custom Housebuilding Act 2015<sup>18</sup> and subsequent amendments in the Housing and Planning Act 2016<sup>19</sup> which place a duty on LPAs to:
- » Keep a register (and publicise this) of eligible prospective 'custom' and self-build individuals, community groups and developers
  - » Provide sufficient serviced plots with planning permission for self-build or custom housebuilding to meet the need on the register, and offer these plots to those on the register at market value
  - » Allow developers working with housing associations to include self-build and custom housebuilding as part of their affordable housing contribution.
- 5.72 PPG for self-build and custom housebuilding was published in 2021.<sup>20</sup> This updated the definition of self-build and custom housebuilding, and set out how the need should be assessed and met.

*Self-build and custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation ('turnkey') ...*

*In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout. Off-plan housing, homes purchased at the plan stage prior to construction and without input into the design and layout from the buyer, are not considered to meet the definition of self-build and custom housing.*

**Planning Practice Guidance, ID: 57-016-20210208**

- 5.73 LPAs are expected to grant sufficient permissions to meet the numbers on their register within three years, with demand measured across base periods that run from 31 October until 30 October the following year. However, whilst authorities must meet the demand for plots identified by their register, they are also expected to consider other data sources.

*Local planning authorities should use the demand data from the registers in their area, supported as necessary by additional data from secondary sources (as outlined in the housing and economic development needs guidance), to understand and consider future need for this type of housing in their area. Secondary sources can include data from building plot search websites, enquiries for building plots recorded by local estate agents and surveys of local residents. Demand assessment tools can also be utilised.*

**Planning Practice Guidance, ID: 57-011-20210208**

<sup>18</sup> <http://services.parliament.uk/bills/2014-15/selfbuildandcustomhousebuilding.html>

<sup>19</sup> <http://services.parliament.uk/bills/2015-16/housingandplanning.html>

<sup>20</sup> [Self-build and custom housebuilding - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/self-build-and-custom-housebuilding)

5.74 MHCLG produced an action plan in 2021 which aimed to further support development of the self-build and custom housebuilding sector.<sup>21</sup> The Government at that time also commissioned an independent review into the scaling up of self-build and custom housebuilding,<sup>22</sup> which they responded to in June 2022.<sup>23</sup> The review focused primarily on supply side factors limiting the delivery of self-build and custom housebuilding, and produced six key recommendations which were broadly supported by the Government:

- » Greater role for Homes England
- » Raise awareness of the Right-to-Build
- » Support community-led housing, diversity of supply and levelling-up
- » Promote greener homes and more use of advanced manufacturing
- » Support custom and self-build housebuilding through the planning reforms
- » Iron out issues around tax which act as disincentives to build.

5.75 More recently, the Levelling Up and Regeneration Act 2023 has introduced two further provisions relating to self-build and custom housebuilding:

- » The Act imposes a new duty on councils to include pre-existing unmet demand for self-build and custom build housing when calculating their current level of demand
- » The demand for self-build and custom housebuilding in any “12-month base period should be treated as including any demand from an earlier 12-month base period which has not been met within the time period allowed for complying with the duty to meet that demand”.

5.76 North Somerset has put arrangements in place to comply with the Self-Build and Custom Housebuilding Act and subsequent legislation, including providing a self-build and custom housebuilding register. No local connection test has been introduced, there is no financial viability test and no charge for joining the register.

5.77 Figure 57 sets out the number of individuals and groups on the register at the end of each period, together with the number of new applicants and the number of planning permissions granted (identified by CIL exemptions) during the period. For a property to qualify for a CIL exemption, the final occupier must either have a significant input into either the design or construction of the property, and be expected to live in the property for at least three years.

**Figure 57: Self-build and Custom Housebuilding Register and Plot Provision (Source: Local Authority Data)**

	Up to October 2016	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
New applicants on Part 1 of the Register	6	16	88	93	88	159	101	59
Planning permissions for serviced plots granted	-	0	0	15	63	115	153	39
<b>Number on Register at end of period</b>								
Individuals	6	16	28	187	281	440	544	599
Groups	0	0	76	3	3	3	4	4
<b>TOTAL ON REGISTER</b>	<b>6</b>	<b>16</b>	<b>104</b>	<b>190</b>	<b>284</b>	<b>443</b>	<b>548</b>	<b>603</b>

<sup>21</sup> [Self and custom build action plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/94444/self-and-custom-build-action-plan.pdf)

<sup>22</sup> [Independent review into scaling up self-build and custom housebuilding: report - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/94444/independent-review-into-scaling-up-self-build-and-custom-housebuilding-report.pdf)

<sup>23</sup> [Government response to the independent review into scaling up self-build and custom housebuilding - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/94444/government-response-to-the-independent-review-into-scaling-up-self-build-and-custom-housebuilding.pdf)

- 5.78 As of October 2021, North Somerset had not provided enough self and custom housebuilding plots to meet the needs identified by the self-build and custom housebuilding register, with a total of 599 individuals and 4 groups on the register in October 2023.
- 5.79 Whilst the register may not count all demand for this type of housing in the local area, the alternative sources suggested by PPG (such as the Need a Plot website) now typically rely on local authority registers – so the housing register and the actual up take of plots are the only information sources available. Given this context, the Council should focus on the need identified by their self-build and custom housebuilding register and address any supply constraints consistent with the focus of the Government’s national policy.
- 5.80 The current Local Plan was adopted some years in advance of the Self-Build and Custom Housebuilding Act being introduced, so the Council does not currently have any adopted policies to promote serviced plots or any requirement for a proportion of plots on larger sites to be made available. It will therefore be important for the Council to consider introducing policies in the new Local Plan to ensure that they are complying with national policy and are able to meet the demand from the self and custom housebuilding register.
- 5.81 Experience elsewhere suggests that the self-build and custom housebuilding sector works relatively well for households who are seeking to build bespoke properties on single plot sites and as part of multi-plot sites. However, such households tend to be relatively affluent and can afford to build homes to their own design. There is less evidence that needs of those with lower budgets are being met, as the price of plots remains high which is arguably a reflection of the market for self and custom housebuilding being supply constrained and that suitable plots attract a premium which is offsetting any potential discounts from CIL exemptions.
- 5.82 Some households with lower budgets will want to be heavily involved in the building of their final property (and possibly undertaking some of the work themselves to save on costs) whereas there will be others who would only want to customise the interior of their new home within a standard exterior. The Council could work proactively with both groups.
- 5.83 The Council could seek to work with developers and Registered Providers to assess the potential demand for Affordable Home Ownership being delivered through self-build and custom housebuilding. This could include providing serviced plots or partially completed dwellings that are sold at cost (in lieu of providing other Affordable Housing) which could enable households to deliver their own Affordable Home Ownership homes.
- 5.84 There is also potential to encourage builders to deliver market homes that is either customised at the outset, or which could be built with a standard exterior but with an interior that the final occupant could customise. Both of these approaches can be considered to fit within the definition of custom-built housing; and could both be encouraged with the provision of small and larger sites.

## 6. Future Housing Mix

- 6.1 Figure 58 sets out the overall housing need identified for Market Housing and Affordable Housing over the 15-year Local Plan period 2026-2041 based on the current inputs to the standard method calculation for North Somerset.
- 6.2 The outputs identify the mix of general needs housing by number of bedrooms and the specialist older person housing need by type of housing based on the two scenarios that have been tested through the LHNA.

**Figure 58: Overall Market Housing and Affordable Housing need by property type and number of bedrooms 2026-2041**  
(Source: ORS Model. Note: Figures may not sum due to rounding)

	Scenario A			Scenario B		
	Market Housing	Affordable Housing	TOTAL 2026-2041	Market Housing	Affordable Housing	TOTAL 2026-2041
<b>General Needs Housing</b>						
1 bedroom	642	1,012	1,655	2,977	2,680	5,657
2 bedrooms	5,106	2,153	7,258	3,108	4,759	7,867
3 bedrooms	5,598	2,288	7,886	3,497	2,185	5,682
4+ bedrooms	3,957	849	4,806	1,707	912	2,619
<b>Specialist Older Person Housing</b>						
Housing with Care	193	157	350	175	142	317
Housing with Support	626	558	1,184	565	488	1,053
<b>Dwellings in Use Class C3</b>	<b>16,123</b>	<b>7,016</b>	<b>23,139</b>	<b>12,028</b>	<b>11,166</b>	<b>23,194</b>
Bedspaces in Use Class C2 (equivalised to dwellings)			561			506
<b>TOTAL HOUSING NEED</b>			<b>23,700</b>			<b>23,700</b>
<b>General Needs Housing</b>						
1 bedroom	2.8%	4.4%	7.2%	12.8%	11.6%	24.4%
2 bedrooms	22.1%	9.3%	31.4%	13.4%	20.5%	33.9%
3 bedrooms	24.2%	9.9%	34.1%	15.1%	9.4%	24.5%
4+ bedrooms	17.1%	3.7%	20.8%	7.4%	3.9%	11.3%
<b>Specialist Older Person Housing</b>						
Housing with Care	0.8%	0.7%	1.5%	0.8%	0.6%	1.4%
Housing with Support	2.7%	2.4%	5.1%	2.4%	2.1%	4.5%
<b>All Dwellings</b>	<b>69.7%</b>	<b>30.3%</b>	<b>100.0%</b>	<b>51.9%</b>	<b>48.1%</b>	<b>100.0%</b>

- 6.3 Whilst both scenarios are based on the 23,700 dwellings identified by the standard method, there are notable differences in the overall housing mix:
- » **Scenario A** identifies a need for 7,000 affordable homes (30% of the total dwellings) with 16,100 homes for market sale or rent (70%)
  - » **Scenario B** identifies a need for 11,200 affordable homes (48%) as a consequence of many of the potential households that are assumed to form being unable to afford suitable housing, with 12,000 homes for market sale or rent (52%).

- 6.4 Both scenarios identify a need for around 1,400-1,500 self-contained specialist older person housing units, comprising both Housing with Care and Housing with Support. There is also an identified need for additional bedspaces in purpose-built residential care or nursing homes.
- 6.5 Whilst the LHNA forms an important part of the wider evidence base to inform the development of housing and planning policies, it is important to recognise that these findings should not be considered in isolation. The LHNA does not seek to determine rigid policy conclusions but instead provides a key component of the evidence required to develop and support a sound policy framework.

# Glossary

There are a number of terms and acronyms used throughout the Local Housing Need Assessment (LHNA) which have specific meanings based on the following definitions.

Where appropriate these definitions reflect those in the National Planning Policy Framework (NPPF),<sup>24</sup> Planning Practice Guidance (PPG),<sup>25</sup> and the Office for National Statistics (ONS) Census 2021 dictionary.<sup>26</sup>

## Key Terms

### Local Housing Need Assessment (LHNA)

An assessment to determine *housing need* and assess the size, type and tenure of housing needed for different groups in the community including those who need *Affordable Housing* (including *Social Rent*); families with children; looked after children; *older people* (including those who need retirement housing, housing-with-care and care homes); students; people with disabilities; service families; people who rent their homes and people wishing to commission or build their own homes.

### National Planning Policy Framework (NPPF)

The *National Planning Policy Framework (NPPF)* sets out the Government's planning policies for England and how these are expected to be applied.

### Planning Practice Guidance (PPG)

*National Planning Practice Guidance (PPG)* is an online resource that provides advice and guidance on various aspects of the planning system. It is intended to be read alongside the *NPPF* and helps both plan makers and decision-makers understand and apply national planning policies. The *PPG* is a material consideration in planning decisions, meaning it must be taken into account when assessing planning applications.

### Local Planning Authority (LPA)

The public authority whose duty it is to carry out specific planning functions for a particular *local area*.

### Local area

*Local area* refers to the specific geographic area covered by a *local planning authority*.

### Local plan

A plan for the future development of a *local area*, drawn up by the *local planning authority* in consultation with the community, under the Town and Country Planning (Local Planning) (England) Regulations 2012.

### Housing need

An unconstrained assessment of the minimum number of homes needed in a *local area*. Assessing *housing need* is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability and establishing a *housing requirement* figure.

### Local Housing Need (LHN) figure

The number of homes identified as being needed through the application of the *standard method* set out in national *planning practice guidance*.

### Standard method

The *standard method* for assessing *local housing need* is a formula used to determine the minimum number of homes a *local planning authority* in England should plan for in their *local area*. It uses local *dwelling* stock to establish a baseline figure which is then adjusted upwards to reflect local affordability pressures.

### Housing requirement

The minimum number of homes that a *local plan* seeks to provide during the plan period. In addition to the *local housing need figure*, any needs that cannot be met within neighbouring areas should also be taken into account.

The planned *housing requirement* may be higher than the identified *housing need* to reflect growth aspirations, which should not normally have to be thoroughly justified at examination.

The planned *housing requirement* may be lower than the identified need where that can be justified by evidence on land availability, development constraints and any other relevant matters.

Where the *local plan* cannot provide for the identified *housing need* this should be discussed with neighbouring *local planning authorities* under the Duty to Cooperate.

<sup>24</sup> <https://www.gov.uk/government/publications/national-planning-policy-framework--2>

<sup>25</sup> <https://www.gov.uk/government/collections/planning-practice-guidance>

<sup>26</sup> <https://www.ons.gov.uk/census/census2021dictionary>



# Types of Housing and Housing Schemes

## Dwelling

A unit of accommodation, for example a house or flat, that will either be the *usual residence* of a *household* or an *unoccupied dwelling* without any *usual residents*.

## Unoccupied dwelling

A *dwelling* that has no *usual residents* living in the accommodation, for example empty homes for sale. *Unoccupied dwellings* may be used by short-term residents or visitors, for example holiday lets, or as a second home for a *household* where the *dwelling* is not their *usual residence*.

## Communal establishment

A managed *communal establishment* is a place that provides managed full-time or part-time supervision of residential accommodation.

Examples include:

- university halls of residence and boarding schools
- care homes, hospitals, hospices and maternity units
- hotels, guest houses, hostels and bed and breakfasts, all with residential accommodation for seven or more guests
- prisons and other secure facilities
- Single Living Accommodation (SLA) in military bases
- staff accommodation
- religious establishments

It does not include sheltered accommodation, serviced apartments, nurses' accommodation, and houses rented to students by private landlords. These are *dwellings* that would be occupied by *households*.

## Market Housing

Housing for sale or rent, for those who can afford to rent or buy housing in the *local area*.

## 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 definitions in Annex 2 of the *NPPF*.

## Social Rent

*Social Rent* housing meets all of the following conditions:

- the rent is set in accordance with the Government's rent policy for *Social Rent*
- the landlord is a registered provider
- provisions are included for the housing to remain at an affordable price for future eligible *households*, or for the subsidy to be recycled for alternative *Affordable Housing* provision.

## General needs housing

Housing to meet the needs of the general population.

## Specialist housing for older people

There are different types of *specialist housing* designed to meet the diverse needs of *older people*:

- age-restricted general market housing
- housing with support, such as retirement living or sheltered housing, with some support provided to help residents live independently
- housing with care, such as extra care housing, with access to support services and staff typically providing 24-hour onsite care
- residential care homes and nursing homes providing bedspaces in *communal establishments*

Any single development may contain a range of different types of *specialist housing for older people*.

## Private Sector Leased (PSL) housing

A scheme where local authorities lease and manage privately owned properties to provide housing for *households* that are often homeless and in need of temporary accommodation.

## Build to Rent

Purpose built housing that is typically 100% rented out. It can form part of a wider multi-tenure development comprising either flats or houses, but should be on the same site and/or contiguous with the main development. Schemes will usually offer longer tenancy agreements of three years or more, and will typically be professionally managed stock in single ownership and management control.

## Self-build and custom-build housing

Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either *Market Housing* or *Affordable Housing*. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), is contained in section 1(A1) and (A2) of that Act.

## Rural exception sites

Small sites used for *Affordable Housing* in perpetuity where sites would not normally be used for housing. *Rural exception sites* seek to address the needs of the local community by accommodating *households* who are either current residents or have an existing family or employment connection.

A proportion of *Market Housing* may be allowed on the site at the *local planning authority's* discretion, for example where essential to enable the delivery of *Affordable Housing* without grant funding.

## Census and Demography

### Usual resident

A person who has stayed or intends to stay in the *local area* for a period of 12 months or more, or has a *usual residence* in the *local area* and intends to be outside the *local area* for less than 12 months.

### Usual residence

The primary address of a *usual resident*.

### Dependent child

A *dependent child* is a person aged 0 to 15 years or a person aged 16 to 18 years who is in full-time education and lives in a *family* with their parent, parents, grandparent or grandparents. It does not include any person aged 16 to 18 years who has a spouse, partner or child living in the *household*.

### Non-dependent child

A *non-dependent child* is a person living with their parent(s) and who is either aged 19 years or over and has no spouse, partner or child living in the *household*, or aged 16 to 18 years and who is not in full-time education and has no spouse, partner or child living in the *household*.

*Non-dependent children* are sometimes referred to as “adult children”.

### Household

A *household* is defined as:

- one person living alone, or
- a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room, or dining area

This includes:

- all sheltered accommodation units in an establishment (irrespective of whether there are other communal facilities), and
- all people living in caravans on any type of site that is their usual residence, and who has no other usual residence elsewhere in the UK

A *household* must contain at least one *usual resident* whose *usual residence* is the *household* address.

A group of short-term residents living together is not classified as a *household*, and neither is a group of people at an address where only visitors are staying. All *households* have one *Household Reference Person (HRP)*.

### Household Reference Person (HRP)

A *Household Reference Person* serves as a reference point, mainly based on economic activity and age, to characterise a whole *household*. The person is not necessarily the member of the *household* in whose name the accommodation is owned or rented.

### Family

A group of people who are any of the following:

- married, civil partnered or cohabiting couple with or without children (the children do not need to belong to both members of the couple)
- a lone parent with at least one child who lives in the same *household*
- a married, civil partnered or cohabiting couple with grandchildren but where the parents of those grandchildren are not present
- a single or couple grandparent with grandchildren but where the parents of those grandchildren are not present

Children can be *dependent* or *non-dependent* and a family can have a mixture of *dependent* and *non-dependent children*.

All families have one *Family Reference Person (FRP)*.

### Family Reference Person (FRP)

A *Family Reference Person* is identified by criteria based on the family make up.

In a lone parent family, the *FRP* is the lone parent. In a couple family, the *FRP* is chosen from the two people in the couple based on their economic activity (in the priority order: full-time job, part-time job, unemployed, retired, other). If both people have the same economic activity, the *FRP* is identified as the elder of the two or, if they are the same age, the first member of the couple on the Census form.

### Multi-generational family household

A *household* where people from across more than two generations of the same extended family live together. This includes *households* with grandparents and grandchildren, whether or not the intervening generation also live in the *household*.

### Multi-family household

A *household* that consists of two or more *families*. The *families* can be:

- unrelated (for example, two unrelated couples sharing a house)
- related and *multi-generational* (for example, cohabiting couple plus children and elderly parents, or married couple plus their teenage daughter and her child)
- related but not *multi-generational* (for example, cohabiting couple plus son and girlfriend, or two brothers and their partners sharing a house).

### Concealed family

*Concealed families* are couple or lone parent *families* living in *multi-family households*, where the *FRP* is not the *Household Reference Person (HRP)*.

As an example:

George and Amy live at the same address as their daughter, Emily, and her husband and daughter. Because Emily is not a *dependent child* and has her own *family*, the *household* contains two *families*. Family one are husband George and wife Amy. George is the *Family Reference Person (FRP)*. Family two are daughter Emily, husband Simon and their daughter Eve. Emily is the *FRP*.

As there is more than one *family* in the *household*, the *FRPs* are prioritised to decide who is the *HRP*.

In this *household*, George is the *HRP*. This means that Emily's *family* is a *concealed family*. Their *HRP* is George, and they will be included as part of his *household* in relevant outputs.

### Potential household

*Potential households* are *concealed families* or *non-dependent children* or other individuals living as part of an existing *household* that want to live independently and form a separate *household* now.

### Older people

People over or approaching retirement age, including the active, newly-retired through to the very frail elderly; and whose housing needs can encompass accessible, adaptable general needs housing through to the full range of *specialist housing for older people* including those with support or care needs.

### Essential local workers

Public sector employees who provide frontline services in areas including health, education and community safety – such as NHS staff, teachers, police, firefighters and military personnel, social care and childcare workers.

## Summary of Acronyms

<b>DCLG</b>	Department for Communities and Local Government (2006-2018) <a href="https://discovery.nationalarchives.gov.uk/details/c/F268656">https://discovery.nationalarchives.gov.uk/details/c/F268656</a>
<b>DWP</b>	Department for Work and Pensions <a href="https://www.gov.uk/government/organisations/department-for-work-pensions">https://www.gov.uk/government/organisations/department-for-work-pensions</a>
<b>EHS</b>	English Housing Survey <a href="https://www.gov.uk/government/collections/english-housing-survey">https://www.gov.uk/government/collections/english-housing-survey</a>
<b>FRP</b>	Family Reference Person
<b>HDT</b>	Housing Delivery Test <a href="https://www.gov.uk/government/collections/housing-delivery-test">https://www.gov.uk/government/collections/housing-delivery-test</a>
<b>HRP</b>	Household Reference Person
<b>HRR</b>	Household Representative Rate
<b>LA</b>	Local Authority
<b>LAHS</b>	Local Authority Housing Statistics <a href="https://www.gov.uk/government/collections/local-authority-housing-data">https://www.gov.uk/government/collections/local-authority-housing-data</a>
<b>LHN</b>	Local Housing Need
<b>LHNA</b>	Local Housing Needs Assessment
<b>LPA</b>	Local Planning Authority
<b>MHCLG</b>	Ministry of Housing, Communities and Local Government <a href="https://www.gov.uk/government/organisations/ministry-of-housing-communities-local-government">https://www.gov.uk/government/organisations/ministry-of-housing-communities-local-government</a>
<b>MYE</b>	Mid-Year Estimates <a href="https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates">https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates</a>
<b>NPPF</b>	National Planning Policy Framework <a href="https://www.gov.uk/government/publications/national-planning-policy-framework--2">https://www.gov.uk/government/publications/national-planning-policy-framework--2</a>
<b>ONS</b>	Office for National Statistics <a href="https://www.ons.gov.uk/">https://www.ons.gov.uk/</a>
<b>ORS</b>	Opinion Research Services <a href="https://www.ors.org.uk/">https://www.ors.org.uk/</a>
<b>PPG</b>	Planning Practice Guidance <a href="https://www.gov.uk/government/collections/planning-practice-guidance">https://www.gov.uk/government/collections/planning-practice-guidance</a>
<b>PRS</b>	Private Rented Sector
<b>PSL</b>	Private Sector Leased
<b>RSL</b>	Registered Social Landlord

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