

AECOM Town Planning

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Submitted to
Wickham Market Parish
Council, Suffolk

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Housing Needs Assessment

Wickham Market Parish Council, Suffolk

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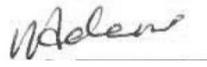
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Glossary of terms used in text

DCLG	Department for Communities and Local Government
HMA	Housing Market Area
HNA	Housing Needs Assessment
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
PPG	Planning Practice Guidance
SCDC	Suffolk Coastal District Council
SHLAA	Strategic Housing Land Availability Assessment
SHMAU	Strategic Housing Market Assessment Update

Executive Summary

1. The 2011 Localism Act introduced neighbourhood planning, allowing parish councils and other groups across England to develop and adopt legally binding development plans for their neighbourhood area.
2. As more and more parishes and 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 Wickham Market Parish Council understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.
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.
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 projection for the settlement being assessed is unclear, for example where the local authority has not set a specific target for the settlement.
8. In the case of Wickham Market, 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 be aligned with the relevant local plan. In the case of Wickham Market, this would mean aligning with the Suffolk Coastal emerging Local Plan period, which extends from 2010 to 2027.
10. Due to unique housing characteristics including a recent influx of housing, Wickham Market Parish Council has decided to draft its plan for the period 2011 – 2036. Wickham Market has witnessed a surge in homebuilding since 2011, with 101 new dwellings completed in this period. Subsequently, Wickham Market has met its Suffolk Coastal Core Strategy derived housing target up to 2027, which is part of the reason the neighbourhood planning group has determined to extend their projections to 2036.

11. 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'

12. 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'*.

13. 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.

14. 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 conversations with local estate agents (Clarke & Simpson and Abbots Countrywide) helped ensure our conclusions were informed by a qualitative, local perspective.

15. 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.'*

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

17. Our assessment of a wide range of data sources identified four separate projections of dwelling numbers for Wickham Market between 2010 and 2036² based on:

- A figure derived from Suffolk Coastal Core Strategy up to 2027 and DCLG household projections 2027-2036, disaggregated to Wickham Market, (which gives a total of 133 dwellings, or 5.3 per year);
- The Government's 2012-based household projections only, extrapolated to Wickham Market, translated from households to dwellings (which gives 211 dwellings, or 8.4 per year);

¹ Such an approach, clearly separating housing need assessment (demand-side) from dwelling capacity assessment (supply side), was recently 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>)

² As explained in more detail within the main body of the report, all calculations of dwellings within Wickham Market parish (and hence future need) exclude the caravans within the parish boundary that were counted in the 2011 Census but not within the 2001 Census.

- A projection forward of dwelling completion rates 2001-2011(which gives 30 dwellings, or 1.2 per year); and
 - A projection forward of dwelling completion rates since 2011 (which gives 150 dwellings, or 6 per year).
18. Wickham Market's future dwelling projections comprise a range, with a maximum of 110 and minimum of 32. This range is quite broad due to extending projections beyond the local plan period, and therefore setting targets for the neighbourhood plan period should be considered in the context of an extruded evidence base.
 19. The factors acting to constrain demand and factors acting to increase demand point to a slightly lower demand in Wickham Market than in Suffolk Coastal as a whole. Taking this into account, we recommend that the most appropriate estimate of dwelling need for Wickham Market up to 2036 is within the range of 32 to 110 housing range. As housing demand is dynamic across a housing area, and Wickham Market lies within a relatively strong demand housing area, the neighbourhood plan steering committee may set a justified housing target towards the higher end of this range should they determine it to be significant. (note: even if the lower end of the range was set as the target, this should be thought of as a minimum figure, in line with best practice).
 20. Note that any dwellings completed or with outstanding permission in the plan area since the start of 2016 would count towards this dwelling total, meaning the outstanding number of dwellings decreases accordingly.
 21. The table below, which replicates Figure 26 of our conclusions, 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.

Executive Summary Table: Summary of local factors specific to Wickham Market with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
<p>Affordable housing</p>	<p>SHMAU, Suffolk Coastal Local Plan, Census, Estate agents</p>	<p>Relatively high weekly earnings in the Suffolk Coastal area, as well as the demand for second homes, suggests that lower income households may often be priced out of the private housing market. The SHMAU supports this as it suggests that prices in Suffolk Coastal increased between 2007-2011 unlike other parts of the Ipswich HMA – due to an overall shortage in supply, higher than average turnover of higher value properties, and spatial influences such as higher and increasing wages or larger properties.</p> <p>The social rented sector in Wickham is double that of Suffolk Coastal as a whole and higher than England figures and has grown at a slightly higher rate than Suffolk Coastal. This also supports the suggestion that there is likely to be heightened need for affordable housing in this area, although the developments at Coop New Build (6), Gospel Hall Close (2), Castell Close (2), Wickham Place (22) and the Oaks (2) have provided 34 affordable housing units since 2010.</p>	<p>Affordable housing need is never evenly spread across a district. Based purely on the evidence in this report, we would suggest the Parish Council work with the District Council to consider how best to provide for local versus district needs for affordable housing provision, given recent developments and indications of demand.</p>

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
Dwelling size	SHMAU, Suffolk Coastal Local Plan, Census, Estate agents, Housing Register	<p>Across the wider market, there is a general decline in household size due to its ageing population so there is demand for smaller properties including bungalows. The Local Plan also states an aspiration to encourage young people to stay in the district which tends to mean requiring smaller sized properties.</p> <p>Despite the decline in families and 25-44 year olds between 2001 and 2011, over this same period the Census showed a strong growth in homes with 6-8 or more rooms. Recent developments such as Wickham Place with its mix of two to five bed houses, supports the argument that a greater proportion of smaller properties in Wickham Market are required as demand has not been met. This view was supported by feedback from Abbots Countrywide.</p> <p>Furthermore, recent completions since 2011 have all been 2-5 detached homes, with a predominance of 3-4 bed properties. This is not fully reflective of the spectrum of the demand for the area which is also likely to require entry level housing.</p>	<p>The Census data suggests that a general trend towards smaller household sizes and therefore demand for smaller properties – on the other hand, market evidence suggests that larger properties are also in demand so there is a trend towards under-occupancy. It is therefore a policy choice for the Parish Council to decide on – whether to encourage a particular size of unit in the Neighbourhood Plan; or to leave it as per existing Local Plan Strategic Policy SP3 New Homes which encourages a mix of housing size.</p> <p>If smaller units are to be encouraged, they should be in the form of 2-bed semi-detached or terraced houses, as well as considering well designed flats for the elderly.</p>
Dwelling tenure	SHMAU, Census, Estate agents	<p>There is a high proportion of home ownership across the Suffolk Coastal area (75%) though it is lower in Wickham Market (65%), and this level has been relatively stable between 2001-2011.</p> <p>There is also a high level of social housing in Wickham Market – almost double that of Suffolk Coastal as a whole, as well as low levels of private rentals and shared ownership. Clarke & Simpson indicated that the private rental market is strong but the low levels of private rentals can also signal low supply.</p>	<p>The data suggests that there is a clear need to provide a greater range of housing tenures in Wickham Market. Whilst Local Plan Strategic Policy SP3 New Homes encourages a mix of tenures, we would recommend that the Parish Council seeks to work closely with the District Council to provide more owner occupied properties across the parish.</p>

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
Dwelling type	SHMAU, Census	Across the wider market, houses are the most popular dwelling types. At Wickham Market, 92% of households in 2011 lived in whole houses/bungalows, with the majority in detached or semi-detached properties. The SHMAU estimates that 90% of demand would be for houses/bungalows by 2031 in Suffolk Coastal.	The majority of new homes to be provided (whether small or large) should be detached/semi-detached or even terraced, with some provision of bungalows, in line with Wickham Market's existing development pattern.
Housing for older people	SHMAU, Census	Suffolk Coastal has seen a larger increase in over 65 year olds between 2001 and 2011 with a significantly high proportion of retired people in Wickham Market than England as a whole, and higher than the rest of Suffolk Coastal. The SHMAU also projects disproportionately high rates of dementia across the whole Ipswich HMA which has implications on housing provision.	<p>In Wickham Market there is a need for smaller homes for the recently retired and/or over-55s to downsize into properties which are specifically designed to facilitate independent living for longer. These could include smaller detached/semi-detached/terraced homes with some bungalows.</p> <p>Specialist housing for elderly populations (i.e. those suffering from dementia) do have some scope for viability in Wickham Market. However, they may be better suited to locations with greater accessibility and larger catchment areas within Suffolk Coastal such as Woodbridge, based on viability, supply and demand factors.</p>

1 Introduction

Housing Needs Assessment in Neighbourhood Planning

22. The 2011 Localism Act introduced neighbourhood planning, allowing parish councils and other qualifying bodies across England to develop and adopt legally binding development plans for their neighbourhood area.
23. As more and more parishes and 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.
24. 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.
25. 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.
26. Our brief was to advise on data at this more local level to help Wickham Market Parish Council understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.

Local Study Context

27. Wickham Market is a large village in Suffolk with a parish population of 2,156 (2011 Census). It is north-east of the larger market town of Woodbridge and north-west of the Suffolk Coast and Heaths Area of Outstanding Natural Beauty (AONB). Its local authority is Suffolk Coastal District Council (SCDC). It is located just off the A12 which provides road links to Ipswich, London and Colchester.
28. Wickham Market railway station is located in the village of Campsea Ashe, some distance from Wickham Market itself on the eastern side of the A12 - approximately 1.5 miles walk or 2.2 miles drive from the village centre itself. Wickham Market is on the East Suffolk railway line, providing access to Ipswich and Lowestoft with connections to the Great Eastern Main Line at Ipswich.
29. The Neighbourhood Plan area is the same as Wickham Market Parish. This greatly simplifies the gathering of statistics, as all are available at parish level.
30. For planning purposes, Wickham Market is covered by the Suffolk Coastal District Local Plan, adopted in July 2013.
31. Wickham Market is also part of the Ipswich Housing Market Area, and as such, the 2012 Ipswich Housing Market Strategic Housing Market Needs Assessment Update (SHMAU) is relevant to this housing needs analysis and has been reviewed.

2 Approach

PPG-Based Assessment

33. 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

34. 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.
35. In the case of Wickham Market, the Local Plan has not set a specific target for the settlement. 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.
36. The planning period of neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Wickham Market, this would mean aligning with the Suffolk Coastal District Local Plan period, which extends from 2010 to 2027. However, Wickham Market Parish Council has stated that they wish to cover the period 2011 to 2036 in their neighbourhood plan in order to react to the need for future housing demand. This has been done by using data for 2036 where available (e.g. household projections) and projecting forward past rates where data is not readily available (e.g. dwelling growth/completions data), using 2011 as the reference point.

Gathering and Using a Range of Data

37. 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'

38. 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'*
39. 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.

40. 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 conversation with a local estate agent (Clarke & Simpson) helped ensure our conclusions were informed by a qualitative, local perspective.

Focus On Demand Rather Than Supply

41. 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.'*

42. For this reason, we advise that the conclusions of this report should be assessed against supply-side considerations (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study³.

Study Objectives

43. The objectives of this report can be summarised as:

- Collation of a range of data with relevance to housing need in Wickham Market relative to the wider Suffolk Coastal area;
- 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.

44. 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.

³ Such an approach, clearly separating housing need assessment (demand-side) from dwelling capacity assessment (supply side), was recently 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

Ipswich Housing Market Area Strategic Housing Market Assessment Update (August 2012)

45. The PPG states that neighbourhood planners can refer to existing needs assessments prepared by the local planning authority as a starting point. As Wickham Market is located within the Ipswich Housing Market Area, we therefore turned to the *Ipswich Housing Market Area Strategic Housing Market Needs Assessment Update (SHMAU)*⁴ which covers the housing market area and informs housing policies at a local authority level, including affordable housing policy.⁵
46. The SHMAU was published in 2012 and serves as an interim update to the 2008 Strategic Housing Market Assessment (SHMA). The update is a hybrid between a review of the data and an entirely new assessment. As a precautionary note, the 2008 SHMA, which underpins some of the 2012 SHMA, uses data from the 2001 Census and Housing Needs Surveys conducted in the four local authorities ranging from 2005 to 2008. Suffolk Coastal District uses an annual needs survey conducted by Opinion Research Services in 2006. The assessment also does not incorporate results from the 2011 Census as not all the data was available at the time of the SHMAU. We have therefore carefully selected data from the SHMAU to reduce potential errors in this housing needs assessment. However, it should be borne in mind that due to the age of the SHMA, confidence in the presented statistics is not as high as it would be for a housing market needs study completed after the 2011 census.
47. The SHMAU draws upon a range of statistics including population projections, housing market transactions and employment scenarios to recommend an objectively-assessed housing need for the Ipswich Housing Market Area (HMA). This area comprises the districts of Babergh, Mid Suffolk and Suffolk Coastal, as well as the borough of Ipswich. As such, it contains a number of relevant points when determining the degree to which the housing needs context of Wickham Market differs from the bigger picture. For the purposes of finer-grained analysis across such a larger area, the HMA is divided into four spatial areas based on local authority boundaries; Wickham Market parish is therefore located within the Suffolk Coastal area.⁶
48. The SHMAU identifies a number of interesting trends across the Suffolk Coastal area.

Population characteristics:

49. Suffolk Coastal's proportion of people aged over 65 is higher than the England average.
50. There is an anticipated significant increase in single person households which are expected to have doubled over the period between 2001 and 2031. Older person households and single households are expected to rise proportionally to the overall average.
51. There was a 3.5% growth in employment between 2001 and 2011 in Suffolk Coastal –but this was constrained by the recession. The East of England Forecasting Model anticipates stronger growth between 2010 and 2031 of 13.5% over this period.
52. Suffolk Coastal residents enjoy a high median level of Gross Weekly Earnings in comparison to the overall Housing Market Area: £510 versus £485.

⁴ Available online at https://www.ipswich.gov.uk/sites/www.ipswich.gov.uk/files/ipswichdistricts-shma-aug-2012_0.pdf

⁵ 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'.

⁶ Figure 1.2 of the Ipswich Housing Market Area Strategic Housing Market Assessment, November 2008, Final Report.

53. A large proportion of Suffolk Coastal's growth is migratory, from approximately 2,300 incomers from Essex and London each year. This trend is likely to continue as London becomes increasingly unaffordable for younger households and proportional growth in house prices is sustained- this trend benefits homeowners wishing to migrate to a more rural context. Within the HMA, it is the case that older households are more likely to move to more rural areas.

General housing market characteristics:

54. Suffolk Coastal has an affordability ratio of 7.6 compared to the national average of 6.5. The result is that many lower income households are priced out of entering the private housing market, unless they save considerable deposits.

55. There is a high proportion of owner-occupiers across Suffolk Coastal.

56. Whilst the demand for couple family housing is expected to remain more or less constant up to 2031 in the HMA, lone parent households are expected to more than double, creating need for both family market housing and family affordable houses.

57. Local estate agents identified that local rural housing markets outside Ipswich, including Suffolk Coastal, attract buyers from outside the area from locations such London and Essex. This is owing to their desirability as retirement destinations.

58. Bucking trends elsewhere, the market for homes at Suffolk Coastal remained buoyant during the recent recession (2008-2012) for all types of housing. Similarly, entry-level prices in Suffolk Coastal have remained highest in the HMA, which is counter to trends of falling entry-level purchase prices.

59. The SHMA has also identified that the market for detached properties has been more resilient than for other forms of housing such as flats and terrace housing.

60. The number of second homes in Suffolk Coastal is much greater than the other HMA sub-areas – equivalent to 4.6% of the total stock (as of 2012). It is growing as a feature of the local housing market (having increased by 8% since 2005). It remains, however, lower than other coastal areas such as North Norfolk (8.9%) or Purbeck (7.3%).

61. Related to second homes, Suffolk Coastal has the highest proportion of vacant dwellings in the HMA, with this proportion having increased from 3.0 to 3.4 between 2007/8 and 2011.

62. Turning to long term vacant dwellings, Suffolk Coastal witnessed significant fluctuations up to 2011, but the overall trend is downward, in line with the national trend (see Figure 1 below, which replicates SHMAU Table 6.9.3). A gradual decrease in long term vacancies demonstrates increasing demand in the Suffolk Coastal District.

Figure 1: Long-term empty dwellings by local authority as at 1 April 2011 (Council Tax Base/DCLG Live Table)

	2005	2006	2007	2008	2009	2010	2011	2005-2011
Suffolk Coastal	664	701	597	644	648	750	649	-15

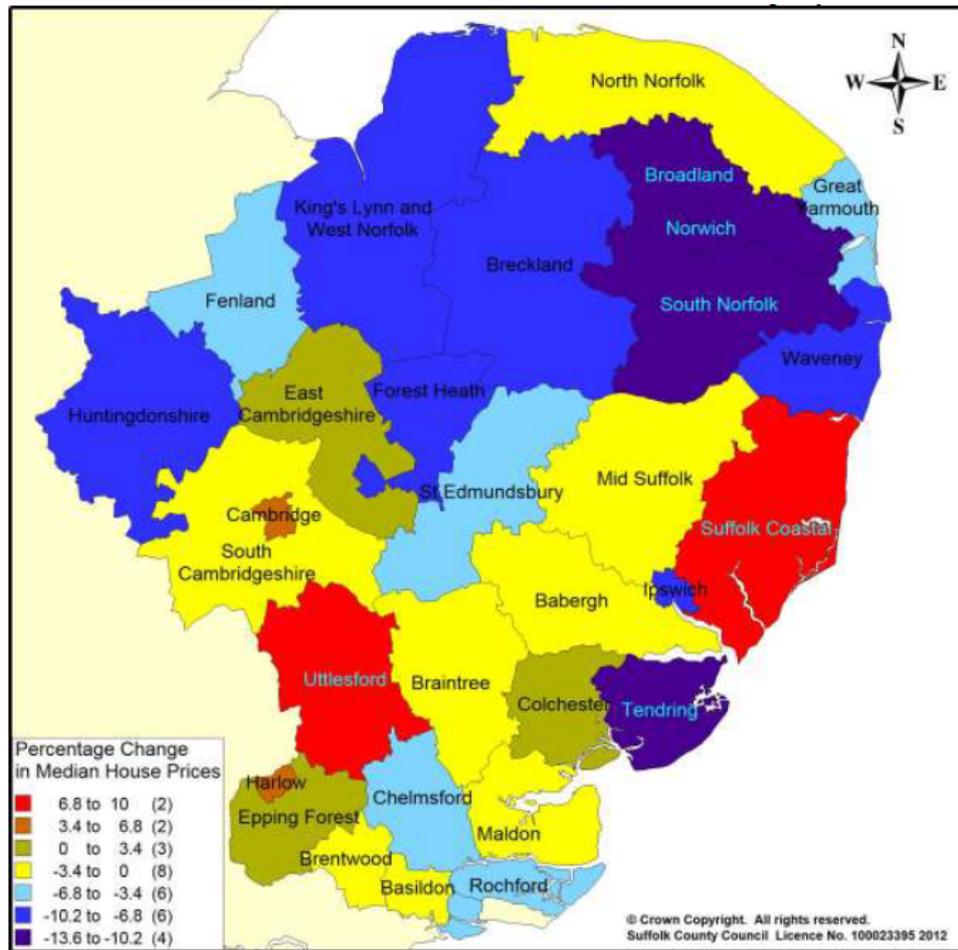
Source: Ipswich SHMAU (2012)

63. Prices in Suffolk Coastal increased between 2007 and 2011 – unlike other parts of the Ipswich HMA. The SHMA suggests that Suffolk Coastal exhibits this behavior due to the following reasons:

- a. *“an overall shortage in supply of an order that is more than which affects the country as a whole;*
- b. *a higher than average turnover of higher value properties throughout this period; and*
- c. *spatial influences, such as higher and increasing wages, larger properties or other value factors, which are not present in the other areas.”*

64. In Suffolk Coastal, the 2007 median house price was £193,000, whilst by 2011 it had grown to £208,950. This represents an increase from 10% higher than the national average to 19% higher than the national average (see Figure 2 overleaf, which replicates SHMAU Figure 7.2.5).

Figure 2: Percentage change in median house prices in Cambridgeshire, Essex, Norfolk and Suffolk, 2007 Q2 to 2011 Q2 (DCLG/Land Registry)



Source: Ipswich SHMAU (2012)

Housing type:

65. The SHMAU provides estimates of demand for particular types of housing (summarised in Figures 3 and 4, which replicate SHMAU Table 12.1.9 and 12.1.14). Suffolk Coastal is predominantly characterised by a demand for houses and bungalows, with a significant preference for 3 bed homes, comprising almost half of all housing need. The demand for two beds is just over a fifth of total housing need.

Figure 3: Estimated proportionate demand for new housing stock by bedroom size by local authority in 2031

	1 Bed	2 Bed	3 Bed	4+
Babergh	18.4%	29.0%	46.4%	6.2%
Ipswich	23.6%	6.0%	63.2%	7.3%
Mid Suffolk	13.8%	24.5%	43.1%	18.5%
Suffolk Coastal	14.6%	22.8%	46.6%	16.0%
Ipswich HMA	17.9%	18.3%	51.4%	12.4%

Source: Ipswich SHMAU (2012)

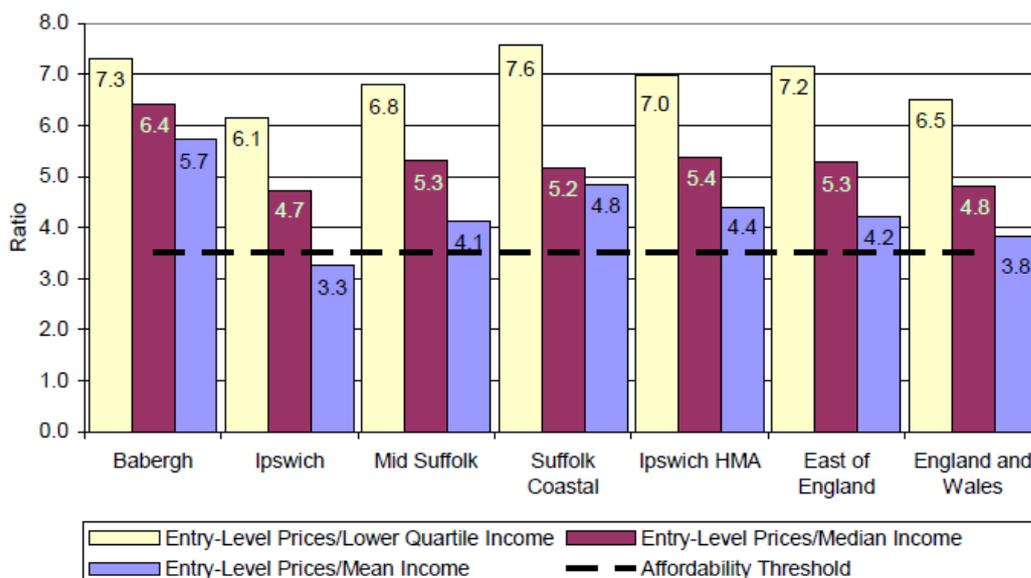
Figure 4: Estimated demand for new housing stock by type of home by local authority in 2031

	House or Bungalow	Flat, maisonette or apartment
Babergh	91%	9%
Ipswich	88%	12%
Mid Suffolk	101%	-1%
Suffolk Coastal	90%	10%
Ipswich HMA	92%	8%

Source: Ipswich SHMAU (2012)

- 66. Average income levels in Ipswich HMA remain below both regional and national averages. The 2012 SHMA estimates that 41% of newly forming households are not able to afford to rent or buy a home within the Ipswich HMA.
- 67. There is a lack of choice of housing within the Ipswich HMA which has knock-on implications including:
 - a. A heightened need for affordable housing in the least affordable areas;
 - b. Disproportionately greater household formation in affordable areas such as Ipswich; and
 - c. People commuting further to work from affordable areas to less affordable areas.
- 68. On balance, Suffolk Coastal is one of the most unaffordable areas in the Ipswich HMA (see Figure 5 below which replicates SHMAU Figure 7.13.8), and more unaffordable than national average so it is likely to suffer from the implications outlined in the preceding paragraph.

Figure 5: Affordability ratios of entry-level owner occupation for different points in the income distribution, 2011 (Land Registry / ASHE)



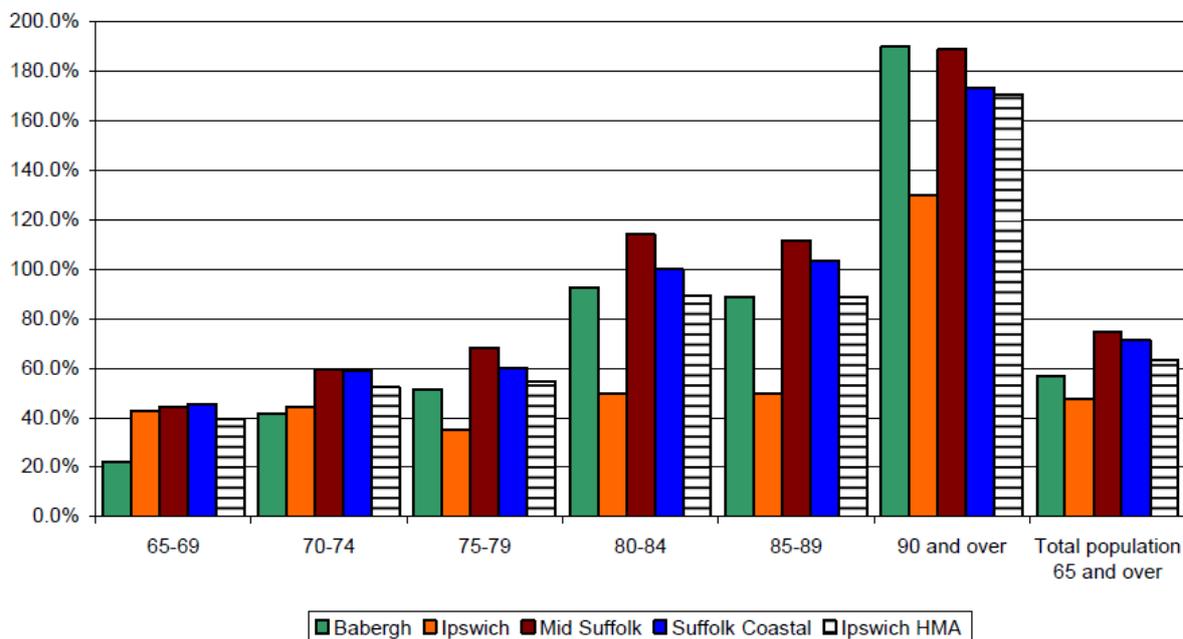
Source: Ipswich SHMAU (2012)

- 69. Private rental prices are, however, relatively affordable in Suffolk Coastal with an entry level price to lower quartile income ratio of 0.28 – the lowest in the HMA and lower than the national average.

Specific housing need:

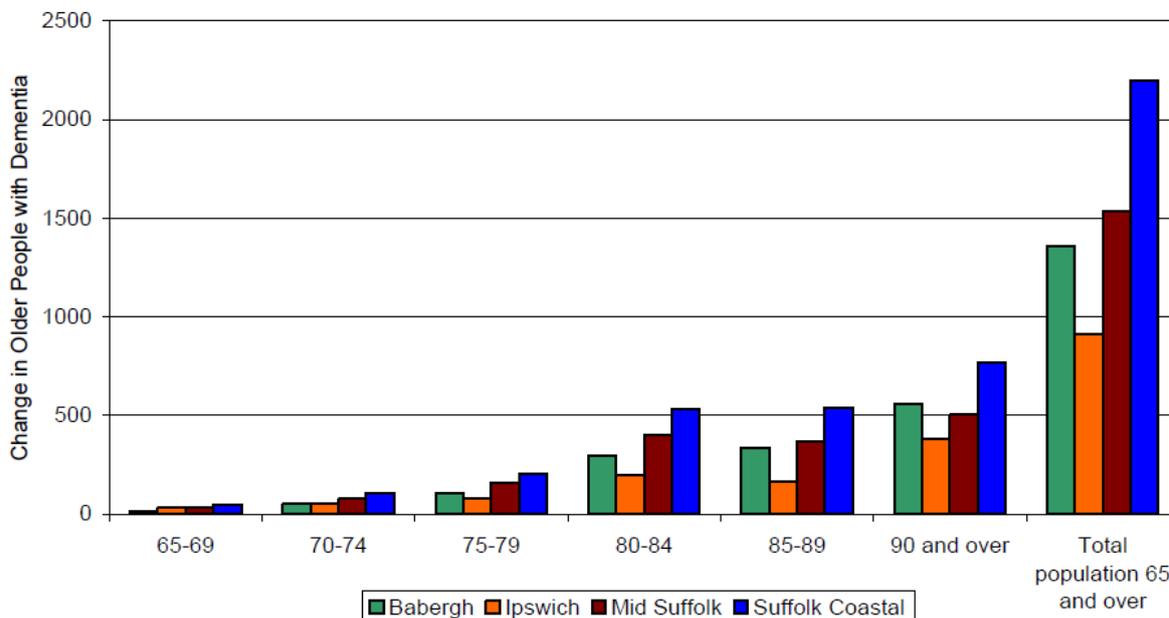
- 70. The SHMA forecasts that the population of people aged 65 and over is expected to increase by 88,600 (63%) in the Ipswich HMA over the next 20 years. This demographic shift will result in more demand for homes designed for the elderly. The SHMA also notes that the prevalence of health conditions requiring support for older people remains approximately constant, implying there will be a proportionate need for ancillary care services, such as housing for older people with dementia, as the elderly population increases.
- 71. Suffolk Coastal is projected to have consistently high rates of growth in elderly populations. Rates of dementia are also forecast to be particularly high compared to the rest of the HMA (see Figures 6 and 7 below, which replicate SHMAU Figures 10.4.2 and 10.4.6).

Figure 6: Proportional increase in population of older people 2011-2030. POPPI, ONS (POPPI, ONS)



Source: Ipswich SHMAU (2012)

Figure 7: Change in number of older people with dementia between 2011 and 2030. (ONS, POPPI, using research for Dementia UK)



Source: Ipswich SHMAU (2012)

72. In regard to families with children, the SHMAU projects that the number of couple-with-children households will increase by 5% between 2001 and 2031. Households comprising a nuclear family (couple and their dependent children) plus one or more adults are projected to decline by a similar amount. This implies that the number of families needing large accommodation is likely to stay constant.

73. The SHMA forecasts that the numbers of lone parent households will more than double between 2001 and 2031. This is a UK-wide phenomenon and accounts for nearly 20% of the total increase in households nationally. Lone parent households with dependent children are, on average, more likely to be tenants in the social sector, meaning the projected increase in lone parent households implies a greater demand for family accommodation in the social rented sector.

Suffolk Coastal District Local Plan: Core Strategy & Development Management Policies (Suffolk Coastal District Council, July 2013)

74. The Core Strategy – the first part of the Suffolk Coastal District Local Plan – was adopted in July 2013 and covers the planning period 2010 to 2027. Specific policies and provisions of the Core Strategy which are relevant for housing to be provided at Wickham Market include:

- Policy SP2 Housing Numbers and Distribution which states that at least 7,900 new homes will be provided across the district in accordance with Policy SP19;
- Policy SP19 Settlement Hierarchy classifies Wickham Market as a Key Service Centre under Table 4.1 in the Core Strategy. Whilst no specific target for Wickham Market is specified, para 4.87 states that “Wickham Market is another larger settlement where larger scale development may be possible.” All of the Key and Local Service Centres combined are allocated 17% of the total proposed housing growth or 1,350 new homes.

75. To calculate Wickham Market’s share of the 1,350, we need first to understand the total number of existing dwellings in the Key and Local Service Centres category. This can be calculated by subtracting from the Suffolk Coastal dwellings total (Census 2011) those dwellings in all other

areas (also derived from Census 2011 definitions)⁷, with the remainder comprising the total number of dwellings in the Key Service and Local Service Centres.

76. The total number of dwellings in Suffolk Coastal in the 2011 Census was 58,330. Of these, 20,860 dwellings were within the Key Service and Local Service Centres as identified in Table 4.1 of the Core Strategy⁸. At the 2011 Census, Wickham Market had 1,006 (permanent) dwellings – in other words, 0.048% of the total dwellings in the Key Services and Local Centres. This means that its ‘fair share’ of the 1,350 homes proposed for this category would be 0.048% of 1,350, which equates to 65 dwellings. This can therefore be taken as the Suffolk Coastal Core Strategy-derived housing target for Wickham Market, for the period 2011-2027.
77. As the neighbourhood planning group at Wickham Market wish to look at the 2016 to 2036 period, it is necessary to extend this projection forward. If the Core Strategy-derived target indicates 65 dwellings over the 16-year Local Plan period, this equates to a rate of 4 dwellings per annum. We can then project this rate forward to estimate that 102 dwellings would be required between 2011 and 2036.
78. Note that projecting the Core Strategy housing target forwards will only yield an approximate dwelling target as it does not consider the effects of household dynamics, strategic spatial policies, or supply-side constraints that have been included in determining the 2036 figure target. As the Core Strategy only covers the period to 2027, it would be more reliable to focus on the DCLG household projections for the period between 2028 and 2036, although this is based on unconstrained need only, i.e. does not build in supply-side constraints like the Core Strategy does (see also Page 18). This is a very important caveat, as it explains the doubling of the requirement in the years after 2027. Figure 7a below shows our estimates of the most appropriate dwelling figures to use for the neighbourhood plan area based on currently available information.

Figure 7a: Provisional Wickham Market Neighbourhood Plan housing requirement, 2011-2036

Period	Current best source for housing requirement (June 2016)	Wickham Market annual housing requirement (derived)	Wickham Market total housing requirement for period (derived)
2011-2027	Suffolk Coastal Local Plan	4.1	65.6
2028-2036	DCLG Household Projections	8.4	67.2
TOTAL 2011-2036 (rounded)			133

Source: Suffolk Coastal Local Plan, DCLG Household Projections, AECOM calculations

79. As and when the new Local Plan is adopted a new housing target for the years after 2027 should be available, and this table can then be updated by the neighbourhood planning group.
80. Other Core Strategy policies with particular relevance to this Housing Needs Assessment include:
- Strategic Policy SP3 New Homes, which states that new housing should provide for the full range of size, type and tenure of accommodation to meet the needs of existing and

⁷ The definition used was a combination of Middle Super Output Areas, Built-Up Areas, Built-Up Area Sub-divisions, or parish level data, depending on the most appropriate geographic boundary to use for each named settlement.

⁸ The villages only of Martlesham, Melton and Rushmere St Andrew were included in this total rather than their entire parishes, to reflect accurately the Core Strategy definition of Key and Local Service Centres.

future populations, particularly to encourage younger people to stay in the district and to address the needs of an ageing population.

- Strategic Policy SP27 Key and Local Service Centres, which states that housing development in these settlements will be permitted “*within physical defined limits or where there is proven local support in the form of small allocations of a scale appropriate to the size, location and characteristics of the particular community. An exception may also be made in respect of affordable housing in accordance with Policy DM1.*” This policy also promotes a mix of open market and affordable housing in order to help young and old people to stay in the local area.
- Development Management Policy DM1 Affordable Housing on Exception Sites, which states the District Council may exceptionally permit a small residential development of affordable housing on a site which abuts or is well-related to the physical limits boundary of a Key Service Centre, as long as such provision has been quantified within an area agreed by the District Council and which has regard to the Suffolk Coastal Local Housing Assessment, SHMA and any Parish/Community Led Plan; and
- Development Management Policy DM2 Affordable Housing on Residential Sites, which states that 1 in 3 units should be affordable in developments of three or more additional housing units in Key Service Centres such as Wickham Market, unless its provision is not required due to lack of identified local need or where site conditions, suitability and economics prove otherwise.

Suffolk Coastal District Local Plan: Site Allocations and Area Specific Policies Development Plan Document (Proposed Submission Document, April 2016)

81. The emerging Site Allocations Document is intended to implement the strategic objectives and policies as set out in the adopted Local Plan. Table 2 of the Site Allocations Document sets out the updated housing contributions and indicates that Wickham Market should seek to provide 116 new homes over the Local Plan period of 2010-2027. Of this 116, 43 have already been completed and 73 had been given permission or a resolution to grant permission. No further allocation has been proposed for Wickham Market in this draft document.

DCLG Household Projections

82. 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, particularly in cases where neighbourhood planners are able to derive a dwellings target from the Core Strategy, as is the case at Wickham Market.

83. Nevertheless, an exercise extrapolating the household projections to Wickham Market may still be helpful in determining number of houses to plan for within the neighbourhood plan.

84. The most recent (2012-based) household projections were published in February 2015⁹, and extend to 2037. Although population projections are only available at a local authority level, a calculation of the share for Wickham Market is nevertheless possible for the household projections based on the neighborhood’s household numbers in 2010 in line with the start of the plan period.

85. At the 2011 Census, Suffolk Coastal had 53,558 households and Wickham Market had 959 households, or 1.79% of the Suffolk Coastal total.

⁹ See 2012-based DCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

86. In the 2012-based household projections, the projection for 2036 is for 64,800 households in Suffolk Coastal (rounded to the nearest 100). Assuming it continues to form 1.79% of the District total, Wickham Market's new total number of households would be 1,160 and therefore 201 new households would have formed in Wickham Market between 2011 and 2036.
87. The number of households does not however, equate precisely to the number of dwellings, as in most locations, the latter is usually slightly higher due to factors including second homes. At the 2011 Census, Wickham Market had 959 households but 1,006 dwellings. This gives a ratio of 0.953 households per dwelling. In the case of Wickham Market then, a projection of 201 new households translates into a need for 211 new dwellings by 2036.
88. Since the 2012-based household projections were produced, the mid-2014 population estimates have since become available which give the actual number of people in Suffolk Coastal at that point. This means the difference between the actual and projected number of dwellings can be taken into account in future projections. As the difference between the 2014 estimates and the 2012 projections of population in the case of Suffolk Coastal is very small (just 24 people), the rebased household projections-derived dwelling figure for Wickham Market remains 211 dwellings.
89. This projection is an entirely unconstrained, theoretical figure comprising a relative proportion of the overall projected increase, and thus, does not take into account political, economic, demographic or any other drivers that might have influenced, or may in future influence, the Core Strategy distribution across the District and hence the difference between this figure and the Core Strategy-derived figure.

Dwelling growth 2001-2011

90. Dwelling growth for Wickham Market between 2001 and 2011 comprised an increase from 994 to 1,006 dwellings. This equates to a ten-year growth of 12 dwellings, or 1.2 dwellings per year.
91. If this rate of completion were to be projected forward for the period to 2011 to 2036, a dwelling number of $(25 \times 1.2 =)$ 30 dwellings would be the result.

Dwelling growth since 2011

92. Suffolk Coastal District Council has provided us with the number of dwellings completed in Wickham Parish since the 2011 Census (up to 31st March 2016). Since 2011, 101 dwellings have been completed in the parish, of which 65 were at Wickham Place and 6 at Dallinghoo Meadow in relatively large scale developments. Taking these two larger schemes aside, we can say that 30 dwellings have been completed that represent the 'natural' growth of Wickham Market. This equates to 6 dwellings per year. If this rate of completion was projected for the period 2011 to 2036, a dwellings target of $(25 \times 6 =)$ 150 dwellings would be the result.

Housing Register findings as at 9th June 2016

93. Up to date information on the local Housing Register taken from 9th June 2016 was provided by the District Council. It shows that of the 65 applicants on the Housing Register who have a current address in Wickham Market, 89% of demand is for 1 and 2-bed properties whilst the current general needs rented affordable housing stock is predominantly 2-bed. There are also 32 other affordable housing units in Wickham Market which are sheltered housing. The findings point to a current housing need in Wickham Market, particularly for 1-bed rental properties.

Characteristics of Population

94. Through analysis of Census 2001 and 2011 data, we have investigated how the population of neighbourhood plan area differs from that of the Suffolk Coastal and England averages.¹⁰
95. Figure 8 gives the population and number of households in Wickham Market, Suffolk Coastal and England, as recorded in the 2011 census. Wickham Market had a population of 2,156, and an average household size of 2.2 persons. This is smaller than both the local and national averages.

Figure 8: Population and household size in Wickham Market, 2011¹¹

	Wickham Market	Suffolk Coastal	England
Population	2,156	124,298	53,012,456
Households	959	53,558	22,063,368
Household size	2.2	2.3	2.4
Dwellings	1,006	58,330	22,976,066

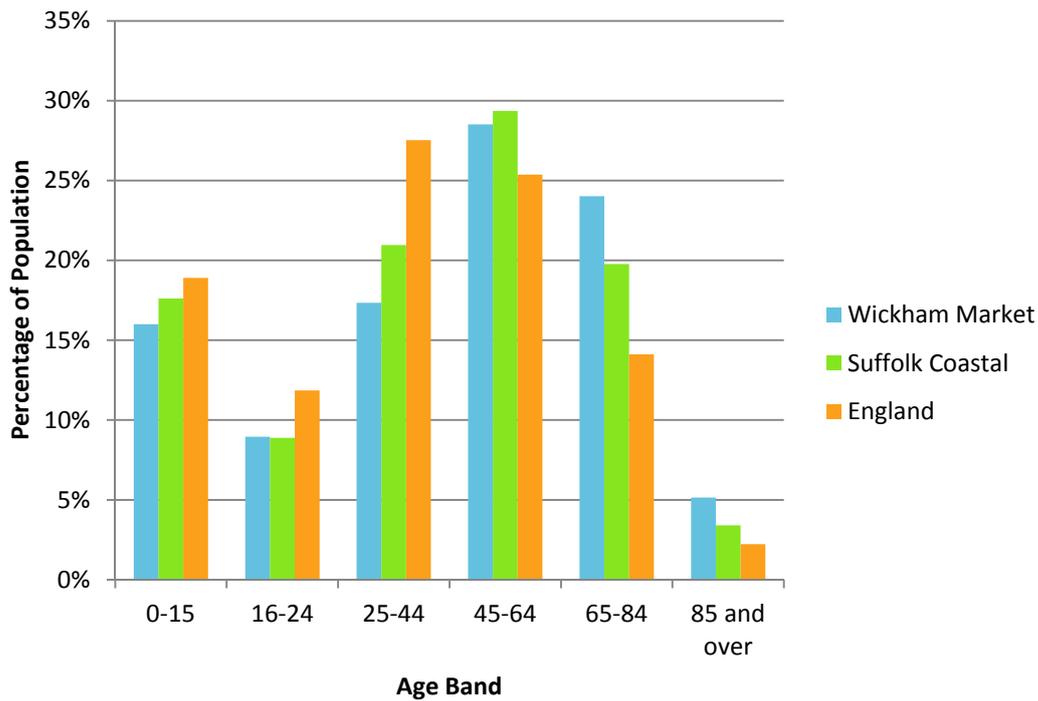
Source: ONS, Census 2011. AECOM calculations

96. As illustrated in Figure 9 below, the largest age group in Wickham Market is ages 45-64, at 29%. This is marginally lower than the figure for Suffolk Coastal (29%) and higher than that of England (25%). The proportion of all age groups younger than 44 is lower in Wickham Market and Suffolk Coastal than England averages, whilst the proportion of people aged 65 and over is higher in Wickham Market (22%) than in Suffolk Coastal (20%), and significantly higher than in England (16%) suggesting a population ageing faster than both local and national averages.

¹⁰ Please note that for demographic statistics, those households occupying caravans cannot be stripped out of the data. However, as the majority of the caravans in the parish in Census 2011 were unoccupied (76 out of 102, or 75%) the 26 households in caravans, most of them likely 1 or 2 person households, are unlikely to have a significant impact on the statistics (given the total population of 430 persons). However, to allow for any distorting effect, we have inserted appropriate caveats at relevant points in our statistical analysis to allow for the effects of the caravans- this is particularly the case for statistics on dwellings (e.g. room sizes) rather than residents, as the unoccupied caravans are included within the dwellings category, thus making the distorting effect potentially greater without adjustment.

¹¹ ONS, Census 2011, Population Density (QS102EW); Household Size, 2011 (QS406EW).

Figure 9: Age structure in Wickham Market¹²



Source: ONS, Census 2011. AECOM calculations

97. Figure 10 shows the rate of change of the population by age band. It shows that the proportions of people in the 65-84 and 85 and over age groups have undergone a considerable increase in Wickham Market between 2001 and 2011. The steep declines in the 0-15 and 25-44 age groups, and low growth in the 16-24 age group, are different from the trends in Suffolk Coastal and England.

Figure 10: Rate of change in the age structure of Wickham Market population, 2001-2011¹³

Age group	Wickham Market	Suffolk Coastal	England
0-15	-16.5%	-1.8%	1.2%
16-24	4.7%	14.5%	17.2%
25-44	-38.5%	-10.7%	1.4%
45-64	5.7%	16.2%	15.2%
65-84	17.6%	15.6%	9.1%
85 and over	16.2%	23.5%	23.7%

Source: ONS, Census 2001 and 2011. AECOM calculations

¹² ONS, Census 2011, Age Structure (KS102EW)

¹³ ONS, Census 2011, Age Structure (KS102EW); ONS, Census 2001, Age Structure (KS02)

98. Figure 11 shows that Wickham Market is home to a significantly lower proportion of people born outside the UK than Suffolk Coastal as a whole, and both are much lower than the England average. By extension, both Wickham Market and Suffolk Coastal have significantly higher proportions of UK-born residents than the UK as a whole.

Figure 11: Country of birth and length of residence

Place of birth	Population breakdown		Wickham Market	Suffolk Coastal	England
Born in the UK	Total		96.4%	93.9%	86.2%
Born outside the UK	Total		3.6%	6.1%	13.8%
	EU		1.8%	2.4%	3.7%
	Other		1.8%	3.7%	9.4%
	Length of residence	Less than 2 years	0.1%	0.5%	1.8%
		2-5 years	0.2%	0.8%	2.2%
5-10 years		0.3%	1.0%	2.9%	
10 years or more		3.0%	3.9%	7.0%	

Source: ONS, Census 2011. AECOM calculations

99. Of the 3.6% of Wickham Market residents who were born overseas, the majority have lived in the UK for ten years or more, indicating no recent influx of international migrants.

Household Type

100. Figure 12 shows that in recent years Wickham Market has seen pronounced decreases in the numbers of households with 5 or less rooms, whilst households with 7 rooms are the only category to witness growth above local and national averages.

Figure 12: Rates of change in number of rooms per household in Wickham Market, 2001-2011¹⁴

Number of Rooms	Wickham Market	Suffolk Coastal	England
1 Room	-100.0%	-25.3%	-5.2%
2 Rooms	-44.4%	8.0%	24.2%
3 Rooms	-3.1%	20.0%	20.4%
4 Rooms	-6.4%	-2.4%	3.5%
5 Rooms	-7.7%	-2.7%	-1.8%
6 Rooms	4.9%	5.8%	2.1%
7 Rooms	33.8%	20.6%	17.9%
8 Rooms or more	8.9%	30.2%	29.8%

Source: ONS, Census 2001 and 2011. AECOM calculations

101. The PPG states that factors such as overcrowding, concealed and shared households, homelessness and the numbers 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.

102. Whilst Figure 13 overleaf seems to demonstrate that housing in Wickham Market is gradually becoming more overcrowded with growth in the 1.0 to 1.5 persons per room categories significantly above the local average, drilling further down into the figures shows that the category 'over 1.0 and up to 1.5 persons per room' is actually an extremely small number (a change from 6 to 8 people between 2001-2011¹⁵). This therefore suggests that overcrowding is not in fact increasing at a problematic rate in the area.

¹⁴ ONS, Census 2011, Number of Rooms (QS407EW); ONS, Census 2001, Number of Rooms (UV57)

¹⁵ ONS, Census 2011, Tenure - Households (QS405EW)

Figure 13: Trends in number of persons per room in Wickham Market, 2001-2011¹⁶

Persons per room	Wickham Market	Suffolk Coastal	England
Up to 0.5 persons per room	2.3%	11.2%	7.9%
Over 0.5 and up to 1.0 persons per room	-6.9%	2.3%	7.0%
Over 1.0 and up to 1.5 persons per room	33.3%	-0.8%	27.3%
Over 1.5 persons per room	0.0%	-12.3%	2.5%

Source: ONS, Census 2001 and 2011. AECOM calculations

Household Tenure

103. 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.

Figure 14: Tenure (households) in Wickham Market, 2011¹⁷

Tenure	Wickham Market	Suffolk Coastal	England
Owned; total	64.7%	73.2%	63.3%
Shared ownership	0.6%	0.4%	0.8%
Social rented; total	24.3%	11.3%	17.7%
Private rented; total	9.0%	13.6%	16.8%

Source: ONS, Census 2011. AECOM calculations

104. Figure 14 above shows that the level of owner occupation in Wickham Market is significantly lower than the Suffolk Coastal average, yet slightly above the England average. The proportion of socially rented housing (rented from the Council or a Registered Social Landlord), by contrast, is much higher in Wickham Market than Suffolk Coastal and England as a whole. In Wickham Market there are proportionately fewer privately rented units than observed across local or national markets.
105. Figure 15 overleaf shows how tenure has changed in Wickham Market between the 2001 and 2011 Censuses. Home ownership in the area has remained more or less stable, which contrasts with the modest growth across Suffolk Coastal as a whole. Note also how shared ownership (which can be an indication of a lack of affordable housing) has significantly increased across Suffolk Coastal but decreased in Wickham Market. Social rentals in Wickham Market and Suffolk Coastal have increased whilst the national trend, by contrast, shows a small decline. Although the increases in private rentals have been proportionately large in Wickham Market, they fall far short of the increases seen at local authority and national level.

¹⁶ ONS, Census 2011, Persons Per Room - Households (QS409EW); ONS, Census 2001, Persons per Room - Households (UV58)

¹⁷ ONS, Census 2011, Tenure - Households (QS405EW)

Figure 15: Rate of tenure change in Wickham Market, 2001-2011

Tenure	Wickham Market	Suffolk Coastal	England
Owned; total	0.5%	7.1%	-0.6%
Shared ownership	-25.0%	77.3%	30.0%
Social rented; total	5.4%	4.0%	-0.9%
Private rented; total	36.5%	56.4%	82.4%

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

106. House price data from Rightmove¹⁸ shows that as of March 2016, the average house price in Wickham Market was £210,264. This is significantly lower than the overall Suffolk average of £241,505. Data from Rightmove also suggests that Wickham Market was on average more expensive than nearby Rendlesham (£193,867), but was cheaper than Woodbridge (£340,207) and Framlingham (£270,740).
107. The Zoopla heat map similarly demonstrates that Wickham Market has a low Zed-Index suggesting a low to median house price in the wider area.¹⁹

¹⁸ <http://www.rightmove.co.uk/house-prices.html>

¹⁹ <http://zoop.la/xcKiKV>

Local Household Composition

108. Figure 16 shows that the proportion of single person households in Wickham Market is slightly higher than the Suffolk Coastal and England averages, whilst the proportion of households in family occupancy is lower than both the Suffolk Coastal average and slightly higher than the England average.

Figure 16: Household composition (by household) in Wickham Market, 2011²⁰

		Wickham Market	Suffolk Coastal	England
One-person household	Total	32.3%	29.2%	30.2%
	Aged 65 and over	20.8%	15.4%	12.4%
	Other	11.6%	13.8%	17.9%
One family only ²¹	Total	63.5%	66.6%	61.8%
	All aged 65 and over	13.9%	12.9%	8.1%
	With no children	19.7%	20.8%	17.6%
	With dependent children	21.2%	24.5%	26.5%
	All children non-dependent	8.8%	8.4%	9.6%
Other household types	Total	4.2%	4.2%	8.0%

Source: ONS, Census 2011. AECOM calculations

109. The proportion of single person households aged 65 and over in Wickham Market is higher than both the Suffolk Coastal and England averages, which reflects the age profile of the town.
110. The plan area is home to a slightly lower proportion of families with no children relative to the Suffolk Coastal average. The proportion of households with dependent children is lower than local and national averages. The proportion of households where all children are non-dependent is very similar to the local average.

²⁰ ONS, Census 2011, Household Composition - Households (QS113EW)

²¹ This includes: married couples, cohabiting couples, same-sex civil partnership couples and lone parents.

111. Figure 17 shows how household composition changed in the 10 years between the 2001 and 2011 Censuses. Overall, there were only nominal changes in single person households and single family households in the plan area relative to the marked increases at local and national levels.
112. In Wickham Market, there have been increases in both types of household for residents aged 65+. This is to be expected considering the age structure statistics for Wickham Market, which indicates an ageing population.

Figure 17: Rates of change in household composition in Wickham Market, 2001-2011²²

Household type		Percentage change, 2001-2011		
		Wickham Market	Suffolk Coastal	England
One-person household	Total	0.6%	9.4%	8.4%
	Aged 65 and over	2.6%	1.4%	-7.3%
	Other	-2.6%	20.1%	22.7%
One family only	Total	-0.2%	8.6%	5.4%
	All aged 65 and over	10.8%	6.0%	-2.0%
	With no children	15.2%	14.6%	7.1%
	With dependent children	-8.6%	3.6%	5.0%
	All children non-dependent	-19.2%	14.2%	10.6%
Other household types	Total	11.1%	18.6%	28.9%

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

²² ONS, Census 2011, Household Composition - Households (QS113EW); ONS, Census 2001, Household Composition - Households (UV65)

113. Figure 18 shows that Wickham Market experienced a slight decrease in its population and nominal growth in the number of households over the period 2001-2011 which contrasts significantly with local and national trends. At the same time, there was a decrease in household size in Wickham Market. The decrease in population without a corresponding decrease in numbers of households is indicative of a growing number of under-occupied dwellings, probably as a result of an ageing demographic.

Figure 18: Change in household numbers and size in Wickham Market, 2001-2011

Key indicator	Percentage change, 2001-2011		
	Wickham Market	Suffolk Coastal	England
Population	-2%	8.0%	8%
Households	1%	9.2%	8%
Household size	-3%	-1.2%	0%

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

114. Figure 19 shows that the proportion of dwellings in Wickham Market that are detached is significantly lower than the local average, but higher than the national average. The proportion of semi-detached housing in Wickham Market is higher than local and national averages, whilst there are fewer terraced dwellings than both the local and national averages. The proportion of flats is lower than the both local and national averages.

Figure 19: Accommodation type (households), 2011

Dwelling type		Wickham Market	Suffolk Coastal	England
Whole house or bungalow	Detached	29%	43.6%	22%
	Semi-detached	44%	29.1%	31%
	Terraced	19%	16.9%	25%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	5%	6.9%	16%
	Parts of a converted or shared house	2%	1.9%	4%
	In commercial building	2%	0.9%	1%

Source: ONS, Census 2001 and 2011. AECOM calculations

115. 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. Figure 20 shows that there are only nine 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 the case in Wickham Market to a certain extent. The proportion of concealed families in Wickham market is slightly lower than that of England, but is higher than the Suffolk Coastal proportion, where number of persons per household is higher.

Figure 20: Concealed families in Wickham Market, 2011²³

Concealed families	Wickham Market	Suffolk Coastal	England
All families: total	639	37,472	14,885,145
Concealed families: total	9	349	275,954
Concealed families as % of total	1.4%	0.9%	1.9%

Source: ONS, Census 2001 and 2011. AECOM calculations

116. Official statistics do not clarify the overlap, if any, between the Wickham Market element of the Suffolk Coastal housing waiting list and the stated number of concealed families locally.

²³ NOMIS, LC1110EW - Concealed family status by family type by dependent children by age of Family Reference Person (FRP)

Economic Activity

117. Figure 21 shows that Wickham Market's proportion of economically active population is lower than both the Suffolk Coastal and England averages. This is largely due to a lower proportion of full time employees in Wickham Market compared to Suffolk Coastal, and a lower proportion of part time employees compared to the England average.
118. Proportions of retired people are slightly higher than the local average and significantly higher than the national average. There is little difference from local and national averages in terms of the proportion of non-economically active individuals looking after home or family. The proportion of individuals who are long-term sick/disabled is higher than the local average and lower than the national average.

Figure 21: Economic activity in Wickham Market, 2011²⁴

Economic category		Wickham Market	Suffolk Coastal	England
Economically active	Total	65.7%	69.1%	69.9%
	Employee: Full-time	33.8%	36.2%	13.7%
	Employee: Part-time	16.3%	15.9%	38.6%
	Self-employed	9.6%	11.8%	9.8%
	Unemployed	3.5%	2.7%	4.4%
	Full-time student	2.5%	2.4%	3.4%
Economically inactive	Total	34.3%	30.9%	30.1%
	Retired	21.7%	19.4%	13.7%
	Student	3.4%	3.2%	5.8%
	Looking after home or family	4.5%	3.9%	4.4%
	Long-term sick or disabled	3.3%	2.6%	4.1%
	Other	1.4%	1.7%	2.2%

Source: ONS, Census 2001 and 2011. AECOM calculations

²⁴ ONS, Census 2011, Economic Activity (QS601EW)

Figure 22: Rates of long-term health problems or disability in Wickham Market, 2011²⁵

Extent of activity limitation	Wickham Market	Suffolk Coastal	England
Day-to-day activities limited a lot	9.5%	7.9%	8.3%
Day-to-day activities limited a little	13.2%	10.6%	9.3%
Day-to-day activities not limited	77.3%	81.5%	82.4%

Source: ONS, Census 2001 and 2011. AECOM calculations

119. The PPG advises taking account in housing need assessment of the number of people with long-term limiting illness. Figure 22 shows that the proportion of working-age residents of Wickham Market who are long-term sick or disabled is relatively high compared with the Suffolk Coastal region, and marginally higher than the England averages. The proportion whose day-to-day activities are not limited is in turn lower than the Suffolk Coastal and England averages.
120. Figure 23 shows that Wickham Market residents travel slightly further to work than both the Suffolk Coastal and England averages. The average distance travelled to work from Wickham Market is 18.9km, compared to 17.2km and 14.9km for Suffolk Coastal and England respectively. Wickham Market has a lower proportion of residents travelling less than 10km to work than the local and national averages, but the proportion of residents travelling between 10 and 30km is much higher than local and national averages. Longer journeys over 30km are slightly above the local and national averages. This indicates a higher proportion of the Wickham Market working population do not work locally, but rather commute to larger nearby settlements such as Ipswich or Felixstowe.
121. Note also the proportion of people working mainly at home in both Wickham Market and Suffolk Coastal does not deviate very far from the national average.

Figure 23: Distance travelled to work, 2011²⁶

Location of work	Wickham Market	Suffolk Coastal	England
Less than 10km	38%	46.3%	52%
10km to less than 30km	32%	22.5%	21%
30km and over	10%	9.2%	8%
Work mainly at or from home	12%	14.1%	10%
Other	7%	7.9%	9%

Source: ONS, Census 2011, AECOM calculations

²⁵ ONS, Census 2011, Long-Term Health Problem or Disability (QS303EW)

²⁶ NOMIS, QS702EW - Distance travelled to work

Information from local estate agents

122. The Parish Council provided AECOM with the contact details of a local estate agent, Clarke & Simpson. Clarke & Simpson has in-depth knowledge of the local housing market that can be used to test and supplement our conclusions based on Census and local authority level data. The following information was sourced from Oliver Johnson of Clarke & Simpson in May 2016.
123. Clarke & Simpson confirmed that Wickham Market is considered to be a sought after village in the Suffolk Coastal area. Property is considered to be better value than the more expensive locations of Woodbridge, or Ipswich.
124. The most active sector of the market looking to buy in Wickham Market is the more affluent, retired buyers, as seen at the newly completed development of 65 two to five bed houses and bungalows at Wickham Place. The majority of buyers in this development tended to be over-55s who were downsizing to houses with smaller gardens (not necessarily smaller houses) and the bungalows were sold quickly. The new development of six houses at Dallinghoo Meadows was also marketed as 4-bed detached properties.
125. The rental property market appears strong in Wickham Market, particularly with people who cannot get on the property ladder or the more affluent, retired people who have chosen to rent rather than own.
126. Clarke & Simpson confirmed that houses and bungalows were most in demand from buyers rather than flats. The estate agent noted that specialist housing for older people, such as those for elderly suffering from long term limiting health problems, was more likely to be located in more accessible, larger settlements such as Woodbridge rather than Wickham Market.
127. We also independently sought feedback from a second local estate agent, Sharon Edevane of Abbotts Countrywide in July 2016. Abbotts Countrywide confirmed that whilst there is indeed demand for the types of larger houses and bungalows as seen at Wickham Place (particularly amongst retirees who were downsizing), there is also a real need for mid-range family houses in the £200,000-£300,000 price bracket with 3-4 bedrooms. In their experience, local families tend to move out to nearby settlements such as Rendlesham which are considered better value where 4-bed properties are around the £250,000 mark.

Information from Wickham Market Parish Plan

128. Whilst PPG guidance suggests that plan makers focus on secondary data such as the Census and national surveys, it is still useful to consider any surveys that have been carried out more locally, such as the Parish Plan survey, to inform our assessment.
129. Wickham Market Parish Council recently carried out a survey which received 200 responses covering a range of topics including housing. The survey showed that the majority of respondents felt that they did not require alternative accommodation now or in the next 10 years. Of those that did require alternative accommodation, bungalows were the preferred type of housing, suggesting an ageing population.
130. When asked what type of new housing should be built, the overwhelming priorities are perceived to be homes for people with a local connection, small family homes (2-3 bed), low cost affordable housing, and homes for the elderly. Small scale housing development was welcomed by 55% of 195 respondents to the question 'What type of new housing would be acceptable development in Wickham Market?' which respondents may have considered to more in keeping with the existing parish/village character and scale of housing, compared with the recent, larger scale developments such as Wickham Place.

4 Conclusions and recommendations

Overview

131. 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.
132. In this first section of this chapter we make recommendations on the overall quantum of housing growth required.
133. 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.
134. 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 factors²⁷ that the Parish Council 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 Suffolk Coastal.

Quantity of Housing Needed

135. To recap, we have identified four separate projections of dwelling numbers for Wickham Market between 2011 and 2036 based on:
 - A figure derived from Suffolk Coastal Core Strategy up to 2027 and DCLG household projections 2027-2036, disaggregated to Wickham Market, (which gives a total of **133 dwellings**, or 5.3 per year);
 - The Government's 2012-based household projections only, extrapolated to Wickham Market, translated from households to dwellings (which gives **211 dwellings**, or 8.4 per year);
 - A projection forward of dwelling completion rates 2001-2011 (which gives **30 dwellings**, or 1.2 per year); and
 - A projection forward of dwelling completion rates since 2011 (which gives **150 dwellings**, or 6 per year).
136. This gives a range from 30 to 211 dwellings over the period 2011 to 2036. The DCLG projection is highest as this is driven by demand and is therefore unconstrained by supply-side factors. The second highest is the dwelling completions 2011-2016 derived which is influenced by the delivery of larger sites in recent years, followed by the Local Plan-derived target which builds in supply as a constraint (up to 2027 at least). The dwelling completions 2001-2011 derived target is the lowest, driven by historically low levels of development.
137. We have summarised the findings of the data gathered in Chapter 3 above in Figure 25 below. The source for each factor with particular relevance to the neighbourhood is shown, together with an 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.
138. 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

²⁷ These factors are also referred to as 'indicators' in the PPG.

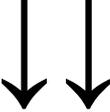
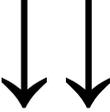
impact', two arrows 'stronger impact' and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.

139. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Parish Council 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.
140. 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.
141. 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.
142. As such, Figure 25 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.
143. 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.
144. 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 24 and the market factors presented in Figure 25, and taking into account our own knowledge and experience of housing need at neighbourhood plan level.

Figure 25: Summary of factors specific to Wickham Market 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
<p>Affordability and house prices</p>	<p>SHMAU, Census, Rightmove, Zoopla, Estate Agents</p>	<p style="text-align: center;">↓</p>	<p>On the one hand, Suffolk Coastal is less affordable than the UK as a whole, with house prices growing faster than the national average. This is especially the case for entry level market housing which remained high even in recession indicating a relatively inelastic demand for lower-cost housing, potentially as a result of the area's popularity as a retirement destination and the inclination for elderly households to downsize as they get older.</p> <p>However, both Rightmove and Zoopla suggest that Wickham Market is a low to median price housing area, with lower cost housing to the east and expensive properties in Woodbridge nearby.</p> <p>In conclusion, though demand for housing will continue to be high across the district, Wickham Market is a relatively low demand area and therefore affordability in Wickham Market is, on balance, less severe than Suffolk Coastal as a whole.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Age structure of population	SHMAU, Estate Agents, Census	↑	<p>Wickham Market has an ageing population – more so than Suffolk Coastal and the Ipswich Housing Mark area. As previously indicated, it is likely that older households provide consistent demand for many types of housing in the area – both for larger homes as they first move into the area, but then, according to a local estate agent, as they age they will downsize to smaller dwellings.</p> <p>The SHMAU projects a very sharp increase in elderly populations in the Ipswich HMA – 63% over 20 years. It is probable that a slightly higher than average proportion of these increases will be concentrated in Wickham market according to trends in the census that depict Wickham Market as an increasingly ageing area. There are, on the other hand, parts of Suffolk Coastal with greater demand from the elderly including coastal settlements and larger towns, such as Woodbridge, that can offer specialist care for activity limiting illnesses.</p> <p>We can therefore anticipate some additional demand for both large, small, and submarket and care housing types for the elderly.</p>
Dwelling occupancy	SHMAU, Census	↔	<p>Long term vacant dwellings in Suffolk Coastal are on average witnessing a gradual downwards trend demonstrating unmet increasing demand in the region. However, census statistics specific to Wickham Market indicate that rates of under occupation relating to persons per bedroom are decreasing at a slower rate than Wickham Market as a whole.</p> <p>There are high levels of concealed households in the neighbourhood plan area relative to the district average. This evidence does indicate that there are numerous instances where supply is too low in aggregate.</p> <p>In summary, whilst there is evidence of under-occupation, this is a fairly typical for rural parts of the district. Relatedly, there are not significant deviations from the district averages in the Wickham Market.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Impact of second homes	Census, SHMAU		<p>Second homes in Suffolk Coastal are significantly greater than in neighbouring areas at 4.6% of total housing supply. However, dwelling occupancy levels in Suffolk Coastal are significantly higher than across the district - 95% of dwellings occupied in Wickham Market compared to 91% in the Suffolk Coastal. We can say in confidence that according to common trends, second homes more popular by the sea and in turn less of a salient issue in Wickham Market.</p>
International and UK in-migration rate	Census		<p>There are very few international migrants in Wickham Market, and census sources indicate that the proportion of this population group is not demonstrating any significant inclinations to increase or decrease. We can therefore anticipate this that international migrants will remain stable as a proportion of the population in upcoming years.</p> <p>Regarding more general migration trends, the census indicates that population and household growth are significantly lower in Wickham Market than in the Suffolk Coastal district. This cannot be solely explained by lack of homebuilding in Suffolk Coastal as the population has actually decreased by 2.2% in the area despite additional dwellings.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Recent dwelling supply	Suffolk Coastal District Council dwellings completion list, Census	↑	<p>The number of dwellings in Wickham market grew by 12 units between 2001 and 2011 from 994 to 1,006. This equates to a 1.2% rate of dwelling growth which is a very low figure when in comparison to the district growth of 9.7%. There has however been stimulated growth in Wickham Market with 43 completions between 2011 and 2015, and an additional 58 on top of this figure from latest council recordings dated up to May 2016. In terms of dwelling rates of growth from 2001 to 2015, this equates to a 5.5% additional housing units, in comparison the district average of 13.1%.</p> <p>Ordinarily this would suggest two up arrows. Yet the recent 58 dwelling completions in 2016 suggest that supply is on its way to meeting demand after a long period of lack of development activity and therefore only one up arrow is appropriate.</p>

- 145. In conclusion, though many sources of evidence demonstrate a strong sustained demand for a variety of housing types in the Suffolk Coastal District, demand is relatively low in Wickham Market according to affordability, migration evidence. Of the demand in Wickham Market, we can hypothesize with reasonable confidence that a large portion of demand is driven and will continue to be driven by elderly populations seeking a broad spectrum of retirement housing.
- 146. Evidence relating to second homes demonstrates that lack of housing supply due to vacancy or allocation of housing stock is not a significant issue in Wickham Market relative to the district.
- 147. A lack of new housing completions in Wickham Market between 2001 and 2011 led to conditions where the rates of projected housing completion would fall far short of projected housing demand. More recently, however, there has been a significant influx of new housing completions in Wickham Market, with 101 homes being completed since 2011 (May 2016 at the time of writing).
- 148. If we consider that unconstrained DCLG housing projection leads to a derived need of 211 dwellings for Wickham Market between 2011 and 2036 and that on balance, Wickham Market has a relatively low housing need with Suffolk Coastal, we can estimate with reasonable confidence that the Wickham Market forecast demand will align more closely with the extended Core Strategy projection of a need for 133 homes up to 2036.
- 149. Wickham Market has already seen 101 homes completed between 2011 and 2016. This leaves a residual demand range of 32 to 110 dwellings up to 2036. Based on Wickham Market's social and economic characteristics, the adjusted demand for the neighbourhood area is likely to lie in the mid-lower end of this range. As housing demand is dynamic across a housing area, and Wickham Market lies within a relatively strong demand housing area, the

neighbourhood plan steering committee may set a justified housing target towards the higher end of this range should they determine it to be significant.

150. At present homebuilding rates without provisions for one off large schemes measured from 2011 to 2016, Wickham Market will have completed 505 additional dwellings by 2036. This is far above the DCLG household formation projections so can be confidently justified to be an inappropriate target. If, however, we make adjustments to our calculations and record instead the natural growth, we end up with a 2011 to 2036 dwelling formation figure of 150, or a requirement for an additional 49 homes over the 2016-2036 neighbourhood plan period once we have taken into account what has recently been built. Considering previous conclusions, a target of around 50 homes seems reasonable and due to closely reflecting the natural growth in Wickham Market, indicates that demand and supply may largely be in equilibrium.
151. Recent completions since 2011 have all been 2-5 detached homes, with a predominance of 3-4 bed properties. This is not fully reflective of the spectrum of the demand for the area which is also likely to require entry level 1-2 bed terraced or semi-detached housing, and a wider offering of facilities for retired populations. It would be reasonable to emphasize that the residual 49-110 units of housing demand between the DCLG Household Projections and completed housing supply should reflect the specific characteristics of population need (detailed below) if the Neighbourhood Planning Steering Committee consider it appropriate.

Characteristics of housing needed

152. Figure 26 overleaf 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 26: Summary of local factors specific to Wickham Market with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
Affordable housing	SHMAU, Suffolk Coastal Local Plan, Census, Estate agents	<p>Relatively high weekly earnings in the Suffolk Coastal area, as well as the demand for second homes, suggests that lower income households may often be priced out of the private housing market. The SHMAU supports this as it suggests that prices in Suffolk Coastal increased between 2007-2011 unlike other parts of the Ipswich HMA – due to an overall shortage in supply, higher than average turnover of higher value properties, and spatial influences such as higher and increasing wages or larger properties.</p> <p>The social rented sector in Wickham is double that of Suffolk Coastal as a whole and higher than England figures and has grown at a slightly higher rate than Suffolk Coastal. This also supports the suggestion that there is likely to be heightened need for affordable housing in this area, although the developments at Coop New Build (6), Gospel Hall Close (2), Castell Close (2), Wickham Place (22) and the Oaks (2) have provided 34 affordable housing units since 2010.</p>	Affordable housing need is never evenly spread across a district. Based purely on the evidence in this report, we would suggest the Parish Council work with the District Council to consider how best to provide for local versus district needs for affordable housing provision, given recent developments and indications of demand.

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
Dwelling size	SHMAU, Suffolk Coastal Local Plan, Census, Estate agents, Housing Register	<p>Across the wider market, there is a general decline in household size due to its ageing population so there is demand for smaller properties including bungalows. The Local Plan also states an aspiration to encourage young people to stay in the district which tends to mean requiring smaller sized properties.</p> <p>Despite the decline in families and 25-44 year olds between 2001 and 2011, over this same period the Census showed a strong growth in homes with 6-8 or more rooms. Recent developments such as Wickham Place with its mix of two to five bed houses, supports the argument that a greater proportion of smaller properties in Wickham Market are required as demand has not been met. This view was supported by feedback from Abbots Countrywide.</p> <p>Furthermore, recent completions since 2011 have all been 2-5 detached homes, with a predominance of 3-4 bed properties. This is not fully reflective of the spectrum of the demand for the area which is also likely to require entry level housing.</p>	<p>The Census data suggests that a general trend towards smaller household sizes and therefore demand for smaller properties – on the other hand, market evidence suggests that larger properties are also in demand so there is a trend towards under-occupancy. It is therefore a policy choice for the Parish Council to decide on – whether to encourage a particular size of unit in the Neighbourhood Plan; or to leave it as per existing Local Plan Strategic Policy SP3 New Homes which encourages a mix of housing size.</p> <p>If smaller units are to be encouraged, they should be in the form of 2-bed semi-detached or terraced houses rather than flats. As an additional detail, there is loose evidence to suggest that parking may be a key composite of demand for housing in Wickham Market, which has commuting distances which are markedly higher than the regional average.</p>
Dwelling tenure	SHMAU, Census, Estate agents	<p>There is a high proportion of home ownership across the Suffolk Coastal area (75%) though it is lower in Wickham Market (65%), and this level has been relatively stable between 2001-2011.</p> <p>There is also a high level of social housing in Wickham Market – almost double that of Suffolk Coastal as a whole, as well as low levels of private rentals and shared ownership. Clarke & Simpson indicated that the private rental market is strong but the low levels of private rentals can also signal low supply.</p>	<p>The data suggests that there is a clear need to provide a greater range of housing tenures in Wickham Market. Whilst Local Plan Strategic Policy SP3 New Homes encourages a mix of tenures, we would recommend that the Parish Council seeks to work closely with the District Council to provide more owner occupied properties across the parish.</p>

Factor	Source(s) (see Chapter 3)	Relevant data gathered on factor	Conclusion
Dwelling type	SHMAU, Census	Across the wider market, houses are the most popular dwelling types. At Wickham Market, 92% of households in 2011 lived in whole houses/bungalows, with the majority in detached or semi-detached properties. The SHMAU estimates that 90% of demand would be for houses/bungalows by 2031 in Suffolk Coastal.	The majority of new homes to be provided (whether small or large) should be detached/semi-detached or even terraced, with some provision of bungalows, in line with Wickham Market's existing development pattern.
Housing for older people	SHMAU, Census	Suffolk Coastal has seen a larger increase in over 65 year olds between 2001 and 2011 with a significantly high proportion of retired people in Wickham Market than England as a whole, and higher than the rest of Suffolk Coastal. The SHMAU also projects disproportionately high rates of dementia across the whole Ipswich HMA which has implications on housing provision.	<p>In Wickham Market there is a need for smaller homes for the recently retired and/or over-55s to downsize into properties which are specifically designed to facilitate independent living for longer. These could include smaller detached/semi-detached/terraced homes with some bungalows.</p> <p>Specialist housing for elderly populations (i.e. those suffering from dementia) do have some scope for viability in Wickham Market. However, they may be better suited to locations with greater accessibility and larger catchment areas within Suffolk Coastal such as Woodbridge, based on viability, supply and demand factors.</p>

Recommendations for next steps

153. This neighbourhood plan housing needs advice has aimed to provide Wickham Market Parish Council with evidence on housing trends from a range of sources. We recommend that the Parish Council should, as a next step, discuss the contents and conclusions with Suffolk Coastal 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 Figures 25 and 26;
- Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the emerging development plan (here, the Suffolk Coastal District East 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 2015) and cross-referencing the findings of this assessment with Figure 26, 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 2014 Strategic Housing Land Availability Assessment.

154. As noted previously, recent changes to the planning system, as well as forthcoming changes to the National Planning Policy Framework as well as the implementation of the Housing and Planning Bill, will continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
155. 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).
156. 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.
157. Most obviously, this includes monitoring the status of the Suffolk Coastal Local Plan.
158. At the same time, monitoring ongoing demographic or other trends in the factors summarised in Figures 25 and 26 would be particularly valuable.

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