

Housing Needs Assessment

Plan for Belper Steering Group, Derbyshire

September 2016
Final Report

Contents

Glossary of terms used in text.....	5
Executive Summary.....	6
Housing Needs Assessment in Neighbourhood Planning	6
PPG-Based Assessment.....	6
Summary of Methodology.....	6
Gathering and Using a Range of Data.....	7
Focus On Demand Rather Than Supply.....	7
Quantity of Housing Needed.....	8
Characteristics of housing needed.....	10
1 Introduction	15
Housing Needs Assessment in Neighbourhood Planning	15
Local Study Context.....	15
2 Approach	17
PPG-Based Assessment.....	17
Summary of Methodology.....	17
Gathering and Using a Range of Data.....	17
Focus On Demand Rather Than Supply.....	18
Study Objectives.....	18
3 Relevant Data	19
Local Planning Context.....	19
Characteristics of Population.....	31
Household Type.....	34
Household Tenure.....	36
Economic Activity.....	41
Local house prices.....	43
Specialist housing for older people.....	43
Information from local estate agents.....	45
4 Conclusions	48
Overview.....	48
Quantity of Housing Needed.....	48
Characteristics of housing needed.....	53
Recommendations for next steps.....	58

Limitations

AECOM Infrastructure & Environment UK Limited (“AECOM”) has prepared this Report for the sole use of **Plan for Belper Steering Group** (“Client”) in accordance with the Agreement under which our services were performed. No other warranty, expressed or implied, is made as to the professional advice included in this Report or any other services provided by AECOM.

Where the conclusions and recommendations contained in this Report are based upon information provided by others it is upon the assumption that all relevant information has been provided by those parties from whom it has been requested and that such information is accurate. Information obtained by AECOM has not been independently verified by AECOM, unless otherwise stated in the Report.

The methodology adopted and the sources of information used by AECOM in providing its services are outlined in this Report. The work described in this Report was undertaken in the period April 2016 to September 2016 and is based on the conditions encountered and the information available during the said period of time. The scope of this Report and the services are accordingly factually limited by these circumstances.

Where assessments of works or costs identified in this Report are made, such assessments are based upon the information available at the time and where appropriate are subject to further investigations or information which may become available.


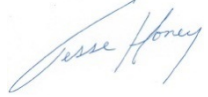


AECOM disclaim any undertaking or obligation to advise any person of any change in any matter affecting the Report, which may come or be brought to AECOM's attention after the date of the Report.

Certain statements made in the Report that are not historical facts may constitute estimates, projections or other forward-looking statements and even though they are based on reasonable assumptions as of the date of the Report, such forward-looking statements by their nature involve risks and uncertainties that could cause actual results to differ materially from the results predicted. AECOM specifically does not guarantee or warrant any estimate or projections contained in this Report.

Where field investigations are carried out, these have been restricted to a level of detail required to meet the stated objectives of the services. The results of any measurements taken may vary spatially or with time and further confirmatory measurements should be made after any significant delay in issuing this Report.

Copyright

© This Report is the copyright of AECOM Infrastructure & Environment UK Limited. Any unauthorised reproduction or usage by any person other than the addressee is strictly prohibited.

<i>Project Role</i>	<i>Name</i>	<i>Position</i>	<i>Actions Summary</i>	<i>Signature</i>	<i>Date</i>
Researcher(s)	Mary Kucharska	Assistant Planner	Compiled Census statistics		02/08/16
Project Manager	Jesse Honey	Principal Planner	Reviewed draft and final text		02/08/16
Director/QA	Stuart Woodin	Technical Director	QA of final draft		15/08/16
Qualifying Body	Roger Shelley, Jyoti Wilkinson, Andrew Huskinson	Group contacts, Plan for Belper Steering Group	Co-ordinated Steering Group inputs and comments	Confirmed via e- mail	01/09/16
Project Coordinator	Ffion Batcup	Housing Needs Advice coordinator	Reviewed Draft for Comment		22/09/2016

Glossary of terms used in text

AVBC	Amber Valley Borough Council
DCLG	Department for Communities and Local Government
HMA	Housing Market Area
Housing LIN	Housing Learning and Improvement Network
HNA	Housing Needs Assessment
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
PPG	Planning Practice Guidance
SHLAA	Strategic Housing Land Availability Assessment
SHOP	Strategic Housing for Older People
SHMAU	Strategic Housing Market Assessment Update

Executive Summary

Housing Needs Assessment in Neighbourhood Planning

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

PPG-Based Assessment

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

Summary of Methodology

7. Housing Needs Assessment at neighbourhood plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
8. In the case of Belper, this is indeed the case. As such, this report focuses both on quantity and type of housing needed. In order to understand both topics, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing quantity and characteristics.
9. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Belper, however, the planning period of the emerging Local Plan has not yet been determined. As such, we recommend aligning with the Derby HMA

Strategic Housing Market Assessment Update assessment period, which extends from 2011 to 2028.

Gathering and Using a Range of Data

10. The PPG states that:

'no single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes'

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

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

13. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. We have gathered data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data. Our work interpreting the results of the survey of local estate agents carried out by the Steering Group helped ensure our conclusions were informed by a qualitative, local perspective.

Focus On Demand Rather Than Supply

14. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*

15. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, heritage and landscape constraints, flood risk and so on) as a separate and follow-on study¹.


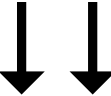
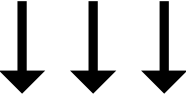
¹ Such an approach, clearly separating housing need assessment (demand-side) from dwelling capacity assessment (supply side), was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

Quantity of Housing Needed

16. We identified four separate projections of dwelling numbers for Belper between 2011 and 2028 based on:
 - A figure derived from the 2013 Derby SHMA Update (SHMAU), disaggregated to Belper, (which gives a total of 1,245 dwellings, or about 73 per year);
 - The Government's 2014-based household projections, extrapolated to Belper, and translated from households to dwellings (which gives 1,382 dwellings, or about 81 per year);
 - A projection forward of dwelling completion rates 2001-2011, (which gives 1,442 dwellings, or about 85 dwellings per year); and
 - A projection forward of dwelling completion rates 2011-2028 (which gives 1,370 dwellings, or about 81 per year).
17. We have summarised the findings of the data gathered in in the table below. The source for each factor with particular relevance to the neighbourhood is shown, together with AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area's future housing need. Following PPG guidance, the factors relate both to housing price and housing quantity.
18. We have applied our professional judgement on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates 'some impact', two arrows 'stronger impact' and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.

Summary of factors specific to Belper with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Age structure of population	SHMAU, Census, Sub-National Population Projections, Housing LIN SHOP report	↑ ↑	SHMAU notes stronger demand from older population in Amber Valley relative to rest of Derby HMA, and with 40-60s age group growing 2001-2011 (largest age group in 2011 Census), thus over 65s, particularly the 75-84 cohort, likely to increase in plan period. At same time the population aged in their 30s and under the age of nine fell across Amber Valley. In Belper, age structure is around average for Amber Valley. The evidence therefore suggests there is likely to be a significant increase in the older population and this is likely to increase overall housing need - which is confirmed through analysis of the sub-national population projections, hence two up arrows.
Economic performance and potential	SHMAU, Census	↑ ↑	Amber Valley is forecast to support moderate in-commuting to higher-paid jobs; out-commuting decreased 2001-2008. Additionally, Belper is home to more economically-active residents, full-time employees and commuters than the Amber Valley average, and likewise, the unemployment rate and level of long-term sick or disabled population is lower than the local average rates. As it is clear that Belper is attractive to commuters (with a rail link) and is likely to remain so, this has been given an assessment of two up arrows.
House prices relative to surroundings	SHMAU, Rightmove	↑	Belper-Ripley sub-market characteristics are mid-range (thus mid-price), but in Belper they do appear slightly above the market/sub-market average. Rightmove suggests Belper is more expensive for semi-detached and terraced housing than the Derbyshire average but cheaper for detached homes. An assessment of a slightly above average house price for Amber Valley has been made (hence one up arrow)

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
International and UK in-migration rate	Census, estate agent survey		Belper is home to very slightly more people born outside the UK than Amber Valley as a whole. However, the majority of non-UK born population has lived in Belper for ten years or more, indicating no significant recent influx of international migrants. Estate agents agree that housing demand is almost entirely from local people. As such, an assessment of no significant difference from the Amber Valley average (sideways arrow) has been made.
Local housing waiting list/need for affordable housing	SHMAU, adopted Local Plan, local housing waiting list, Census		SHMAU notes ageing of population likely to result in increased need for affordable housing over plan period; however, currently, affordable need relatively lower in Belper-Ripley sub-market. Affordable housing waiting list shows need in fact significantly lower than 20-30% target (though this is only a snapshot in time, it is still the case that affordable housing need in Belper is not so high that it acts to raise overall demand). As such, an assessment of two down arrows has been made to indicate that although affordable housing need exists, it is lower than the Amber Valley average.
Overcrowding, including concealed families	SHMAU, Census		SHMAU notes less marked increase in overcrowding in Amber Valley relative to Derby HMA as a whole; housing vacancy rate also highest here (4.3%). Census shows Belper's households becoming significantly more under-crowded, likely as a result of ageing population. Another significant trend showing under-occupation is a decrease in household size at the same time as an increasing population, and a lower than the local average rate of concealed families. Wide range of evidence strongly supports under-crowding rather than over-crowding and lack of concealed families, hence three down arrows.

Characteristics of housing needed

19. The table below summarises the data we have gathered with a potential impact on the characteristics of the housing needed in the neighbourhood. Factors are in alphabetical but no other order.

Summary of local factors specific to Belper with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Affordable housing	SHMAU	Demand strong for 1-2 bed dwellings in affordable sector; older people particularly reliant on this sector. SHMAU also notes slightly higher demand for intermediate tenure housing (which may or may not include Starter Homes) in Belper than social housing or affordable rent tenure. Overall, across all tenures of affordable housing, there is a need for about 20-25% 1 bed units, 40% 2-bed units, 30% 3-bed units and about 5-10% 4+ bed units.	The conclusion is that affordable housing need in Belper is not high enough for the Steering Group to have to consider setting their own affordable need housing target; nevertheless, we recommend close working with Amber Valley to ensure that local affordable need is met through appropriate developer contributions and completions. No evidence has been uncovered that the SHMAU demand split summarised to the left would be inappropriate for Belper, so we recommend planning on the basis of this. To ensure Belper's specific needs are met, we recommend the Neighbourhood Plan should offer strong policy support for the provision of intermediate housing locally, for which there appears to be a strong demand. It is possible that the new tenure of Starter Homes may replace intermediate housing in part or in whole, and as such we recommend that the Steering Group monitors closely detailed Government Policy on this tenure once it is finalised later in 2016, as there could also be potential for this tenure in Belper.

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Dwelling size	SHMAU, Census, estate agent survey	Demand across Amber Valley is for 2-3 bed properties, based on low to middle-income demand; SHMAU recommends 5% 1 bedroom units, 30% two bedroom, 50-55% three bedroom and 10-15% 4+ bedroom units across all tenures. Census shows large recent increase in smaller households in Belper, contrasting with a fall in Amber Valley as a whole, and a slightly higher than average level of one-person households in Belper (though this is mainly among under-65s). Also a rise in larger households, but not as marked a rise as across Amber Valley as a whole. The highest level of open market demand, according to estate agents, is for 2-4 bed properties, with a lesser (though still present) demand for 1-bedroom units. Among renters, 2-3 bed properties are most in demand. Estate agents report a stronger demand among younger buyers than older buyers (which suggests a need for smaller/starter units), but note caveat that older people needing specialist housing may not be using mainstream estate agents.	<p>The demographic and estate agent evidence suggests that the demand for one-bed properties in Belper is likely a little higher than for across Amber Valley as a whole. At the same time, there seems a lower level of demand for the largest properties. As such, we recommend that the most appropriate dwelling size split for market properties in Belper (adapting the recommended SHMA split for Amber Valley) would be 10% one bedroom units, 30% two-bedroom units, 50% three bedroom units and 10% 4+ bedroom units (within which there should be a large majority of four bedroom units rather than five or more).</p> <p>Such a split will simultaneously help to meet the needs of those requiring a smaller open market unit (including younger people and older people looking to downsize, both of which will require 1-2 bed units), as well as a healthy proportion of family-sized units for the commuter population. The split also reflects the general lack of evidence for demand for the largest (5 bedroom or more) units.</p>
Dwelling tenure	Census	Levels of owner-occupation in Belper are higher than the Amber Valley average and have risen recently. The level of private rents is also rising, and is now higher than average. Shared ownership (indicative of a lack of purchasing power for owner-occupation) increased significantly in Belper recently, contrasting with Amber Valley as a whole	This data supports the recommendation above that 40% of all new supply should be 1-2 bedroom units, as this will ensure that there is a wider range of cheaper options for those currently with no option but to share ownership or to rent. It is likely that there will nevertheless be demand from renters into the future, and again, providing 1-2 bedroom units (which are more likely to end up in the buy to rent market) will help meet this need.

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Dwelling type	SHMAU, Census, estate agent survey	Belper-Ripley sub-market focusses on semi-detached properties; however, also more detached houses in Belper than Amber Valley average, and fewer semi-detached; slightly more terraced and flats than the Amber Valley average but flats significantly lower than the national average. Estate agents report semi-detached properties in particular demand, with bungalows and terraced housing also in demand, but to a lesser extent. Detached housing is considered only moderately popular.	<p>The evidence suggests that strong policy support for semi-detached housing is justified, as there seems to be a high demand and a relatively low supply. At the same time, bungalows should be offered strong support; in most places, bungalows are high in demand but low in supply, as they are less profitable for housing developers- as such, there is the potential for the neighbourhood plan to incentivise bungalow provision through, for example, encouraging their provision through planning agreements on individual developments. Terraced housing should also be strongly supported as it is likely to be able to provide smaller dwellings at the cheaper end of the market. It is considered that there is no need to support (or to constrain) the provision of detached housing in policy.</p> <p>Note also the low level of flats locally compared to the national average. Given the relatively high number of local people unable to afford market housing without subsidy, provision of more flats is likely to help in this regard, and as such, most of the one or two-bed units to be provided could be flats.</p>

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Housing for older people	SHMAU, Sub-National Population Projections, Housing LIN SHOP Report	Amber Valley has a relatively high proportion of pensioner households, and the SHMAU notes that specialist housing, including care homes, will likely be needed as a result; there is a forecast 66% growth in older people with dementia and a 55% increase in older people with mobility problems; however, only extra care housing falls within the scope of housing need, with care homes considered as a separate use in the planning system. At present, rate of retired people in Belper lower than Amber Valley average, but this is likely to change over the plan period. Analysis of sub-national population projections and Housing LIN SHOP report suggests a need for 360 specialist dwellings for older people, including 86 additional conventional sheltered housing units, 172 additional leasehold sheltered housing units, 29 additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale, 65 additional extra care housing units (including 22 for rent and 43 for sale); and 8 additional specialist dementia care dwellings.	<p>As per previous recommendations, the Steering Group should work with specialist providers to provide a range of dwellings suitable for older people, both for general purpose/independent living and for specialist care. For the former, this will essentially comprise support for smaller units, accessible apartments and/or bungalows with 1-2 bedrooms. A policy supporting downsizing for households currently under-occupying larger properties, though non-binding, could at least be a useful statement of intent.</p> <p>We recommend monitoring downsizing as it takes place- the more that happens, the lower the need for new family-sized/larger dwellings (see below).</p> <p>In terms of specialist provision, Belper seems ideal for the provision of the full range of specialist housing types estimated to be needed through analysis of sub-national population projections and the Housing LIN SHOP report, and as such we recommend a policy supporting provision of these dwelling types, including close working with Amber Valley to ensure delivery and implementation, as well as seeking to understand what proportion (if any) of the 403 dwellings completed since 2011 fall into these categories of specialist provision.</p>
Need for family housing	Census, estate agent survey	Household size is around average, suggesting need for a proportion of family-sized housing; census data also shows slightly higher than average proportion of families with dependent children, and Belper is popular among commuters, who tend to demand family-sized housing. Estate agents report that buyers value parking and gardens, suggesting some level of demand for larger, family-sized properties which are more likely to be able to provide these.	<p>As per recommendations above, there is likely to be a sustained need in Belper for family-sized and/or commuter housing (three bedrooms and above, usually semi-detached or detached).</p> <p>Note as per our previous conclusion that downsizing rates should be monitored, because if family-sized housing is freed up through downsizing, there will correspondingly be less need to provide new family-sized housing.</p>

1 Introduction

Housing Needs Assessment in Neighbourhood Planning

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

Local Study Context

25. Belper is a small town in Derbyshire with a parish population of 21,823 (2011 Census). It is eight miles north of the city of Derby, and 10 miles south-east of the county town of Matlock. Its local authority is Amber Valley Borough Council. It is about six miles west of Junctions 26 and 27 of the M1 motorway, providing fast road links to the South East and Yorkshire.
26. Belper is on the East Midlands mainline railway between Sheffield and London. As such, it benefits from easy rail access to these cities, as well as more locally to Derby, Chesterfield, East Midlands Parkway (providing access to the nearest major airport) and Leicester. The Midland Main Line is due to be fully electrified within the next few years.
27. Belper is also on the North East-South West Cross Country route from Edinburgh via Newcastle, York and Doncaster to Birmingham, Bristol, South Wales and Penzance, and now has a regular hourly rail service direct to Newark, Nottingham and Matlock.
28. The Neighbourhood Plan area is the same as Belper Parish. This greatly simplifies the gathering of statistics, as all are available at parish level.
29. For planning purposes, Belper is covered by the emerging Amber Valley Local Plan, but this has had a long and troubled development, meaning the final Local Plan is a long way from being adopted. As such, there is no specific housing target for the town, and a prime objective of this report is to help determine one.

30. Belper is also part of the Derby Housing Market Area, and as such, the Derby Strategic Housing Market Assessment Update (SHMAU) is relevant to this housing needs analysis and will be interrogated as appropriate.
31. This report is limited to the demand side of housing rather than the supply side and therefore does not consider potential housing development sites. However, the Steering Group have advised that there are strong constraints to housing growth locally resulting from the designation of substantial parts of the valley as either core World Heritage Site or Buffer Zone.

2 Approach

PPG-Based Assessment

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

Summary of Methodology

33. Housing Needs Assessment at neighbourhood plan level can be focused either on quantity of housing needed, type of housing need, or both. In most cases, there is a need to focus on quantity where the housing target for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement, or where there is no local plan in place.
34. In the case of Belper, this is indeed the case. As such, this report focuses both on quantity and type of housing needed. In order to understand both topics, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on housing quantity and characteristics.
35. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Belper, however, the planning period of the emerging Local Plan has not yet been determined. As such, we recommend aligning with the Derby HMA Strategic Housing Market Assessment Update assessment period, which extends from 2011 to 2028.

Gathering and Using a Range of Data

36. The PPG states that:

'no single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes'.

37. It continues: *'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance'.*
38. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if a PPG-based approach is being used.
39. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. We have

gathered data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data. Our work interpreting the results of the survey of local estate agents carried out by the Steering Group helped ensure our conclusions were informed by a qualitative, local perspective.

Focus On Demand Rather Than Supply

40. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the PPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*
41. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, heritage and landscape constraints, flood risk and so on) as a separate and follow-on study².

Study Objectives

42. The objectives of this report can be summarised as:
- Collation of a range of data with relevance to housing need in Belper relative to Amber Valley and the wider Derby Housing Market Area as a whole;
 - Analysis of that data to determine patterns of housing need and demand;
 - Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.
43. The remainder of this report is structured around the objectives set out above:
- Chapter 3 sets out the data gathered from all sources; and
 - Chapter 4 sets out our conclusions and recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

² Such an approach, clearly separating housing need assessment (demand-side) from dwelling capacity assessment (supply side) , was endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

3 Relevant Data

Local Planning Context

Derby HMA Strategic Housing Market Assessment Update (SHMAU) (GL Hearn, July 2013)

44. The PPG states that neighbourhood planners can refer to existing needs assessments as a starting point. As Belper is located within the Derby Housing Market Area, we therefore turned to the Derby Strategic Housing Market Assessment Update (2013, henceforth SHMAU)³ which covers the housing market area and informs housing policies at a local authority level, including affordable housing policy⁴.
45. The Housing Market Area (HMA) covered by the SHMAU comprises the three local planning authorities of Derby City, South Derbyshire and Amber Valley. Interrogating a range of more specific data including house prices, type and tenure, it defines a number of sub-markets across all three authorities.
46. Within Amber Valley, the sub-market relevant for our purposes is named as 'Belper-Ripley'. In defining this sub-market, the SHMAU states 'There is a clear inter-relationship between the two towns. Belper and settlements to the west of the A609 typically are typically more affluent with stronger housing demand; and there is a clear inter-relationship from this area into the Derbyshire Dales'.
47. Our analysis of the SHMAU breaks its conclusions down by the following key topic areas, presented in broad order of their appearance in the document:
- Dwelling type;
 - Occupation levels;
 - Recent levels of housing supply;
 - Housing for older people;
 - Economic growth as a driver of housing demand;
 - House prices;
 - Affordable housing; and
 - Overall quantity of housing required.

SHMAU conclusions on dwelling type

48. The Belper-Ripley sub-market comprises a fairly balanced profile, focused on mid-market housing, particularly semi-detached properties (paragraph 5.29). Across Amber Valley as a whole, Figure 1 (which reproduces SHMAU Figure 132, and which covers additional rather than existing housing) shows that the strongest demand for market housing is for 3 and 2 bedroom

³ Available online at

<http://www.derby.gov.uk/media/derbycitycouncil/contentassets/documents/policiesandguidance/planning/Derby%20SHMA%20Update%20Report%20Final%202013.pdf>

⁴ Here and throughout this report, we have defined affordable housing according **only** to the standard definition found in Annex 2 of the National Planning Policy Framework (NPPF), namely: 'Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.' We have avoided the definition of affordable housing in its colloquial sense of 'relatively cheaper market housing'.

houses, and in the affordable sector for 2 and 1 bedroom dwellings. Total requirement can be calculated by adding together the market and affordable requirements.

Figure 1: Estimated dwelling requirement by size, Amber Valley 2012-2028

Number of bedrooms	Market			Affordable		
	Households	Dwellings	% of dwellings	Households	Dwellings	% of dwellings
1 bedroom	251	259	5.4%	487	501	31.1%
2 bedrooms	1,436	1,479	30.6%	607	625	38.8%
3 bedrooms	2,579	2,656	55.0%	421	434	26.9%
4+ bedrooms	426	439	9.1%	49	51	3.1%
Total	4,692	4,833	100.0%	1,564	1,611	100.0%

Source: Derby HMA SHMAU, GL Hearn (2013)

49. On the basis of Figure 1 above, the total percentage of housing across both tenures by size would be 11.8% 1-bed units, 32.7% 2-bed units, 48% 3-bed units and 7.6% four or more bed units.
50. Later in the SHMAU, Figure 159 (adapted as Figure 2 below) builds in a number of other factors to the raw outputs presented in Figure 1 above to refine the percentage of market dwellings to aim for in planning policy.

Figure 2: Indicative recommended targets for market housing by size

Number of bedrooms	Amber Valley
1 bedroom	5%
2 bedrooms	30%
3 bedrooms	50%-55%
4+ bedrooms	10%-15%

Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU conclusions on occupation levels

51. The SHMAU states that levels of overcrowding have increased significantly over time in the HMA with some 55.6% more people failing this standard in 2011 than did in 2001 (an increase of 3,721), although the increase was less marked in Amber Valley (paragraph 5.46). This is supported by further data showing that within the HMA, the housing vacancy rate is highest in Amber Valley (4.3%) (para. 5.51).

SHMAU conclusions on recent levels of housing supply

52. Housing delivery in Amber Valley is reported to have fallen off notably since the downturn in housing market conditions caused by the 2009 recession (though note that this conclusion is now itself rather out of date, having been drafted in 2013). Although 548 dwellings were completed in 2007/8, this fell to 218 in 2009/10, with 206 dwellings delivered in 2011/12. However, the SHMAU expects supply to return to normal levels, boosted by larger sites in a number of towns, although it is interesting to note that the towns listed do not include Belper (paras 5.59-5.61).

SHMAU conclusions on housing for older people

53. The SHMAU concludes that in Amber Valley the demand profile is likely to be more focused towards lower and middle-income households and with stronger demand from an older population (Policy Implications section, Chapter 6).
54. Over the 2001-11 period, the SHMAU reports that the population in Amber Valley in their 40s and 60s grew. This was partly influenced by the ageing of the existing population. The population aged in their 30s fell (as did the population aged 5-9). Improvements in life expectancy have driven growth in the population of people in their 80s (para 6.9).
55. Amber Valley is reported to have a higher proportion of pensioner households (22.7%) and couples with non-dependent children (6.8%) relative to the region and the HMA, reflecting its older age structure (para. 6.20).
56. In Amber Valley, the profile of both market and affordable housing is generally slightly smaller than for the whole HMA as a result of the Borough's older age structure and proportionally stronger growth in older persons in the Borough over the period to 2028. As seen from statistics earlier in the section, older person households tend to occupy smaller accommodation and so this tends to push outputs slightly towards smaller homes in this area. (para 10.9)
57. Older persons are more likely to under-occupy homes. The SHMAU notes that in the market sector, however, there is a very limited ability to influence this. In the affordable sector, there may be potential to reduce (or seek to limit potential growth in) under-occupation and that AVBC may wish to consider providing support and incentives to social housing occupiers to downsize. This will help to release larger affordable homes for younger households.
58. An analysis of older person households suggest that they are particularly likely to live in social rented housing (especially single pensioner households). With the projected increases in older persons there may therefore be additional pressure on the affordable housing stock from such households.
59. The SHMAU analysis also suggests that the increasing older population (particularly in the oldest age groups) will result in growth in households with specialist housing needs. Some households will require support. Typically the greatest support needs are for alterations to properties (such as to bathrooms, showers and toilets, provision of emergency alarms or help maintaining homes). Many of these can be resolved in situ through adaptations to existing properties. The resource implications of this will need to be planned for.
60. The increasing older population will, however, likely lead to some increase in requirements for specialist housing solutions. The SHMAU analysis suggests a 66% growth in older population with dementia, and a 55% increase in the older population with mobility problems. From a planning point of view, some of these people will require specialist housing such as sheltered or extra care provision. The SHMAU analysis also suggests that the care home population can be expected to increase by around 2,400 persons between 2012 and 2030.
61. The SHMAU points out that as care homes do not count as housing on the use class schedule; an issue for AVDC (and, by implication, neighbourhood plans) to consider is the extent to which older persons should be accommodated within extra care housing⁵ as opposed to residential/nursing homes. The former (depending on the level of care) may count towards housing numbers, but the latter would not (Policy implications: Older people, Chapter 11).
62. Data analysis presented by the SHMAU suggests that the proportion of people with a limiting long-term illness is about average when compared with other areas and that health issues are

⁵ Extra care housing comprises developments that comprise self-contained homes with design features and support services available to enable self-care and independent living.

very substantially concentrated amongst older persons. There is a concentration of people with limiting long term illnesses in the social rented sector.

63. In the future the adult population with a range of disabilities is expected to increase slightly (by around 11%-13%). This may generate additional demand for specialist accommodation, particularly if there is any current mismatch in requirements and availability (Policy Implications: People with Disabilities, Chapter 11).

64. Figure 3 below replicates SHMAU Figure 138, which presents the older person population in Amber Valley at the 2011 Census, comparing it to the East Midlands and England averages. It is clear that the Borough's under-55 population is lower than the regional and national figures and, correspondingly, every figure in the age bands of 55 and over are higher than average.

Figure 3: Older person population in Derby HMA (including Amber Valley) compared with regional and national averages, 2011

Area		Under 55	55-64	65-74	75-84	85+	Total	Total 55+
Amber Valley	Population	82,393	17,137	12,496	7,232	3,051	122,309	39,916
	% of popn	67.4%	14.0%	10.2%	5.9%	2.5%	100.0%	32.6%
Derby	Population	186,121	24,962	18,884	13,540	5,245	248,752	62,631
	% of popn	74.8%	10.0%	7.6%	5.4%	2.1%	100.0%	25.2%
South Derbyshire	Population	67,869	12,115	8,167	4,726	1,734	94,611	26,742
	% of popn	71.7%	12.8%	8.6%	5.0%	1.8%	100.0%	28.3%
Derby HMA	Population	336,383	54,214	39,547	25,498	10,030	465,672	129,289
	% of popn	72.2%	11.6%	8.5%	5.5%	2.2%	100.0%	27.8%
East Midlands	Population	3,198,942	561,332	414,713	256,569	101,666	4,533,222	1,334,280
	% of popn	70.6%	12.4%	9.1%	5.7%	2.2%	100.0%	29.4%
England	Population	38,182,658	6,169,269	4,552,283	2,928,118	1,180,128	53,012,456	14,829,798
	% of popn	72.0%	11.6%	8.6%	5.5%	2.2%	100.0%	28.0%

Source: Derby HMA SHMAU, GL Hearn (2013)

65. Figure 4 below, which replicates SHMAU Figure 123, shows the SHMAU's estimate of how the older population in Amber Valley is forecast to change in the period 2011-2028 relative to the HMA as a whole. The existing pattern of high levels of population over the age of 60 will only increase, with the only younger age band showing growth being under 15s, and with over 75s forecast to grow by a very high 79.5%.

Figure 4: Population change in Amber Valley 2011-2028 by five-year age band

Age group	Amber Valley		Derby City		South Derbyshire		Derby HMA	
	Change in population	% change from 2011	Change in population	% change from 2011	Change in population	% change from 2011	Change in population	% change from 2011
Under 15	1,013	5.1%	2,656	5.6%	3,665	21.1%	7,333	8.6%
15-29	-1,045	-5.2%	2,465	4.5%	912	5.6%	2,332	2.6%
30-44	-489	-2.0%	5,164	10.1%	1,639	8.0%	6,313	6.6%
45-59	-1,118	-4.3%	877	2.0%	1,775	8.9%	1,534	1.7%
60-74	3,974	18.2%	8,540	27.1%	5,448	37.6%	17,961	26.5%
75+	8,242	79.4%	7,069	37.3%	5,990	92.0%	21,301	59.4%
Total	10,576	8.6%	26,771	10.8%	19,428	20.5%	56,774	12.2%

Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU conclusions on economic growth as a driver of housing demand

66. Economic growth plays an extremely important role in driving or constraining housing growth, and this is addressed by the SHMAU. We consider the key factors presented in the SHMAU that will play the biggest role in influencing housing growth in Amber Valley include the following:

- Performance of the manufacturing industry in the HMA – the HMA has a strong manufacturing base and supports a number of key manufacturing firms – Rolls Royce, Bombardier and Toyota in particular – together with their wider supply chains. Investment and innovation by these businesses will support the local economy and there are opportunities to nurture and develop local supply chains. However these are firms which compete within global markets and are affected by the wider economic outlook. A continued reduction in employment in lower-value manufacturing activities can be expected, and with the post-Brexit exchange rate and the UK's new trading relationships far from settled, this creates added uncertainty in the manufacturing sector, the long-term impact of which is difficult to quantify at the time of writing;
- Derby City Centre regeneration – further city centre regeneration in Derby provides the potential to support further employment growth including through development of world class leisure facilities, and through delivery of new office space. There is a concentration of office occupiers in the city related to existing specialisms, such as professional service companies engaged in the rail sector. The office market in the city is influenced by the proximity to Nottingham particularly in terms of the strength of the financial & business services sector in the City.
- Public sector austerity measures – spending restraints can be expected to influence public sector employment over the period to 2017; although it should be recognised that demographics over the longer-term may influence employment in health and education in particular; and
- Enterprise and small business growth – growth in small businesses and self-employment could be an important driver of economic performance moving forwards. (para 6.30)

67. The SHMAU notes that in Amber Valley, the proportion of people in skilled trades is above average, as is the proportion of process, plant and machine operatives. (para 6.41)

68. It also states that workplace earnings in Amber Valley are surprisingly high: they are above those in South Derbyshire and other authorities which surround the Derby HMA. They are also moderately higher than residents' earnings. This could support moderate in-commuting to higher paid jobs (para. 6.46).

69. Between 2001 and 2008, out-commuting among Amber Valley employees decreased, as shown in Figure 5 below, which replicates SHMAU Figure 64, although commuting to Nottingham has risen slightly, and to Derby it has remained broadly the same.

Figure 5: Out-commuting from Amber Valley, 2001 and 2008

Where people living in Amber Valley work ...	2001 flow	2008 flow
Amber Valley	53.1%	58.7%
Derby	11.2%	11.1%
Nottingham	4.1%	5.9%
Erewash	6.0%	5.5%
Derbyshire Dales	4.9%	3.8%
Broxtowe	3.5%	2.9%

Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU conclusions on house prices

70. Figure 6 below replicates SHMAU Figure 77 and provides an analysis of spatial variations in average house prices across the HMA as of 2012. House prices appear higher (on a like-for-like basis) in Belper (para 7.53).

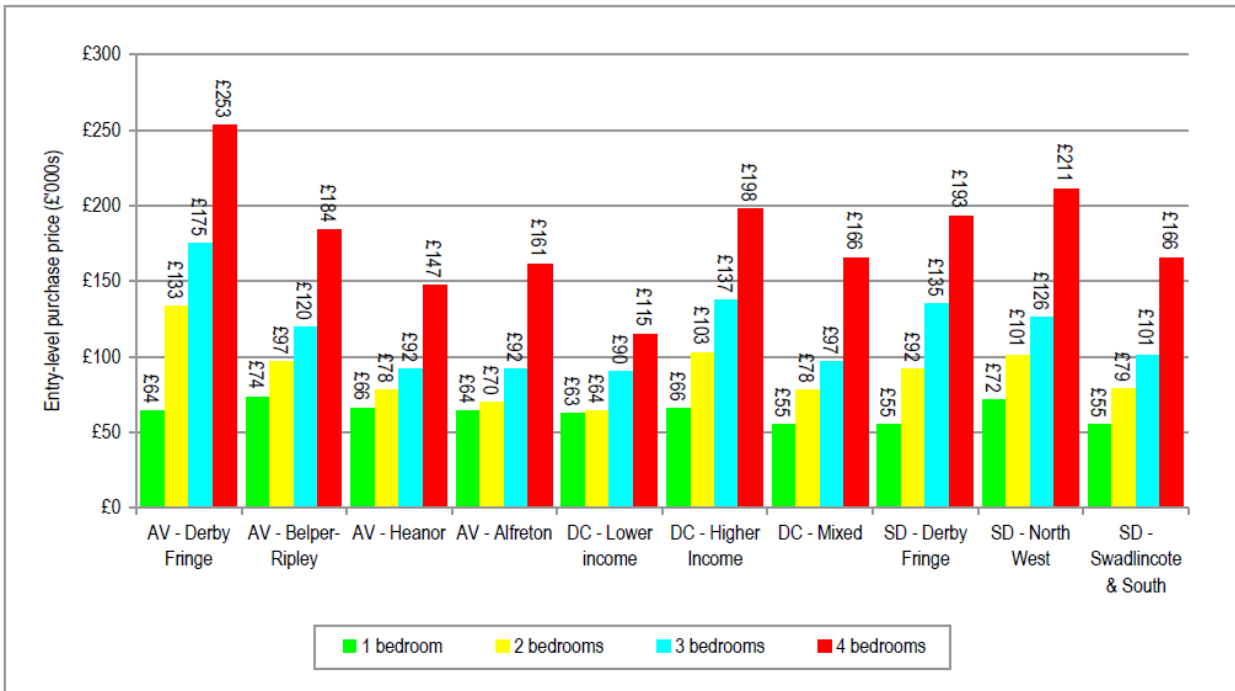
Figure 6: House prices in selected locations in Derby HNA, 2012

	Average House Price
Derby	
Derby	£154,587
South Derbyshire	
Swadlincote	£139,536
Amber Valley	
Alfreton	£124,103
Ripley	£131,857
Heanor	£119,144
Belper	£184,305

Source: Derby HMA SHMAU, GL Hearn (2013)

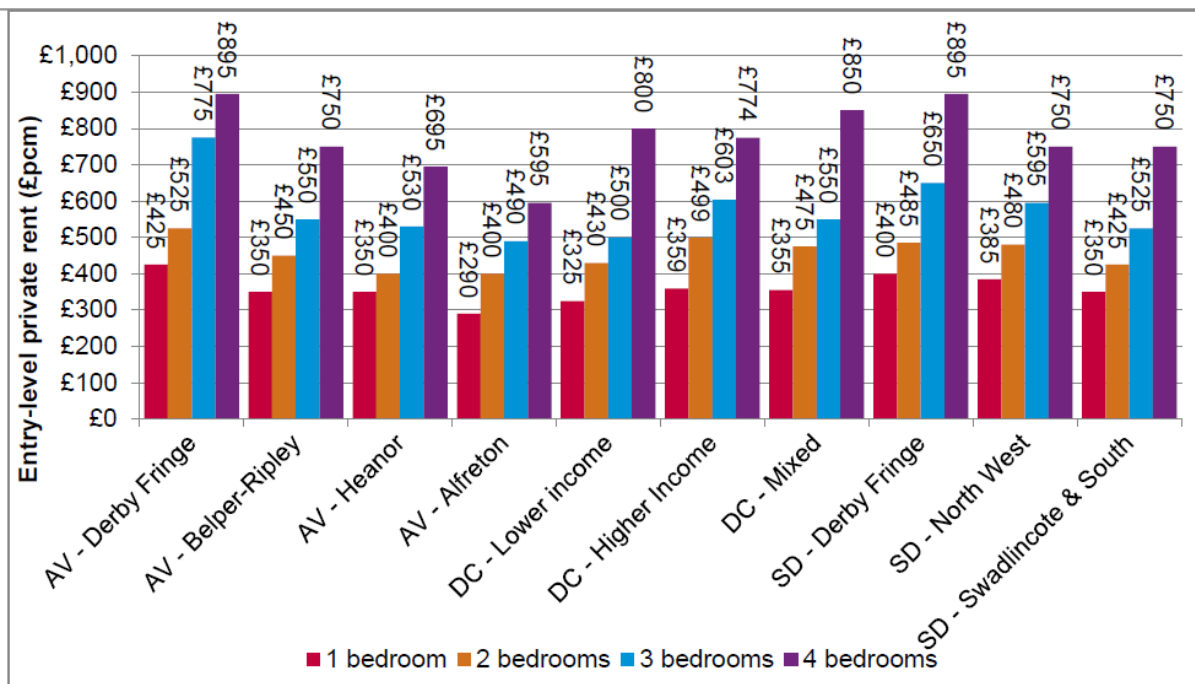
71. The SHMAU provides in its Figures 86 and 88 (replicated as Figures 7 and 8 below) an indication of how purchase and rental price differed in the Belper-Ripley sub-market relative to other parts of Amber Valley and the HMA as a whole. The figures show that the sub-market is generally more expensive than the Borough's prices as a whole, but is not as expensive as the Derby Fringe sub-market to its south.

Figure 7: Entry-level house prices by sub-market area, October 2012



Source: Derby HMA SHMAU, GL Hearn (2013)

Figure 8: Entry-level private rents by sub-market area, October 2012



Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU conclusions- affordable housing

72. The SHMAU assesses the affordability ratio for the Belper-Ripley sub-market compared to the rest of Amber Valley and the wider HMA. The higher the affordability ratio, the less affordable entry-level market homes are for local people on a lower quartile income (i.e. the lowest 25% of all incomes). Figure 9 (which replicates SHMAU Figure 98) demonstrates that the affordability ratio for Belper and Ripley is in fact slightly below the Amber Valley average and well below those for the Derby Fringe and Alfreton.

Figure 9: Affordability ratio (i.e. LQ Price: Income ratio) for Derby HMA, October 2012

Sub-area	Entry-level Purchase Price	Lower Quartile Income	LQ Price: Income Ratio
AV - Derby Fringe	£133,000	£20,792	6.20
AV – Belper-Ripley	£97,000	£15,222	5.99
AV – Heanor	£78,000	£13,276	5.41
AV – Alfreton	£70,000	£12,623	6.26
Amber Valley	£88,403	£14,263	6.05
DC - Lower income	£64,000	£10,682	4.87
DC - Higher Income	£103,000	£19,043	4.53
DC – Mixed	£78,000	£12,456	5.39
Derby City	£81,445	£13,472	5.16
SD - Derby Fringe	£92,000	£18,910	6.20
SD – North West	£101,000	£22,282	5.99
SD - Swadlincote & South	£79,000	£14,665	5.41
South Derbyshire	£86,433	£16,739	6.26

Source: Derby HMA SHMAU, GL Hearn (2013)

73. Figure 10 below, which replicates SHMAU Figure 99, shows the estimated proportion of households unable to afford market housing without subsidy. This equates to 38.2% in the Belper-Ripley sub-market, which is broadly in line with the Amber Valley average of 38.9%.

Figure 10: Estimated proportion of households unable to access market housing without subsidy, 2012

Area	Income required to access market	Number unable to afford	Estimated households (2012)	% of households unable to afford
AV - Derby Fringe	£25,200	1,017	3,173	32.0%
AV – Belper-Ripley	£21,600	8,951	23,405	38.2%
AV – Heanor	£19,200	5,605	14,221	39.4%
AV – Alfreton	£19,200	4,931	11,890	41.5%
Amber Valley	-	20,503	52,689	38.9%
DC - Lower income	£18,400	9,780	20,383	48.0%
DC - Higher Income	£23,940	9,682	28,913	33.5%
DC - Mixed	£22,343	25,781	52,562	49.0%
Derby City	-	45,243	101,857	44.4%
SD - Derby Fringe	£23,280	3,482	10,639	32.7%
SD - North West	£23,040	1,713	6,559	26.1%
SD - Swadlincote & South	£20,400	8,016	21,350	37.5%
South Derbyshire	-	13,212	38,548	34.3%
Total	-	78,957	193,093	40.9%

Source: Derby HMA SHMAU, GL Hearn (2013)

74. Figure 11 below, which replicates SHMAU figure 115, sets out the estimated level of affordable housing need 2012-2017 by tenure. It shows that there is a slightly higher than average need for intermediate housing⁶ in the Belper-Ripley sub-market compared with the Amber Valley average, and there is a correspondingly slightly lower than average need for socially-rented housing within the sub-market. The need for the affordable rent tenure is slightly higher than average as well.

Figure 11: Estimated tenure split of affordable housing needed by sub-market

Area	Intermediate	Affordable Rent	Social Rent	Total
AV - Derby Fringe	35.4%	13.3%	51.3%	100.0%
AV – Belper-Ripley	29.7%	2.8%	67.5%	100.0%
AV – Heanor	23.5%	0.0%	76.5%	100.0%
AV – Alfreton	28.0%	0.0%	72.0%	100.0%
Amber Valley	27.8%	1.5%	70.7%	100.0%
DC - Lower income	7.8%	0.0%	92.2%	100.0%
DC - Higher Income	24.2%	9.9%	65.9%	100.0%
DC – Mixed	30.1%	3.7%	66.2%	100.0%
Derby City	22.5%	3.7%	73.8%	100.0%
SD - Derby Fringe	25.5%	12.4%	62.1%	100.0%
SD - North West	32.1%	11.2%	56.7%	100.0%
SD - Swadlincote & South	31.9%	1.3%	66.8%	100.0%
South Derbyshire	30.3%	4.5%	65.2%	100.0%
Total	25.2%	3.3%	71.5%	100.0%

Source: Derby HMA SHMAU, GL Hearn (2013)

⁶ The Government definition of intermediate housing is as follows: 'affordable homes for sale and rent provided at a cost above social rent, but below market levels..... These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing'. (see <https://www.gov.uk/guidance/definitions-of-general-housing-terms>)

75. Figure 12 below replicates SHMAU figure 158, and sets out the recommended mix of dwelling sizes to aim for within the affordable housing sector across Amber Valley as a whole. The SHMAU recommends (Chapter 12) that this estimate should be brought together with local evidence of need at the time of a planning application in determining the appropriate mix of affordable housing on individual development schemes.

Figure 12: Recommended policy targets for affordable housing mix in Amber Valley

Number of bedrooms	Amber Valley	Derby City	South Derbyshire	Derby HMA
1 bedroom	20%-25%	20%-25%	10%-15%	15%-20%
2 bedrooms	40%	30%	35%-40%	35%
3 bedrooms	30%	35%	35%-40%	35%
4+ bedrooms	5%-10%	10%-15%	10%-15%	10%-15%

Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU conclusions- overall quantity of housing required

76. In the absence of an up-to-date local plan providing a housing target for Amber Valley, for the purposes of this housing needs assessment for Belper, it is important to understand what the town's share of the overall quantity of housing that the SHMA estimates to be required across the Borough would be.

77. Figure 13 below, which is adapted from SHMA Figure 125, shows that the SHMA estimates 3,042 dwellings will be required within the Belper-Ripley sub-market between 2011 and 2028.

Figure 13: SHMA dwelling projections for Amber Valley by sub-market, 2011-2028

Area	Population Growth		Housing Numbers		Employment Growth	
	Total	% change	Total	% change	Total	% change
AV - Derby Fringe	860	11.2%	496	15.1%	24	0.7%
AV – Belper-Ripley	4,708	8.7%	3,042	12.6%	1,025	3.7%
AV – Heanor	2,633	7.9%	1,705	11.7%	566	3.5%
AV – Alfreton	2,375	8.7%	1,611	13.2%	65	0.5%
Amber Valley	10,576	8.6%	6,855	12.6%	1,680	2.8%

Source: Derby HMA SHMAU, GL Hearn (2013)

SHMAU-derived housing projection for Belper parish

78. Figure 13 enables us to formulate a SHMAU-derived housing projection for Belper parish alone, on a proportional share basis, as follows:

79. The SHMAU's definition of the Belper-Ripley submarket, as illustrated in SHMAU Figure 21 and set out further in SHMAU Figure 22, comprises the following wards (in the SHMAU, 2005 ward boundaries are used):

- Alport;
- Belper Central;
- Belper East;

- Belper North;
- Belper South;
- Crich;
- Heage and Ambergate;
- Kilburn;
- Ripley; and
- Ripley and Marehay.

80. These 2005 ward boundaries were largely unchanged at the 2011 Census, enabling us to determine the share of sub-market housing both inside and outside the neighbourhood plan boundary.

81. At the 2011 Census, the ten sub-market wards contained between them 24,384 dwellings. This means that the 2011-2028 projection of 3,042 new dwellings equates to one new dwelling for every 8.016 existing dwellings.

82. The four wards of Belper Central, Belper East, Belper North and Belper South correspond with the boundary of the neighbourhood plan area. These four wards contained 9,981 dwellings. Therefore, with one new dwelling for every 8.016 existing dwellings, the SHMA-derived neighbourhood plan dwelling projection for Belper is $(9,981/8.016=)$ 1,245 new dwellings between 2011 and 2028.

83. It is very likely that some of these 1,245 dwellings will already have been completed since 2011, thus reducing the outstanding number of dwellings to be delivered between now and 2028. We analyse this further below.

Amber Valley Borough Local Plan (April 2006)

84. Following the withdrawal of the emerging Local Plan in 2015, the adopted development plan for Amber Valley remains the Amber Valley Local Plan adopted in April 2006. In 2009, a number of policies were saved, including housing policies. However, the saved policies do not provide a specific housing target for Belper. The two saved policies most relevant for the purposes of this housing needs assessment are the following:

- Policy H3, which supports housing development at Belper; and
- Policy H10, which states that the council will require 20 – 30% of all units on individual sites to comprise affordable housing.

DCLG Household Projections

85. The Department for Communities and Local Government (DCLG) periodically publishes household projections. The NPPG recommends that these household projections should form the starting point for the assessment of housing need, albeit that this advice is likely aimed more at local authorities than neighbourhood planners. However, in locations such as Belper that have no adopted Local Plan target, the household projections can be useful in terms of deriving a broadly accurate dwellings target.

86. The most recent (2014-based) household projections were published in July 2016⁷, and extend to 2039. Although population projections are only available at a local authority level, a calculation of the share for Belper is nevertheless possible for the household projections based on the town's household numbers in 2011 (the Core Strategy base date).
87. At the 2011 Census, Amber Valley had 52,596 households and Belper had 9,480 households, or 18.02% of the Amber Valley total.
88. In the 2014-based household projections, the projection for 2028 is for 59,893 households in Amber Valley. Assuming it continues to form 18.02% of the District total, Belper's new total number of households would be 10,793 and therefore 1,313 new households would have formed in Belper over the Plan period.
89. Number of households does not, however, equate precisely to number of dwellings, with the latter slightly higher in most places. Belper is no exception; in the 2011 Census, there were 9,480 households but 9,981 dwellings. This gives a ratio of 0.95 households per dwelling. In the case of Belper, then, a projection of 1,313 new households translates into a need for 1,382 dwellings (rounded to the nearest whole number).
90. This projection is an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase, and thus does not take into account political, economic, demographic or any other drivers that might have influenced, or may in future influence, the Local Plan distribution across the Borough and hence any difference between this figure and a future Local Plan-derived figure.

Dwelling growth 2001-2011

91. Dwelling growth for Belper between 2001 and 2011 can be determined by comparing dwelling numbers from the two Censuses. With Census 2001 showing 9,133 dwellings and Census 2011 9,981 dwellings, this equates to a ten-year growth rate of 848 dwellings, or just under 85 dwellings per year.
92. If this rate of completion was projected forward for the period 2011-2028, a dwelling requirement of $(17 \times 84.8=)$ 1,442 dwellings would be the result.

Dwelling growth since 2011

93. Amber Valley has helpfully provided the number of dwellings completed in Belper Parish since the 2011 Census.
94. Amber Valley advises that between March 2011 and March 2016, a net figure of 403 dwellings have been completed in the parish. This equates to a rate of 80.6 dwelling completions per year. If this rate of completion was applied across the period 2011-2028, a dwelling projection of $(17 \times 80.6=)$ 1,370 dwellings would be the result. Those dwellings already completed since 2011 can also, of course, be discounted from all 2011-2028 projections, and this is addressed in our conclusion.

Local housing waiting list (Amber Valley, May 2016)

95. We contacted Amber Valley's housing management organisation, Futures Homescape for their assessment of the number of households currently on the waiting list that live in Belper. This provides a useful indication of whether the adopted Core Strategy target of 20-30% affordable homes is sufficient to meet present affordable need.

⁷ See 2014-based DCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

96. Like most affordable housing waiting lists, the list for Amber Valley is banded⁸, whereby Bands A, B and C comprise identified affordable housing need (with A most urgent, C least urgent) and Band D is named 'non-priority housing'. In line with standard housing needs assessment practice, we have discounted households in Band D so that our assessment covers only those in genuine priority need of affordable housing.
97. Amber Valley advises that currently there are 2,975 households on the waiting list for Amber Valley, of which 215 live in Belper. Of these 215, 118 are in Bands A to C, as follows:
- Band A (Emergency/Top Priority): 6 households, all needing 1 bed units;
 - Band B (Urgent Need to Move): 27 households, of which 23 need 1 bed units, 2 need 2 bed units, 1 needs a 3 bed unit and 1 a 4+ bed unit; and
 - Band C (Identified Housing Need): 85 households, of which 56 need 1 bed units, 20 need 2 bed units, 6 need 3 bed units and 3 need 4 bed units.
98. Although the waiting list is only a snapshot in time, it does seem apparent that, with 118 households in need of affordable housing at present (just 8.6% of the midpoint of the dwelling number projections), the adopted policy of 20-30% affordable housing provision should be adequate to meet affordable need in Belper over the remainder of the plan period, even allowing for a reasonable level of increase in affordable need in future. As such, on the basis of this evidence, there does not appear to be a requirement for the Belper Neighbourhood Plan to set its own affordable housing target, although it may reference the need to monitor Amber Valley's list and mention the need to work closely with the District Council in general to ensure the needs of those on the housing waiting list continue to be met.
99. Note that even after the Neighbourhood Plan is adopted, Amber Valley's affordable housing policy will continue to apply within Belper, and as such it will still be the Council that controls the housing waiting list and negotiate affordable housing commitments with developers as part of the development management process.

Characteristics of Population

100. Through analysis of Census 2001 and 2011 data, we have investigated how the population of Belper neighbourhood plan area differs from that of the Amber Valley and England averages.
101. Table 1 gives the population and number of households in Belper, Amber Valley and England, as recorded in the 2011 census. In 2011, Belper had a population of 21,823, and an average household size of 2.3 persons. This is identical to the local average but slightly lower than the national average.

⁸ For full band definitions, please refer to <https://www.home-options.org/Content.aspx?wkid=71>

Table 1: Population and household size in Belper, 2011⁹

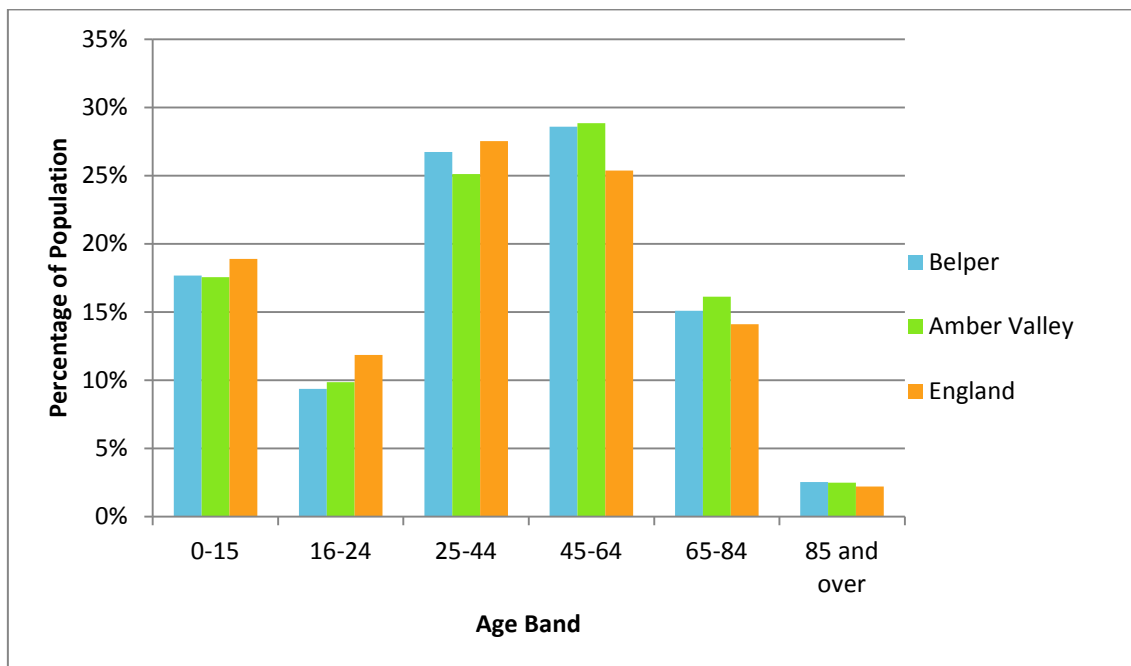
	Belper	Amber Valley	England
Population	21,823	122,309	53,012,456
Households	9,480	52,596	22,063,368
Household size	2.3	2.3	2.4
Dwellings	9,981	54,933	22,976,066

Source: ONS, Census 2011. AECOM calculations

102. As illustrated in Figure 14 below, the largest age group in Belper is ages 45-64, at 29%. This is exactly the same as the figure for Amber Valley (29%) but higher than the figure for England (25%). The proportion of 0-15 year olds is the same in Belper (18%) as Amber Valley (18%) but slightly lower than England's average (19%).
103. Belper has a smaller proportion of young adults (16-24) than either Amber Valley or England. The proportion of people aged 25-44 is higher in Belper than Amber Valley, but lower than the England average. The proportion of people aged 65-84 is lower in Belper (15%) than in Amber Valley (16%) but slightly higher than in England (14%). The proportion of people aged 85 and over is slightly higher in Belper than the local and national averages.
104. Table 2 shows the rate of change of the population by age band. It shows that the proportion of people in the 45 and over age groups have undergone a considerable increase in Belper between 2001 and 2011, which is an even greater increase than the considerable local and national increases. The declines in the 25-44 age group in Belper and Amber Valley are also in stark contrast to the trend in England, though there has been an above-average increase in the 16-24 age group.

⁹ ONS, Census 2011, Population Density (QS102EW); Household Size, 2011 (QS406EW).

Figure 14: Age structure in Belper¹⁰



Source: ONS, Census 2011. AECOM calculations

Table 2: Rate of change in the age structure of Belper population, 2001-2011¹¹

Age group	Belper	Amber Valley	England
0-15	-5.5%	-5.6%	1.2%
16-24	20.4%	14.9%	17.2%
25-44	-15.8%	-8.1%	1.4%
45-64	20.3%	12.6%	15.2%
65-84	16.6%	13.2%	9.1%
85 and over	32.7%	23.2%	23.7%

Source: ONS, Census 2001 and 2011. AECOM calculations

105. Table 3 shows that Belper is home to slightly more people born outside the UK than Amber Valley but a much lower proportion than the England average.

¹⁰ ONS, Census 2011, Age Structure (KS102EW)

¹¹ ONS, Census 2011, Age Structure (KS102EW); ONS, Census 2001, Age Structure (KS02)

Table 3: Country of birth and length of residence

Place of birth	Population breakdown		Belper	Amber Valley	England
Born in the UK	Total		96.7%	97.0%	86.2%
Born outside the UK	Total		3.3%	3.0%	13.8%
	EU		1.4%	1.5%	3.7%
	Other		1.9%	1.5%	9.4%
	Length of residence	Less than 2 years	0.2%	0.2%	1.8%
		2-5 years	0.5%	0.5%	2.2%
5-10 years		0.6%	0.5%	2.9%	
10 years or more		2.0%	1.8%	7.0%	

Source: ONS, Census 2011. AECOM calculations

106. Of the 3.3% of Belper residents who were born overseas, the majority have lived in the UK for ten years or more, indicating no recent large-scale influx of international migrants.

Household Type

107. Table 4 shows a large increase in smaller room households in Belper, contrasting in particular with the fall in smaller room households in Amber Valley and England. There has also, contrastingly, been an increase in larger room households, but not to the same extent as Amber Valley.

Table 4: Rates of change in number of rooms per household in Belper, 2001-2011¹²

Number of Rooms	Belper	Amber Valley	England
1 Room	53.8%	-32.9%	-5.2%
2 Rooms	48.1%	19.6%	24.2%
3 Rooms	16.7%	14.3%	20.4%
4 Rooms	-3.9%	-2.7%	3.5%
5 Rooms	5.0%	-2.0%	-1.8%
6 Rooms	2.5%	4.0%	2.1%
7 Rooms	13.6%	21.0%	17.9%
8 Rooms or more	38.4%	46.1%	29.8%

Source: ONS, Census 2001 and 2011. AECOM calculations

108. The PPG states that factors such as overcrowding, concealed and shared households, homelessness and the numbers of people in temporary accommodation demonstrate un-met need for housing. Increases in the number of such households may be a signal to consider increasing planned housing numbers.
109. Table 5 emphasises that, on the contrary, Belper is becoming significantly more under-crowded, which is indicative of an ageing population. In other words, larger units that once housed a family are gradually losing residents (from children moving away, and then parents becoming widowed or moving into care), resulting in decreasing number of persons per room.

¹² ONS, Census 2011, Number of Rooms (QS407EW); ONS, Census 2001, Number of Rooms (UV57)

Table 5: Trends in number of persons per room in Belper, 2001-2011¹³

Persons per room	Belper	Amber Valley	England
Up to 0.5 persons per room	10.8%	11.3%	7.9%
Over 0.5 and up to 1.0 persons per room	-2.0%	-5.2%	7.0%
Over 1.0 and up to 1.5 persons per room	45.5%	19.9%	27.3%
Over 1.5 persons per room	-28.6%	-32.8%	2.5%

Source: ONS, Census 2001 and 2011. AECOM calculations

Household Tenure

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

Table 6: Tenure (households) in Belper, 2011¹⁴

Tenure	Belper	Amber Valley	England
Owned; total	77.9%	74.1%	63.3%
Shared ownership	0.7%	0.4%	0.8%
Social rented; total	7.3%	12.3%	17.7%
Private rented; total	13.0%	11.8%	16.8%

Source: ONS, Census 2011. AECOM calculations

111. Table 6 shows that the level of owner occupation in Belper is higher than the Amber Valley average and significantly higher than the England average. The proportion of socially rented housing (rented from the Council or a Registered Social Landlord) is much lower than local and national averages. The proportion of private rented housing is higher than the local average but lower than the national average.
112. Table 7 shows how tenure has changed in Belper between the 2001 and 2011 Censuses. Home ownership in the area has increased slightly, but to a lesser extent than the modest growth in Amber Valley and the contraction at national level. Note also how shared ownership (an indication of a lack of affordable housing) increased significantly across Belper but only

¹³ ONS, Census 2011, Persons Per Room - Households (QS409EW); ONS, Census 2001, Persons per Room - Households (UV58)

¹⁴ ONS, Census 2011, Tenure - Households (QS405EW)

slightly in Amber Valley. However, there has been a much larger increase in social rentals in Belper (far higher than local and national averages), as well as in private rentals. These trends are indicative of a declining level of affordability for local people.

Table 7: Rate of tenure change in Belper, 2001-2011

Tenure	Belper	Amber Valley	England
Owned; total	1.7%	2.8%	-0.6%
Shared ownership	17.0%	1.9%	30.0%
Social rented; total	3.8%	-0.9%	-0.9%
Private rented; total	120.0%	117.2%	82.4%

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

Local Household Composition

113. Table 8 shows that the proportion of single person households in Belper is slightly higher than the Amber Valley average but lower than the England average. By contrast, the proportion of households with a single family occupancy is much higher than the England average but only slightly higher than the Amber Valley average.

Table 8: Household composition (by household) in Belper, 2011¹⁵

		Belper	Amber Valley	England
One person household	Total	28.6%	27.9%	30.2%
	Aged 65 and over	11.8%	12.8%	12.4%
	Other	16.8%	15.1%	17.9%
One family only ¹⁶	Total	67.6%	67.5%	61.8%
	All aged 65 and over	9.1%	9.6%	8.1%
	With no children	22.4%	21.8%	17.6%
	With dependent children	26.9%	25.8%	26.5%
	All children non-dependent	9.2%	10.2%	9.6%
Other household types	Total	3.9%	4.7%	8.0%

Source: ONS, Census 2011. AECOM calculations

114. The proportion of single person households aged 65 and over in Belper is lower than both the Amber Valley and England averages, which is perhaps surprising given the age profile of the village. However, at the same time, the proportion of single family households aged 65 and over is only slightly lower than the Amber Valley average.
115. The plan area is home to a higher than average proportion of families with no children but also families with dependent children. The proportion of households where all children are non-dependent is slightly lower than both the local and national averages. The proportion of other household types is low.
116. Table 9 shows how household composition changed in the 10 years between the 2001 and 2011 Censuses. Overall, there was an increase in single person households in the plan area, which was greater than the local and national average increases. This increase applied, however, only to households under the age of 65.
117. There were also larger than average increases in one family households, and in particular families over the age of 65, reflecting retired couples living longer as well as those with no children and with non-dependent children.

¹⁵ ONS, Census 2011, Household Composition - Households (QS113EW)

¹⁶ This includes: married couples, cohabiting couples, same-sex civil partnership couples and lone parents.

Table 9: Rates of change in household composition in Belper, 2001-2011¹⁷

Household type		Percentage change, 2001-2011		
		Belper	Amber Valley	England
One person household	Total	9.4%	8.6%	8.4%
	Aged 65 and over	-0.7%	-5.1%	-7.3%
	Other	17.9%	23.8%	22.7%
One family only	Total	6.2%	4.8%	5.4%
	All aged 65 and over	10.9%	4.6%	-2.0%
	With no children	7.0%	12.1%	7.1%
	With dependent children	2.5%	-0.1%	5.0%
	All children non-dependent	10.9%	3.8%	10.6%
Other household types	Total	29.4%	37.2%	28.9%

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

118. As noted previously, Belper's household size is in line with the local average. However, Table 10 shows that the plan area experienced an increase in its population and number of households over the period 2001-2011 but that at the same time there was a decrease in household size. The decrease in household size at the same time as an increase in population is indicative of a growing number of under-occupied dwellings, as might be expected from a population that is older than average.

¹⁷ ONS, Census 2011, Household Composition - Households (QS113EW); ONS, Census 2001, Household Composition - Households (UV65)

Table 10: Change in household numbers and size in Belper, 2001-2011

Key indicator	Percentage change, 2001-2011		
	Belper	Amber Valley	England
Population	6.2%	5.0%	7.90%
Households	7.8%	7.1%	7.90%
Household size	-1.5%	-1.9%	0%

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

119. Table 11 shows that the proportion of dwellings in Belper that are detached is higher than both the Amber Valley and England averages¹⁸. In turn, the proportion of semi-detached dwellings is lower than local and national averages, while the proportion of terraced dwellings is lower than the national average but slightly higher than the local average. The proportion of flats is higher than the local average but significantly less than the national average.

Table 11: Accommodation type (households), 2011

Dwelling type		Belper	Amber Valley	England
Whole house or bungalow	Detached	39.1%	35.8%	22.4%
	Semi-detached	30.2%	36.5%	31.2%
	Terraced	22.6%	20.9%	24.5%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	5.7%	4.8%	16.4%
	Parts of a converted or shared house	1.3%	0.9%	3.8%
	In commercial building	1.2%	0.9%	1.0%

Source: ONS, Census 2001 and 2011, AECOM calculations

120. A 'concealed family' means any group of people who want to form a new household but are unable to do so, typically for economic reasons such as high house prices or a lack of suitable property. Table 12 shows that there is a rate of only 0.8% concealed families in the plan area; one would normally expect a correlation between lower numbers of people per household and lower numbers of concealed families, and this is indeed the case. The proportion of concealed families is lower than the Amber Valley and England rates.

¹⁸ This table excludes caravans and other mobile and/or temporary structures.

Table 12: Concealed families in Belper, 2011¹⁹

Concealed families	Belper	Amber Valley	England
All families: total	6,681	37,437	14,885,145
Concealed families: total	51	395	275,954
Concealed families as % of total	0.8%	1.1%	1.9%

Source: ONS, Census 2001 and 2011. AECOM calculations

121. Official statistics do not clarify the overlap, if any, between the Belper/Amber Valley housing waiting list and the stated number of concealed families locally.

Economic Activity

122. Table 13 shows that Belper's proportion of economically active residents is greater than in Amber Valley and England, and the proportion of economically inactive residents is lower than in Amber Valley or England. Full-time employee levels in Belper are greater than the Amber Valley and England rates, while its unemployment level is lower than both the national and local averages. Part-time employment, self-employed and full-time student levels are all slightly higher than the Amber Valley levels but lower than the England levels.
123. Levels of retired people are lower than the local average but higher than the national average. Relatively fewer households are looking after home or family, or are long-term sick/disabled (despite the relatively older population) than the local and national averages. The proportion of students is slightly less than across Amber Valley or England as a whole.

¹⁹ NOMIS, LC1110EW - Concealed family status by family type by dependent children by age of Family Reference Person (FRP)

Table 13: Economic activity in Belper, 2011^{20,21}

Economic category		Belper	Amber Valley	England
Economically active	Total	73.5%	69.9%	69.9%
	Employee: Full-time	43.1%	40.0%	13.7%
	Employee: Part-time	15.5%	14.8%	38.6%
	Self-employed	9.2%	9.0%	9.8%
	Unemployed	3.3%	3.9%	4.4%
	Full-time student	2.5%	2.2%	3.4%
Economically inactive	Total	26.5%	30.1%	30.1%
	Retired	16.2%	17.4%	13.7%
	Student	3.3%	3.4%	5.8%
	Looking after home or family	3.0%	3.8%	4.4%
	Long-term sick or disabled	2.9%	4.1%	4.1%
	Other	1.1%	1.5%	2.2%

Source: ONS, Census 2001 and 2011. AECOM calculations

Table 14: Rates of long-term health problems or disability in Belper, 2011²²

Extent of activity limitation	Belper	Amber Valley	England
Day-to-day activities limited a lot	7.9%	9.4%	8.3%
Day-to-day activities limited a little	9.9%	10.8%	9.3%
Day-to-day activities not limited	82.2%	79.7%	82.4%

Source: ONS, Census 2001 and 2011. AECOM calculations

125. The PPG advises taking account in housing need assessment of the number of people with long-term limiting illness. Table 13 shows that the proportion of working-age residents of Belper

²⁰ ONS, Census 2011, Economic Activity (QS601EW)

²¹ The Census definition of Economic Activity (see www.neighbourhood.statistics.gov.uk/dissemination) is as follows: 'relating to whether or not a person who was aged 16 to 74 was working or looking for work in the week before census. Rather than a simple indicator of whether or not someone was currently in employment, it provides a measure of whether or not a person was an active participant in the labour market. A person's economic activity is derived from their 'Activity last week'. This is an indicator of their status or availability for employment - whether employed, actively looking for work, waiting to start a new job, available to start a new job, or their status if not employed or not seeking employment.

²² ONS, Census 2011, Long-Term Health Problem or Disability (QS303EW)

who are long-term sick or disabled is lower than the Amber Valley and England averages, and Table 14 shows the proportion whose day-to-day activities are not limited is much higher than the Amber Valley average and slightly lower than the England average.

126. Table 15 shows that Belper residents generally travel further to work than the Amber Valley average with 40.3% of residents travelling more than 10km to work, compared with an average for this distance band of 33.4% of Amber Valley residents. This indicates Belper is popular with longer-distance commuters and that places to which they commute are likely to include Derby and Nottingham based on the distance bands.
127. Note also the lower proportion of people working from home compared to the Amber Valley and England averages.

Table 15: Distance travelled to work, 2011²³

Location of work	Belper	Amber Valley	England
Less than 10km	43.8%	49.8%	52.30%
10km to less than 30km	34.1%	27.8%	21%
30km and over	6.2%	5.6%	8%
Work mainly at or from home	8.7%	9.6%	10.30%
Other	7.2%	7.2%	8.50%
Average distance travelled to work	14.7km	13.9km	14.9km

Source: ONS, Census 2011, AECOM calculations

Local house prices

128. Data from Rightmove²⁴ enables more detailed conclusions to be drawn about local house prices. The Rightmove website gives an average price paid for housing in Derbyshire over the last year. The majority of sales across the county were semi-detached properties, selling for an average price of £147,619. Detached properties sold for an average of £260,023, with terraced properties fetching £124,612. Prices rose by 5% over the year.
129. This compares with an average for Belper of £156,312 for semi-detached, £224,897 for detached (therefore lower than the county average for this house type) and £143,668 for terraced properties. Prices rose by 7% over the year.
130. As such, house prices appear to be slightly, but not significantly, higher in Belper than across Derbyshire as a whole, although detached houses are cheaper than the county average.

Specialist housing for older people

131. It would be useful to be able to break down the homes for older people by type at Belper, which is possible to do on the basis of age band projections presented in Table 16 below. The Housing Learning and Improvement Network (Housing LIN)²⁵ provides guidance which can be

²³ NOMIS, QS702EW - Distance travelled to work

²⁴ <http://www.rightmove.co.uk/house-prices.html>, accessed May 2016.

²⁵ Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at:

used to give an indication of the potential future demand for specialist provision arising from the future population age structure.

Table 16: Projected age band change in Belper, 2011-2030

Age band	2011		2028 ²⁶	
	Population	Percentage of total population	Projected population	Percentage of total population
All ages	21,823	100%	23,623	100%
75-84	1,259	5.77%	2,307	9.77%
85-89	345	1.58%	571	2.42%
90 and over	212	0.97%	375	1.59%
Total Over 75	1,816	8.32%	3,253	13.78%

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

132. Applying Housing LIN's suggested numbers per 1,000 of the 75+ population (see table on Page 19 of the SHOP Resource Pack mentioned above), we can estimate that Belper's increase of 1,437 people over the age of 75 over the plan period will result in a need for:

- 86 additional conventional sheltered housing units;
- 172 additional leasehold sheltered housing units;
- 29 additional 'enhanced' sheltered units²⁷, split 50:50 between those for rent and those for sale;
- 65 additional extra care housing units (including 22 for rent and 43 for sale); and
- 8 additional specialist dementia care dwellings.

133. Only certain locations are suitable for specialist housing for older people. Many residents value being within walking distance of town centre services and facilities, and away from steep hills; also taking into account that many models of provision are places of employment as well as places of residence, meaning employees need to be able to access the units as sustainably as possible (e.g. by bus or rail). At the same time, centralised dementia care units or enhanced sheltered developments in rural towns are able to serve a widely dispersed rural population from a single location. The steering group advises that there is outstanding planning permission for 107 such units currently in Belper.

134. With its rail connection and wide range of town centre services and facilities, Belper appears an ideal location for the development of the 360 specialist units for older people estimated to be needed as part of the overall housing need.

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

²⁶ Based on Belper's projected share of Amber Valley total and age bands, as population projections are not available at parish level

²⁷ Enhanced sheltered units are defined as provision with some care needs

Information from local estate agents

135. The Steering Group designed and distributed a survey for local estate agents to fill out to determine their views on both the demand side and supply side of the local housing market. This provides a very useful local, more qualitative perspective to complement the more quantitative information gathered elsewhere.
136. Interviewing local estate agents with strong local knowledge of the existing market helps verify or validate evidence gathered from other sources, including the Census, and as such it will inform our conclusions alongside these other data sources.
137. This section summarises the demand-side answers provided by each of the four estate agents who completed the survey, namely Leaders, Hall and Benson, Boxall Brown Jones and Burchell Edwards, by relevant question asked. Tables of answers are provided, and then a summary of all responses.

Table 17: Current demand for types of house in Belper

Estate agent name	Detached	Semi detached	Terraced	Bungalow	Accessible
Leaders	4	1	2	3	5
Hall & Benson	3	1	4	2	5
Boxall, Brown & Jones	4	2	3	1	5
Burchell Edwards	1	3	No demand	2	No demand

Source: 2016 Survey of Belper Estate Agents, Plan for Belper Steering Group

Table 18: Demand for number of bedrooms per house from buyers in Belper

Estate agent name	>3	3	2	1
Leaders	1	1	1	2
Hall & Benson	3	1	1	2
Boxall, Brown & Jones	4	2	3	1
Burchell Edwards	No demand	1	No demand	1

Source: 2016 Survey of Belper Estate Agents, Plan for Belper Steering Group

Table 19: Demand for number of bedrooms from renters in Belper

Estate agent name	>3	3	2	1
Leaders	1=	1=	1=	2
Hall & Benson	2	1=	1=	1=
Boxall, Brown & Jones	2=	1	1	2=
Burchell Edwards	2=	1=	1=	2=

Source: 2016 Survey of Belper Estate Agents, Plan for Belper Steering Group

Table 20: Age groups looking for property in Belper

Estate agent name	18-34	26-34	35-50	51-65	65+
Leaders	All age ranges actively seeking property				
Hall & Benson	4	1	2	3	5
Boxall, Brown & Jones	All age ranges actively seeking property				
Burchell Edwards	3	1	2	4	5

Source: 2016 Survey of Belper Estate Agents, Plan for Belper Steering Group

What is the current demand by housing type?

138. In summary, semi-detached appears to be the most in-demand housing type, with bungalows and terraced housing also in demand. Accessible housing appears least popular and detached only moderately popular (though see caveat below about housing for older people which is relevant to the apparently low demand for accessible housing).

What number of bedrooms is in demand from buyers?

139. The highest level of demand among buyers appears to be for 2-4 bed properties, with a lesser, though still present, demand for one bedroom properties.

What number of bedrooms is in demand from renters?

140. It appears that there is a consensus that two to three bed properties are probably most in demand among the rental sector.

What age groups are looking for property?

141. Therefore, among those agents who singled out individual age groups, the consensus seems to be higher demand from 26-34 year olds and lower demand from older buyers of 65+. However, it should be noted that the specialist housing demanded by this age group may not

always be available on the open and/or non-specialist market, and as such the fact it is not in demand among mainstream estate agents does not necessarily mean that demand is low.

Are the majority of buyers from within the parish, or outside looking to move in?

142. Leaders consider that most buyers are from within a five mile radius, which includes the parish itself and also some neighbouring areas. Burchell Edwards agree that the majority of buyers are from the local area. It seems therefore reasonable to conclude that the market is very much driven by local purchasers and renters.

What are the top three requirements for house-buyers currently in the parish?

143. Leaders stated that the three top requirements are parking, a garden and the number of bedrooms. Hall and Benson agree on the first two, but think the potential for value to increase is also important. Boxall Brown Jones agrees on the parking, but sees easy access to town and views as also important. Burchell Edwards interpreted the question slightly differently, pointing out that four-bed detached newbuilds are most in demand, then bungalows (with the former's high level of demand resulting from an undersupply of the latter, meaning existing four-bed detached properties are not being freed up). They also see a need for Starter Homes.²⁸
144. It therefore appears that parking is a particularly important demand factor, while gardens are also valued. However, other than these clear messages, other answers vary widely and are therefore difficult to summarise.

²⁸ Starter Homes were introduced by the Housing and Planning Act 2016, and are intended to be houses affordable to first-time buyers under the age of forty. However, at the time of writing, their status in the planning system (i.e. whether they are a replacement for, or an addition to, affordable housing obligations) is not yet clear as the Government has not yet published its response to the Starter Homes Regulations Consultation (see <https://www.gov.uk/government/consultations/starter-homes-regulations-technical-consultation> for updates)

4 Conclusions

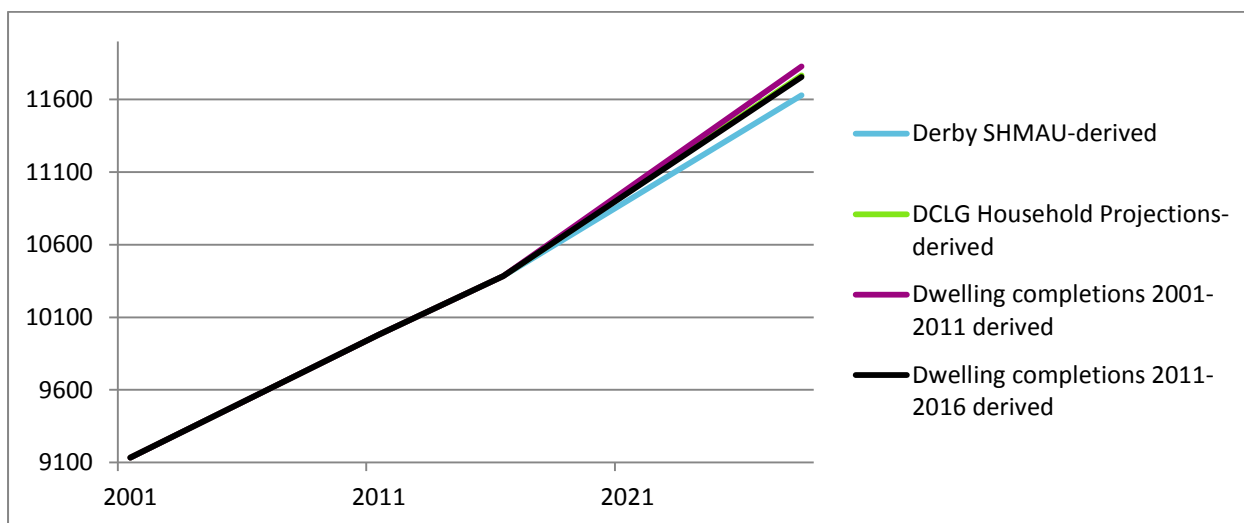
Overview

146. This housing needs assessment has interrogated a wide range of data sources, which, taken together, can inform key trends and messages relevant to the Neighbourhood Plan's housing policies.
147. In this first section of our conclusions we make recommendations on the overall quantum of housing growth required.
148. In the second section, we assess, based on the data uncovered, indications of the components and characteristics of future housing based on the data analysed.
149. In line with recommended best practice, our preferred methodology is to present the projections our analysis has produced as a starting point, and then highlight the factors²⁹ that the Steering Group might wish to take into consideration as they determine the final housing policy text, bearing in mind the requirement to be in general conformity with the strategic housing policies of Amber Valley.

Quantity of Housing Needed

150. To recap, we have identified four separate projections of dwelling numbers for Belper between 2011 and 2028 based on:
 - A figure derived from the 2013 Derby SHMA Update, disaggregated to Belper, (which gives a total of 1,245 dwellings, or about 73 per year);
 - The Government's 2014-based household projections, extrapolated to Belper, and translated from households to dwellings (which gives 1,382 dwellings, or about 81 per year);
 - A projection forward of dwelling completion rates 2001-2011, (which gives 1,442 dwellings, or about 85 dwellings per year); and
 - A projection forward of dwelling completion rates 2011-2028 (which gives 1,370 dwellings, or about 81 per year).
151. These dwelling number projections are illustrated alongside actual completions as of 2016 in Figure 15 below. It is clear how close together they are; this is unusual in housing needs assessments, but welcome, as it provides a much greater degree of certainty that the final figure recommended is likely to be realistic.

²⁹ These factors are also referred to as 'indicators' in the PPG.

Figure 15: Comparison of dwelling number projections


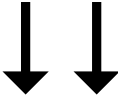

Source: Derby SHMAU (2013), DCLG 2014-Based Household Projections (2016), Census 2011, information from Amber Valley District Council, AECOM calculations

152. We have summarised the findings of the data gathered in Chapter 3 above in Table 17 below. The source for each factor with particular relevance to the neighbourhood is shown, together with AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area's future housing need. Following PPG guidance, the factors relate both to housing price and housing quantity.
153. We have applied our professional judgement on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates 'some impact', two arrows 'stronger impact' and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.
154. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Steering Group is invited to use its judgement in resolving any conflicts, but we would advise that the more local and more recent data should generally have priority over data gathered at a larger spatial scale or older data.
155. However, our general approach reflects PPG advice to adjust the housing quantity suggested by household projections to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings, such as house prices and past build-out rate.
156. The PPG also advises that market signals are affected by a number of factors, and plan makers should not attempt to estimate the precise impact of an increase in housing supply. Rather they should increase planned supply by an amount that, on reasonable assumptions and consistent with principles of sustainable development, could be expected to improve affordability, and monitor the response of the market over the plan period.
157. As such, Table 17 should be used as a basis for qualitative judgement rather than quantitative calculation. It is designed to form the starting point for steering group decisions on housing policy rather than to provide definitive answers. Again, this reflects the PPG approach- it states that when considering future need for different types of housing, planners have the option to consider whether they plan to attract an age profile that differs from the present situation. They should look at the household types, tenure and size in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs.

158. The PPG also states that appropriate comparisons of indicators (i.e. factors) should be made and that trends uncovered may necessitate adjustment to planned housing numbers compared to ones based solely on household projections. Where upward adjustment is considered necessary, it should be at a reasonable level and not negatively affect strategic conformity with the emerging Local Plan.
159. To help inform the steering group discussions that will be necessary to determine a neighbourhood plan housing target, we have provided our own professional judgement of need level, based on the projections presented in Figure 15 and the market factors presented in Table 17, and taking into account our own knowledge and experience of housing need at neighbourhood plan level.

Table 21: Summary of factors specific to Belper with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Age structure of population	SHMAU, Census, Sub-National Population Projections, Housing LIN SHOP report	↑ ↑	SHMAU notes stronger demand from older population in Amber Valley relative to rest of Derby HMA, and with 40-60s age group growing 2001-2011 (largest age group in 2011 Census), thus over 65s, particularly the 75-84 cohort, likely to increase in plan period. At same time the population aged in their 30s and under the age of nine fell across Amber Valley. In Belper, age structure is around average for Amber Valley. The evidence therefore suggests there is likely to be a significant increase in the older population and this is likely to increase overall housing need - which is confirmed through analysis of the sub-national population projections, hence two up arrows.
Economic performance and potential	SHMAU, Census	↑ ↑	Amber Valley is forecast to support moderate in-commuting to higher-paid jobs; out-commuting decreased 2001-2008. Additionally, Belper is home to more economically-active residents, full-time employees and commuters than the Amber Valley average, and likewise, the unemployment rate and level of long-term sick or disabled population is lower than the local average rates. As it is clear that Belper is attractive to commuters (with a rail link) and is likely to remain so, this has been given an assessment of two up arrows.
House prices relative to surroundings	SHMAU, Rightmove	↑	Belper-Ripley sub-market characteristics are mid-range (thus mid-price), but in Belper they do appear slightly above the market/sub-market average. Rightmove suggests Belper is more expensive for semi-detached and terraced housing than the Derbyshire average but cheaper for detached homes. An assessment of a slightly above average house price for Amber Valley has been made (hence one up arrow)

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
International and UK in-migration rate	Census, estate agent survey		Belper is home to very slightly more people born outside the UK than Amber Valley as a whole. However, the majority of non-UK born population has lived in Belper for ten years or more, indicating no significant recent influx of international migrants. Estate agents agree that housing demand is almost entirely from local people. As such, an assessment of no significant difference from the Amber Valley average (sideways arrow) has been made.
Local housing waiting list/need for affordable housing	SHMAU, adopted Local Plan, local housing waiting list, Census		SHMAU notes ageing of population likely to result in increased need for affordable housing over plan period; however, currently, affordable need relatively lower in Belper-Ripley sub-market. Affordable housing waiting list shows need in fact significantly lower than 20-30% target (though this is only a snapshot in time, it is still the case that affordable housing need in Belper is not so high that it acts to raise overall demand). As such, an assessment of two down arrows has been made to indicate that although affordable housing need exists, it is lower than the Amber Valley average.
Overcrowding, including concealed families	SHMAU, Census		SHMAU notes less marked increase in overcrowding in Amber Valley relative to Derby HMA as a whole; housing vacancy rate also highest here (4.3%). Census shows Belper's households becoming significantly more under-crowded, likely as a result of ageing population. Another significant trend showing under-occupation is a decrease in household size at the same time as an increasing population, and a lower than the local average rate of concealed families. Wide range of evidence strongly supports under-crowding rather than over-crowding and lack of concealed families, hence three down arrows.

160. Table 17 contains in total five up arrows and five down arrows, indicating that the local market factors acting to increase or decrease demand for new housing are effectively in balance. This is considered a reasonable overall judgement on the basis of all the evidence surveyed.

161. Additionally, it is notable from Figure 15 that Belper's future dwelling projections comprise a very narrow range, with a maximum of 1,442 and minimum of 1,245. Given that Belper is in

the relatively unusual position of not having any kind of up-to-date Local Plan-derived target (which normally carries the most weight, as the Neighbourhood Plan needs under Basic Condition E to be in 'general conformity' with it), the Steering Group has a greater degree of freedom to decide on the most appropriate estimate of overall housing need.

162. Therefore, taking into account the narrow range of projections, and also Table 17, which shows that the factors acting to increase demand and factors acting to constrain demand appear to cancel one another out at Belper, we recommend that the most appropriate estimate of dwelling need at Belper over the period 2011 to 2028 would be the midpoint of all four projections, which is 1,360 dwellings.
163. Note, however, that all dwellings completed in the plan area since the start of the plan period in March 2011 would count towards this dwelling total. As Belper have indicated that this is a net figure of 403, the outstanding estimate of dwellings to meet need drops to 957 dwellings, or around 80 dwellings per year 2016-2028. This is comparable to past rates of dwelling completion in the town.
164. Since the Council's assessment of dwelling completions 2011-2016 also appears not to include outstanding commitments (i.e. dwellings with permission but not yet completed), and also does not include new completions and commitments since March 2016, the outstanding dwelling figure is, at the time of writing, likely to be somewhat lower than 957 dwellings. It is recommended that the Steering Group work with Belper to monitor completions and commitments for the duration of the plan period to monitor progress towards meeting outstanding housing need, and it is acknowledged that the Steering Group is aware of this requirement.

Characteristics of housing needed

165. Table 18 summarises the data we have gathered with a potential impact on the characteristics of the housing needed in the neighbourhood. Factors are in alphabetical but no other order.

Table 22: Summary of local factors specific to Belper with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Affordable housing	SHMAU	Demand strong for 1-2 bed dwellings in affordable sector; older people particularly reliant on this sector. SHMAU also notes slightly higher demand for intermediate tenure housing (which may or may not include Starter Homes) in Belper than social housing or affordable rent tenure. Overall, across all tenures of affordable housing, there is a need for about 20-25% 1 bed units, 40% 2-bed units, 30% 3-bed units and about 5-10% 4+ bed units.	The conclusion is that affordable housing need in Belper is not high enough for the Steering Group to have to consider setting their own affordable need housing target; nevertheless, we recommend close working with Amber Valley to ensure that local affordable need is met through appropriate developer contributions and completions. No evidence has been uncovered that the SHMAU demand split summarised to the left would be inappropriate for Belper, so we recommend planning on the basis of this. To ensure Belper's specific needs are met, we recommend the Neighbourhood Plan should offer strong policy support for the provision of intermediate housing locally, for which there appears to be a strong demand. It is possible that the new tenure of Starter Homes may replace intermediate housing in part or in whole, and as such we recommend that the Steering Group monitors closely detailed Government Policy on this tenure once it is finalised later in 2016, as there could also be potential for this tenure in Belper.

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Dwelling size	SHMAU, Census, estate agent survey	Demand across Amber Valley is for 2-3 bed properties, based on low to middle-income demand; SHMAU recommends 5% 1 bedroom units, 30% two bedroom, 50-55% three bedroom and 10-15% 4+ bedroom units across all tenures. Census shows large recent increase in smaller households in Belper, contrasting with a fall in Amber Valley as a whole, and a slightly higher than average level of one-person households in Belper (though this is mainly among under-65s). Also a rise in larger households, but not as marked a rise as across Amber Valley as a whole. The highest level of open market demand, according to estate agents, is for 2-4 bed properties, with a lesser (though still present) demand for 1-bedroom units. Among renters, 2-3 bed properties are most in demand. Estate agents report a stronger demand among younger buyers than older buyers (which suggests a need for smaller/starter units), but note caveat that older people needing specialist housing may not be using mainstream estate agents.	<p>The demographic and estate agent evidence suggests that the demand for one-bed properties in Belper is likely a little higher than for across Amber Valley as a whole. At the same time, there seems a lower level of demand for the largest properties. As such, we recommend that the most appropriate dwelling size split for market properties in Belper (adapting the recommended SHMA split for Amber Valley) would be 10% one bedroom units, 30% two-bedroom units, 50% three bedroom units and 10% 4+ bedroom units (within which there should be a large majority of four bedroom units rather than five or more).</p> <p>Such a split will simultaneously help to meet the needs of those requiring a smaller open market unit (including younger people and older people looking to downsize, both of which will require 1-2 bed units), as well as a healthy proportion of family-sized units for the commuter population. The split also reflects the general lack of evidence for demand for the largest (5 bedroom or more) units.</p>
Dwelling tenure	Census	Levels of owner-occupation in Belper are higher than the Amber Valley average and have risen recently. The level of private rents is also rising, and is now higher than average. Shared ownership (indicative of a lack of purchasing power for owner-occupation) increased significantly in Belper recently, contrasting with Amber Valley as a whole	This data supports the recommendation above that 40% of all new supply should be 1-2 bedroom units, as this will ensure that there is a wider range of cheaper options for those currently with no option but to share ownership or to rent. It is likely that there will nevertheless be demand from renters into the future, and again, providing 1-2 bedroom units (which are more likely to end up in the buy to rent market) will help meet this need.

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Dwelling type	SHMAU, Census, estate agent survey	Belper-Ripley sub-market focusses on semi-detached properties; however, also more detached houses in Belper than Amber Valley average, and fewer semi-detached; slightly more terraced and flats than the Amber Valley average but flats significantly lower than the national average. Estate agents report semi-detached properties in particular demand, with bungalows and terraced housing also in demand, but to a lesser extent. Detached housing is considered only moderately popular.	<p>The evidence suggests that strong policy support for semi-detached housing is justified, as there seems to be a high demand and a relatively low supply. At the same time, bungalows should be offered strong support; in most places, bungalows are high in demand but low in supply, as they are less profitable for housing developers- as such, there is the potential for the neighbourhood plan to incentivise bungalow provision through, for example, encouraging their provision through planning agreements on individual developments. Terraced housing should also be strongly supported as it is likely to be able to provide smaller dwellings at the cheaper end of the market. It is considered that there is no need to support (or to constrain) the provision of detached housing in policy.</p> <p>Note also the low level of flats locally compared to the national average. Given the relatively high number of local people unable to afford market housing without subsidy, provision of more flats is likely to help in this regard, and as such, most of the one or two-bed units to be provided could be flats.</p>

Factor	Source(s) (see Chapter 3)	Summary of data reviewed	Conclusion
Housing for older people	SHMAU, Sub-National Population Projections, Housing LIN SHOP Report	Amber Valley has a relatively high proportion of pensioner households, and the SHMAU notes that specialist housing, including care homes, will likely be needed as a result; there is a forecast 66% growth in older people with dementia and a 55% increase in older people with mobility problems; however, only extra care housing falls within the scope of housing need, with care homes considered as a separate use in the planning system. At present, rate of retired people in Belper lower than Amber Valley average, but this is likely to change over the plan period. Analysis of sub-national population projections and Housing LIN SHOP report suggests a need for 360 specialist dwellings for older people, including 86 additional conventional sheltered housing units, 172 additional leasehold sheltered housing units, 29 additional 'enhanced' sheltered units, split 50:50 between those for rent and those for sale, 65 additional extra care housing units (including 22 for rent and 43 for sale); and 8 additional specialist dementia care dwellings.	<p>As per previous recommendations, the Steering Group should work with specialist providers to provide a range of dwellings suitable for older people, both for general purpose/independent living and for specialist care. For the former, this will essentially comprise support for smaller units, accessible apartments and/or bungalows with 1-2 bedrooms. A policy supporting downsizing for households currently under-occupying larger properties, though non-binding, could at least be a useful statement of intent.</p> <p>We recommend monitoring downsizing as it takes place- the more that happens, the lower the need for new family-sized/larger dwellings (see below).</p> <p>In terms of specialist provision, Belper seems ideal for the provision of the full range of specialist housing types estimated to be needed through analysis of sub-national population projections and the Housing LIN SHOP report, and as such we recommend a policy supporting provision of these dwelling types, including close working with Amber Valley to ensure delivery and implementation, as well as seeking to understand what proportion (if any) of the 403 dwellings completed since 2011 fall into these categories of specialist provision.</p>
Need for family housing	Census, estate agent survey	Household size is around average, suggesting need for a proportion of family-sized housing; census data also shows slightly higher than average proportion of families with dependent children, and Belper is popular among commuters, who tend to demand family-sized housing. Estate agents report that buyers value parking and gardens, suggesting some level of demand for larger, family-sized properties which are more likely to be able to provide these.	<p>As per recommendations above, there is likely to be a sustained need in Belper for family-sized and/or commuter housing (three bedrooms and above, usually semi-detached or detached).</p> <p>Note as per our previous conclusion that downsizing rates should be monitored, because if family-sized housing is freed up through downsizing, there will correspondingly be less need to provide new family-sized housing.</p>

Recommendations for next steps

166. This neighbourhood plan housing needs advice has aimed to provide the Plan for Belper Steering Group with evidence on housing trends from a range of sources. We recommend that the Steering Group should, as a next step, discuss the contents and conclusions with Amber Valley District Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:
- the contents of this report, including but not limited to Tables 21 and 22;
 - Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with adopted policies and have regard to the emerging development plan (here, the emerging Amber Valley Local Plan);
 - the types (detached, semi-detached, terraced etc.) and sizes (1 bedroom, 2 bedroom etc.) of recent and existing dwelling completions and commitments (i.e. post 2016) and cross-referencing the findings of this assessment with Table 18, as what has already been provided will have an impact on the types and sizes of the remaining homes to be provided over the rest of the plan period;
 - the views of the District Council;
 - the views of local residents;
 - the views of other relevant local stakeholders, including housing developers; and
 - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the Council, including but not limited to the SHLAA.
167. As noted previously, recent changes to the planning system, forthcoming changes to the National Planning Policy Framework and the implementation of the Housing and Planning Act will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
168. This advice note has been provided in good faith by AECOM consultants on the basis of housing data current at the time of writing (alongside other relevant and available information).
169. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by the District Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.
170. Most obviously, this includes monitoring the status of the emerging Amber Valley Local Plan.
171. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Tables 21 and 22 would be particularly valuable.

AECOM (NYSE: ACM) is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. With approximately 45,000 employees around the world, AECOM is a leader in all of the key markets that it serves. AECOM provides a blend of global reach, local knowledge, innovation, and collaborative technical excellence in delivering solutions that enhance and sustain the world's built, natural, and social environments. A Fortune 500 company, AECOM serves clients in more than 100 countries and has annual revenue in excess of \$6 billion.

More information on AECOM and its services can be found at www.aecom.com.

Address: 6-8 Greencoat Place, London SW1P 1PL
Phone number +44 (0)20 7798 5000