

Housing Needs Assessment

Willenhall Neighbourhood Forum

November 2015
Draft Report For Comment

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Executive Summary

TO BE COMPLETED FOLLOWING GROUP'S COMMENT

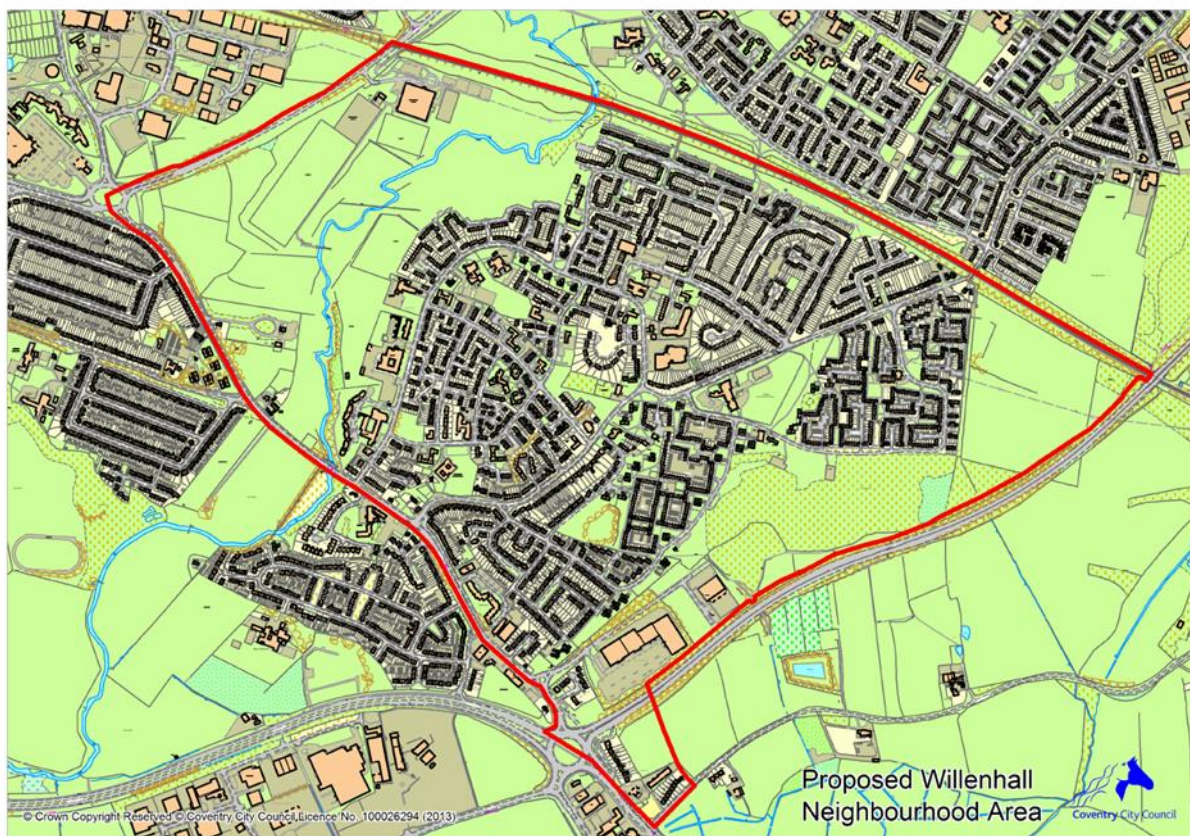
1 Introduction

Housing Needs Assessment in Neighbourhood Planning

1. The 2011 Localism Act introduced Neighbourhood Planning, allowing parishes or neighbourhood forums 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 (NPPG), 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 Willenhall Neighbourhood Forum understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.

Local Study Context

6. Willenhall is a largely residential area in the outer suburbs of Coventry, lying around three miles south-east of the city centre. The neighbourhood plan area forms the majority of the ward of Binley and Willenhall. The local authority is Coventry City Council.
7. The Neighbourhood Plan area is defined by the red line boundary shown on the map in Figure 1 below. The area is broadly defined by the railway line on the eastern boundary, the A46 to the south, B4110 to the west and the A4082 to the north.

Figure 1: Willenhall Neighbourhood Plan Area

Source: Coventry City Council

8. The plan area is close to the strategic road network and is just north of the A46, the Coventry ring road. The A46 leads directly to the M6 junction 2. The closest railway station is Coventry, about 2 miles to the north-east.
9. The Willenhall neighbourhood is considered for planning purposes part of the Coventry Housing Market Area. The Willenhall Neighbourhood Plan area is not contiguous with any ward boundaries, and for this reason we have used National Statistics divisions in this report when gathering data on the area. The statistical divisions we have used are known as Middle Super Output Areas (MSOAs) and Output areas (OAs). The MSA we have used is known as Coventry 039 and we have added to this Output areas E00048300, E00048304, E00048308, as together these correspond most closely to the Neighbourhood Plan area.

2 Approach

NPPG-Based Assessment

10. This objective and independent housing needs advice note follows the NPPG approach where relevant. This ensures our findings are appropriately evidenced. The NPPG 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

11. The neighbourhood forum has stated they are interested in the types of dwelling required as well as the quantity. In order to answer this question, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on the characteristics of the housing required.
12. To inform the quantum of housing required, we have calculated a range of four possible housing projections for the area over the proposed Neighbourhood Plan period¹ based on:
- Adopted and emerging Coventry City housing policy and evidence;
 - 2012-based Government household projections (released in February 2015); and
 - Two projections forward of recent dwelling completions in the area;

Each of these sources can help planners understand how the neighbourhood housing need translates into a numerical range of dwellings to be planned for.

13. A range of factors relevant to the plan area derived from a range of other demographic and economic sources can then be applied to this range to move the recommended figure of housing need up or down. We have summarised these factors in our concluding chapter.
14. Note that the neighbourhood plan period has not yet been officially determined. However, in order to provide a meaningful estimate of housing need over a given period, it is important to define that period. Neighbourhood plans, where possible, should always be aligned with the relevant local plan. In the case of Willenhall, this is Coventry's emerging Local Plan, which covers the period 2011 to 2031.
15. Given that much of the data interrogated by this report dates from Census 2011, this fits well with our plan period. Therefore, all estimates of housing need in this report cover the period 2011 to 2031, and as such all housing completions and permissions since 2011 can count towards the neighbourhood plan target.

Gathering and Using a Range of Data

16. The NPPG 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

¹ Throughout this report, we have assumed that the Neighbourhood Plan will cover the period 2011-2031, as explained in paragraphs 14-16 above.

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’.

17. 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’.*
18. 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 an NPPG-based approach is being used.
19. 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 local estate agent Alternative Estates helped ensure our conclusions were informed by a qualitative, local perspective.

Focus On Demand Rather Than Supply

20. 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 NPPG, 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.’*
21. For this reason, we advise that the conclusions of this report should be assessed against available capacity (including, for example, factors such as transport infrastructure, landscape constraints, flood risk and so on) as a separate and follow-on study².

Study Objectives

22. The objectives of this report can be summarised as:
- Collation of a range of data with relevance to housing need in Willenhall relative to Coventry and the wider area as a whole;
 - Analysis of that data to determine patterns of housing demand;
 - Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan’s housing policies.
23. The remainder of this report is structured around the objectives set out above:
- Chapter 3 sets out the data gathered from all sources; and

² Such an approach, clearly separating housing need assessment from dwelling capacity assessment, 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>)

- 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 Relevant Data

Local Planning Context

Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report, (November 2013)

24. The NPPG states that neighbourhood planners can refer to existing needs assessment prepared by the local planning authority as a starting point. As Willenhall is located within Coventry, we therefore turned to the Coventry and Warwickshire Joint Strategic Housing Market Assessment (2013, henceforth SHMA)³ which covers the housing market area and informs housing policies at a local authority level, including affordable housing policy⁴.
25. The SHMA draws upon a range of statistics including population projections, housing market transactions and employment scenarios to recommend an objectively-assessed housing need for Coventry. As such, it contains a number of points of relevance when determining the degree to which the housing needs context of the Willenhall Neighbourhood Plan area differs from the authority-wide picture.
26. The analysis commences with an appreciation of the baseline factors driving the local housing market. Figure 2 below replicates SHMA Table 1 and provides a summary of proposed housing in Coventry.

Figure 2: Summary of Proposed Housing in Coventry/Warwickshire.

	Planning Period	Housing Numbers Proposed	Homes per Annum	% Affordable Housing
Coventry*	2011 - 2028	11,373	669	25 – 35%
North Warwickshire	2006 - 2028	3,800	173	40%
Nuneaton and Bedworth	2010- 2028	7,900	439	25%
Rugby	2006 - 2026	10,800	540	33.3% - 40%
Stratford	2008-2028	9,500	475	35%
Warwick	2011 - 2029	12,300	683	40%
Total			2979	

*Coventry Core Strategy is withdrawn

Source: *Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report*

27. Figure 3 below replicates SHMA Table 14 and shows the profile of net housing completions during the period (2001-2012). The level has varied considerably from a peak of just under 4000 net additional housing completions across the HMA in 2006/7 to just over 1500 net additional housing completions in 2009/2010. Looking at the more recent period 2009-2012 for Coventry specifically, the average delivery was around 700 houses per year, reflecting wider market conditions.

³ Available online at http://www.tamworth.gov.uk/sites/default/files/planning_docs/L_examinationdocs/EX8-CoventryandWarwickshire-Joint-SHMA-2013.pdf

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

Figure 3: Net Completions 2001-2012

	2001/2	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	2009/10	2010/11	2011/12
Coventry	542	626	334	418	691	1,165	1,149	680	496	705	921
North Warwickshire	172	100	120	104	106	167	142	106	93	98	75
Nuneaton and Bedworth	515	646	601	442	682	308	303	301	146	331	239
Rugby	522	193	531	273	494	1429	701	360	412	420	328
Stratford-on-Avon	472	436	602	806	649	454	401	196	240	109	147
Warwick	844	946	709	702	733	465	580	410	177	77	144
HMA	3067	2947	2897	2745	3355	3988	3276	2053	1564	1740	1854

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

28. The SHMA also identifies the following key characteristics in Coventry:

- The highest social renting level within the Housing Market Area (HMA);
- A relatively 'narrow' housing offer, with a focus on smaller and cheaper properties. 71% of homes are in council tax bands A and B – 20% above the regional average;
- Flats and terraced homes make up 62% of the housing stock.
- It also has the highest level of private renting of the authorities within the HMA.

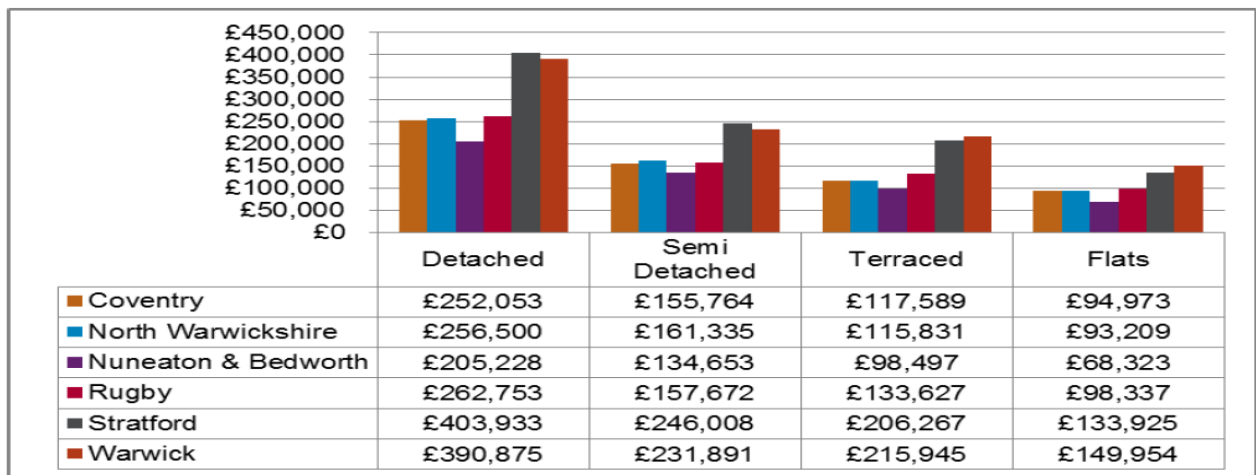
The SHMA report states that *“Whilst for the largest urban area we would expect a housing offer more strongly focused towards smaller properties and renting, the degree of focus on these in Coventry suggests a degree of imbalance within its housing stock and a need to diversify this.”*

“Of all the authorities within the HMA, only Coventry demonstrates a level of overcrowding above regional and national averages; albeit that we have seen some growth in overcrowding across the HMA which may provide some indication that household formation rates have been suppressed”.

- Coventry has shown the greatest increase in overcrowded households (in terms of the volume of overcrowded households); this is likely to partly be a reflection of the imbalance within the City's housing offer. The implication of this is that it could partly be addressed through a greater focus on delivering larger homes. It may also reflect growth within the student population within the City who are resident within the private rented sector. The level of private renting is highest in Coventry and private renting has increased more in Coventry than in any local authority in the HMA.

29. Figure 4 below replicates SHMA Figure 16 and shows Coventry has some of the lowest average house prices within the HMA.

Figure 4: Average House Prices by Type (October 2012 –March 2013)



Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

- 30. The SHMA includes data from local estate agents on what they see as the main features of the Coventry housing market, which is relevant for our purposes.
- 31. Agents felt that most market activity is from older households ‘downsizing’ although an increasing number of people across the HMA are moving house out of choice, rather than necessity.
- 32. Housing market conditions in Coventry were generally described as “slow and steady”. Some agents believe that activity has increased over the past year (at the time of the survey, this was 2013) but have seen limited house price growth. Market activity has been strongest in areas in ‘good’ catchment areas such as: Coundon, Finham and Earlsdon (all to the west of the city).
- 33. The agents generally believed that new-build first time buyer properties, in particular, are in short supply. First time buyer activity in Coventry was also considered to have been quite limited. New build activity was reported to be slow but is picking up.
- 34. The lettings market in Coventry was described as “very strong” and “much better than the sales market”. However, as it appears to be driven mainly by students at the Universities of Warwick and Coventry, this is considered less relevant to Willenhall, as the main areas of student demand are close to the universities on the west side of the city rather than the east.
- 35. The SHMA notes that population growth in the City (and the level of housing need associated with this) is particularly sensitive to migration, which has varied significantly over time.
- 36. Pressures on affordability within Coventry are less pronounced than in other parts of the HMA, and lower quartile house price to income ratios have fallen over the period since 2007. There is evidence that overcrowding is higher than in other parts of the HMA, but this is likely to be related (at least in part) to the level of multi-occupancy student households in the City, and to the structure of Coventry’s housing offer rather than specifically an indicator of market stress.
- 37. The SHMA concludes that Coventry as a city has a need for 1,179 net new homes per year.
- 38. The projections presented in the SHMA show affordable housing needs for each of the individual local authorities. This indicates Coventry has an affordable housing need of 477 units per year between 2013 and 2031, as illustrated in **Figure 5** below, which is an extract from SHMA Table 68. The net need in Coventry is far higher than the other local authorities within the HMA.

Figure 5: Net Need for Affordable Housing 2013-2031

	Coventry	North Warwickshire	Nuneaton & Bedworth	Rugby	Stratford-on-Avon	Warwick	HMA
Net Affordable Need per Annum	477	112	151	215	133	268	1,356

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

39. The SHMA provides strategic guidance on the mix of market housing required. It states that the evidence suggests a need to broaden the stock of larger family homes. Furthermore, there are potential regeneration benefits from diversifying the housing offer through delivery of larger homes which attract higher skilled/ paid workers to live in the City rather than commute in.
40. Figure 6 replicates Table 75 of the SHMA and identifies the recommended mix of market housing for Coventry.

Figure 6: Recommended Mix of Market Housing

	1-bed	2-bed	3-bed	4+ bed
Coventry	5-10%	25-30%	40-45%	20-25%
North Warwickshire	5-10%	34-40%	45-50%	5-10%
Nuneaton & Bedworth	5-10%	35-40%	45-50%	10-15%
Rugby	5-10%	25-30%	40-45%	20-25%
Stratford-on-Avon	5-10%	35-40%	40-45%	15-20%
Warwick	5-10%	25-30%	40-45%	20-25%
HMA	5-10%	30-35%	35-40%	15-20%

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

41. The SHMA also undertakes a similar (though slightly more complex) modelling exercise for types of affordable housing needed. On the basis of the evidence, it considers that the following mix of affordable housing at a City-wide level would be appropriate:
- 1-bed properties: 20-25%
 - 2-bed properties: 30-35%
 - 3-bed properties: 25-30%
 - 4+ bed properties: 15-20%
42. Turning to general characteristics of the population, the SHMA (Table 83) identifies that Coventry is expected to see a substantial increase in the older person population with the total number of people aged 55 and over expected to increase by 35% over just 20 years.

Figure 7: Projected Change in Population of Older Persons (2011- 2013)

Age group	Coventry	North Warwks	Nuneaton/ Bedworth	Rugby	Stratford-on-Avon	Warwick	HMA
Under 55	12.0%	-4.6%	5.6%	15.7%	-2.0%	9.3%	8.2%
55-64	16.5%	2.8%	7.3%	33.7%	7.2%	14.3%	13.9%
65-74	22.5%	28.9%	32.9%	46.0%	34.0%	36.6%	31.7%
75-84	27.4%	71.2%	68.8%	69.2%	70.3%	56.0%	53.8%
85+	76.4%	131.0%	145.8%	122.6%	140.4%	105.9%	110.8%
Total	15.4%	7.3%	14.5%	26.2%	13.2%	17.3%	15.9%
Total 55+	25.8%	32.1%	36.1%	51.9%	39.5%	37.6%	35.3%

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

43. The SHMA also identifies a net requirement for around 3,500 units of Extra Care Housing for Coventry up to 2031. However, the current supply as shown below totals only 597.

Figure 8: Net Need for Specialist (Extra-Care) Housing

Area	Total need (by 2031)			Supply			Net need (by 2031)		
	Market	Afford-able	Total	Market	Afford-able	Total	Market	Afford-able	Total
Coventry	3,067	1,022	4,089	0	597	597	3,067	425	3,492
North Warwickshire	893	298	1,190	0	0	0	893	298	1,190
Nuneaton & Bedworth	1,681	560	2,241	0	10	10	1,681	550	2,231
Rugby	1,438	479	1,918	0	45	45	1,438	434	1,873
Stratford-on-Avon	2,294	765	3,058	18	46	64	2,276	719	2,994
Warwick	1,859	620	2,479	21	21	42	1,838	599	2,437
HMA	11,232	3,744	14,976	39	719	758	11,193	3,025	14,218

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report

SHMA Caveats

44. It is important to remember that there is no single definitive method available to attribute need for new market housing to specific geographical areas within Coventry. The precise geographic distribution of future housing was therefore left as a policy choice for the Authority.
45. This caveat applies equally for neighbourhood planners within Willenhall. As we recommend an approach based on the assessment of need at a local authority level, the Neighbourhood Forum should monitor any updates to the assessment of housing need at that level, as well as the release of any relevant new statistics.

Adopted Coventry Local Development Plan (2001)

46. The current adopted Local Plan only covers Coventry's housing needs up to the year 2011.
47. This means that there is no up-to-date housing need target within local policy. However, the SHMA comprises up-to-date evidence at the Coventry level, and therefore the SHMA figure can be taken as the main local authority level proxy figure for housing need.

DCLG Household Projections (2015)

48. 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.
49. The most recent (2012-based) household projections were published in February 2015, and extend to 2037. Although population projections are only available at a local authority level, a

calculation of the share for Willenhall is nevertheless possible for the household projections based on the neighbourhood's household numbers in 2011.

50. In 2011, Coventry had 128,447 households⁵ and in the Census the same year, the neighbourhood plan area had 3,716 households, or 2.89% of the City total.
51. In the 2012-based household projections, the projection for 2031 is for 166,035 households in Coventry. Assuming it continues to form 2.89% of the City total, the neighbourhood plan area's new total number of households would be 4,798 and therefore 1,082 new households would have formed over the Plan period.
52. Number of households does not, however, equate precisely to number of dwellings, with the latter usually slightly higher. In the 2011 census, the plan area had 3,716 households but 3,732 dwellings, giving a ratio of 0.996 households per dwelling. This means that the projection of 1082 new households would entail a need for $(1082/0.996=)$ 1086 dwellings.
53. However, the 2012-based household projections need to be 'rebased' for accuracy now that the mid-2014 population estimates are available. This is because the mid-2014 population estimates give the actual number of people in Coventry at that point, meaning the difference between the actual and the projected number of dwellings can be taken into account in future projections.
54. The 2012-based projections were based on the 2012-based Sub-National Population Projections, which estimated that by 2014 there would be 332,500 people in Coventry. The mid-2014 estimates show that there were actually 337,428 people, which is higher than the projections by 1.5%. This allows us to rebase the 1,086 dwellings in 2031 to a slightly increased figure of **1,102 dwellings** within the plan area at that point.
55. 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 influence the forthcoming Local Plan Review distribution across the City and hence any difference between these and the forthcoming Local Plan-based figure.

Dwelling Growth 2001-2011

56. By comparing the number of dwellings in the neighbourhood in Census 2001 against the number in Census 2011, we can project forward the completion rate to 2031. This provides the first of two dwelling growth-based projections to complement the two projections outlined above.
57. In Census 2001, Willenhall had a total of 3,519 dwellings, and in Census 2011 it had 3,732. This entails a total 10-year growth rate of 213 dwellings (i.e. 6.05%), or around 21.3 per year. Projecting this forward to 2031 would give a plan period total of $(20 \times 21.3=)$ **426 new dwellings**.
58. Note that the dwelling growth rate in Willenhall over this period was therefore 6.05%. Census data indicates that the 'background' rate for Coventry over the same period was only 4.84%.
59. The Neighbourhood Forum has provided AECOM with completion rates post 2011, which help us determine the extent to which the 2001-2011 rates may have differed from more recent housing market activity.
60. The post-2011 completion rates indicate that an additional 34 dwellings were completed between January 2011 and January 2015, equating to a rate of 6.8 completions per year- in other words,

⁵ See 2012-based DCLG Household Projections live tables at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

a 68% decrease against the 2001-2011 rate. However, all 34 of these dwellings can count towards the final Neighbourhood Plan housing target.

61. Projecting this rate of dwelling completion forward to 2031 would result in (20 x 6.8=136) **136 new dwellings**.

Local housing waiting list (Coventry City Council, November 2015)

62. We contacted Coventry City Council for an assessment of the number of households on the waiting list that expressed a preference for Willenhall or its surrounding area.
63. However, the Council informed us that unfortunately, the waiting list cannot be disaggregated spatially in this way. As such, it is not possible to determine affordable housing need for Willenhall specifically, only for Coventry as a whole. Across the city as a whole, the existing Coventry target of 20% affordable housing for areas (like Willenhall) with high amounts of existing social housing⁶ will continue to apply.
64. This approach of a varying target percentage depending on the existing quantum of affordable housing is endorsed by the emerging Coventry Local Plan, which states that 'affordable housing needs vary across the city and policy will look to reflect these differences in order to promote urban regeneration and viable development opportunities, whilst providing the right homes at the right tenures in the right locations.'
65. Note that even after Willenhall Neighbourhood Plan is adopted, Coventry affordable housing policy will continue to apply within the area, and it will still be the Council that controls the housing waiting list and negotiates affordable housing commitments with developers as part of the development management process. We have covered the implications of this in our conclusions section.

Local Economic Context

66. The NPPG states that a housing market assessment should take employment trends into account. This is to ensure that any conclusions on housing need take into account the likely change in job numbers based on past trends or economic forecasts as appropriate and also have regard to the growth of the working age population in the housing market area. In this case, we have taken into account the relevant Strategic Economic Plan and the Employment Land Review,
67. However, as the SHMA in fact concluded that in the case of Coventry, the citywide economy has little impact on the housing market, the below documents relating to the economy have only been reviewed briefly.

A LEP for the Future, Coventry and Warwickshire Local Enterprise Partnership: Strategic Economic Plan (Mar) 2014

68. Willenhall lies within the Coventry and Warwickshire Local Enterprise Partnership area and is therefore subject to the 2014 Strategic Economic Plan (SEP). However, it should be noted that SEPs are aspirational document used to bid for funds, and have not been fully tested at examination. As such, any figures and facts collated from it should be used cautiously. Nevertheless, the SEP acts as the main document guiding the type and amount of strategic economic growth locally, and as such it may have some impact on housing demand at Willenhall.

⁶ Coventry Supplementary Planning Guidance: Affordable Housing, available online at http://www.coventry.gov.uk/downloads/file/986/affordable_housing_adopted_-_feb

69. Like all economic plans and strategies, the SEP seeks generally to grow and promote the local economy. It seeks to deliver, by 2030, 50,099 additional private sector employee jobs in the SEP area, and 76,000 additional homes across the wider LEP area to accommodate the growing population.
70. The SEP references extending investment for Coventry Station to increase passenger capacity, on-going rail growth, boost connectivity to HS2 and to support the development of Friargate in Coventry City Centre. There is additional potential for investment in the redevelopment of Civic Centre buildings in Coventry City Centre following the planned relocation of the City Council.

Characteristics of Population

71. Through analysis of Census 2011 data, we have investigated how the population of Willenhall neighbourhood plan area differs from that of the Coventry and England averages.⁷
72. Table gives the population and number of households in Willenhall, Coventry and England, recorded in the 2011 census. In 2011, Willenhall had a population of 7,910, and an average household size of 2.2 persons. This is slightly below the local and national averages.

Table 1: Population and household size in Willenhall, 2011⁸

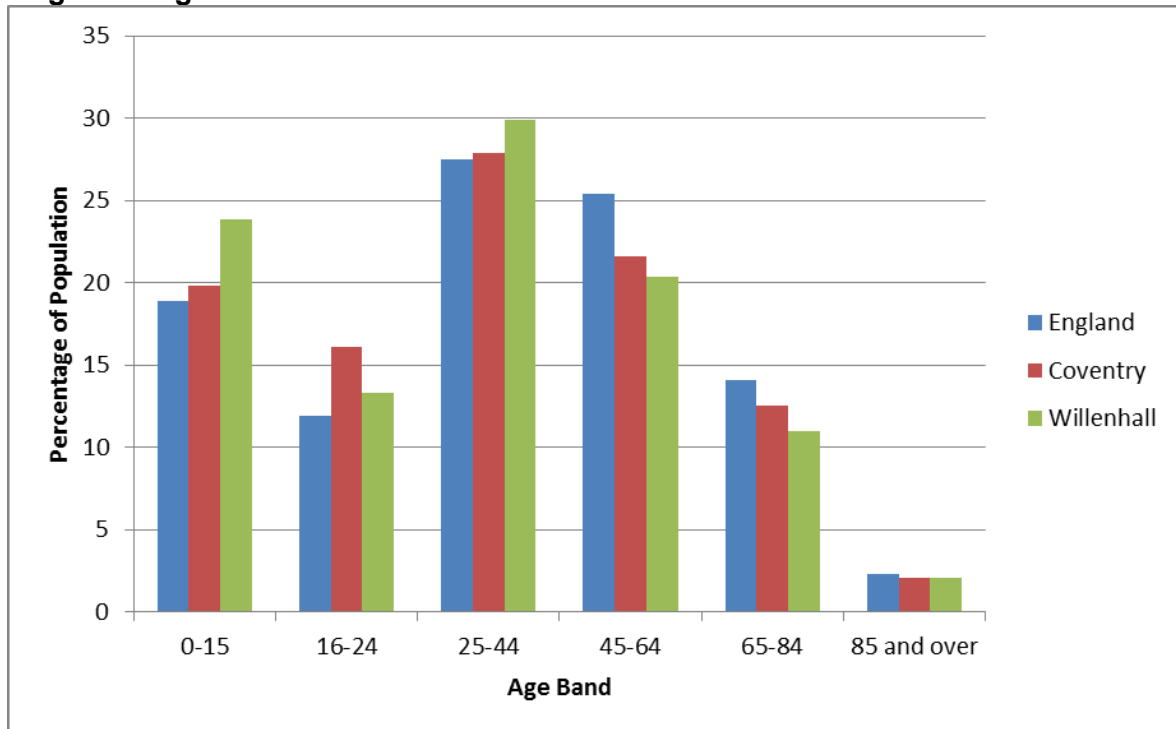
	Willenhall NP Area	Coventry	England
Population	7,910	316,960	53,012,456
Households	3,716	128,592	22,063,368
Household size	2.2	2.5	2.4

Source: ONS, Census 2011. AECOM calculations

73. As illustrated in Figure 9 below, the largest age group in Willenhall is ages 25-44, at 29.9%. This is slightly higher than the figure for Coventry (27.9%) and England (27.5%). The proportion of children aged 0-15 is also higher than local and national averages, at 23.8% in Willenhall compared with 19.8% across Coventry and 18.9% across England. The proportion of people aged 45 to 84 in Willenhall is below local and national averages, with the proportion of residents aged 85 and over largely in line with local and national values.
74. Table 2 shows the rate of change of the population by age band. It shows that the proportion of people in the 16-24 and 25-44 age groups have undergone a considerable increase in Willenhall between 2001 and 2011, with slight growth in the 45-64 age group largely being in line with local but below national averages. The growth in the 25-44 age band in Willenhall of 23.6% is significant when compared to the much lower local and national levels of 3.9% and 1.4% respectively.
75. There was a significant increase in the proportion of children in the 0-15 age band in Willenhall by 12.8% from 2001 to 2011.

⁷ Super Output Area Middle Layer Coventry 039, Output Area E00048304, Output Area E00048308
Output Area E00048300 Neighbourhood Statistics online at: <http://www.neighbourhood.statistics.gov.uk>

⁸ ONS, Census 2011, Population Density (QS102EW); Household Size, 2011 (QS406EW).

Figure 9: Age structure in Willenhall⁹

Source: ONS, Census 2011. AECOM calculations

Table 2: Rate of change in the age structure of the population of Willenhall, 2001-2011¹⁰

Age group	Willenhall	Coventry	England
0-15	12.8%	-1.3%	1.2%
16-24	17.5%	19.7%	17.2%
25-44	23.6%	3.9%	1.4%
45-64	8.4%	7.9%	15.2%
65-84	-14.9%	-2.9%	9.1%
85 and over	46.7%	27.8%	23.7%

Source: ONS, Census 2001 and 2011. AECOM calculations

76. There was a significant decrease across the 65-84 age band in Willenhall, which remains approximately 20% lower than national growth rates for this age band.
77. Population averages in **Figure 9** and **Table 2** show a significant increase in the proportion of children and of people aged 25-44, which suggests that many families may have moved to or formed within the parish within the period 2001-2011.
78. **Table 3** shows that Willenhall is home to fewer people born outside the UK (18.8%) than Coventry as a whole (21.1%), but is nevertheless higher than the national average (13.8%).

⁹ ONS, Census 2011, Age Structure (KS102EW)

¹⁰ ONS, Census 2011, Age Structure (KS102EW); ONS, Census 2001, Age Structure (KS02)

Table 3: Country of birth and length of residence

Place of birth	Population breakdown		Willenhall	Coventry	England
Born in the UK	Total		81.2%	78.9%	86.2%
Born outside the UK	Total		18.8%	21.1%	13.8%
	EU		7.4%	6.4%	3.7%
	Other		11.4%	14.7%	9.4%
	Length of residence	Less than 2 years	1.8%	3.9%	1.8%
		2-5 years	3.4%	3.7%	2.2%
		5-10 years	7.3%	4.4%	2.9%
10 years or more		6.4%	9.2%	7%	

Source: ONS, Census 2011. AECOM calculations

79. Of the 18.8% of Willenhall residents who were born overseas, the majority have lived in the UK for four years or more. There is a significantly higher proportion of people born outside the UK that have residing in Willenhall for 5-10 years than the local and national average.
80. Census 2011 data on ethnic origin shows that Willenhall's residents are 81.5% white, with 11.4% of the population classing themselves as Black African. A further 2.7% classed themselves as of Mixed/Multiple ethnic groups¹¹ The sometimes differing housing needs of minority populations, which can play a significant role in housing need assessment, may therefore be considered to be of particular relevance in the case of Willenhall.

Household Type

81. Table 4 shows that although the number of rooms per household in Willenhall has shown a generally upward trend, in line with the local and national picture, there has been a particularly significant increase in one room households within the plan area. There is also a significant increase in residents living in 2 room households, when compared to local and national averages. It could be concluded that the increase in occupancy of one and two room households was driven by the increase in 25-44 year olds in the plan area, particularly the younger end of this range.
82. The trends in 3 to 5 room households are largely in line with local and national rates of change. There has been a slight increase in households with 4 and 6 rooms, while the larger increase in 7 and 8 room households since 2001 is significantly lower than Coventry averages but higher than the national rate of change.

¹¹ ONS, Census 2011, Ethnic Group, 2011 (KS201EW)

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

Number of Rooms	Willenhall	Coventry	England
1 Room	451.4%	19.8%	-5.2%
2 Rooms	38.2%	25.6%	24.2%
3 Rooms	16.8%	14.1%	20.4%
4 Rooms	5.7%	2.7%	3.5%
5 Rooms	-4.9%	-5%	-1.8%
6 Rooms	5%	1.5%	2.1%
7 Rooms	23.5%	29.6%	17.9%
8 Rooms or more	34.6%	48.7%	29.8%

Source: ONS, Census 2001 and 2011. AECOM calculations

83. The ONS statistics underlying this table, though not tabulated, show that in 2011 the proportion of households with six to nine rooms in Willenhall was significantly lower than local and national averages. Conversely, the proportion of households that have one to four rooms is significantly higher than local and national averages.
84. The NPPG states that factors such as overcrowding, concealed and sharing 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.
85. Table 5 emphasises that overcrowding does seem to be increasing slightly in Willenhall, but at a far lower rate than across Coventry as a whole, particularly for households with over 1.5 persons per room.

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

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

Persons per room	Willenhall	Coventry	England
Up to 0.5 persons per room	5.74%	2.31%	7.90%
Over 0.5 and up to 1.0 persons per room	3.76%	29.34%	6.99%
Over 1.0 and up to 1.5 persons per room	3.39%	37.93%	27.29%
Over 1.5 persons per room	6.48%	105.56%	2.54%

Source: ONS, Census 2001 and 2011. AECOM calculations

Household Tenure

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

Table 6: Tenure (households) in Willenhall, 2011¹⁴

Tenure	Willenhall	Coventry	England
Owned; total	33.7%	60.6%	63.3%
Shared ownership	0.7%	0.6%	0.8%
Social rented; total	53%	17%	17.7%
Private rented; total	11.2%	20.6%	16.8%

Source: ONS, Census 2011. AECOM calculations

87. Table 6 shows that the level of owner occupation in Willenhall is significantly lower than the Coventry and England averages. On the contrary, the proportion of social rented housing (rented from the Council or a Registered Social Landlord) is significantly higher than local and national averages. There is also a smaller proportion of privately rented units in Willenhall, particularly compared with Coventry, which has a higher than national average proportion of households in the private rented sector.
88. Table 7 shows how tenure has changed in Willenhall between the 2001 and 2011 censuses. Home ownership in the area has fallen slightly, largely in line with local trends but significantly below national trends. On the contrary, there was a significant increase in private rented tenures in the plan area compared to the growth in private rented tenures at local and national level.

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

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

89. Willenhall has had a considerable decrease in shared ownership and social rented housing tenures from 2001 to 2011, but as shown by Table 6 previously, they remain unusually high.

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

Tenure	Willenhall	Coventry	England
Owned; total	-12%	-8%	-0.6%
Shared ownership	-43.2%	-8.7%	30.0%
Social rented; total	-12.1%	-1.8%	-0.9%
Private rented; total	143.9%	113.2%	82.4%

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

90. We can analyse the rental sector using data from the home.co.uk website. This provides, for each postcode area and city, data on average price of rented property (adjusted for local range of housing type to enable like-for-like comparison), and data on average time that a rental property has been on the market. It can be assumed that the higher average rental price and shorter the average time on the market, the higher local demand for rental property, and by implication, the higher the local demand for owner-occupied stock as many prospective home-owners will rent if they cannot yet afford to buy.

Table 8: Rental sector statistics in Willenhall versus Coventry average

	Willenhall	Coventry	Willenhall difference
Average time on market (days)	81	114	-28.9%

Source: home.co.uk website.

91. The average price of rented property in Willenhall (£866 pcm) is 2% higher than the average across Coventry (£848 pcm). A more significant indicator of demand is the average time on the market as presented in Table 8. Properties in Willenhall rent faster than across Coventry, indicating higher levels of demand in Willenhall relative to the wider area. This corresponds with the Census data showing low but rapidly growing rates of private renting in the plan area. The slightly higher average rental prices in Willenhall and shorter average time on the market indicates strong demand for rented properties here. In an area of lower than average home ownership, and an increase in private rented tenures since 2001, this would indicate that Willenhall is an area of high rental demand.
92. This is echoed by house price data from Zoopla. As of November 2015, the average house price in CV3, Willenhall's postcode area (house prices are not available at any lower geography), was £182,291. This compares with a lower Coventry average of £172,724.

Local Household Composition

93. Table 9 shows that the proportion of single person households in Willenhall is significantly higher than the Coventry and England average. However, the proportion of households with a single family occupancy is significantly lower than both the Coventry and England averages.

Table 9: Household composition (by household) in Willenhall, 2011¹⁵

		Willenhall	Coventry	England
One person household	Total	43.3%	31.2%	30.2%
	Aged 65 and over	11.4%	11.9%	12.4%
	Other	31.8%	19.3%	17.9%
One family only ¹⁶	Total	49.7%	58.5%	61.8%
	All aged 65 and over	4.1%	7%	8.1%
	With no children	9.5%	13.7%	17.6%
	With dependent children	28.3%	27.8%	26.5%
	All Children Non-Dependent	7.9%	10%	9.6%
Other household types	Total	7%	10.3%	8%

Source: ONS, Census 2011. AECOM calculations

94. The proportion of single person households aged 65 and over in Willenhall is largely in line with the Coventry average but slightly lower than the England average. The plan area, however, has a significantly higher proportion of single person households aged below 65 than the Coventry and England averages, indicating that Willenhall has a relatively high proportion of younger people living alone.
95. The plan area is home to a lower than average proportion of families with no children, and a slightly higher than average proportion of families with dependent children. The proportion of households where all children are non-dependent is lower than the local and national average. The proportion of other household types is low.
96. Table 10 shows how household composition changed in the 10 years between the 2001 and 2011 Censuses. Overall, there was an increase in single person households in the plan area compared to the local and national average increases. This increase in single person households coupled with a significant decrease in people aged 65 and over living alone, signifies that there is an increase in people aged under 65 living alone.

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

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

Table 10: Rates of change in household composition in Willenhall, 2001-2011¹⁷

Household type		Percentage change, 2001-2011		
		Willenhall	Coventry	England
One person household	Total	10.7%	4.8%	8.4%
	Aged 65 and over	-24.7%	-15.2%	-7.3%
	Other	33.1%	22.7%	22.7%
One family only	Total	8%	1.9%	5.4%
	All aged 65 and over	-25.1%	-11%	-2%
	With no children	-2.8%	-0.2%	7.1%
	With dependent children	18%	3.6%	5%
	All children non-dependent	14.9%	11.4%	10.6%
Other household types	Total	55.8%	35.6%	28.9%

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

97. There was a significant increase in Willenhall of one family households with dependent children and non-dependent children, and a significant decrease in one family households aged 65 and over than at local and national level. The rate of change of households with no children was broadly in line with local averages but below national averages.
98. As noted previously, Willenhall currently has a smaller than average household size. Table 11 shows that the plan area experienced an increase in its population, which is reflected in the similar percentage increase in number of households over the period from 2001-2011. The change in household size is largely in line with local and national levels, although there has been a larger increase in population and households in Willenhall than at local and national level over this ten year period.

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

Table 11: Change in household numbers and size in Willenhall, 2001-2011

Key indicator	Percentage change, 2001-2011		
	Willenhall	Coventry	England
Population	11.9%	5.4%	7.9%
Households	11%	5.1%	7.9%
Household size	0.8%	0.2%	0%

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

99. Table 12 shows that the proportion of dwellings in Willenhall that are detached houses or bungalows is lower than local averages, which in turn is significantly lower than the national average. The proportion of semi-detached dwellings is also lower than local and national averages, while the proportion of terraced dwellings is largely in line with national averages but considerably below the Coventry average. The proportion of flats is significantly above both local and national averages.

Table 12: Accommodation type (households), 2011

Dwelling type		Willenhall	Coventry	England
Whole house or bungalow	Detached	4.6%	10.5%	22.4%
	Semi-detached	24.3%	27.8%	31.2%
	Terraced	26%	43.1%	24.5%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	39.5%	15.6%	16.4%
	Parts of a converted or shared house	1.8%	1.5%	3.8%
	In commercial building	0.3%	0.8%	1.0%

Source: ONS, Census 2001 and 2011. AECOM calculations

100. A 'concealed family' means any group of people who want to form a new household but are unable to do so, typically for economic reasons such as high house prices or a lack of suitable property. Table 13 shows the low levels of 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. The proportion of concealed families is in line with proportions in England and smaller than across Coventry.

Table 13: Concealed families in Willenhall, 2011¹⁸

Concealed families	Willenhall	Coventry	England
All families: total	2,039	83,637	14,885,145
Concealed families: total	33	1,973	275,954
Concealed families as % of total	1.6%	2.4%	1.9%

Source: ONS, Census 2001 and 2011. AECOM calculations

101. Official statistics do not clarify the overlap, if any, between the Coventry housing waiting list and the stated number of concealed families locally.

Economic Activity

102. Table 14 shows that Willenhall has a slightly lower proportion of economically active residents than both the Coventry and England averages. Willenhall also has a lower proportion of economically active residents that are self-employed. Full-time employee levels in Willenhall are in line with local levels but slightly below the national average. Part-time employee levels are also lower than the local and national average.
103. Levels of unemployment are significantly above local and national averages. Levels of full-time students living in the plan area are in line with national averages but below local averages.

Table 14: Economic activity in Willenhall, 2011¹⁹

Economic category		Willenhall	Coventry	England
Economically active	Total	64.3%	66.3%	69.9%
	Employee: Full-time	12.4%	12.9%	13.7%
	Employee: Part-time	33%	36.5%	38.6%
	Self-employed	3.7%	6.2%	9.8%
	Unemployed	11.4%	5.4%	4.4%
	Full-time student	3.9%	5.4%	3.4%
Economically inactive	Total	35.7%	33.7%	30.1%
	Retired	10.3%	12%	13.7%
	Student	5%	10.5%	5.8%
	Looking after home or family	6.1%	4.3%	4.4%

¹⁸ NOMIS, LC1110EW - Concealed family status by family type by dependent children by age of Family Reference Person (FRP)

¹⁹ ONS, Census 2011, Economic Activity (QS601EW)

	Long-term sick or disabled	10.2%	4.5%	4.1%
	Other	4.1%	2.4%	2.2%

Source: ONS, Census 2001 and 2011. AECOM calculations

104. Among economically inactive categories, the proportion of residents who look after home or family or are long-term sick or disabled exceeds local and national averages, while the proportion of retired residents is below local and national averages.

Table 15: Rates of long-term health problems or disability in Willenhall, 2011²⁰

Extent of activity limitation	Willenhall	Coventry	England
Day-to-day activities limited a lot	12.6%	8.7%	8.3%
Day-to-day activities limited a little	10.7%	9%	9.3%
Day-to-day activities not limited	76.7%	82.3%	82.4%

Source: ONS, Census 2001 and 2011. AECOM calculations

105. The NPPG advises taking account of the number of people with long-term limiting illness. Table 15 shows that the proportion of working-age residents of Willenhall who are long-term sick or disabled significantly exceeds Coventry and England averages. Residents who stated that their day-to-day activities are limited a lot is higher than local and national levels, while those who stated their day-to-day activities are limited a little is slightly higher.
106. Table 16 shows that Willenhall residents travel less far to work than both the Coventry and England averages. The average distance travelled to work is 12.8 kilometres, with 66.2% of residents travelling less than 10km, compared with 63.4% of Coventry residents and 52.3% nationally.

Table 16: Distance travelled to work, 2011²¹

Location of work	Willenhall	Coventry	England
Less than 10km	66.2%	63.4%	52.3%
10km to less than 30km	13.4%	16%	21%
30km and over	6.7%	6.3%	8%
Work mainly at or from home	5.8%	7.3%	10.3%
Other	7.9%	7%	8.5%
Average distance travelled to work	12.8km	12.5km	14.9km

Source: ONS, Census 2001 and 2011. AECOM calculations

²⁰ ONS, Census 2011, Long-Term Health Problem or Disability (QS303EW)

²¹ NOMIS, QS702EW - Distance travelled to work

107. This indicates Willenhall residents are most likely to travel for work within Coventry itself.

Information from local estate agent

108. The Neighbourhood Forum provided AECOM with the contact details of a local estate agent, Alternative Estate Agents of Coventry. Alternative Estate Agents cover the whole of Coventry, so have a strong knowledge of the local housing market that can be used to test and supplement our conclusions based on Census and local authority level data.
109. Alternative Estates stated that the housing market in and around Willenhall is characterised by ex-council house terraced houses and blocks of flats. There is a high level of demand for the area from both investors looking to rent properties as well as from middle-aged buyers looking for family home. Any property which comes on the market is usually sold rapidly. These types of houses are on the market for up to £80,000-£100,000
110. The rental market is also strong with tenants, either younger single people or young families. This evidence backs up the data given by the other sources used.

4 Conclusions

Overview

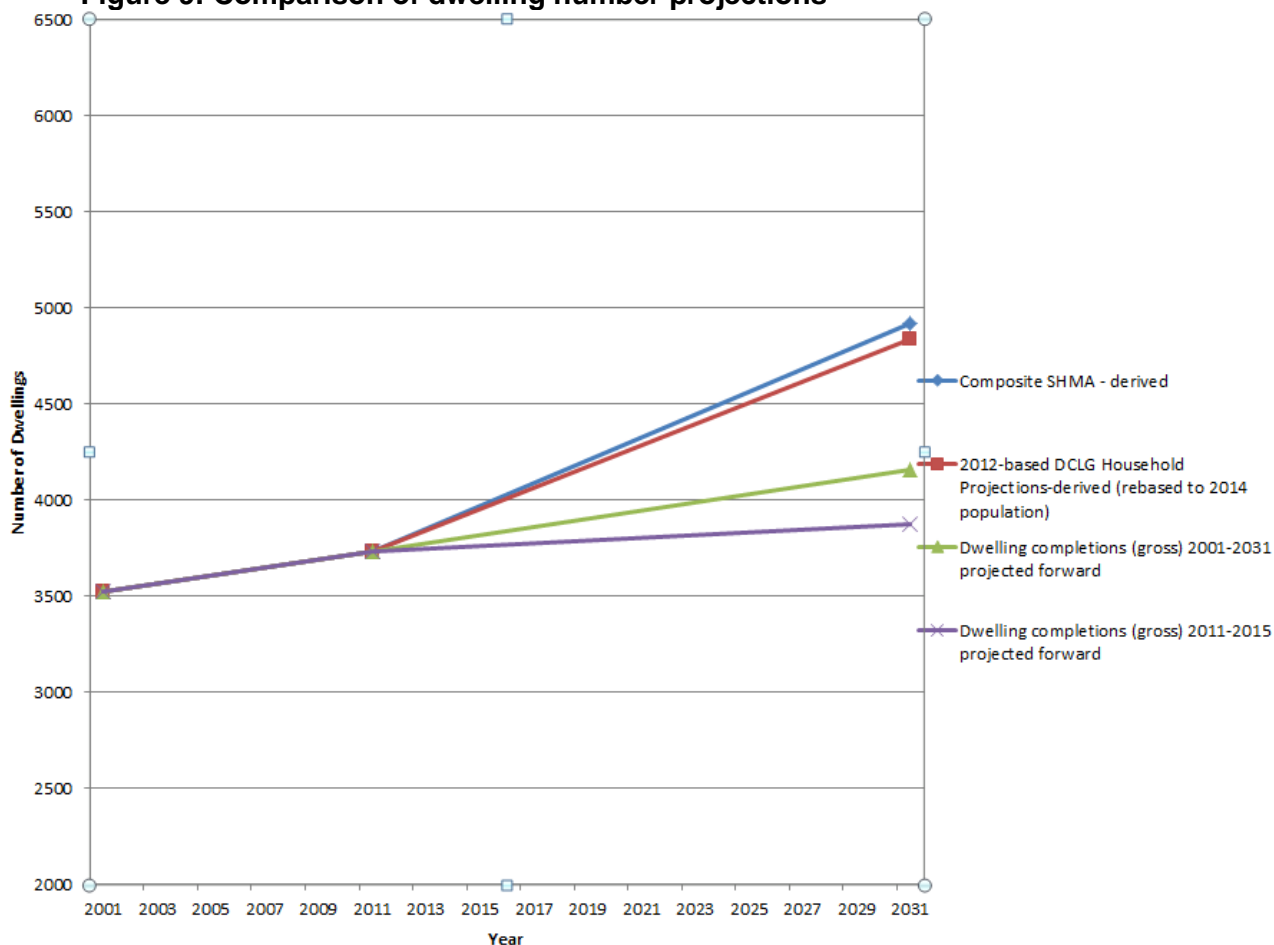
112. This neighbourhood plan housing needs advice has interrogated a wide range of data sources, which, taken together, can inform key trends and messages relevant to the Neighbourhood Plan's housing policies.
113. In this first section of our conclusions we make recommendations on the overall quantum of housing growth required.
114. 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.
115. 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 factors²² that the Neighbourhood Forum 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 strategic housing policy at the Coventry City Council.

Quantity of Housing Needed

116. To recap, we have identified four separate projections of dwelling numbers for Willenhall between 2011 and 2031 based on:
- A figure derived from the Coventry & Warwickshire Joint Strategic Housing Market Assessment Final Report, (November 2013) from 2011 to 2031 (which gives a total of 1,180 dwellings, or 59 per year);
 - The Government's 2012-based household projections, extrapolated to Willenhall translated from households to dwellings, and rebased to actual 2014 population (which gives 1,102 dwellings, or 55 per year);
 - A projection forward of dwelling completion rates 2001-2011 (which gives 426 dwellings, or 21 per year)
 - A projection forward of dwelling completion rates 2011-2015 (which gives 136 dwellings, or 14 per year).
117. These dwelling number projections are illustrated in **Figure 9** below.

²² These factors are also referred to as 'indicators' in the NPPG.

Figure 9: Comparison of dwelling number projections



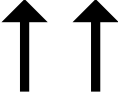

Source: Coventry and Warwickshire SHMA 2013, DCLG 2012-Based Household Projections (rebased to 2014), Census 2001, Census 2011, AECOM calculations

- 118. We have summarised the findings of the data gathered in Chapter 3 above in **Table 17** below. The source for each factor with particular relevance to the neighbourhood is shown, together with AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) the neighbourhood plan area’s future housing need. Following NPPG guidance, the factors relate both to housing price and housing quantity.
- 119. We have applied our professional judgement on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates ‘some impact’, two arrows ‘stronger impact’ and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.
- 120. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Neighbourhood Forum 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.
- 121. However, our general approach reflects NPPG 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.
- 122. The NPPG 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

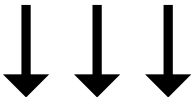
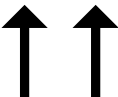
and consistent with principles of sustainable development, could be expected to improve affordability, and monitor the response of the market over the plan period.


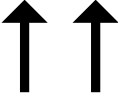
123. As such, **Table 17** should be used as a basis for qualitative judgement rather than quantitative calculation. They are designed to form the starting point for steering group decisions on housing policy rather than to provide definitive answers. Again, this reflects the NPPG approach- it states 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.
124. The NPPG 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 adopted Core Strategy.
125. 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 9** and the market factors presented in **Table 17**, and taking into account our own knowledge and experience of housing need at neighbourhood plan level.

Table 17: Summary of factors specific to Willenhall with a potential impact on neighbourhood plan housing quantity

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Age structure of population	SHMA, Census		<p>The Census shows that the proportion of children and 25-44 age population is significantly higher than Coventry and England's averages, and increased significantly between 2001 and 2011.</p> <p>Although the SHMA projects an increase of 25.8% in the over-55 population in Coventry between 2013 and 2031, this is considered to have a lesser impact in Willenhall, which has a relatively younger demand demographic.</p> <p>As such, an assessment of two (rather than three) up arrows has been made to show strong demand from younger people and families, but less demand from older people.</p>
Economic performance and potential	SHMA, SEP, Census,		<p>The SHMA notes (relatively unusually for a SHMA) that economic growth in Coventry as a whole is not considered to have a significant effect on housing growth.</p> <p>As such, the assessment for the city as a whole would be a sideways arrow, but Willenhall's economically inactive population, including a high unemployment rate, is slightly higher than the Coventry average.</p> <p>At the same time, the SEP does not provide any particular indications of major new employment opportunities close to Willenhall.</p> <p>Taking these factors together, a single down arrow is our assessment. Note that this does not mean that we expect Willenhall to contract economically- it simply means that we expect economic growth as set out in the SEP and SHMA will drive housing demand here to a lesser extent than the Coventry average.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
House prices relative to surroundings	Zoopla, Alternative Estate Agents, SHMA	↑	<p>Zoopla indicates that house prices in CV3 (including Willenhall) are slightly, but not significantly, higher than the Coventry average (which the SHMA notes are low generally).</p> <p>Evidence from the Estate Agent backs this up, indicates that the area experiences consistent and solid demand.</p>
International and UK in-migration rate	SHMA, Census,	↓	<p>The SHMA notes that population growth in the City was largely driven by migration in recent years.</p> <p>Willenhall is home to fewer international migrants than the Coventry average, but has a higher rate than the national average.</p> <p>Furthermore the census indicates a significant increase in the proportion of children and of people aged 25-44, suggesting that families may have moved to the plan area in the period 2001-2011.</p> <p>However, an assessment of one down arrow has been made, as although in-migration seems relatively high, it is less than the Coventry average, which is already captured in the SHMA-derived figure.</p>
Level of new supply in local housing market	Census, Willenhall Neighbourhood Forum	↑	<p>Census data shows that Willenhall's dwelling numbers grew by 6.05% between 2001 and 2011, faster than the Coventry average of 4.84%. However, more recent data on completions from the neighbourhood forum shows that the rate has slowed, which has the effect of creating a larger demand backlog. To account for the lower recent rate of completions, we have made an assessment of one up arrow.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
<p>Local housing waiting list/need for affordable housing</p>	<p>Emerging Local Plan, Coventry Affordable Housing Supplementary Planning Guidance, Census</p>		<p>Although Coventry Council are not able to determine affordable need for Willenhall compared with Coventry as a whole, the unusually high proportion of socially-rented housing locally is a strong indicator that further affordable housing should be constrained, as it is undesirable in planning terms for affordable housing to be concentrated in single locations, as this hinders the creation of mixed, balanced communities.</p> <p>This policy position is reflected in the SPG and the emerging Local Plan, and as such, it is considered that compared with the rest of Coventry, providing new affordable housing in Willenhall over the plan period would risk an over-supply locally and should be avoided.</p>
<p>Long-term vacancy rates</p>	<p>Vacant Dwellings by Local Authority District, Alternative Estate Agents, Zoopla</p>		<p>Local vacancy rates in Coventry are slightly higher than the England average, indicating a lower-demand housing market. However, data from Zoopla, Alternative Estate Agents and Census data on households per dwelling all indicate that the vacancy rate will be lower in Willenhall than the Coventry average, thus indicating higher demand, thus leading to an assessment of two up arrows.</p>

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Overcrowding, including concealed families	SHMA, Census		<p>Coventry has shown a significant increase in overcrowded households.</p> <p>However, the Census shows Willenhall's average household size is lower than the average England household size indicating a low rate of overcrowding, and the proportion of single person households is significantly higher than the Coventry average. The proportion of concealed families is also smaller than across Coventry.</p> <p>All indicators point to down arrows, but only two rather than three as the area is not significantly different from Coventry as a whole on this indicator.</p>
Rental market relative to wider area	SHMA, home.co.uk		<p>The SHMA reported that the lettings market in Coventry was "very strong"; however, this is largely driven by student lets, which are more common on the western side of the city rather than in Willenhall.</p> <p>However, in Willenhall, the private rented sector appears in demand and is growing rapidly. This is not unusual in areas with a high concentration of social housing.</p> <p>As private rented units are often indicative of an unmet desire for owner-occupation, and as demand is high and increasing, an assessment of two up arrows has been made.</p>

126. Based on the data summarised on the quantity of dwellings required and the market factors affecting those quantities, AECOM recommends that unconstrained housing need for the neighbourhood plan area (i.e. that does not reflect supply-side constraints) in the period 2011-2031 would be approximately 1,300 net additional dwellings, or around 65 dwellings per year over the plan period.

127. The reasons for our assessment is as follows:

- Of the range of projections used, both of the dwelling completion rate projections are supply-constrained as well as demand-driven. In locations with less significant supply-side (i.e. land-based) constraints than Willenhall, these projections might be closer to

other projections. However, in the case of Willenhall, it is clear there is a significant disparity between the dwelling completions-based projections and the Household Projections and SHMA-derived completions, neither of which is supply-constrained.

- In the absence of a Core Strategy-derived target (which is also supply-constrained but with which the Neighbourhood Plan should usually seek to be in conformity), a cautious approach is recommended, which means taking those projections derived entirely from unconstrained demand as a starting point. This will ensure that the final estimate is an accurate reflection of demand-side factors only.
 - In the case of Willenhall, this suggests taking as a starting point the midpoint between the SHMA and the Household Projections figure, and discounting entirely the two projections derived from completion rates as being overly constrained for our purposes. In the case of Willenhall, this midpoint equates to 1,141 dwellings.
 - Then, assessing the local factors set out in Table 17, we need to adjust this discounted midpoint up or down. In the table, up arrows slightly outnumber down arrows, suggesting that the most appropriate final estimate of unconstrained demand would be slightly, but not significantly, higher than the discounted midpoint of 1,141 dwellings. We consider that raising the midpoint by around 15% would reflect the extent to which up arrows slightly outnumber down arrows, and this would indicate an unconstrained need for around 1,300 dwellings over the plan period.
128. Note that the 36 dwellings completed in the plan area since 2011 count towards the dwelling total, meaning the outstanding number of dwellings needed as of 2015 drops to 1,264 dwellings. The SHLAA, which is only a snapshot in time, indicates a current capacity for 1,180 dwellings, and there are also likely to be existing and future opportunities that it has not captured.
129. As such, it may well be possible to meet the need arising from Willenhall within the neighbourhood plan area boundaries, although it should be noted that there is no specific obligation to meet unconstrained need in full within the neighbourhood plan area itself (and indeed, in many locations, this may not be possible).

Characteristics of housing needed

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

Table 18: Summary of local factors specific to Willenhall with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
Affordable housing	SHMA, Census,	<p>As noted in Table 17, although Coventry Council is not able to estimate affordable housing need for Willenhall specifically, the existing proportion of affordable housing is so high that providing more may well result in an oversupply and an undesirable local concentration. This is recognised in Coventry's Affordable Housing SPG and in the emerging Local Plan. As such, it seems reasonable to conclude that there is no need for additional affordable housing within the Plan period, unless affordable housing provision drops significantly due to Right to Buy.</p>	<p>Subject to consultation with Coventry Council, it would appear that (subject to any decreases in existing provision through Right to Buy) affordable housing contributions required of developers within the Plan area should normally be directed to other parts of Coventry where the need is greater, and the new dwellings to be provided in the plan area should consist of open market dwellings.</p> <p>Existing provision of affordable housing should be monitored as it may drop through Right to Buy.</p>
Demand/need for smaller dwellings	SHMA, Census	<p>The Census indicates an increase in single person households in the plan area compared to the local and national average.</p> <p>This could indicate a need for further 1 to 2 bedroom dwellings.</p> <p>Agents quoted in the SHMA indicated that there was a shortage across Coventry of smaller new units.</p> <p>The SHMA notes the ageing population of Coventry, and, though there are fewer older people in Willenhall, 1-2 bedroom dwellings would offer the opportunity to downsize and free up existing larger dwellings for families.</p>	<p>Provide within range of new dwelling sizes a limited proportion of smaller dwellings (1-2 bedrooms), for which there is evidenced demand, but note existing high levels of provision, so monitor carefully levels to be provided to ensure no oversupply.</p> <p>Providing these smaller units will also be an effective response to the increase in private renting seen locally, and would offer the opportunity for the (albeit limited) older population to downsize locally.</p> <p>For smaller units aimed at older people downsizing, bungalows are likely to be in greater demand than flats.</p>

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion
Housing type	Census, SHMA, home.co.uk	<p>Census shows that dwellings in the neighbourhood plan area are predominately terraced houses or flats. There is a lower than average number of detached houses when compared to the regional and national averages.</p> <p>The SHMA states that Coventry stands out as having a relatively 'narrow' housing offer, with a focus on smaller and cheaper properties. Flats and terraced homes make up 62% of the housing stock</p>	<p>To provide a wider range of dwellings and a more balanced community, the neighbourhood plan area may wish to encourage the provision of more detached and semi-detached homes, which would complement the large number of existing smaller terraced units and flats.</p> <p>These detached and semi-detached homes would be an effective response to the recent increase in families within the plan area.</p>
Need for larger/family households	SHMA, Census,	<p>The SHMA notes a need across Coventry for larger homes for incomers.</p> <p>The Census indicates an upward trend for 7 and 8 room or more houses within the Neighbourhood Plan Area. This increase in rooms per household may be driven by incoming families, and is also likely an indicator of a wide ethnic mix.</p> <p>However the area still has a smaller than average household size.</p>	<p>In order to provide a greater balance/mix of dwellings, and to cater for the significant increase in families with children evidenced by the Census data (including ethnic minorities), within the range of new dwelling size, there is likely to be a need for a significant proportion of larger, family sized dwellings (i.e. 3-5 bedroom units).</p> <p>As per our conclusion above, these could be detached or semi-detached.</p>
Need for specialist housing for the disabled and/or elderly	SHMA, Census	<p>The proportion of the neighbourhood plan area residents whose day-to-day activities are limited a lot is above Coventry's average and the England average.</p> <p>The proportion with day-to-day activities limited a little is again just slightly higher than the local and national average.</p> <p>However, the relatively low (and declining) levels of elderly population locally means that although there is a significant need for specialist housing for the elderly across Coventry, this is less of an issue for Willenhall.</p>	<p>The high levels of people with disabilities living locally suggests that the neighbourhood plan should support the provision of new housing adapted for disabled residents, as well as supporting improvements and adaptations to existing socially-rented properties.</p> <p>The group should aim for new housing for disabled residents to be located in easily accessible locations close to services and facilities such as shops.</p>

Recommendations for next steps

131. This neighbourhood plan housing needs advice has aimed to provide Willenhall Neighbourhood Forum with evidence on housing trends from a range of sources. We recommend that the Neighbourhood Forum should, as a next step, discuss the contents and conclusions with Coventry City Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:
- the contents of this report, including but not limited to **Tables 17 and 18**;
 - Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the strategic development plan (here, the adopted Local Plan);
 - the types (detached, semi-detached, terraced etc.) and sizes (1 bedroom, 2 bedroom etc.) of existing dwelling commitments (i.e. the 36 homes already completed since 2011), and cross-referencing the findings of this assessment with **Table 18**, as what has already been provided will have an impact on the types and sizes of the remaining homes to be provided over the rest of the plan period;
 - the views of the City Council;
 - the views of local residents;
 - the views of other relevant local stakeholders, including housing developers; and
 - the numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by the Council, including but not limited to the SHLAA.
132. As noted previously, recent changes in the planning system, including the introduction of the National Planning Policy Framework, continue to affect housing policies at a local authority and, by extension, a neighbourhood level.
133. This advice note has been provided in good faith by AECOM consultants on the basis of housing projections, distribution and assessment current at the time of writing (alongside other relevant and available information).
134. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by Coventry City Council or any other relevant body and review the neighbourhood plan accordingly to ensure that general conformity is maintained.
135. Most obviously, this includes monitoring the status of the emerging Coventry City Development Plan.
136. At the same time, monitoring ongoing demographic or other trends in the factors summarised in **Tables 17 and 18** would be particularly valuable.

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