



The Broads Authority:

Local Housing Needs Assessment Update 2025

Report of Findings

March 2025



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Executive Summary

Summary of Key Findings and Conclusions

Introduction

1. Opinion Research Services (ORS) was commissioned in 2022 by Great Yarmouth Borough Council and the Broads Authority to prepare a Local Housing Needs Assessment (LHNA) for the period 2021-2041 to identify the size, type and tenure of homes that will be needed in the future, and the housing needs of different groups, including affordable housing.
2. The previous Government's policy approach to planning for housing need in National Parks and associated areas such as the Broads Authority was different to that of other Local Planning Authorities. Planning Practice Guidance (PPG) on Housing and Economic Needs at paragraph 14 stated that an area such as the Broads Authority could identify its own housing needs based upon local evidence, rather than follow the national standard method for Local Housing Need set out for local authority areas.
3. The current Government published an updated version of the NPPF in December 2024. PPG continues to state that an area such as the Broads Authority is not covered by the standard method for local housing need and that they can consider using a local determined housing need figure. However, it now suggests that the Broads Authority may wish to consider an overall needs figure based upon the current size of its dwelling stock and the median workplace affordability ratio for the local authorities which it covers.
4. Applying this figure as an adjustment factor yields an overall housing need of 51.3 dwellings per annum. Therefore, for this study, we have used an overall housing need for the Broads Authority of 51.3 dwellings per annum for the period 2021-2042. This gives a total dwelling need of 1,077 dwellings over the 21-year period.

Establishing Current Unmet Need for Affordable Housing

5. To assess the current need for affordable housing, we initially calculated the number of households in the Broads Authority who are not suitably housed and who are unable to afford market housing. These include; all households that are currently homeless, those who currently housed in temporary accommodation, concealed families living as part of another household, households overcrowded in social or private rent, and people otherwise not counted who are in a reasonable preference category on the housing register.
6. The Broads Authority is not a housing authority, so does not collect information on current housing needs. Therefore, we have apportioned need from the 6 local authorities who include part of the Broads Authority. This shows 62 households currently unsuitably housed and needing to move, with a net need for 40 households.

Future Need for Affordable Housing

7. In addition to those who cannot currently afford market housing, it is also necessary to consider those households who will arise in the future; and households that can afford market rents but aspire to home ownership. The following tables (Figure 1) summarises the overall impact for those who cannot afford market rents of:
- » New households adding to housing need,
 - » The households no longer present reducing housing need and
 - » The changes in circumstances impacting existing households.

Figure 1: Summary annual components of Household Growth in The Broads Authority 2021-42 (Source: ORS Housing Model)
Note: Figures may not sum due to rounding)

The Broads Authority	All households	Households able to afford housing costs	Households unable to afford housing costs
All new households	480	372	107
All households no longer present	436	349	88
Change in existing households	-	9	-9
Future affordable housing need 2021-42 (Annual average)	43	32	11

8. Overall reviewing the contribution of each element amounts to an additional 11 households needing affordable housing in the Broads Authority annually over the 21-year period 2021-42.

Needs of Households Aspiring to Home ownership

9. Based on an analysis of English Housing Survey and local level household data, we can estimate that there is a total of around 240 households currently resident in the Broads Authority who cannot afford to own their own home but would aspire to do so. In addition to the current need, it is also important to consider new households that are projected to form over the period 2021-2042. Through combining this data with the aspiration data from the EHS, we can conclude that it is likely that there would be a further 161 households that form over the 21-year period who will be able to afford to pay market rent but unable to afford to own, despite that being their aspiration.
10. The below Figure 2 bring together the information on assessing the unmet need for affordable housing in 2021 together with the future need for affordable housing and those aspiring to home ownership arising over the 21-year period 2021-42. It can be noted that this assessment has no regard for whether those aspiring can access affordable home ownership options.

Figure 2: Total need for affordable housing 2021-2042 – The Broads Authority (Source: ORS Housing Model)

The Broads Authority	Affordable Housing Need Households unable to afford	Affordable Housing Need Households aspiring to home ownership	Overall Affordable Housing Need
Current housing need in 2021	40	240	280
Future housing need 2021-42	221	161	382
TOTAL HOUSING NEED	261	401	662

11. Neither the NPPF or PPG identify that any affordability criteria should be applied to those households who aspire to home ownership but cannot afford to buy their own home. However, it is appropriate to consider the extent to which these households could plausibly afford affordable home ownership products.
12. Given this context, we assessed affordability for households that both have sufficient income and savings to purchase an open market property but nonetheless choose to rent, those households with income that would be insufficient to afford 70% of newbuild prices at the lower quartile for the local area, and those households with savings of less than £5,000. After all these households have been discounted from the 401 previously identified there are only 59 households in the Broads Authority who:
 - » Aspire to home ownership but cannot afford to purchase on the open market;
 - » Have incomes sufficient to afford a property at 70% of market value;
 - » Have at least £5,000 in savings.
13. Figure 3 provide a breakdown of the total affordable housing on this basis.

Figure 3: Overall need for Affordable Housing 2021-42 in The Broads Authority, including aspiring households able to access affordable home ownership, by property size (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	Affordable Housing Need Households unable to afford	Affordable Housing Need Households aspiring to home ownership	Affordable Housing (Households)
1 bedroom	18	7	25
2 bedrooms	109	20	129
3 bedrooms	117	26	143
4+ bedrooms	18	7	25
TOTAL HOUSING NEED	261	59	321

14. For the Broads Authority, the LHNA identifies an overall affordable housing need from 321 households over the 21-year period 2021-42 (15 per annum).

Local Housing Need

15. Overall, there is a need for 1,077 dwellings over the 21 year period, or 51.3 dwellings per annum. This is the total need for housing, with the final affordable housing need being 325 dwellings over the 21 year period.

Figure 4: Overall need for Market and Affordable Dwellings (including affordable home ownership products) by property size in The Broads Authority (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	Unable to afford market rents	Unable to afford market ownership but able to afford 70% DMS	Affordable Housing	Total Market Housing	Total Housing
1 bedroom	19	7	25	22	47
2 bedrooms	110	20	130	94	224
3 bedrooms	118	26	144	500	644
4+ bedrooms	18	7	25	136	161
DWELLINGS	265	60	325	752	1,077

1. Introducing the Study

Background to the Project and Wider Policy Context

Introduction

- 1.1. Opinion Research Services (ORS) was commissioned in 2022 by Great Yarmouth Borough Council and the Broads Authority to prepare a Local Housing Needs Assessment (LHNA) for the period 2021-2041 to identify the size, type and tenure of homes that will be needed in the future, and the housing needs of different groups, including affordable housing.
- 1.2. The 2019 National Planning Policy Framework (NPPF) required local planning authorities to inform strategic policy making with a local housing needs assessment. A Local Housing Needs Assessment (LHNA) was required to be prepared which established a minimum Local Housing Need (LHN) figure, which in turn was set by a Standard Method formula issued by MHCLG. As of late 2021, this gave a figure of 353 dwellings per annum for Great Yarmouth.
- 1.3. The previous Government's policy approach to planning for housing need in National Parks and associated areas such as the Broads Authority was different to that of other Local Planning Authorities. Planning Practice Guidance (PPG) on Housing and Economic Needs at paragraph 14 stated that an area such as the Broads Authority could identify its own housing needs based upon local evidence, rather than follow the national standard method for Local Housing Need set out for local authority areas. As a result, the Broads Authority commissioned ORS to calculate the need for the entire area of the Broads, breaking it down into its 6 constituent districts.
- 1.4. The final outcome of this process was that a 5-year migration trend model was derived which showed a need for 358 dwellings over the 20 year period, or 17.9 dwellings per annum was the best model for the Broads Authority. This is the total need for housing, with the affordable housing need being 153 dwellings over the 20 year period, or 7.6 dwellings per annum.

Government Policy December 2024

- 1.5. The current Government published an updated version of the NPPF in December 2024. In terms of overall housing need, paragraph 62 still states that:

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

National Planning Policy Framework, December 2024

- 1.6. However, PPG has been updated to derive a new methodology for local authority areas based upon their existing number of dwellings and the ratio of median house prices to median incomes in the area. Therefore, the methodology for calculating housing need at a local authority area has been updated.

- 1.7. Importantly, an addition has been made to paragraph 14 of PPG for Housing and Economic Needs Assessment covering National Parks and the Broads Authority:

Where strategic policy-making authority boundaries do not align with local authority boundaries, or data is not available, should the standard method be used to assess local housing need?

Where strategic policy-making authorities do not align with local authority boundaries (either individually or in combination), or the data required for the model are not available such as in National Parks and the Broads Authority, or local authority areas where the samples are too small, an alternative approach may have to be used.

Such authorities may continue to identify a housing need figure using a method determined locally. In doing so authorities should take into consideration the best available evidence on the amount of existing housing stock within their planning authority boundary, local house prices, earnings and housing affordability. In the absence of other robust affordability data, authorities should consider the implications of using the median workplace-based affordability ratio for the relevant wider local authority area(s).

For local authorities whose boundaries cross National Parks or Broads Authority areas, the proportion of the local authority area that falls within and outside the National Park or Broads Authority area should also be considered – for example where only a minimal proportion of the existing housing stock of a local authority falls within the National Park or Broads Authority area it may be appropriate to continue to use the local housing need figure derived by the standard method for the local authority area.

Paragraph: 014 Reference ID: 2a-014-20241212

- 1.8. Therefore, PPG continues to state that an area such as the Broads Authority is not covered by the standard method for local housing need and that they can consider using a local determined housing need figure. However, it now promotes that the Broads Authority should use an overall needs figure based upon the current size of its dwelling stock and the median workplace affordability ratio for the local authorities which it covers.
- 1.9. In terms of the new methodology, the baseline housing need figure in is derived using the following formula, set out at paragraph 4 of PPG for Housing and Economic Needs Assessment.

How is a minimum annual local housing need figure calculated using the standard method

The standard method calculates a minimum annual local housing need figure as follows:

Step 1 - Setting the baseline – 0.8% of existing housing stock for the area

Set the baseline using the value of existing housing stock for the area of the local authority. The baseline is 0.8% of the existing housing stock for the area, and the most recent data published at the time should be used.

Step 2 - An adjustment to take account of affordability

The housing stock baseline figure (as calculated in step 1) is then adjusted based on the affordability of the area.

The affordability data used is the median workplace-based affordability ratios, published by the Office for National Statistics at a local authority level. The mean average affordability over the five most recent years for which data is available should be used.

No adjustment is applied where the ratio is 5 or below. For each 1% the ratio is above 5, the housing stock baseline should be increased by 0.95%. An authority with a ratio of 10 will have a 95% increase on its annual housing stock baseline.

Where an adjustment is to be made, the precise formula is as follows:

For values of 'five year average affordability ratio' above 5; otherwise zero.

Adjustment Factor = ((five year average affordability ratio-5)/5)×0.95 + 1

Paragraph: 004 Reference ID: 2a-004-20241212

- 1.10. For the Broads Authority, our estimate for the current dwelling stock is 3,775 properties based upon the postal address file and the share of the Broads Authority's dwelling contained within the Census Output Areas covering it. 0.8% of 3,755 is 30.2 dwellings and this is the baseline need.
- 1.11. Taking a weighted average of the 5 year average affordability ratio gives a figure of 8.683. Applying this figure as an adjustment factor yields an overall housing need of 51.3 dwellings per annum.
- 1.12. Therefore, for this study, we have used an overall housing need for the Broads Authority of 51.3 dwellings per annum for the period 2021-2042¹. This gives a total dwelling need of 1,077 dwellings over the 21-year period.
- 1.13. From a plan-making perspective, housing need has to be assessed independently of any constraints. However, the final housing requirement and plan target for the Broads Authority may well be different due to constraints, and the previous 17.9 dwellings per annum figure was already challenging in the context of the Broads Authority's overarching statutory duties to protect the area. It is important to note that the housing need that is identified in this report is part of and not additional to the housing need identified for the Broads Authority's 6 constituent districts.
- 1.14. The remainder of this report explores the impact of a total dwelling need of 1,077 on the need for affordable housing need of the Broads Authority. Much of the Great Yarmouth and Broads Authority LHNA 2022 still remains valid and has not been updated in this report. This report is effectively an addendum to the original report.

¹ The LHNA 2022 study looked to 2041, but given the time that has passed, in order to ensure the plan period is 15 years on adoption, it has been extended to 2042.

2. Demographic Projections

The starting point for establishing Local Housing Need

Demographic Analysis for the Broads Authority

- 2.1. As noted above, the LHNA 2022 included household projections for the Broads Authority. The new standard method introduced in December 2024 does not include any direct input from population or household projections. However, to allow the modelling of affordable housing need it is necessary to develop household projections for the different types of households who are projected to reside in the Broads Authority.
- 2.2. The changes from an overall need from a need on 17.9 dwellings per annum to one with 51.3 dwellings represent a very large step up on the number of households. The LHNA 2022 considered the affordable need based upon the existing population and migration flows to the Broads Authority. If more homes are assumed to be delivered then this will allow more households to form in the area and also more households to migrate into the area. Our modelling in the LHNA 2022 already allowed for future household formation, so our updated modelling in this report assumes higher levels of in-migration to the area.

Projected Household Age Profile

- 2.3. Figure 5 show the net change in projected household numbers for The Broads Authority between 2021 and 2042 based on the trend-based projections by household type and age. This data relates to all households, not just those in affordable housing need and it shows how households are likely to change by type and age over the next 21 years. The data is then used to underwrite the modelling of housing need set out below.
- 2.4. Given the overall size of the population for the Broads Authority, the numbers in some categories are small, but overall trends are clear. This shows a growing number of single person households in the area, but also a growth in 'Other' households, some of which are likely to represent adult children of any age living at home with their parents who may be above retirement age.

Figure 5: Summary of 21-year change by household type and age of household representative for the Broads Authority (Note: Figures may not sum due to rounding. Source: ORS Model)

Age of Household Representative	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	TOTAL
Single person	-2	8	18	19	4	-25	50	118	191
Couple without children	-3	8	13	-3	28	61	140	104	347
Families with child(ren)	8	47	29	53	24	2	2	4	169
Other households	9	0	3	0	6	9	65	64	156
TOTAL CHANGE	13	64	62	68	62	47	257	290	862
% of Total Change²	1%	7%	7%	8%	7%	5%	30%	34%	100%

² Percentage change in households in the age group in the column heading

3. Affordable Housing Need

Identifying households who cannot afford market housing

Introduction

- 3.1. The definition of affordable housing was changed by the NPPF 2019, with a specific emphasis now placed on affordable home ownership. This was retained in the NPPF December 2024 update. Annex 2 of the Revised NPPF now defines affordable housing as being:

Affordable housing

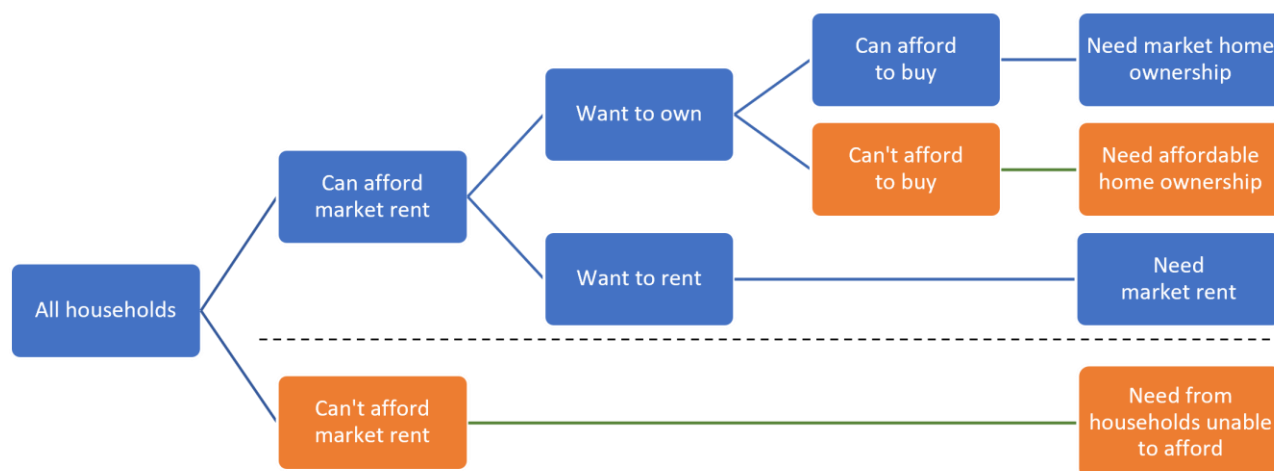
Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers)

NPPF December 2024, Annex 2

- 3.2. To reflect this change, paragraphs of PPG were updated in February 2019. These were further updated with a new set of guidance on “Housing needs of different groups” published on 22nd July 2019³. Further guidance to reflect the need to consider First Homes was then added on May 24th 2021.
- 3.3. On this basis, it is clear that the assessment of affordable housing need must now consider those households who would like to own but are unable to do so, in addition to those households unable to afford to own or rent which have formed the longstanding basis for assessing affordable housing needs.
- 3.4. Figure 6 illustrates the different groups of households that must now be considered when assessing the need for affordable housing. The needs of those households that can’t afford market rent need to be added to the needs of those that can afford market rent but who want to own but can’t afford to buy.

³ <https://www.gov.uk/guidance/housing-needs-of-different-groups#affordable-housing>

Figure 6: Establishing the need for market and affordable housing



Affordable Housing Need: Households Unable to Afford

- 3.5. PPG notes that affordable housing need is based on households “*who lack their own housing or who cannot afford to meet their housing needs in the market*” [ID 67-006-20190722]; though goes on to say that this should include the needs of those that can afford market rent but who want to own but can’t afford to buy. Given this context, the following section firstly considers the needs of those households who cannot afford to meet their housing needs, either through buying or renting. The additional needs of those who can afford to rent but who want to own will be considered in the next section.
- 3.6. PPG sets out the framework for this calculation, considering both the current unmet housing need and the projected future housing need in the context of the existing affordable housing stock:

Current Unmet Need for Affordable Housing

- 3.7. In terms of establishing the **current** unmet need for affordable housing, the PPG draws attention again to those types of households considered to be in housing need; whilst also emphasising the need to avoid double-counting and including only those unable to afford their own housing. The PPG guidance continues:

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

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

...

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

Planning Practice Guidance, ID: 2a-020-20190220

Establishing Current Unmet Need for Affordable Housing for Households Unable to Afford

- 3.8. Households assumed to be unable to afford housing include:
- » All households that are currently homeless;
 - » All those currently housed in temporary accommodation; and
 - » People in a reasonable preference category on the housing register, where their needs have not already been counted.
- 3.9. Given this context, our analysis counts the needs of all these households when establishing the need for affordable housing at a base date of March 31st 2021.
- 3.10. The analysis counts the needs of all households living in overcrowded rented housing when establishing the need for affordable housing, (which could marginally overstate the affordable housing need) but it does not count the needs of owner occupiers living in overcrowded housing (which can be offset against any previous over-counting). Student households are also excluded, given that their needs are assumed to be transient and do not count towards the need for affordable housing.
- 3.11. The analysis does not count people occupying insanitary housing or otherwise living in unsatisfactory housing conditions as a need for additional affordable housing. These dwellings would be unsuitable for any household; and enabling one household to move out would simply allow another to move in – so this would not reduce the overall number of households in housing need. This housing need should be resolved by improving the existing housing stock.
- 3.12. Concealed families are defined as, “family units or single adults living within other households, who may be regarded as potential separate households which may wish to form given appropriate opportunity”⁴. When considering concealed families, it is important to recognise that many do not want separate housing. Concealed families with older family representatives will often be living with another family, perhaps for cultural reasons or in order to receive help or support due to poor health. However, those with younger family representatives are more likely to experience affordability difficulties or other constraints (although not all will want to live independently).
- 3.13. Concealed families in a reasonable preference category on the housing register will be counted regardless of age, but our analysis also considers the additional growth of concealed families with family representatives aged 18-54 years (even those not registered on the housing register) and assumes that all such households are unlikely to be able to afford housing (otherwise they would have found a more suitable home). The needs of these households are counted when establishing the need for affordable housing.
- 3.14. The Broads Authority is not a housing authority, so does not collect information on current housing needs. Therefore, we have apportioned need from the 6 local authorities who include part of the Broads Authority. Figure 7 sets out the assessment of current affordable housing need for The Broads Authority, which shows 62 households currently unsuitably housed and needing to move, with a net need for 40 households.

⁴ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6338/1776873.pdf

Figure 7: Assessing current unmet gross need for affordable housing – The Broads Authority (Sources: CLG P1E returns; Census 2001, 2011 and 2021; English Housing Survey; DWP Housing Benefit; CLG Local Authority Housing Statistics)

Current unmet need classification	Current status	Affordable Housing Gross Need	Affordable Housing Supply	Affordable Housing Net Need
Homeless households in priority need [Source: CLG P1E returns]	Currently in temporary accommodation in communal establishments (Bed and breakfast or Hostels)	1		1
Homeless households in priority need [Source: CLG P1E returns]	Currently in temporary accommodation in market housing (Private sector leased or Private landlord)	1		1
Homeless households in priority need [Source: CLG P1E returns]	Currently in temporary accommodation in affordable housing (Local Authority or RSL stock)	0	0	0
Homeless households in priority need [Source: CLG P1E returns]	Households accepted as homeless but without temporary accommodation provided	2		2
Concealed households [Source: Census 2001 and 2011]	Growth in concealed families with family representatives aged under 55	11		11
Overcrowding based on the bedroom standard [Source: Census 2011 and English Housing Survey]	Households living in overcrowded private rented housing	13		13
Overcrowding based on the bedroom standard [Source: Census 2011 and English Housing Survey]	Households living in overcrowded social rented housing	21	21	0
Other households living in unsuitable housing that cannot afford their own home [Source: CLG LAHS]	People who need to move on medical or welfare grounds, including grounds relating to a disability	13	1	12
Other households living in unsuitable housing that cannot afford their own home [Source: CLG LAHS]	People who need to move to a particular locality in the borough of the authority, where failure to meet that need would cause hardship	0	0	0
TOTAL		62	22	40

Projected Future Affordable Housing Need

- 3.15. In terms of establishing **future** projections of affordable housing need, the PPG draws attention to new household formation (in particular the proportion of newly forming households unable to buy or rent in the market area) as well as the number of existing households falling into need.
- 3.16. The ORS Housing Mix Model considers the need for market and affordable housing on a longer-term basis that is consistent with household projections and the LHN. The Model uses a range of secondary data sources to build on existing household projections and profile how the housing stock will need to change in order to accommodate the projected future population. The Model provides robust and credible evidence about the required mix of housing over the full planning period, and recognises how key housing market trends and drivers will impact on the appropriate housing mix.
- 3.17. Whilst PPG identifies that “Projections of affordable housing need will have to reflect new household formation, the proportion of newly forming households unable to buy or rent in the market area, and an estimate of the number of existing households falling into need.” [ID: 2a-021-20190220], the Model recognises

that the proportion of households unable to buy or rent in the market area will not be the same for all types of household, and that this will also differ by age. Therefore, the appropriate proportion is determined separately for each household type and age group.

- 3.18. The affordability percentages in Figure 8 are calculated using detailed information on existing households living in the local authorities covering the Broads Authority from the 2021 Census alongside data published by DWP about housing benefit claimants. For each type of household in each age group, the table identifies the percentage of households unable to afford their housing costs. The defining factor here is whether a household can pay for their housing without requiring affordable housing or housing benefit. Therefore, this is the proportion of households in each age and household composition group that either occupy affordable housing or receive housing benefit to enable them to afford market housing.

Figure 8: Assessing affordability by household type and age for Broads Authority (Source: Census 2011 and DWP)

Percentage unable to afford market housing in The Broads Authority	Under 25	25-34	35-44	45-54	55-64	65+
Single person household	23%	10%	23%	23%	22%	21%
Couple family with no dependent children	21%	7%	10%	9%	8%	13%
Couple family with 1 or more dependent children	67%	33%	20%	13%	13%	28%
Lone parent family with 1 or more dependent children	76%	78%	53%	43%	37%	73%
Other household type	24%	49%	34%	23%	20%	11%

Establishing the Future Affordable Housing Need for Households Unable to Afford

- 3.19. When considering the number of newly arising households likely to be in affordable housing need, the PPG recommends a “*gross annual estimate*” [ID 2a-021-20190220] suggesting that “*the total need for affordable housing should be converted into annual flows*” [ID 2a-024-20190220].
- 3.20. Together with information on household type, this provides a framework for the model to establish the proportion of households who are unable to afford their housing costs. The following tables look at the impact of different types of household over the longer period of 2021-2042.

Figure 9: Newly forming and in-migration: Annual components of Household Growth 2021-42 in The Broads Authority (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	All households	Households able to afford housing costs	Households unable to afford housing costs	% unable to afford housing costs
Newly forming households	139	102	36	26%
Households migrating into the area	341	270	71	21%
All new households	480	372	107	22%

- 3.21. The ORS Model identifies 139 new households projected to form in the Broads Authority each year, of which 26% will be unable to afford their housing costs. This amounts to 36 households each year.
- 3.22. The model also considers new households migrating to the area. The projection is for 341 households per annum of which 21% (71 households) will be unable to afford their housing costs. Migrating households are less likely to be in housing need because they typically have higher incomes and equity from property elsewhere.
- 3.23. **This results in a total of 107 new households in need of affordable housing per annum in the Broads Authority.**

- 3.24. PPG identifies that “there will be a current supply of housing stock that can be used to accommodate households in affordable housing need” and that it is necessary to establish “the number of affordable dwellings that are going to be vacated by current occupiers that are fit for use by other households in need” (ID 2a-022).

Figure 10: Dissolution and out-migration: Annual components of Household Growth in The Broads Authority 2021-42 (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	All households	Households able to afford housing costs	Households unable to afford housing costs	% unable to afford housing costs
Household dissolutions following death	192	159	33	17%
Households migrating <u>out</u> of the area	245	190	54	22%
All households no longer present	436	349	88	20%

- 3.25. In the Broads Authority, the model identifies 192 households are likely to dissolve following the death of all household members. Many of these households will own their homes outright however, 33 of these are likely to have been unable to afford market housing, with many living in social rented housing.
- 3.26. In addition, some households that are unable to afford housing will migrate away from the area, so their needs should be discounted to ensure consistency with the household projections. The model identifies that in the Broads Authority 245 households will migrate out of the area each year, including 54 households who are unable to afford their housing costs. A proportion of these will vacate rented affordable housing (which will become available for another household) whereas others that have not yet been allocated an affordable home will reduce the number of households waiting. (It should be noted that some might have chosen to stay if housing costs were cheaper or more affordable housing was available).
- 3.27. Altogether, there are 88 households per annum who will vacate affordable dwellings or will no longer be waiting for a home in the Broads Authority.
- 3.28. PPG also identifies that it is important to estimate “*the number of existing households falling into need*” (ID 2a-021). Whilst established households that continue to live in the local authorities will not contribute to household growth, changes in household circumstances (such as separating from a partner or the birth of a child) can lead to households who were previously able to afford housing falling into need. The needs of these households are counted by the model by considering changes in affordable housing and housing benefit uptake between cohorts in the population, and it is estimated that 17 established households in the Broads Authority will fall into need each year.
- 3.29. However, established households’ circumstances can also improve. For example:
- » When two single person households join together to form a couple, pooling their resources may enable them to jointly afford their housing costs (even if neither could afford separately).
 - » Households also tend to be more likely to afford housing as they get older, so young households forming in the early years of the projection may be able to afford later in the projection period.
- 3.30. These improved circumstances can therefore reduce the need for affordable housing over time. The model identifies that the circumstances of 25 in the Broads Authority will improve such that they become able to afford their housing costs having previously being unable to afford. This is again calculated by analysing flows of households moving into affordable housing and housing benefit claimants between different cohorts in the population.

Figure 11: Existing households: Annual components of Household Growth in The Broads Authority 2021-42 (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	All households	Households able to afford housing costs	Households unable to afford housing costs	% unable to afford housing costs
Existing households falling into need	-	-17	17	100%
Existing households climbing out of need	-	25	-25	0%
Change in existing households	-	9	-9	-

3.31. The following tables (Figure 12) summarise the overall impact of:

- » New households adding to housing need;
- » The households no longer present reducing housing need; and
- » The changes in circumstances impacting existing households.

Figure 12: Summary annual components of Household Growth in The Broads Authority 2021-42 (Source: ORS Housing Model Note: Figures may not sum due to rounding)

The Broads Authority	All households	Households able to afford housing costs	Households unable to afford housing costs
All new households	480	372	107
All households no longer present	436	349	88
Change in existing households	-	9	-9
Future affordable housing need 2021-42 (Annual average)	43	32	11

3.32. Overall reviewing the contribution of each element amounts to an additional 11 households needing affordable housing in the Broads Authority annually over the 21-year period 2021-42.

Overall Affordable Housing Need for Households Unable to Afford

3.33. Below, Figure 13 brings together the information on assessing the unmet need for affordable housing in 2021 and the associated impact on market housing, together with the future need for market and affordable housing arising over the 21-year period 2021-42.

**Figure 13: Assessing total need for market and affordable housing for The Broads Authority ((Source: ORS Housing Model.
Note: Figures may not sum due to rounding)**

The Broads Authority	Housing Need (households) Market housing	Housing Need (households) Affordable housing	Overall Housing Need
Unmet need for affordable housing in 2021 (see Figure 7)			
Total unmet need for affordable housing (a)	-	62	62
Supply of housing vacated (b)	26	22	48
Current housing need (c) = (a) - (b)	-26	40	14
Projected future housing need 2021-42 (see Figure 12)			
Average annual housing need (d)	32	11	43
Future housing need (e) = (d) x 21	642	221	862
Total need for market and affordable housing (f) = (c) + (e)	615	261	876
Average annual household growth (g) = (f) / 21	31	13	44
Proportion of overall need for market and affordable housing	70.2%	29.8%	100.0%

- 3.34. In the Broads Authority, there is a need to provide affordable housing for 261 households unable to afford to rent or buy over the Plan period 2021-42 (30% of the projected growth) which equates to **13 households per year**.
- 3.35. These levels would provide for the current unmet needs for affordable housing in addition to the projected future growth in affordable housing need, but any future losses from the current stock (such as demolition, or sales through Right to Buy) would increase the number of affordable dwellings needed by an equivalent amount.

Needs of Households Aspiring to Home Ownership

- 3.36. Through combining data on the number of households of each type in each age group living in private rented housing and paying their own rent with the aspiration data from the EHS 2013-14, Figure 14 establishes the number of existing households likely to aspire to home ownership that have not been counted in the affordable housing need. It is important to recognise that all of these households are able to meet their own housing costs in the private rented sector, when they find a dwelling that suits them, so would typically not be considered for social or Affordable Rent.

Figure 14: Households currently living in the Private Rented Sector in the Broads Authority and paying their own rent that aspire to home ownership by Age of Household Representative (Note: Figures may not sum due to rounding)

Household Type	15-24	25-34	35-44	45-54	55-64	65+	TOTAL
Single person	5	26	20	12	8	8	78
Couple without children	4	24	11	18	17	8	81
Families with child(ren)	2	28	26	14	0	0	70
Other households	7	0	1	2	1	0	11
Total Volume	17	78	57	45	26	16	240
Percentage of households	7%	33%	24%	19%	11%	7%	100%

- 3.37. Based on this analysis, we can estimate that there is a total of around 240 households currently resident in the Broads Authority who cannot afford to own their own home but would aspire to do so.
- 3.38. In addition to the current need, it is also important to consider new households that are projected to form over the period 2021-2042. Through combining this data with the aspiration data from the EHS, we can

conclude that it is likely that there would be a further 161 households that form over the 21-year period who will be able to afford to pay market rent but unable to afford to own, despite that being their aspiration. **Overall, in the Broads Authority there are likely to be 401 households who aspire to home ownership but who cannot afford to buy their own home over the period 2021-42, a net annual need of 19 per year.**

- 3.39. In the LHNA 2022, the then government policy for affordable home ownership focused upon a housing product entitled First Homes, which are properties to be sold with at least a 30% discount to first-time buyers. However, the current government have removed the promotion of First Homes as a key policy and have allowed areas to consider a wider range of affordable home ownership products such as Shared Ownership and Discount Market Sales. For this report, we have consider Discount Market Sales with a 30% reduction from market pricing, which is consistent with First Homes. We would note that using Shared Ownership or a different level of discount does not impact significantly on the conclusions.
- 3.40. While the figure of 401 households who aspire to home ownership in the Broads Authority sets an upper threshold for the number who could seek to access Discount Market Sales, it would still be the case that these households would require a deposit and to be able to afford to service the cost of a mortgage. We explore the importance of this point below.

Identifying the Overall Affordable Housing Need

- 3.41. Below, Figure 15 brings together the information on assessing the unmet need for affordable housing in 2021 together with the future need for affordable housing and those aspiring to home ownership arising over the 21-year period 2021-42. All data relates to households and this will be converted to dwellings when we add a vacancy rate in the next chapter. It can be noted that this assessment has no regard for whether those aspiring can access affordable home ownership options; some may be able to afford home ownership but have not found a suitable property yet.

Figure 15: Total need for affordable housing 2021-2042 – The Broads Authority (Source: ORS Housing Model)

The Broads Authority	Affordable Housing Need Households unable to afford	Affordable Housing Need Households aspiring to home ownership	Overall Affordable Housing Need
Current housing need in 2021	40	240	280
Future housing need 2021-42	221	161	382
TOTAL HOUSING NEED	261	401	662

- 3.42. In the Broads Authority we can conclude that the overall need for affordable housing would comprise a total of 662 households over the 21-year period 2021-2042, equivalent to an average of 32 per annum.
- 3.43. Given that the need for affordable housing and affordable home ownership in particular is very high, it is necessary to consider how this need can be addressed within the overall need established.
- 3.44. It will be important to plan for the needs of **all** households unable to afford to rent or own market housing if they are going to avoid the number of housing benefit claimants living in private rented housing increasing.
- 3.45. It is important to recognise that the figures for those who aspire to home ownership are based upon those households who currently can afford market rent. But these households would not necessarily choose new build Affordable Home Ownership if it was available, as some may prefer to secure full ownership in the less expensive second-hand housing market. Similarly, some households may not ultimately need affordable home ownership if their circumstances change to such a degree that they are eventually able to buy without

financial assistance. It is also important to recognise that the identified demand could only be realised if Affordable Home Ownership products can be delivered at prices that are truly affordable in the area, in line with local house prices and incomes.

- 3.46. Neither the NPPF nor PPG identify that any affordability criteria should be applied to those households who aspire to home ownership but cannot afford to buy their own home. However, it is appropriate to consider the extent to which these households could plausibly afford affordable home ownership products if they were provided. Whilst a range of affordable home ownership products are available, each with different costs and eligibility criteria, we have considered Discount Market Sales at 70% of market prices.
- 3.47. Given this context, Figure 16 identifies those households with income that would be insufficient to afford 70% of newbuild prices at the lower quartile for the local area, those households with savings of less than £5,000, and those households that both have sufficient income and savings to purchase an open market property but nonetheless choose to rent. This is based on further analysis of the EHS data which considers the income distribution and savings data for households that rent privately but aspire to home ownership. This data has been updated to reflect current income levels and scaled for each local area using indices from the ONS gross disposable household income (GDHI) tables.

Figure 16: Affordable home ownership housing mix by household affordability in the Broads Authority 2021-2042 (Source: ORS Housing Model)

The Broads Authority	All households aspiring to home ownership	MINUS households able to afford market home ownership	Households unable to afford market home ownership	MINUS households unable to afford 70% of newbuild LQ	Households able to afford 70% of newbuild LQ	MINUS households with savings of less than £5,000	Households able to afford and have savings of £5,000 or more
1 bedroom	44	11	33	8	25	19	7
2 bedrooms	153	27	126	34	92	72	20
3 bedrooms	174	22	152	39	113	87	26
4+ bedrooms	30	3	27	11	16	9	7
TOTAL	401	63	338	92	246	187	59

- 3.48. On this basis, 59 dwellings are needed for households that aspire to home ownership but cannot afford it, who also have at least £5,000 in savings and incomes above the relevant threshold. This is 15% of the total that was originally identified.
- 3.49. Whilst it will be a policy decision as to how much of the additional need for affordable home ownership from households able to afford market rent should be provided, in the Broads Authority, it would seem appropriate to only plan for the needs of those 59 households likely to form an effective demand (i.e. those able to afford the various products that will potentially be available) in addition to the 261 households unable to afford to rent or own market housing.

Figure 17: Overall need for Affordable Housing 2021-42 in The Broads Authority, including aspiring households able to access affordable home ownership, by property size (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	Affordable Housing Need Households unable to afford	Affordable Housing Need Households aspiring to home ownership	Affordable Housing (Households)
1 bedroom	18	7	25
2 bedrooms	109	20	129
3 bedrooms	117	26	143
4+ bedrooms	18	7	25
TOTAL HOUSING NEED	261	59	321

- 3.50. For the Broads Authority, the LHNA identifies an overall affordable housing need from **321 households⁵** over the 21-year period 2021-42 (15 per annum).

⁵ 151 households, before converting the need to 153 dwellings in Figure 18.

4. Overall Housing Need

Local Housing Need based on the Standard Method

Establishing the Housing Target

- 4.1. The overall housing need of 1,077 dwellings provides the starting point for establishing the final housing requirement which will be planned for through strategic policies. This is confirmed by PPG at the outset of the section on assessing housing and economic development needs:

Housing need is an unconstrained assessment of the number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing requirement figure and preparing policies to address this such as site allocations.

Planning Practice Guidance, ID 2a-001-20190220

- 4.2. In determining the local plan housing target, it will be necessary for the Broads Authority to consider whether or not the housing need can be met within their area, taking account of any constraints on land availability.
- 4.3. Where planning authorities are unable to meet their LHN in full, it will be necessary for them to engage with neighbouring authorities through the Duty to Cooperate discussion. This should establish if any of the identified housing need that isn't able to be delivered locally (the "unmet need") could be provided for in other areas. It is important to note that the housing need that is identified in this report is part of and not additional to the housing need identified for the Broads Authority's 6 constituent districts.

The Broads Authority: Overall Housing Need for 2021-42

- 4.4. Previously, Figure 17 set out the affordable housing need growth for the Broads from 2021-42. To convert this to dwellings requires the application of a vacancy and second homes dwelling rate to allow for the fact that at any one time some properties will be empty. A low rate of 1.5% has been allowed for in the affordable housing sector to reflect the low rates of vacancies in this stock. In the LHNA 2022, we allowed a rate of 18.9% in the market sector to allow for the high rate of second and vacant homes and this has been repeated in this study.
- 4.5. Overall, there is a need for 1,077 dwellings over the 21 year period, or 51.3 dwellings per annum. This is the total need for housing. The affordable housing need is 325 dwellings over the 21 year period, or 15.5 dwellings per annum. The figure of 325 dwellings includes all of the backlog of current affordable need, newly arising need and any need for affordable home ownership. This figure is consistent with the standard method for Local Housing Need for the 6 local authorities covering the Broads Authority, but allows for the differences in population structure between the Broads Authority and the wider local authorities.
- 4.6. We would note that the Broads Authority have regard to the affordable housing policies of the relevant district. The Broads Authority currently seek off-site affordable housing contributions for schemes of 6-9 dwellings, but are seeking to lower the threshold in their emerging plan.

4.7. Figure 18 and Figure 19 shows the data for the Broads Authority.

Figure 18: Overall need for Market and Affordable Dwellings (including affordable home ownership products) by property size in The Broads Authority (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	Unable to afford market rents	Unable to afford market ownership but able to afford 70% DMS	Affordable Housing	Total Market Housing	Total Housing
1 bedroom	19	7	25	22	47
2 bedrooms	110	20	130	94	224
3 bedrooms	118	26	144	500	644
4+ bedrooms	18	7	25	136	161
DWELLINGS	265	60	325	752	1,077

Figure 19: Overall need for Market and Affordable Dwellings as percentages of the LHN (including affordable home ownership products) by property size in the Broads Authority (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

The Broads Authority	Unable to afford market rents	Unable to afford market ownership but able to afford 70% DMS	Affordable Housing	Total Market Housing	Total Housing
1 bedroom	1.7%	0.7%	2.4%	2.0%	4.4%
2 bedrooms	10.2%	1.8%	12.1%	8.7%	20.8%
3 bedrooms	11.0%	2.5%	13.4%	46.4%	59.8%
4+ bedrooms	1.7%	0.7%	2.3%	12.7%	15.0%
DWELLINGS	24.6%	5.6%	30.1%	69.9%	100.0%

4.8. It is also possible to calculate the housing need for the Broads Authority by local authority area. Figure 20 shows the distribution of the housing need by local authority area. Taking an example of North Norfolk, 293 dwellings identified are being needed in the Broads Authority within North Norfolk over the period 2021-42. This is a total figure, not an annual rate which is 14 dwellings per annum. It is also part of the existing total for North Norfolk, which is currently 932 dwellings per annum under the December 2024 standard method figures, and should not be added to figures calculated earlier. Therefore, it is clear that the housing need for the Broads is very small and has only a marginal impact on meeting the needs of local authorities in the area.

Figure 20: Projected Dwellings needed for the Broads by Local Authority (Note: Dwelling numbers derived based on proportion of dwellings without a usually resident household in the 2021 Census. Note: figures may not sum due to rounding)

The Broads Authority	Broadland	North Norfolk	Norwich	South Norfolk	Great Yarmouth	East Suffolk
Overall need 2021-2042	316	293	17	204	177	70
Annual average need	15	14	1	10	8	3

Appendix A

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Appendix B

Glossary of Terms

Definitions

Affordability is a measure of whether housing may be afforded by certain groups of households.

Affordable housing includes social rented and intermediate housing, provided to specified eligible households whose needs are not met by the market. For the purpose of this report we have used the definition in the Revised NPPF, which specifies the main categories of affordable housing to be: affordable housing for rent; starter homes; discounted market sales housing (sold at a discount of at least 20% below market value); shared ownership, relevant equity loans, other low cost homes for sale and rent to buy.

Affordable Rent is provided by social landlords and rented for less than would be paid if renting privately. It must be at least 20% cheaper than the equivalent private rent in the area and must also be below the value of the Local Housing Allowance in the area.

Census Output Area is the smallest area for which UK Census of Population statistics are produced. Each Census Output Area had a population of around 250 people with around 100 dwellings at the time of the 2011 Census.

Concealed families are defined as; *“family units or single adults living within other households, who may be regarded as potential separate households which may wish to form given appropriate opportunity”*⁶.

Discount Market Sales are discounted market sale units which must be sold with at least a 20% discount in perpetuity.

First Homes are discounted market sale units which must be sold with either a 30%, 40% or 50% discount in perpetuity to a person or persons meeting the First Homes eligibility criteria.

Headship rates are defined by CLG as: *“the proportion of people in each age group and household type who are the ‘head’ of a household”*⁷

A household is one person living alone, or two or more people living together at the same address who share at least one meal a day together or who share a living room.

Household formation refers to the process whereby individuals in the population form separate households. ‘Gross’ or ‘new’ household formation refers to households that form over a period of time, conventionally one year. This is equal to the number of households existing at the end of the year that did not exist as separate households at the beginning of the year (not counting ‘successor’ households, when the former head of household dies or departs). ‘Net’ household formation is the net growth in households resulting from new households forming less the number of existing households dissolving (e.g. through death or joining up with other households).

Housing demand is the quantity of housing that households are willing and able to buy or rent.

⁶ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6338/1776873.pdf

⁷ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/182427/MethodologyFinalDraft.pdf

Household income includes all salaries, benefits and pensions, before deductions such as tax and National Insurance.

Housing need is the quantity of housing required for households who are unable to access suitable housing without financial assistance.

Housing requirements encompasses both housing demand and housing need, and is therefore the quantity of housing necessary for all households to have access to suitable housing, irrespective of their ability to pay.

Housing type refers to the type of dwelling, for example, flat, house, specialist accommodation.

Low cost home ownership or **Shared ownership** is intermediate affordable housing designed to help people who wish to buy their own home, but cannot afford to buy outright (with a mortgage). Through this type of scheme you buy a share in the property with a Housing Association or other organisation.

Lower quartile means the value below which one quarter of the cases falls. In relation to house prices, it means the price of the house that is one-quarter of the way up the ranking from the cheapest to the most expensive.

Market housing is private housing for rent or for sale, where the price is set in the open market.

Migration is the movement of people between geographical areas. In this context it could be either local authority districts, or wider housing market areas. The rate of migration is usually measured as an annual number of individuals, living in the defined area at a point in time, who were not resident there one year earlier. Gross migration refers to the number of individuals moving into or out of the authority. Net migration is the difference between gross in-migration and gross out-migration.

A projection of housing needs or requirements is a calculation of numbers expected in some future year or years based on the extrapolation of existing conditions and assumptions. For example, household projections calculate the number and composition of households expected at some future date(s) given the projected number of residents, broken down by age, sex and marital status, and an extrapolation of recent trends in the propensity of different groups to form separate households.

Secondary data is existing information that someone else has collected. Data from administrative systems and some research projects are made available for others to summarise and analyse for their own purposes (e.g. Census, national surveys).

Shared ownership see Low Cost Home Ownership.

Social rented housing is provided by social landlords and rented for less than would be paid if renting privately. It typically has lower rents than Affordable Rent.

Acronyms and Initials

BRMA	Broad Rental Market Area
CLG	Department for Communities and Local Government (now MHCLG)
DWP	Department of Work and Pensions
LA	Local Authority
LHA	Local Housing Allowance
LHN	Local Housing Need
LHNA	Local Housing Needs Assessment
MHCLG	Ministry for Housing, Communities and Local Government
NPA	National Park Authority
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
ORS	Opinion Research Services
PPG	Planning Practice Guidance
RSL	Registered Social Landlord
SHMA	Strategic Housing Market Assessment