



Ashington Parish Council

Ashington Housing Needs Assessment

Final Report

July 2017



CONTENTS

PREFACE	1
1 INTRODUCTION	2
Local context	2
Policy context	4
2 GROWTH MODELS.....	6
Model 1a: Horsham Development Planning Framework – long term trend 2001 to 2031/36	6
Model 1b: Horsham Development Planning Framework – 2011 to 2031/36.....	6
Model 2a: Dwelling completions 2001-2011.....	7
Model 2b: Dwelling completions 2011-2016	7
Model 3a: 2012-based DCLG household projections.....	7
Model 3b: 2014-based DCLG household projections.....	8
Summary.....	9
3 MARKET SIGNALS	11
Housing market	11
Employment and income signals	22
Summary.....	25
4 CONCLUSIONS	28

PREFACE

Horsham District Council has reviewed this Housing Needs Assessment and, in an email dated 7th July 2017, gave the following summary of their opinion as to the robustness of its approach and recommendations:

'Ashington Neighbourhood Plan Group has undertaken a Housing Needs Assessment (July 2017) through their consultant Navigus Planning. All parishes undertaking a Neighbourhood Plan are required to comply with Policy 15 (4) of the adopted HDPF and should deliver a fair proportion of the 1500 dwellings (at least) through Neighbourhood Plans in accordance with the settlement hierarchy (Policy 3). The report closely follows the methodology developed by AECOM and advocated by Locality which in turn is closely aligned with the Planning Practice Guidance. The report stipulates a housing requirement target that is considered proportionate to the Ashington Neighbourhood Plan (up to 2031) and every endeavour should be made to meet this target through the site assessment and SEA process.'

1 INTRODUCTION

- 1.1 The Ashington Neighbourhood Plan (NP) will cover the period 2017 to 2031. Two key considerations for the Ashington NP Steering Group are firstly, how much growth is anticipated (i.e. without the NP being in place) to come forward within the plan period, and secondly how much growth should be planned for by the Ashington NP to ensure the most sustainable outcome for the local community within the parish.
- 1.2 There isn't currently an Ashington-specific housing target in the adopted Horsham District Planning Framework (HDPF), with the approach taken by Horsham District Council (HDC) of providing a single, non-strategic housing requirement for the whole of the district (excluding the strategic sites). A review of the HDPF has been commenced but consultation on a Preferred Options draft Local Plan (Regulation 18) is not proposed until late-2018 at the earliest.
- 1.3 The scope of this report is limited to providing an assessment of housing need within the NP area. The findings should be used to inform the direction of the Ashington NP. They should be assessed against supply side considerations (including land use designations) as a separate exercise.
- 1.4 The approach followed has been based upon the relevant parts of the Government's National Planning Practice Guidance (NPPG) advice¹ as endorsed by the NPPG itself², and described in the 'toolkit' for neighbourhood planners³ that was published by Locality. An important provision is that the methodology intended for Strategic Housing Market Assessments (SHMAs) undertaken by local authorities should be applied at neighbourhood plan level in a way that is proportionate⁴.
- 1.5 The process requires the forming of balanced judgements, following the collation of data and facts from a variety of sources. However, establishing future need (to quote from the NPPG) is not an exact science, and no single approach will provide a definitive answer. Further, there is no requirement to consider purely hypothetical future scenarios as opposed to scenarios that could be reasonably expected to occur.

Local context

- 1.6 Ashington is situated within Horsham district, which is in West Sussex. The largest settlement in the district is Horsham town which is home to the largest proportion of the population. There are a series of smaller towns and large villages, including Billingshurst, Broadbridge Heath, Pulborough, Storrington and Southwater. Ashington is classed as a medium-sized village, being smaller than these settlements.
- 1.7 Just to the south of Ashington parish lies the South Downs National Park.
- 1.8 In 2011, Ashington parish had a population of 2,526. These people live mainly in the village of Ashington which is located adjacent and immediately to the west of the A24, the main north-south route through the district. As a result, it has good vehicular access to Horsham and Crawley to the north and Worthing to the south.

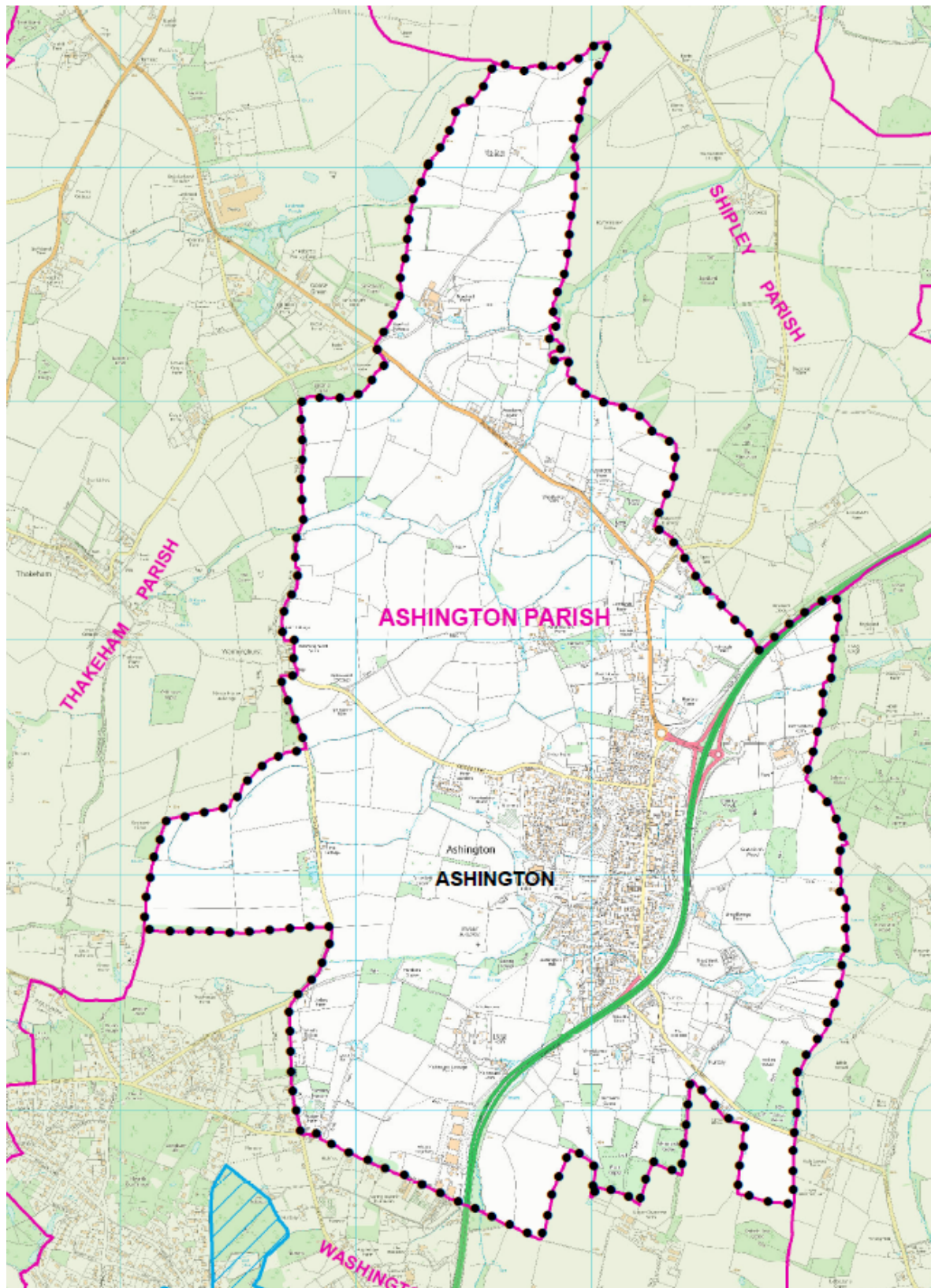
¹ <http://planningguidance.planningportal.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/>

² See NPPG Paragraph 006 Reference ID: 2a-006-20140306

³ AECOM (2015) *Housing Needs Assessment at Neighbourhood Plan Level – A toolkit for neighbourhood planners*, for Locality

⁴ NPPG Paragraph: 006 Reference ID: 2a-006-20140306. Although the NPPG does not specifically define 'proportionate', see NPPG Paragraph 014 Reference ID: 2a-014-20140306 for examples of work considered disproportionate.

Figure 1.1: Neighbourhood Plan area boundary



1.9 The village is quite linear in nature, with residential development following route of the London Road, which was the main north-south route prior to the construction of the new A24. The main

shops and services are located along London Road in small clusters, with a pharmacy at the southern end and a post office and supermarket in the centre of the village. Other shops and services are dotted along London Road, including two car garages, a carpet shop and a beauty salon. Generally the number of 'day-to-day' services in the village are limited.

- 1.10 Ashington village has a primary school and a community centre, with the latter located adjacent to a number of sports pitches, a multi-use games area and skate park.
- 1.11 The village does not have a doctor's or dental surgery, with the nearest of each being over five kilometres away in Storrington.
- 1.12 Despite seeing a significant growth in the population of retirement age in the parish between 2001 and 2011, there is very limited supported-living accommodation in Ashington for older residents, and there is no retirement home and/or retirement village-style provision.
- 1.13 Ashington may be characterised as a relatively affluent and healthy place to live, with a low level of crime. The two lower super output areas (LSOAs) that include the parish are in the 11% and 25% least deprived areas in England (based on the 2015 Index of Multiple Deprivation). However, within these indices, the two LSOAs score relatively poorly with respect to 'Barriers to Housing and Services' and 'Living Environment'. The former, which parts of the parish are in the lowest 17% by rank in the country, relates to a combination of geographical barriers to services and affordability issues in respect of access to housing. The latter, which parts of the parish are in the lowest 17% by rank, relates to a combination of quality of housing stock (the indoor environment) and measures of air quality and road traffic accidents (the outdoor environment).

Policy context

- 1.14 The adopted local plan covering the NP area is the Horsham District Planning Framework (HDPF) 2015. Policy 2 covers the spatial strategy for the district. Its stated intention is, 'To maintain the district's unique rural character whilst ensuring that the needs of the community are met through sustainable growth and suitable access to services and local employment.' The approach to achieve this is to focus growth in and around the key settlement of Horsham and 'allow for growth in the rest of the district in accordance with the identified settlement hierarchy.' Much of the overall housing requirement is to be delivered on strategic sites, most notably 2,500 dwellings north of Horsham Town.
- 1.15 Policy 2 provides some guidance on development in other settlements, which includes Ashington. Its spatial strategy in these settlements is to:
 - 'Continue to support in principle the sustainable development of settlements through an appropriate scale of development which retains the existing settlement pattern over the plan period.*
 - Manage development around the edges of existing settlements in order to prevent the merging of settlements and to protect the rural character and landscape.*
 - Support the provision of rural housing which contributes towards the provision of affordable housing where there is a demonstrable need.'*
- 1.16 It is therefore clear that the settlement hierarchy plays a key role in understanding the broad contribution that Ashington village is expected to make to delivering the HDPF. Policy 3 identifies Ashington as a 'Medium Village'. The policy states that:

'These settlements have a moderate level of services and facilities and community networks, together with some access to public transport. These settlements provide some day to day needs for residents, but rely on small market towns and larger settlements to meet a number of their requirements.'

- 1.17 Policy 4 makes clear that the growth of settlements will be supported in order to meet the identified local housing needs. It states that:

'Outside built-up area boundaries, the expansion of settlements will be supported where;

1. The site is allocated in the Local Plan or in a Neighbourhood Plan and adjoins an existing settlement edge.

2. The level of expansion is appropriate to the scale and function of the settlement type.

3. The development is demonstrated to meet the identified local housing needs and/or employment needs or will assist the retention and enhancement of community facilities and services.

4. The impact of the development individually or cumulatively does not prejudice comprehensive long term development, in order not to conflict with the development strategy; and

5. The development is contained within an existing defensible boundary and the landscape and townscape character features are maintained and enhanced.'

- 1.18 Overall, the HDPF seeks to deliver 16,000 dwellings over the period 2011 to 2031. Policy 15 states that of this figure, 1,500 dwellings are to be delivered 'in accordance with the settlement hierarchy, allocated through Neighbourhood Planning.'

- 1.19 Whenever possible, neighbourhood plans should align with the duration of the local plan. However, the Horsham Local Development Scheme for the period January 2017 to December 2019 envisages that the review of the HDPF will reach the Preferred Options Consultation Stage in late-2018, with an expected adoption date of September 2020. As such, it is expected that the strategic policy context provided by the HDPF – including a new district-wide housing requirement – will be emerging and then adopted early in the lifetime of the NP. As such, the estimates of housing need in this study cover both the existing lifetime of the adopted HDPF (to 2031) and the period to 2036, this being nearly a 20-year period for the NP.

2 GROWTH MODELS

- 2.1 This section discusses growth scenarios for Ashington, recognising for the first time the parish of Ashington as an area approved for the development of a Neighbourhood Plan.

Model 1a: Horsham Development Planning Framework – long term trend 2001 to 2031/36

- 2.2 The HDPF 2015 sets a housing requirement for Horsham district of 16,000 dwellings over the period 2011 to 2031, an annual requirement of 800 dwellings.
- 2.3 In 2001, according to the Census, Ashington parish comprised 922 dwellings and 916 household spaces, whereas Horsham district comprised 51,195 dwellings and 51,341 household spaces. The ratio of dwellings in Ashington relative to the number in Horsham was 0.0180; the ratio of household spaces was also 0.0178.
- 2.4 Based on the Horsham district target of 800 dwellings per year, the pro rata share for Ashington is 14.41 new dwellings per year. Over the 30-year period from 2001 to 2031 that equates to 432 additional dwellings and over the 35-year period to 2036, to 504 dwellings.
- 2.5 For the NP period 2017 to 2031, this equates to 202 dwellings and for a potentially longer period to 2036, to 274 dwellings.

Model 1b: Horsham Development Planning Framework – 2011 to 2031/36

- 2.6 In 2011, according to the Census, Ashington parish comprised 1,010 dwellings and 987 household spaces, whereas Horsham district comprised 56,516 dwellings and 54,923 household spaces. The ratio of dwellings in Ashington relative to the number in Horsham was 0.0179; the ratio of household spaces was also 0.0180.
- 2.7 Based on the Horsham district target of 800 dwellings per year, the pro rata share for Ashington is 14.3 new dwellings per year. Over the 30-year period from 2001 to 2031 that equates to 429 additional dwellings and over the 35-year period to 2036, to 501 dwellings.
- 2.8 For the NP period 2017 to 2031, this equates to 200 dwellings and for a potentially longer period to 2036, to 272 dwellings.
- 2.9 Compared with the theoretical requirement using the 2001 figures, the 2011 requirement is almost identical.
- 2.10 In fact, by 2011, the number of dwellings in Ashington had risen to 1,010, representing an increase of 88 dwellings (9.5%) relative to 2001. Therefore, the above-calculated pro rata share of District development had not been fulfilled in either case. In order to have achieved this, an additional 55-56 dwellings would have needed to have been delivered.
- 2.11 No housing allocation currently applies to the village. However, windfall development approvals have continued to be granted at a low level. As at May 2016, a total of 15 net additional dwellings had planning permission but had yet to be completed and a further 17 dwellings had been completed in recent years. This snapshot alone represents 2.2 years of supply based on the 2011-based pro rata housing requirement.

Model 2a: Dwelling completions 2001-2011

- 2.12 As stated above, between 2001 and 2011, there was a total of 88 net additional dwelling completions, representing an average of 8.8 dwellings per annum. Rolling this completion rate forward over the NP period 2017 to 2031 equates to a housing requirement of 123 dwellings. For the longer plan period 2017 to 2036, the requirement is 167 dwellings.

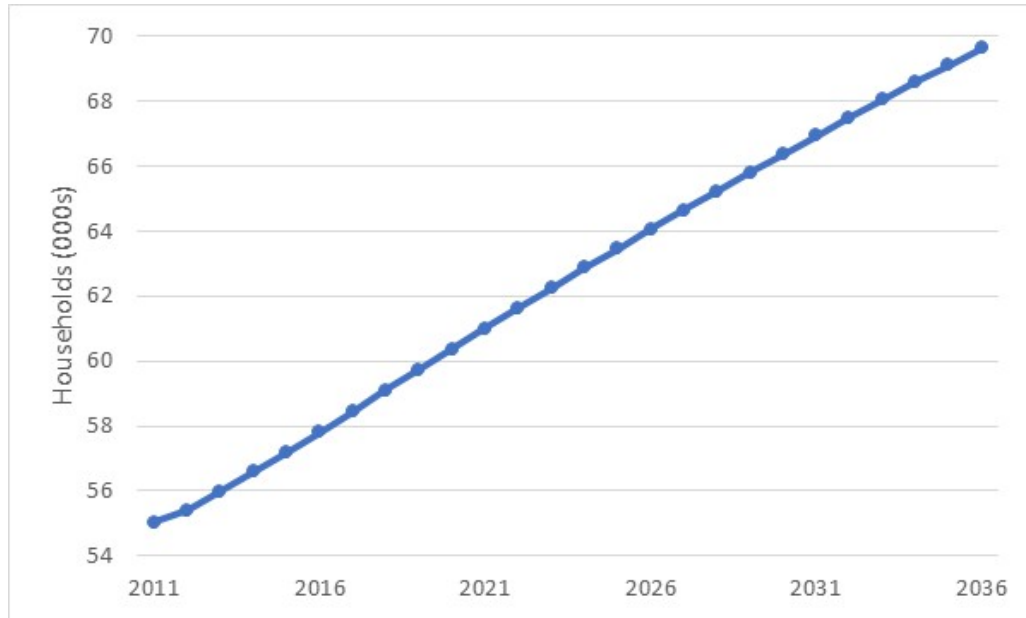
Model 2b: Dwelling completions 2011-2016

- 2.13 Over the five-year period 2011/12 to 2015/16, a total of 55 net additional housing units were built in Ashington parish (consisting of 56 new dwellings and demolition of one unit). In addition, a further 15 dwellings on five sites are in the planning pipeline, i.e. have permission but as at April 2016, had not been completed.
- 2.14 If it is assumed that by the end of 2017/18, these 15 windfalls have been completed and that no other windfall sites come forward over the same period, then a total of 70 net additional dwellings will have been delivered over the seven-year period 2011/12 to 2017/18. This represents an annual average of 10 dwellings.
- 2.15 Projecting this annual average forward over the plan period creates a housing requirement of 140 dwellings between 2017 and 2031 and 190 dwellings over the longer plan period 2017-2036.
- 2.16 It should be noted that all of these completions and sites in the planning pipeline are on windfall sites, i.e. they were not allocated in the Horsham Local Plan prior to the adoption of the HDPF. Whilst it is useful to understand past delivery within this framework of no site allocations, it is not appropriate to adopt a similar strategy moving forward of simply relying on windfall sites. Horsham District Council requires certainty that identified sites will come forward in order to establish its five-year housing land supply and windfalls cannot be counted in this calculation.

Model 3a: 2012-based DCLG household projections

- 2.17 An Affordable Housing Needs Model Update for Horsham District Council, as part of a wider housing market area assessment with Mid Sussex District Council and Crawley Borough Council, was published in 2014. Whilst this focused on affordable housing needs only, it did not represent a full Strategic Housing Market Assessment (SHMA). Subsequent to this, and in order to inform the Proposed Modifications to the then emerging HDPF, a document entitled 'Housing Need in Horsham' was published in 2015. Its purpose was to establish the objectively assessed need (OAN) figure for the district using the 2012-based Sub-National Population Projections as a starting point. It also used the 2012-based DCLG Household Projections to inform its assessment. It did not provide any alternative scenarios which would merit testing as part of this study.
- 2.18 Figure 2.1 shows the 2012-based DCLG Household Projections for Horsham district. This shows linear growth which slows very slightly after 2031.

Figure 2.1: 2012-based DCLG Household Projections for Horsham district



Source: DCLG

- 2.19 Between 2011 and 2031, the number of households in the district was forecast by the 2012-based projections to increase by 11,907. In order to pro rata this to the parish level, the Locality guidance recommends using proportion of population at the base date. In 2011, Ashington had 1.9% of the population of the district⁵, therefore the share of forecast household growth to 2031 would be 229 households.
- 2.20 In order to determine the number of dwellings required from forecast household growth, it is necessary to apply the same ratio as at the base date. In 2011, Ashington had a ratio of 1.02 dwellings per household, therefore the dwelling growth to 2031 would be 234 dwellings. This represents an annual average of 11.7 dwellings. Applying this to the NP period 2017 to 2031 creates a total requirement of 164 dwellings; for the longer period to 2036, the requirement is 223 dwellings.

Model 3b: 2014-based DCLG household projections

- 2.21 Comparing the 2012-based and 2014-based DCLG Household Projections for Horsham district shows that there are almost no differences over the entire forecast period 2011 to 2036.
- 2.22 Between 2011 and 2031, the number of households in the district was forecast by the 2014-based projections to increase by 11,818. In 2011, Ashington had 1.9% of the population of the district, therefore the share of forecast household growth to 2031 would be 227 households.
- 2.23 In 2011, Ashington had a ratio of 1.02 dwellings per household, therefore the dwelling growth to 2031 would be 233 dwellings. This represents an annual average of 11.6 dwellings. Applying this to the NP period 2017 to 2031 creates a total requirement of 163 dwellings; for the longer period to 2036, the requirement is 221 dwellings.

⁵ The 2011 Census gives Ashington parish’s population as 2,526 persons and Horsham district’s population as 131,301 – Ashington has 1.9% of the population of the district

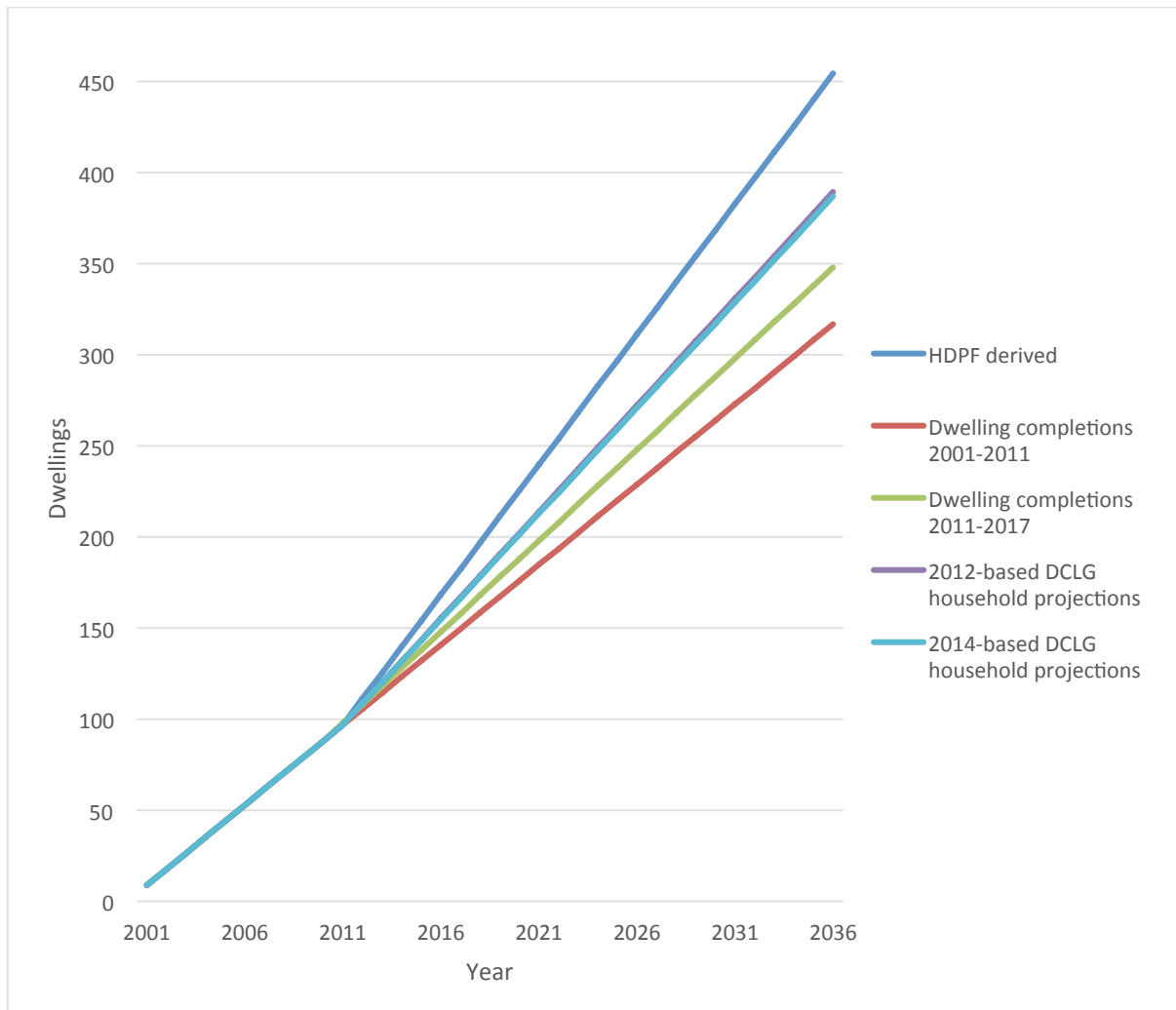
Summary

2.24 All of the dwelling growth models are brought together in Table 2.1 and Figure 2.2. This shows a range of between 123 and 200 dwellings between 2017 and 2031 and 167 and 272 dwellings between 2017 and 2036.

Table 2.1: Summary of projections for growth in Ashington’s dwelling numbers for 2017 to 2031 and 2036

Model	HDPF derived	Dwelling completions 2001-2011	Dwelling completions 2011-2017	2012-based DCLG household projections	2014-based DCLG household projections
<i>Key driver for scenario</i>	<i>Pro rata share of District’s required growth for 2001 to 2025, extended to 2036</i>	<i>Past trends</i>	<i>Past trends</i>	<i>DCLG household projections used to inform emerging HDPF, as the then most-current figures</i>	<i>Almost identical to 2012-based figures but uses a more up-to-date base</i>
Dwelling growth 2017-2031	200	123	140	164	163
Dwelling growth 2017-2036	272	167	190	223	221
Annual dwelling growth	14.3	8.8	10.0	11.7	11.6

Figure 2.2: Comparison of dwelling number projections for Ashington



- 2.25 Following NPPG-endorsed methodology, the housing projections should be adjusted upwards or downwards based on specific factors that are considered to apply within the neighbourhood plan area being considered, i.e. 'market signals'. These are discussed in the following section. Subjective judgements have to be made to some extent, and the NPPG recognises this by stating that any adjustment made should be reasonable.
- 2.26 The aim of this Housing Needs Assessment is to provide the Neighbourhood Planning Team with evidence on housing trends from a range of sources. It is recommended that the contents should be discussed with Horsham District Council. These discussions should take into account the contents of the report; Neighbourhood Planning Basic Condition E (which is the need for the plan to be in general conformity with the strategic development plan); the views of the District Council; the views of local residents; the views of other stakeholders, including housing developers; and the relevant 'supply-side' factors, e.g. local environmental constraints, location of suitable sites and any capacity work undertaken by the Council.

3 MARKET SIGNALS

- 3.1 The intention of this section is to inform group decision-making on policies related to housing in the Ashington Neighbourhood Plan. It is not intended, on its own, to form the basis of a quantitative assessment of housing numbers. Rather, the signals identified through comparison of the various indicators may require adjustment to planned housing numbers compared to ones based only upon household projections. Moreover, this analysis will inform the development of other housing-related policies in the Neighbourhood Plan.
- 3.2 The impact of each signal is assessed as being neutral, small, moderate, significant or very significant.
- 3.3 When considering the future need for differing types of housing, the option exists for policy makers to consider whether to attract an age profile differing from the current one (as opposed to planning for the forecast age profile).

Housing market

Level of new supply in local housing market

- 3.4 The guidance in the AECOM toolkit is that if development during the period 2011 to 2017 was low compared with the prevailing HDPF projection (2011 to 2031) and with that of the surrounding area more generally, there is the possibility of pent-up local need.
- 3.5 As was shown in Models 2a and 2b, dwelling completions over the period 2001 to 2016 total 143 net additional dwellings. This represented an annual average of 9.5 dwellings. This is below the annual average requirement in order to meet the 2012 and 2014 household projections of 11.7 and 11.6 dwellings per annum respectively. It is also well below the requirement for 14.3 dwellings per annum required to meet Ashington's pro rata share of the HDPF.
- 3.6 This suggests that, based on the relatively low levels of delivery over the past 15 years, that there is likely to be a level of pent up demand. Given Ashington's lesser role in terms of housing delivery compared with larger settlements, this is not considered to be significant but is a clear indicator of need.

Possible impact on need: Moderate

Vacant housing

- 3.7 Statistics on vacant dwellings are only available at District level.
- 3.8 As a proxy indication, Census-derived percentages of empty household spaces at the time of the 2011 Census were 2.3% for Ashington and 2.9% for Horsham. The Ashington figure for empty household spaces is also low in comparison to that for England (4.3%). Therefore this is not considered to represent a clear signal that additional housing is needed to address this issue.
- 3.9 The percentage of vacant dwellings in Horsham in 2011 was 1.9%, and the percentage of long-term vacant dwellings was 0.5%⁶. The latter figure is the more important regarding the potential for meeting future housing need, but is well below the percentage figure for unoccupied housing in Ashington.

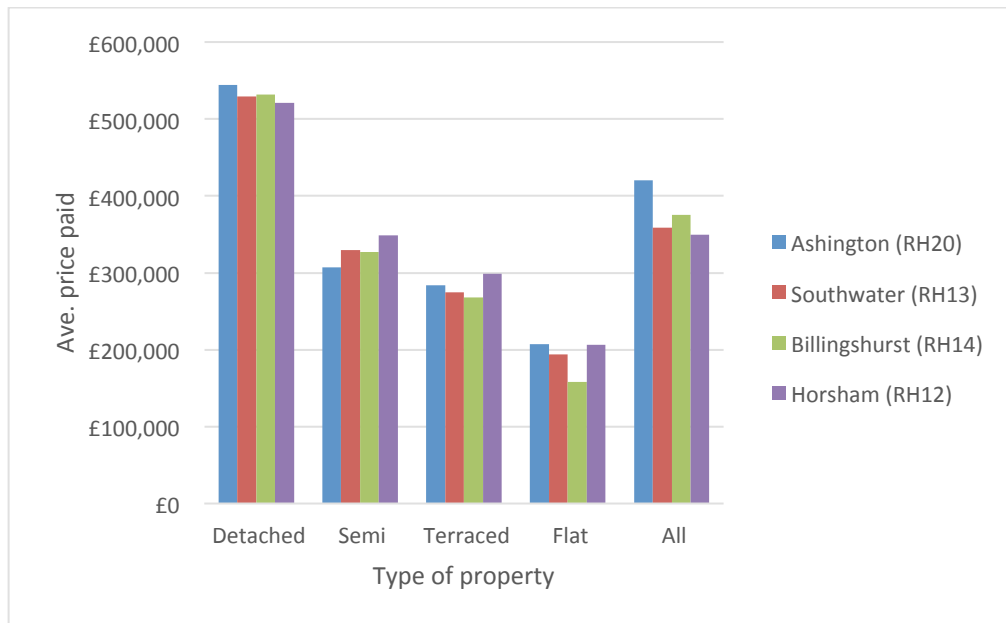
Possible impact on need: Neutral

⁶ DCLG table 615: All vacant dwellings by local authority district, England, from 2004. Source: Council tax base

House prices relative to surroundings

3.10 Figure 3.1 compares average house prices in the Ashington postcode area against those of other postcode areas containing settlements in the District. It should be noted that these postcode areas cover areas far broader than the Neighbourhood Plan area for Ashington or the settlement areas of the towns it is being compared with. In addition, the data does not distinguish between house sizes within each category, so is a relatively crude comparator.

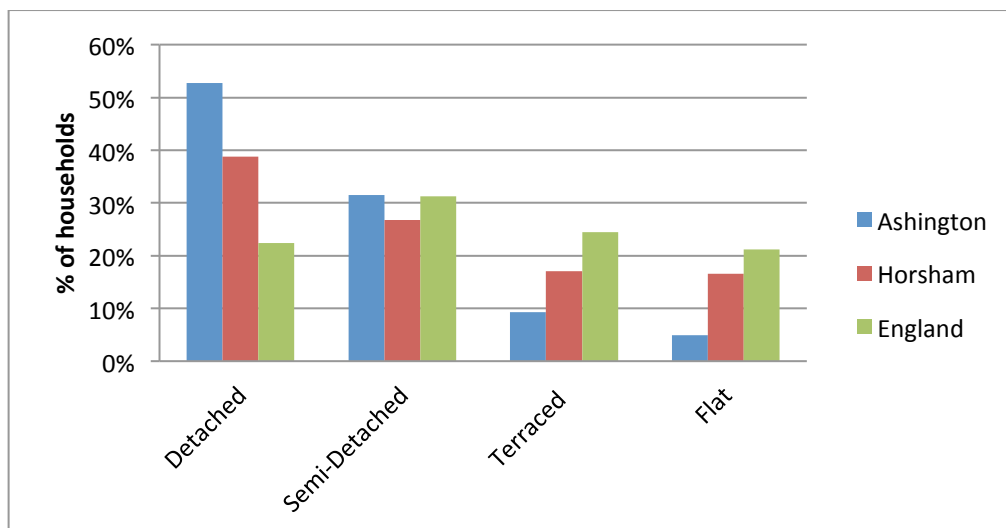
Figure 3.1: Average house price paid, April 2012 to April 2017



Source: Zoopla

3.11 The data shows that Ashington’s house prices are, as a whole, slightly higher than those for Southwater, Billingshurst and Horsham.

Figure 3.2: Type of property, 2011

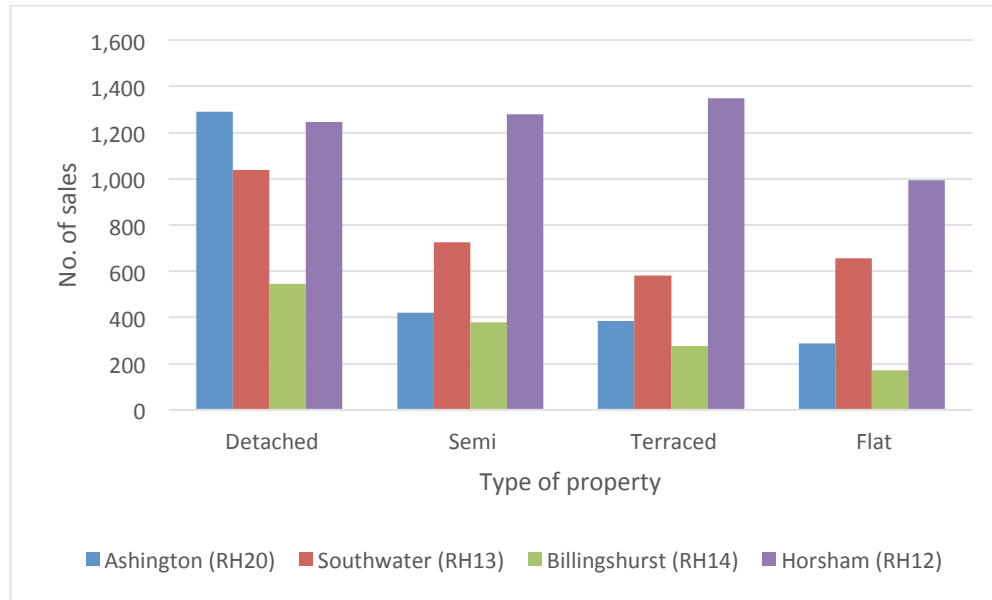


Source: Zoopla

3.12 As is shown in Figure 3.2, there are relatively few flats in Ashington, with the stock of property dominated by detached and semi-detached housing - detached housing in particular represents a

far higher percentage of the stock of property than the comparator areas. As such, the slightly above-average house prices are mainly accounted for by detached housing sales. Over the five-year period 2012 to 2017, there were 1,290 detached property sales in the RH20 postcode (for Ashington), representing 54% of all sales. This was above the number in the comparator areas, including the far larger market in Horsham (see Figure 3.3).

Figure 3.3: Number of property sales, April 2012 to April 2017



Source: Zoopla

- 3.13 This suggests that the prices paid for detached houses in particular represent a reliable market price signal and the picture this creates is of strong demand and comparatively high prices. Figure 3.4 reinforces this by showing that the change in prices over the last 12 months in Ashington has been in line with other locations and has shown strong growth in particular in the market for detached property. Conversely, the lowest price growth has been in the market for semi-detached property – the second largest stock of property by type in Ashington – and in flatted development where prices have actually fallen. It is perhaps unsurprising that there are such fluctuations in the price paid for flats, given the lower numbers of such properties.

Figure 3.4: Change in average house prices, April 2016-April 2017



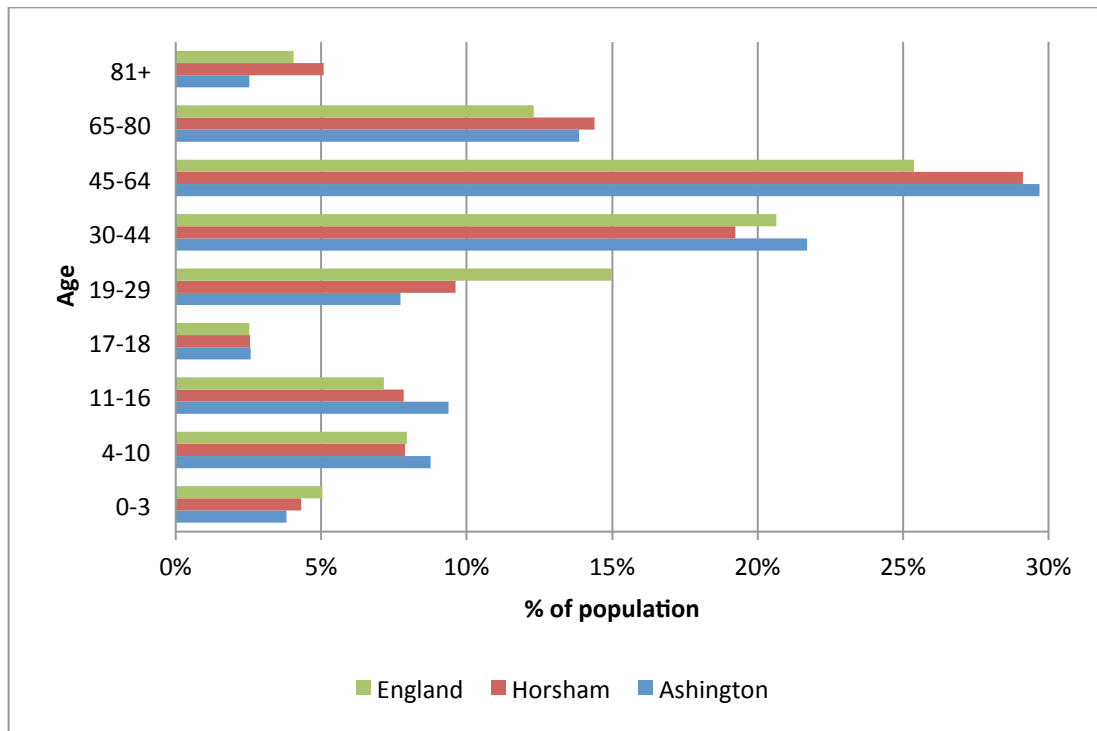
Source: Zoopla

Possible impact on need: Moderate

Age structure and health of population

3.14 This suggests that there are two distinct markets in Ashington. The first is for high priced detached properties, with the relatively large stock showing strong market demand. The second is for semi-detached, terraced and flatted properties where there has been weaker house price inflation, particularly for flats, although with the stock of such properties being limited and prices still relatively high, this is perhaps not surprising.

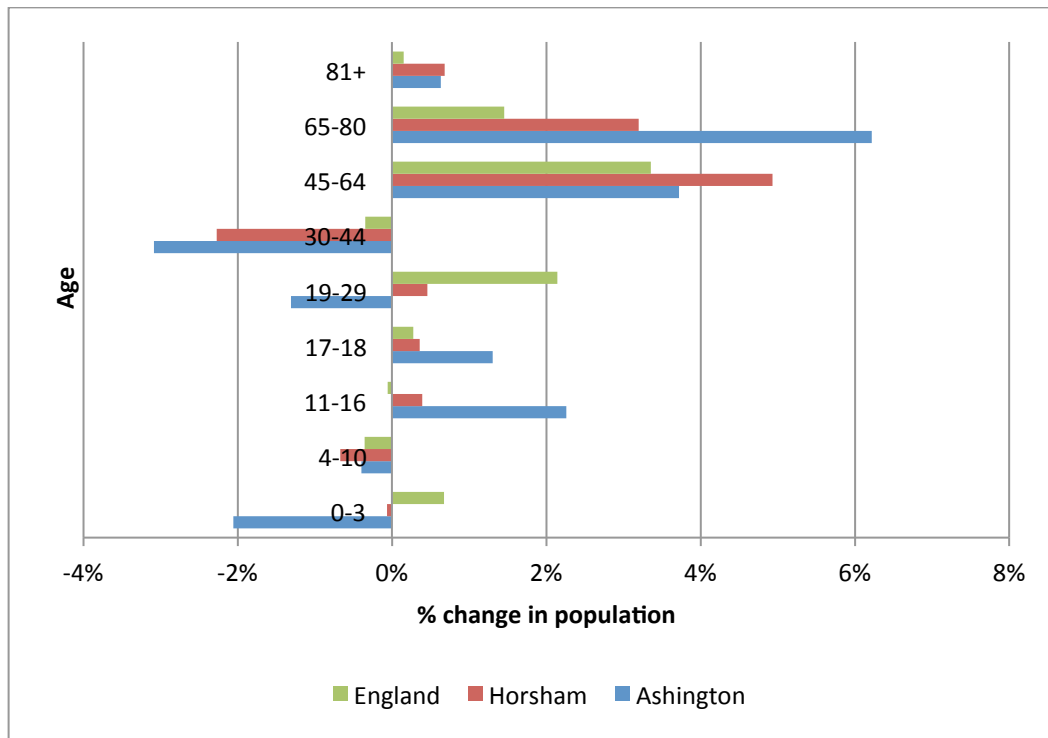
Figure 3.5: Age of residents, 2011



Source: Census

3.15 In 2011, Ashington parish had 2,526 residents. Over the period since 2001 this had grown by 184 people, or 7.3%. This was slightly above the Horsham district growth of 7.0%. (despite the average number of dwellings delivered being low, suggesting increasing average household sizes). Figure 3.5 shows that Ashington is strongly represented across most of the working age spectrum (30-64) but is under-represented in those aged 19-29. It has above-average numbers of children aged 4-18 which is unsurprising given the high number of adults of 'family age'. Since 2001 there has been fluctuation across the different age bands. Ashington has seen a decline in those aged 19-44 and in very young children aged 0-3. By contrast, there has been above-average growth of children aged 11-18 and retirees aged 65-80. In fact, the number of people in Ashington aged 65-80 has grown by 157 persons, or more than 6%. This is shown in Figure 3.6.

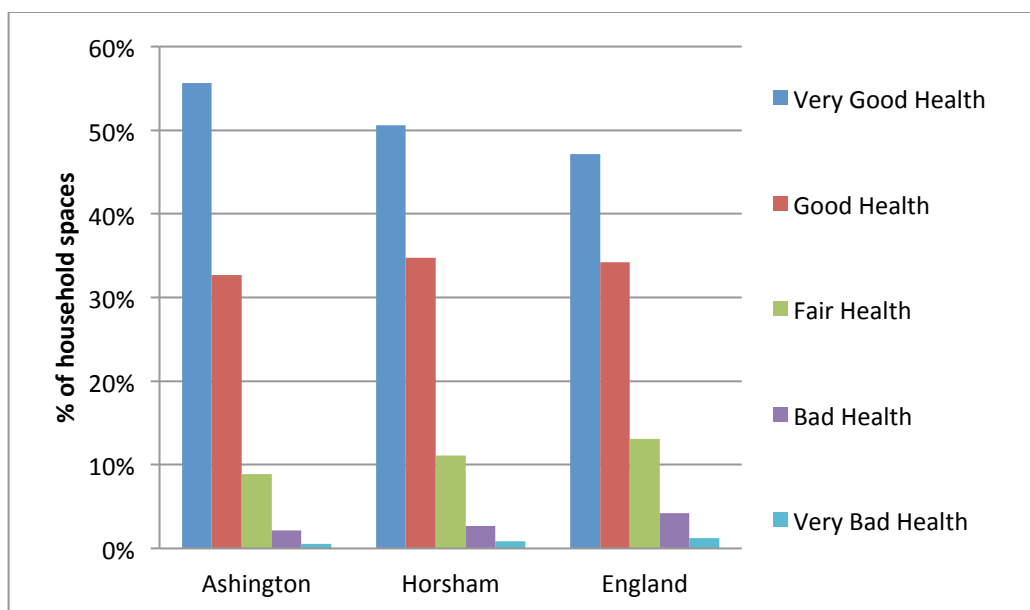
Figure 3.6: Change in age of residents, 2001 to 2011



Source: Census

3.16 Figure 3.7 shows that the general health of the population of Ashington is very good, and well above the average across Horsham district and nationally. This, coupled with the ageing population (as shown in Figures 3.6 and 3.17) suggests that a significant amount of the demand for housing from older people is likely to be for independent living.

Figure 3.7: General health, 2011



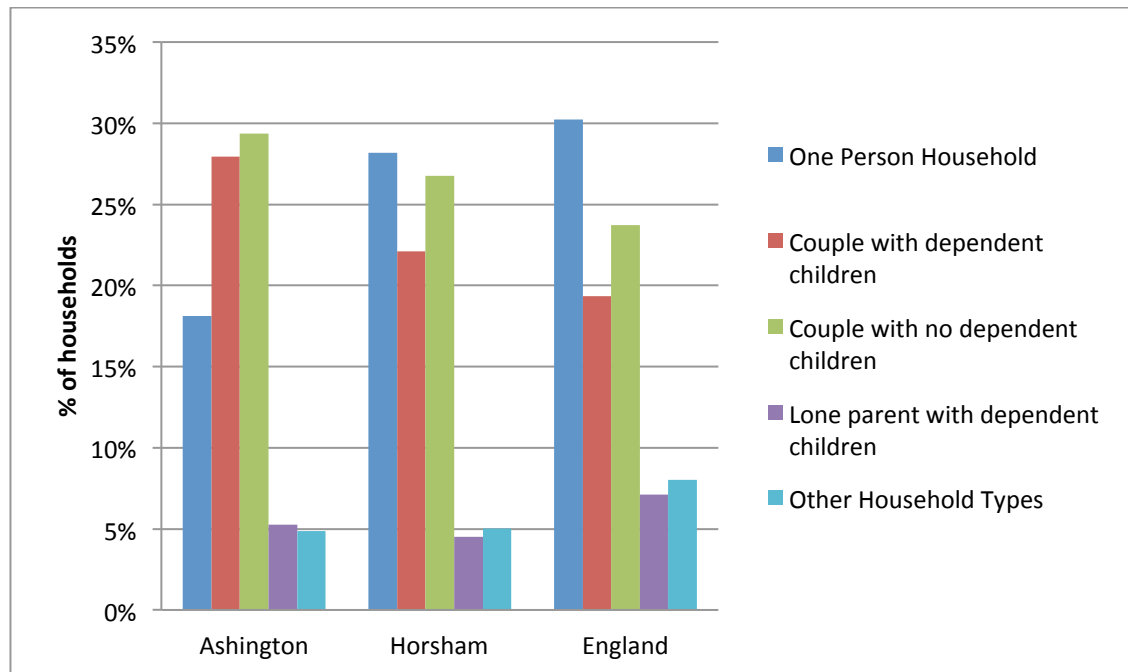
Source: Census

3.17 Figure 3.8 shows the type of households that make up the overall demographic mix – this is important because the household type is a more reliable indicator of the type of property that

people are looking to live in. Ashington has a high proportion of couples with no dependent children, i.e. 2-person households, which is indicative of a need for smaller properties, although the low proportion of 1-person households suggests a limited need for the very smallest types of property.

- 3.18 However, there is also a high – and above average – proportion of couples with dependent children, i.e. family units seeking family housing.

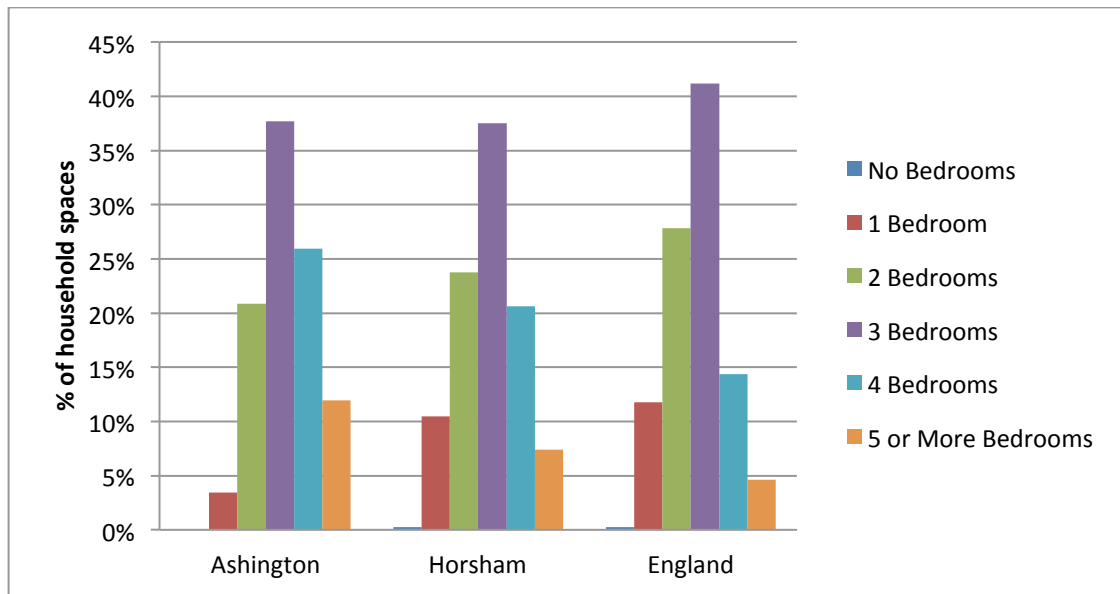
Figure 3.8: Household composition, 2011



Source: Census

- 3.19 There appears therefore to be two trends. Firstly, there is strong representation of older couples with no children. This is matched by strong sales and growth of detached properties, which tend to be the largest properties in the housing stock and not what retirees tend to prefer to live in. Figure 3.9 confirms this, with a high and above average proportion of properties in Ashington being 4 bedrooms or more, i.e. large, mainly detached properties.

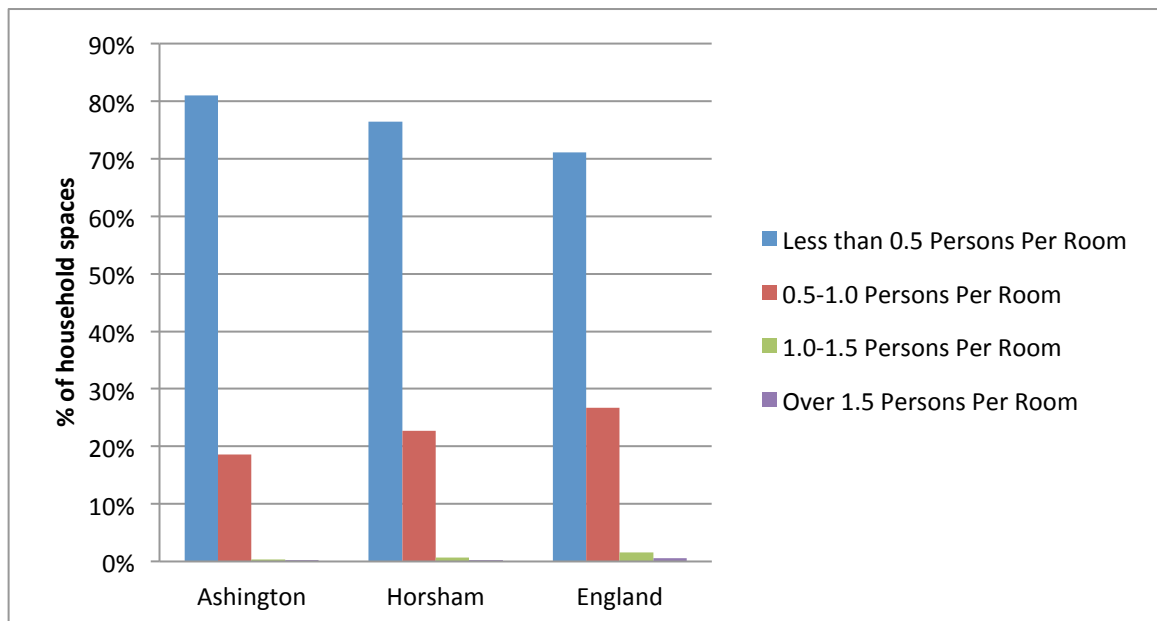
Figure 3.9: Number of bedrooms, 2011



Source: Census

3.20 This suggests that many of these older couples are likely to have lived in Ashington for a long time and have previously brought children up there in these large, detached houses. These children have since moved out but the couples have remained in these large properties, either because they have not been interested in moving or because they would like to stay locally but there is a lack of smaller properties that they would be prepared to live in. This is a signal of demand for one form of smaller property.

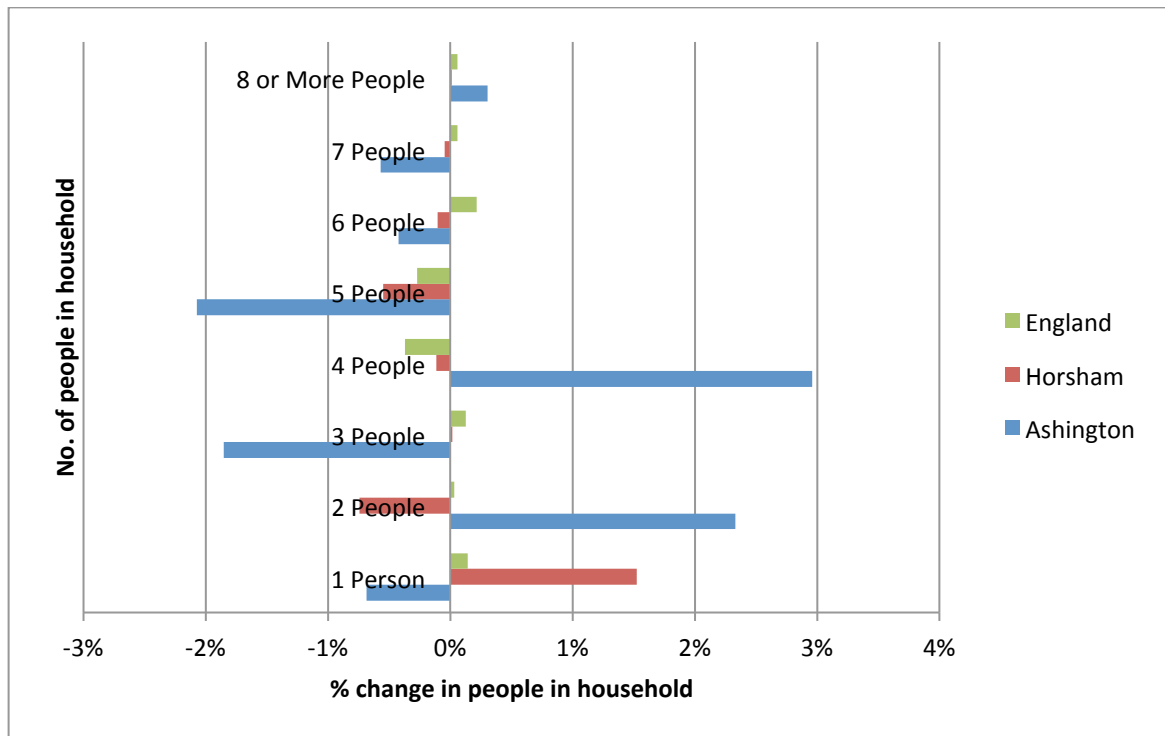
Figure 3.10: Occupancy levels, 2011



Source: Census

3.21 Figure 3.10 confirms that property in Ashington is comparatively under-occupied. Over 80% of properties have less than 0.5 persons per room, which means they are classed as being under-occupied.

Figure 3.11: Change in household size, 2001-2011



Source: Census

- 3.22 Household change over the period 2001 to 2011 also reinforces this picture. Figure 3.8 shows that there has been very strong growth in 2-person households. This represents part of the second trend, namely the strong core of families, with many living in 3-bed properties.
- 3.23 Indeed, Figure 3.11 also highlights the fact that the 'family unit' still forms an important part of the household composition of Ashington – 4-person households (predominantly one couple and two children) grew by nearly 5% over this period, albeit from a much lower base than 2-person households. This is another reason why the market for detached property has been strong. But there is also a market for properties sought by 2-person households.
- 3.24 Some of these may be young couples looking to start a family. However, caution should be raised in assuming that this means Ashington has a strong market for young families. The evidence presented in Figures 3.5 and 3.6 shows that the proportion of young working people has been low and falling, as has been the proportion of very young children (0-3). Ashington is less a place for young people to buy in order to raise a family.
- 3.25 As is noted in the 'Housing Need in Horsham' 2015 report⁷, Horsham district is the least affordable of the Housing Market Area (HMA) authorities (which also include Mid-Sussex and Crawley), with lower quartile house prices over 11 times above lower quartile earnings. For younger workers, typically on these lower quartile wages, this means that places such as Ashington which are some of the most expensive within Horsham district, are unaffordable. This lack of affordability is either in perpetuity or until they have built up a significant level of equity by buying and selling lower priced houses elsewhere and taking advantage of higher proportionate increases in value.
- 3.26 Rather, as Figures 3.5 and 3.6 also show, Ashington has more older couples with older children who were able to buy properties when they were relatively more affordable. The market for

⁷ GL Hearn (2015) *Housing Need in Horsham*, for Horsham District Council – para. 5.19

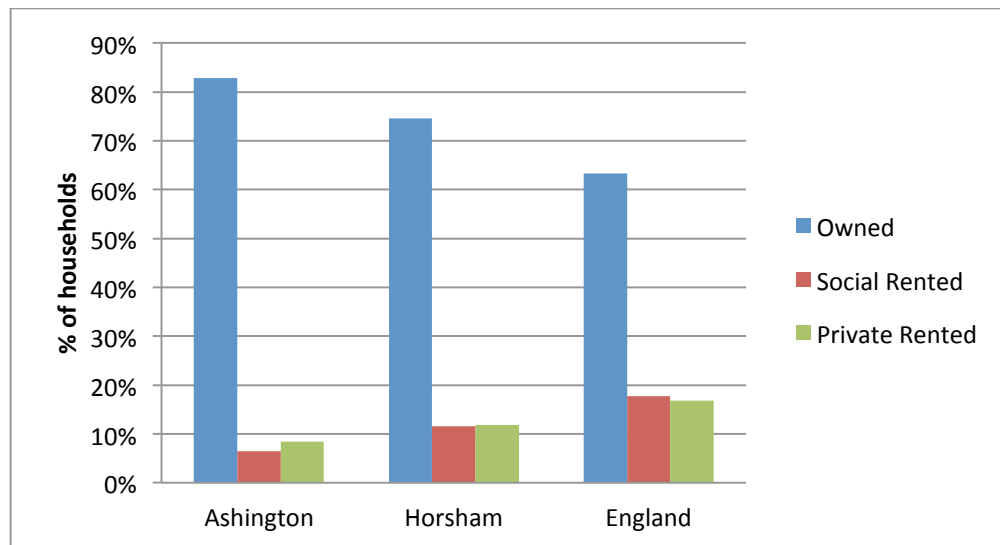
smaller properties is more robust when focused on the needs of the older downsizer – as these older children leave home then older couples will often look to find a smaller property locally. The evidence on the number of these smaller properties is that such a search for those wishing to remain in Ashington is difficult. In such circumstances, older couples tend to remain in their large family homes, which means these are not available for families to buy, also serving to drive the price up given the relatively limited stock and low levels of new development.

Possible impact on need: Very significant

Rental market

3.27 Figure 3.12 compares tenure profiles in 2011. This shows that, compared with Horsham and the national average, the proportion of both social rented and private rented housing was low. The most common renters are commonly young, single people. As was shown in Figure 3.7, Ashington has a low proportion of single households, suggesting a connection between this and the limited number of flats in the parish.

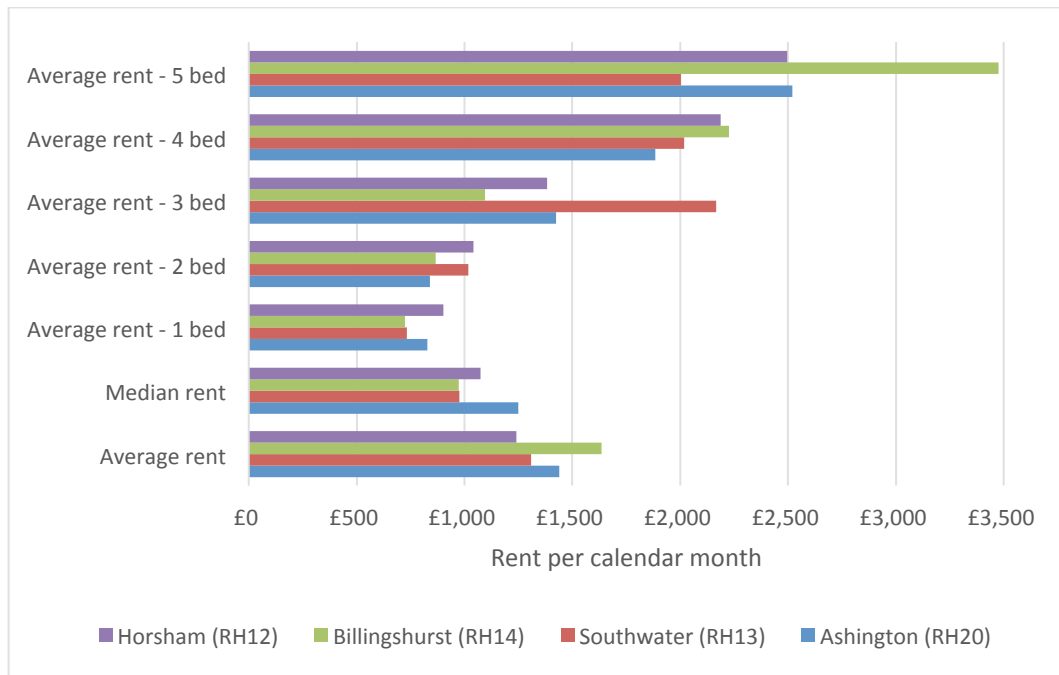
Figure 3.12: Tenure profile, 2011



Source: Census

3.28 Figure 3.13 shows the average rents as at April 2017. Whilst there are some fluctuations in the data, the general trend is that rents for smaller properties in Ashington are below the average of those in the surrounding area. Whilst the average and median rents are comparatively high, this is largely accounted for by the high rents being paid for the largest 5-bed properties.

Figure 3.13: Rental value, April 2017



Source: home.co.uk

3.29 The low cost coupled with the limited supply of rental properties in Ashington means that new rentals are not on the market for long. The average time for rental property on the Ashington market is 66 days, whereas the average time for the comparator areas is double this. This suggests the scope to expand the rental market, particularly for smaller properties which could address the currently suppressed needs of young people, including young couples looking to start a family.

Possible impact on need: Moderate to significant

Local housing waiting list/need for affordable housing

3.30 As of May 2017, there were 668 households on the Horsham district housing register. Of those, 103 households had indicated Ashington as an area of choice. These households are prioritised through a banding system, with Band A being in the greatest need of housing and Band C being the lowest need. The 103 households that have identified Ashington as an area of choice are broken down as follows:

- Band A – 66 households
- Band B – 15 households
- Band C – 25 households

3.31 Nearly two-thirds of these households are in the highest need band, which is a very high proportion. This does not necessarily mean that they would accept a property if offered one in Ashington but does suggest that over 15% of all those on the district’s housing register may, in principle, wish to live in Ashington and nearly 10% have the highest level of need.

3.32 Of the 103 households, there are 10 on the register that have a local connection to the parish of Ashington. These are people who do not have reasonable preference or need for housing but are living with family as a concealed household or who are living outside of the district but would like to move to Ashington because they have a family connection. These are all classified in Band C,

the lowest level of need. However, it does demonstrate that the number of people in housing need that have put themselves on the housing register and have family living in Ashington is low.

Possible impact on need: Moderate to significant

Overcrowding and concealed families

- 3.33 In 2011, Horsham district had 451 concealed families⁸, representing 1.2% of all families. Equivalent data isn't available at parish level; however a number of smaller output areas aggregate precisely to the Ashington parish area. For the area of Ashington parish in 2011 there were 12 concealed families, representing 1.3% of all families. This is therefore slightly above the district average, with half of these being couples without children. This is perhaps not surprising in a high value residential market such as Ashington, where young couples find it difficult to access the housing market.
- 3.34 This suggests that concealed households do create a small amount of need in Ashington.
- 3.35 As was shown in Figure 3.9, the proportion of properties in Ashington that are under-occupied, i.e. have less than 0.5 persons per room, is high at over 80%. This exceeds the proportion for Horsham district and is 10% higher than the figure for England. This suggests that overcrowding is not a factor adding to housing need in Ashington.

Possible impact on need: Small

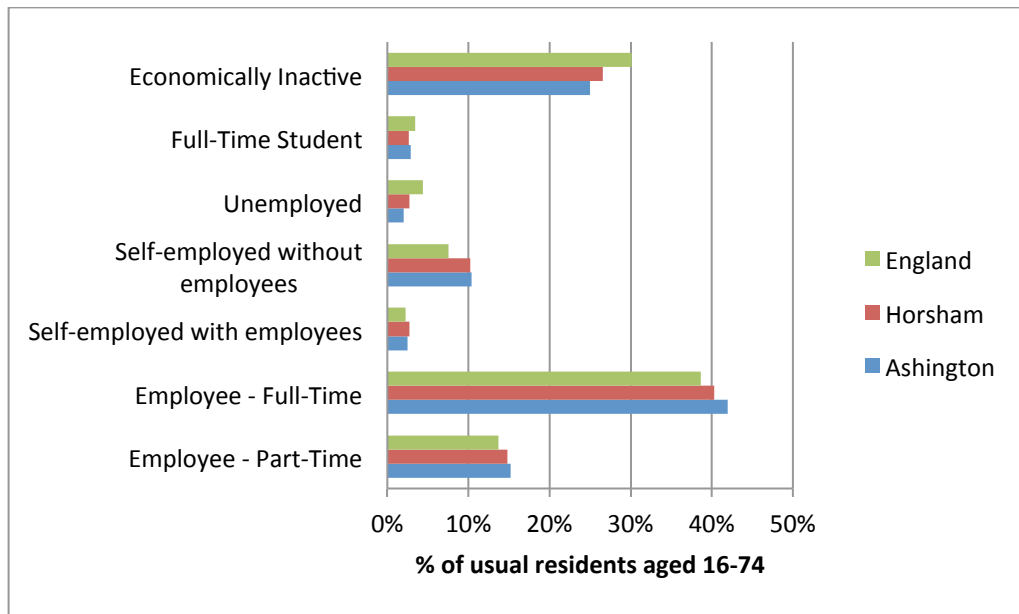
Employment and income signals

Economic activity and qualifications

- 3.36 Economic activity in Ashington parish is high, with 75% of the population being economically active. This is above the Horsham district (73.4%) and England (69.9%) averages. These high levels of economic activity are largely due to the high proportion of people in full-time and, to slightly lesser degree, part-time work – over 57% of all residents aged 16 to 74 are in employment (see Figure 3.14).

⁸ Nomis data; LC1110EW – *Concealed family status by family type by dependent children by age of Family Reference Person (FRP)*. Horsham; 2011.

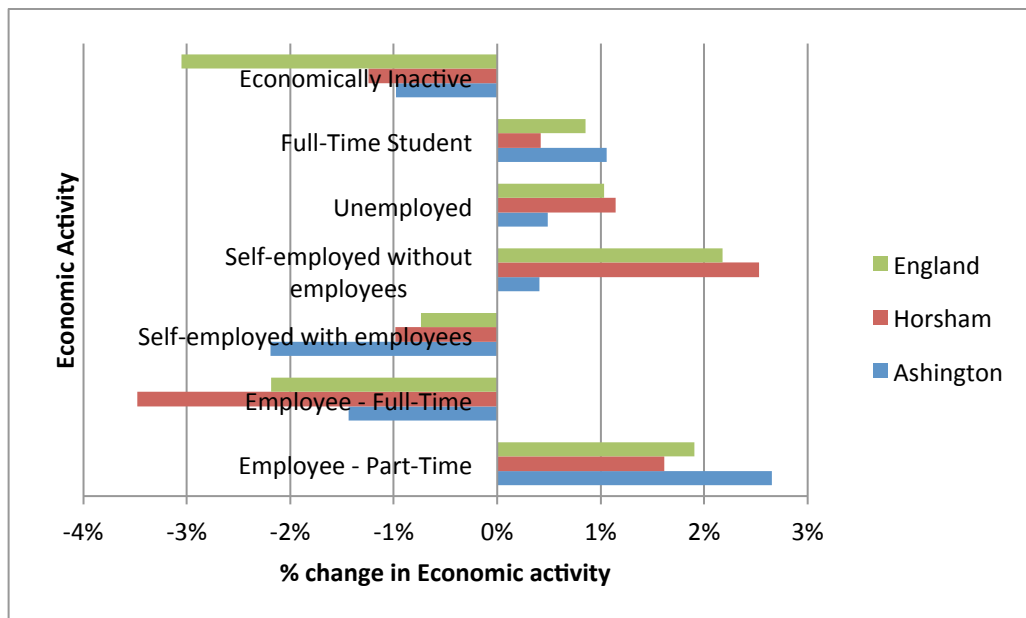
Figure 3.14: Economic activity, 2011



Source: Census

3.37 This high proportion has also held reasonably steady since 2001 whilst the equivalent proportion in Horsham district and England has fallen quite considerably (see Figure 3.15). It would appear that the labour market in Ashington is robust, and has stood up to the impacts of the economic downturn.

Figure 3.15: Change in economic activity, 2001-2011

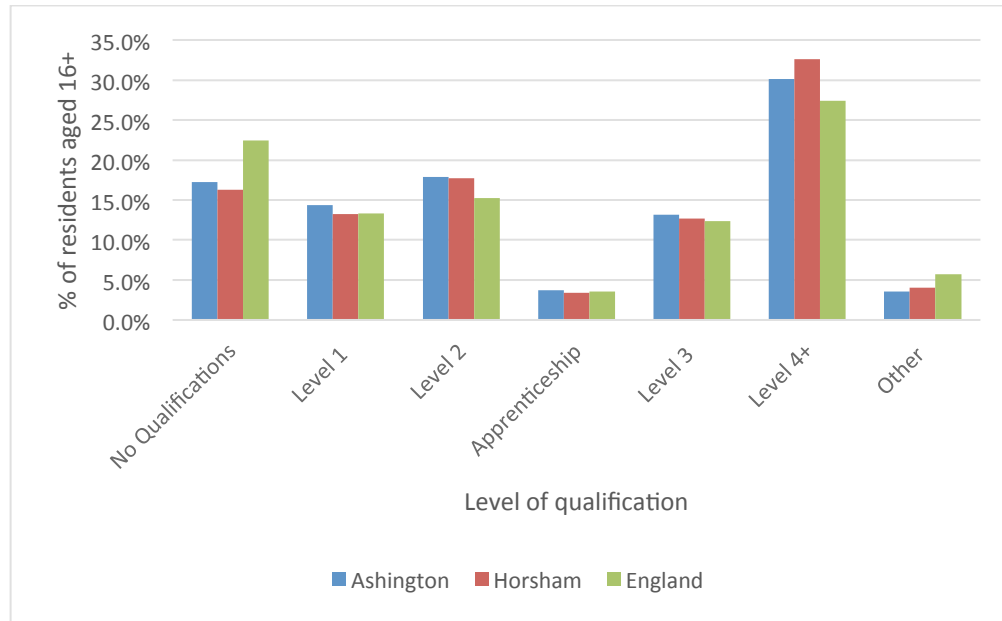


Source: Census

3.38 Figure 13.16 shows the level of qualifications gained. This shows that Ashington has high levels of those with Level 3 qualifications and above (at least two A-levels or equivalent), albeit that the proportion of Level 4 qualifications (degree equivalent or higher) is below that of Horsham district. Ashington also has a high proportion of people with Level 1 (1-4 GCSEs or equivalent)

and Level 2 (5+ GCSEs or equivalent qualifications, indicating a range of skills across its workforce.

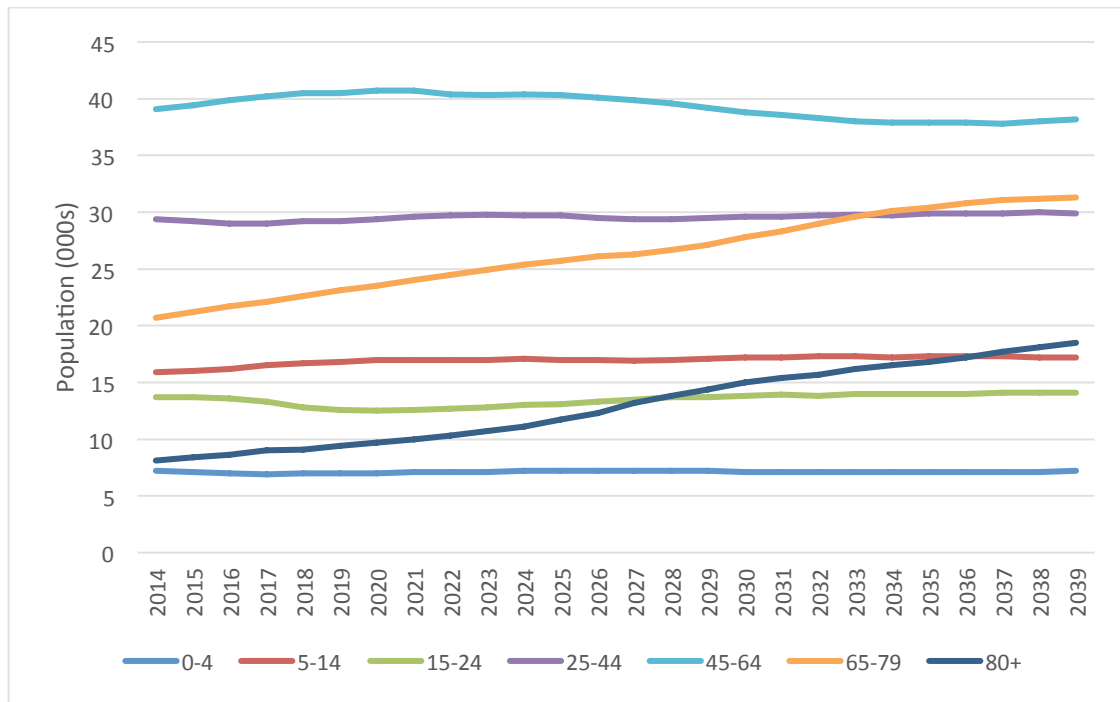
Figure 13.16: Level of qualifications gained, 2011



Source: Census

- 3.39 Whilst data on earnings is not available below district level, this suggests a range of incomes across households in Ashington, albeit with relatively few people without qualifications and therefore likely to be on very low incomes. Given the high house prices, this suggests that some people may struggle to afford to live in the parish. However, this does depend on when they bought their houses.
- 3.40 Figure 3.17 shows that the population growth which is forecast for Horsham district is very variable by age group. The age groups that are forecast to represent almost all of the growth over the period 2014 to 2039 are those of retirement age – 65 and over. All other groups are forecast to remain largely static. This suggests a declining workforce in the district and an increase in need for housing to address the needs of older people.

Figure 3.17: Forecast population change in Horsham district



Source: ONS 2014 sub-national population projections

Possible impact on need: Moderate

Economic strategy

3.41 It is important to balance this with an understanding of the market interventions that could impact on the area as a place to work. The Horsham Employment Land Review was published in 2010, therefore is considered to be out of date and an unreliable indicator of where economic growth is expected to be focused. More recently in 2014 the Capital to Coast Local Enterprise Partnership (LEP) prepared a Strategic Economic Plan (SEP)⁹ for the area encompassing Horsham district as well as Croydon in the north and Brighton and Bognor Regis in the south.

3.42 The SEP proposes to create 60,000 new jobs as well as 26,000 new homes over the period 2014/15 to 2020/21. The main focus will be on strategic business and employment locations, of which there are nine. Ashington is reasonably well placed to access those in Burgess Hill, the Heart of Gatwick Diamond, Brighton and Hove and the 'Enterprise Bognor Regis' Enterprise Zone.

Possible impact on need: Moderate

Summary

3.43 A wealth of data and evidence has been presented from a number of different sources. It is therefore important to summarise this and the potential implications for considering the scale of growth that should be planned for by the Ashington Neighbourhood Plan.

3.44 Table 3.1 summarises the market factors that should influence the overall housing requirement.

⁹ Coast to Capital (2014) *Strategic Economic Plan*

Table 3.1: Assessment of market factors specific to Ashington

Market signal	Source(s)	Possible impact on future housing need	Rationale for judgement
Dwelling completions	Census, AMR	Moderate	New dwellings delivered between 2001 and 2011 and 2011 and 2018 (based on sites in planning pipeline) is low compared with other projections, so possibility of some level of pent-up local need as a result.
House price change relative to surroundings	Zoopla.co.uk	Moderate	The data shows that house price rises and sales were very strong for detached property in Ashington but were in line with other locations. The market for other types of property – which represent the minority of stock in Ashington - is much weaker.
Overcrowding, including concealed families	Census	Small	Ashington's properties are significantly under-occupied, despite having slightly above-average numbers of concealed households (mostly young couples). This is linked with the ageing population.
Rental market relative to wider area	Home.co.uk	Moderate	The rental market in Ashington is small but strong, suggesting potential for it to expand to meet the suppressed demand from smaller households, including young couples. This indirectly suggests evidence of demand for owner-occupied property too.
Local housing need	Housing Register	Moderate to significant	Whilst Ashington has a low number of those on the housing register with a local connection, a high proportion of households on the register in the highest level of need have expressed an interest in living in Ashington.

3.45 Table 3.2 summarises the factors that should influence the type of new dwellings that are planned for in Ashington.

Table 3.2: Summary of factors specific to Ashington with a potential impact on the type of new dwellings

Market indicator	Source(s)	Possible impact on housing needed	Conclusion
Increase in older person households	Census, SNPP	Evidence from Census (increasing numbers of older people but relatively low level of long-term sick/disabled) suggests housing for independent living for older people likely to be in demand.	Provide range of dwelling sizes, including smaller dwellings (2- and possibly 3-bedroom) suitable for older people. Three beds would mostly be suitable for couples. Also potential provide housing that specifically meets the needs of older people, e.g. independent living developments or possibly bungalows.
Need for family-sized housing	Census, SNPP, Zoopla.co.uk, SEP	Evidence of demand for smaller family housing – which is likely to continue due to strong economic growth planned in the LEP area. However, this is contradicted by population projections which suggest a decrease of young families. High prices will restrict demand from these families for the largest properties.	Provide range of dwelling sizes, including small- to medium-sized (2-3 bedroom) dwellings for young families.

4 CONCLUSIONS

- 4.1 Following the guidance prepared by AECOM on behalf of Locality, the range of recognised data sources that should be used to assess the overall housing number to be planned for, identifies the following ranges:
- 123 to 200 dwellings for the period 2017 to 2031
 - 167 to 272 dwellings for the period 2017 to 2036.
- 4.2 It should be noted that the lower levels of growth in this range are based on past trends. Over this period, Ashington did not have any sites allocated for housing development so new houses were only built on windfall sites. Given that this growth was lower than the household projections and also Ashington's pro rata share of the HDPF districtwide growth, it should be expected that Ashington should plan for a higher level of housing in order to address the housing issues which were identified in Section 3.
- 4.3 This represents the assessed housing need before adjustment for market factors. The analysis in Section 3 showed that there was a need for affordable housing in particular and housing to provide for the needs of first-time buyers and young families – both rented accommodation and property to purchase. The under-occupancy of existing properties is a particular issue which suggests that it is more the *type* of housing that is at issue in Ashington than the *volume* of housing. There is a need for a greater proportion of smaller properties which will help to address needs and also under-occupation as downsizers are able to access properties locally.
- 4.4 It is therefore considered that, following adjustment for market factors, the levels of housing that should be planned for in Ashington over the plan period (whether 2017 to 2031 or 2017 to 2036) should be broadly around the mid-point of those shown in paragraph 4.1.
- 4.5 It will be for the Neighbourhood Plan Steering Group, in conjunction with the community, using the available evidence to determine the scale of growth that is ultimately planned for through housing allocations. It is important to note that any housing requirement in the Neighbourhood Plan represents a floor to the level of growth rather than a ceiling.
- 4.6 In addition, there are other factors which may influence the scale of growth that is ultimately planned for. For instance, if the evidence from the community and the evidence base suggests there is a need for new social infrastructure, e.g. play areas, sports facilities, community facilities, etc, then the Neighbourhood Plan may consider it appropriate to plan for higher numbers to ensure that contributions from development are sufficient to deliver these. This may also relate to the specific sites in question and whether such needs can be delivered on site.
- 4.7 Another influencing factor could be the type of housing that is needed. If certain specialist types of housing are justified, then this may need to be supported by higher overall housing numbers in order to ensure the viability of such specialist housing products. In addition, evidence should be sought from providers to demonstrate that there is market demand to locate specialist housing in Ashington. One such example may be retirement housing.
- 4.8 The analysis of the housing market suggests strong demand in Ashington, particularly for the predominant type of property, detached housing. Prices are high and sales are strong. It will be of value to test this with local estate agents.

- 4.9 The analysis in this report needs to be set against supply side considerations, i.e. constraints. Ashington is a village and as such, is not expected to be the main focus for housing growth in Horsham district. However, it does have a role and this will be influenced by a range of factors such as site availability, location, accessibility to services and facilities and the capacity of infrastructure to support growth. It will be important that the Neighbourhood Plan considers these matters through its development.

