The 2016-based Household Projections for England

On 20th September 2018, ONS published the 2016-based Household Projections. This is ONS’s first set of projections, having taken over responsibility from MHCLG in 2017. ONS project average household growth nationally of 159,000 per annum 2016-41 (165,000 over the ten year period 2018-28), compared to 210,000 per annum 2014-39 (218,000 over the ten years 2018–28). These projections form the current basis for estimating housing needs under the current ‘standard method’, but further changes are afoot.

Over the past two years Government has proposed significant changes to the way housing needs are assessed. The previous practice guidance on housing needs – which often resulted in lengthy debates and delays in the plan-making process – is gone, replaced with a much simpler ‘standard method’. Termed ‘local housing need’ in the 2018 NPPF, it takes the household projections as a starting point and applies a percentage uplift, depending on the scale of affordability pressures in an area. This means that:

1. the level of household growth in the projections is even more important given these are the unambiguous basis of local housing need. They should only be departed from in exceptional circumstances which are to be tested through local plan examinations;
2. any local authority with an affordability ratio greater than 4.0 will be required to make an uplift to the figure so that increased supply reduces the upward pressure on house prices.

However, Government is clear that the standard method local housing need figure is a minimum; authorities may submit higher numbers on the basis of, for example, economic growth, regeneration, infrastructure investment or affordable housing.

Moreover, for reasons we explain in this publication, the Government is already proposing to consult on changes to the methodology to one consistent with achieving 300,000 homes per annum. These latest projections may prove less important to housing need than previous iterations.

This guide has been produced by Lichfields to help you navigate the new household projections. Click on an area of England for the headlines, including:

- Difference in projected household growth (by authority and housing market area) between the 2014-based and 2016-based projections
- Possible standard method figure
- How this compares to average rates of new housing over the past three years.
Why is Government already planning to revise the standard method?

The introduction of a standard method for assessing housing needs was welcomed by many. Rather than having plan making dominated by debates over the robustness of housing need estimates in Strategic Housing Market Assessments, we can - in Government’s own words - focus on ‘planning for the right homes in the right places’. However, just a year since the standard method was first published, Government is already planning to consult on changes to it. Why?

Household projections have been a core input to assessing housing need since at least 1977, when the Housing Services Advisory Group of the old Department of the Environment advocated what it called the total stock/household method. The standard method combines these projections with a second input (an uplift based on the affordability ratio). For any method to have credibility as a measure of need, we need to be confident its inputs and/or the way they are used remain fit for purpose.

Of course, ONS does not produce population and household projections specifically for the purposes of planning, and they do not in fact purport to be a measure of housing need. They are simply projections of past trends and are not produced with a particular housing policy outcome in mind.

Further, the ONS has changed the methodology for assessing household formation rates (to convert population into households) from that used in previous projections. It is thus important for Government to ensure that its guidance on housing need is calibrated to adjust for any changes in the underlying data inputs on which it relies.

Household projections have fluctuated over a number of years, but there is a broad consensus that, over the long term, there is a need for in the order of 300,000 homes per annum to improve relative housing affordability. Achieving this level of supply by the mid-2020s is now the Government’s stated ambition.

When the standard method was published for consultation in September 2017, it yielded a national total (for England) of 266,000 homes per annum (2016-26) as the minimum estimate of need. This represented around a 20% uplift on the-then household projection growth of 222,000 households over the 10-year period. To reach 300,000, authorities across the country then collectively needed to plan for 34,000 homes per annum on top of the minimum figure. Ambitious, when one factors in that some areas (e.g. London) were unlikely to hit their minimum figures, but arguably the 300,000 was an achievable goal.

However, if the new projections are used as the basis of the standard method they yield just 214,000 nationally, as shown in Figure 1. Councils would need to be electing to plan for an extra 86,000 homes per annum, on top of the standard method figure, and given some areas might not meet their need, the reality is an even bigger uplift.

Figure 1: Homes per year generated by standard method – September 2017 and September 2018

To read more about why the new projections are so different.
Are the projections still fit for purpose in assessing local housing need?

Population Projections
In May 2018 ONS published the 2016-based Sub-National Population Projections (SNPPs) – these are the basis for the household projections. Within this, ONS has changed some of its underlying assumptions about births, deaths and migration. In short, it now assumes lower birth rates, higher death rates and lower international migration than previously. This means there are now projected to be around 1.5 million fewer people in England by 2036 in the new projections compared to the previous projections, as shown in Figure 2.

Of course, not all of this population change will affect household growth – for example a decrease in the birth rate will not impact household projections until 20+ years’ time. However, the increase in death rates amongst older people and lower migration will affect household projections in the short and long term.

International migration trends are projected to fall, with the recent peaks of net in-migration expected to fall to a long term average (from mid-2023) of +152,000 each year, compared with +170,200 in the 2014-based projections.

Household Formation Rates
In addition to lower underlying population projections, ONS has adopted a new methodology for projecting household formation rates which differs to that previously used by DCLG. ONS now uses just two historic points – 2001 and 2011 – to projecting headship rates up to 2021, after which it holds rates constant (i.e. a ‘floor’ based on 2021 rates). Previously, trends going back to 1971 were used.

By using such a short period (2001-11) the projections inherently ‘bake in’ the implications of a period that saw a dramatic fall in housebuilding to its lowest levels in modern history and a rise in affordability problems, a substantial increase in concealed families, and an increasing number of adults living at home. In that sense they have an endogenous circularity.

ONS’s remit is to produce demographic projections based on past trends – its approach is not inherently wrong from a statistician or demographer’s perspective, but they now project forward trends that Government policy is explicitly seeking to reverse, raising questions as to whether they are fit for purpose for planning for housing need.

Perhaps the best examples of the concern is that the projections show minimal or negative figures for Oxford and Cambridge over the ten-year period used in the standard method, which might imply no need for any new housing in two locations with acute housing problems. There is also an inconsistency in how communal establishments such as care homes are treated (excluded from the projections but included within the housing need figure).

ONS is clear: “Household projections show the number of households there would be in England in the future if a set of assumptions ...were realised in practice. The assumptions used in household projections for England ...are based on past demographic trends in the population and rates of household formation”. This means that events from the past can dramatically impact on the projections, and if those events persist, trends will be ‘baked in’ to the projections.

What next?
The problem was already on the Government’s radar. Back in July it indicated it will consult on changes to the standard methodology to address the fact the projections are not consistent with achieving 300,000 homes per annum. At the time of writing we await the new proposals; in the meantime, those involved in planning would be unwise to get too excited about the 2016-based figures as they stand.

Figure 2: Projected population – England – 2014-based and 2016-based projections

Source: Lichfields analysis
### England

**Average Household Size - England**

**Past and Projected Average Household Size**

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#### Annual household growth - 2016-26 (2014-based)

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<td>10,200</td>
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*May not sum due to rounding.

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Visit lichfields.uk for more information.
**Birmingham and Coventry**

### Housing Market Areas
1. Birmingham and Black Country
2. Coventry-Warwickshire

<table>
<thead>
<tr>
<th>Fastest growing areas</th>
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</thead>
<tbody>
<tr>
<td>1. Coventry</td>
</tr>
<tr>
<td>2. Rugby</td>
</tr>
<tr>
<td>3. Bromsgrove</td>
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</table>

<table>
<thead>
<tr>
<th>Slowest growing areas</th>
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</thead>
<tbody>
<tr>
<td>1. Tamworth</td>
</tr>
<tr>
<td>2. Redditch</td>
</tr>
<tr>
<td>3. Dudley</td>
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**Projected rate of household growth 2018-28** (2016-based) **6.5%**

**Annual rate of household growth 2018-28** (2016-based) **0.7%**

**Average Household Size in 2016** **2.47**

**Average Household Size in 2041** **2.39**

**Homes under standard method (potential, 2018-28 total)** **124,295**

**Homes under standard method (potential, 2018-28 annual)** **12,430**

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**The Lichfields perspective**

The GBSLEP area is projected to see a decline in local housing needs, to 8,500 dpa based on the standard method, whilst Coventry-Warwickshire is expected to reduce to 3,900 dpa. As always in this part of the West Midlands, Birmingham City’s needs are key to understanding wider housing requirements; for Birmingham alone the latest projections are almost 33,000 lower over the next 25 years compared to the previous projections, a fall of 30%. This would result in a LHN figure of 3,250 dpa for Birmingham based on the standard method, which is still higher than the adopted Local Plan figure of 2,555 dpa. Unmet needs will still need to be addressed elsewhere in the HMA.

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*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.*
The latest household projections anticipate an 8.4% increase in the number of households in this sub-region between 2018 and 2028. The new projections equate to a housing need of 14,200 dpa over the next 10 years under the current standard methodology. This is lower than that based on the 2014-SNHP, however, across the sub-region the latest housing need figures suggest a level of growth slightly higher than that planned for in adopted Local Plans.

The Lichfields perspective

Fastest growing areas
1. Tewkesbury
2. Sedgemoor
3. North Somerset

Slowest growing areas
1. West Somerset
2. Cheltenham
3. Bath and North East Somerset

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<td>727</td>
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*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
Cheshire, Greater Manchester and Merseyside

The Lichfields perspective

Recent delays to the GMSF have ensured that these latest projections have become keenly anticipated, with the current GMSF housing target of 227,200 requiring significant levels of Green Belt release. The latest household growth figures are 26% lower than their predecessors over the next 25 years, which could suggest a LHN figure of 7,700 dpa annually. This is a massive 73,600 dwellings below the current figure in the 2016 version of the GMSF. Manchester City's figure alone would decline by almost a thousand homes annually. Whilst there may be pressure from some GM authorities to pursue this lower figure, such an approach could risk severely harming the economic prospects of the Northern Powerhouse.

Fastest growing areas

1. Salford
2. Manchester
3. Trafford

Slowest growing areas

1. West Lancashire
2. Sefton
3. Wirral

Projected rate of household growth 2018-28 (2016-based) 5.2%

Annual rate of household growth 2018-28 (2016-based) 0.5%

Average Household Size in 2016 2.31

Average Household Size in 2041 2.21

Homes under standard method (potential, 2018-28 total) 135,807

Homes under standard method (potential, 2018-28 annual) 13,581

The Lichfields perspective

Recent delays to the GMSF have ensured that these latest projections have become keenly anticipated, with the current GMSF housing target of 227,200 requiring significant levels of Green Belt release. The latest household growth figures are 26% lower than their predecessors over the next 25 years, which could suggest a LHN figure of 7,700 dpa annually. This is a massive 73,600 dwellings below the current figure in the 2016 version of the GMSF. Manchester City's figure alone would decline by almost a thousand homes annually. Whilst there may be pressure from some GM authorities to pursue this lower figure, such an approach could risk severely harming the economic prospects of the Northern Powerhouse.

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See Endnotes for further information.
The latest household projections anticipate a 7.2% increase in the number of households in Cornwall, Devon and Dorset between 2018 and 2028. This translates to a housing need figure of 10,500dpa under the standard methodology; 16% lower than that based on the previous set of household projections. The most significant reductions are expected in Bournemouth and Poole and Plymouth (c.-40%), whilst an increased level of housing need is expected in East Devon (+11%) and Teignbridge (+4%). Across this sub-region area, the latest standard methodology figures indicate a need that slightly lower than existing requirements contained within adopted Local Plans, albeit that there are some significant variations between individual local authorities.

### Fastest growing areas
1. East Devon
2. Teignbridge
3. Torridge

### Slowest growing areas
1. Plymouth
2. North Devon
3. Poole

### Table: Average Household Size in 2016 and 2041

<table>
<thead>
<tr>
<th>Area</th>
<th>Average Household Size in 2016</th>
<th>Average Household Size in 2041</th>
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*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
## Cumbria and Lancashire

### Housing Market Areas

1. Allerdale
2. Barrow-in-Furness
3. Blackburn and Hyndburn
4. Burnley-Pendle
5. Carlisle
6. Central Lancashire
7. Copeland
8. Eden
9. Fylde Coast
10. Lancaster
11. Ribble Valley
12. Rossendale
13. South Lakeland

### The Lichfields perspective

Cumbria has some of the lowest household growth rates of any sub-region in England, with an increase of just 2,500 households projected over the next 25 years. Based on the new projections, both Copeland and Barrow-in-Furness would have a negative LHN whilst for Cumbria as a whole the LHN would be just 220 dpa despite some areas being amongst the least affordable in Northern England. For Lancashire the picture is more positive, with the standard method indicating a need for 2,100 dpa over the next 25 years. Bizarrely, the largest City in Lancashire, Preston, has an LHN of just 20 dpa, which demonstrates that economic growth aspirations will need to be factored into the equation.

### Fastest growing areas

1. Chorley
2. Fylde
3. Ribble Valley

### Slowest growing areas

1. Copeland
2. Barrow-in-Furness
3. Blackpool

### Endnotes/Contacts

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
**East Anglia - Central and North**

### Housing Market Areas
1. Bedford
2. Cambridgeshire
3. Central Norfolk
4. Great Yarmouth
5. Ipswich
6. King’s Lynn
7. Luton and Central Bedfordshire
8. Waveney
9. West Suffolk

---

**Fastest growing areas**
1. Central Bedfordshire
2. Bedford
3. South Norfolk

**Slowest growing areas**
1. Cambridge
2. Great Yarmouth
3. Norwich

---

### The Lichfields perspective

The new projections show reductions from the 2014-based figures in almost every Housing Market Area and in Cambridge it produces a negative figure - an output that raises an emblematic concern about the use of these new figures as the basis of housing need. Overall in Cambridgeshire, the standard methodology figure would mean a lower level of housing growth than recent rates of housing completions, which sits at odds with the NIC report for the corridor which is seeking to boost growth above past rates to support economic growth.

In Bedford, the new projections give a standard method figure of £1185 which is £215 above that in its recently published Local Plan, perhaps explaining its haste to submit before the January 2019 NPPF transition period.

---

**Homes under standard method**
- Potential, 2018-28 total: 132,761
- Potential, 2018-28 annual: 13,276

**Average Household Size in 2016**: 2.35
**Average Household Size in 2041**: 2.22

---

**Projected rate of household growth 2016-28 (2016-based)**: 8.2%
**Annual rate of household growth 2016-28 (2016-based)**: 0.8%

---

The Lichfields perspective

The new projections show reductions from the 2014-based figures in almost every Housing Market Area and in Cambridge it produces a negative figure - an output that raises an emblematic concern about the use of these new figures as the basis of housing need. Overall in Cambridgeshire, the standard methodology figure would mean a lower level of housing growth than recent rates of housing completions, which sits at odds with the NIC report for the corridor which is seeking to boost growth above past rates to support economic growth. In Bedford, the new projections give a standard method figure of £1185 which is £215 above that in its recently published Local Plan, perhaps explaining its haste to submit before the January 2019 NPPF transition period.

---

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.*
The new projections show lower levels of household growth across all of the housing market areas in Hampshire, but if applied through the standard methodology would see – overall – a slightly higher level of housing need (7311 dpa) than recent average net completions (6,956). But this masks variations. The eastern part of PUSH area sees a standard method figure that is higher than recent completions, whereas in the western half it is below. In Hart, Surrey Heath and Rushmoor, the standard need figure based on the projections would be markedly below what has been built in recent years, reflecting that rates of development in Hart were low in the years up to 2016, before seeing an uptick off the back of completions.
The new projections show a reduction across the main Housing Market Areas in a region that is subject to extensive Green Belt constraint and where the North Essex Garden Communities plans faced marked difficulties. Over the past three years, annual net completions were 9,384 dwellings, well below previous (13,668 pa) and the latest (11,313 pa) rates of household growth. Under the current standard method, c.15,700 homes would be required per year; a 50% increase on past rates. The new projections also imply (for South Essex alongside north Kent, and east London) that the current standard method will not match the vision of the Thames Estuary Growth commission who were seeking 31,000 homes per annum across that area.
Kent

Housing Market Areas
1. Ashford, Maidstone, Tonbridge & Malling
2. East Kent
3. North Kent
4. Sevenoaks-Tunbridge Wells

Kent sees a fall across all Housing Market Areas compared to the 2014-based projections, with household growth of 7,800 per annum over the next ten years. However, this base of household growth is markedly above the 6,800 net housing completions over the past three years, and the current standard method implies housing need figures of 10,600 per annum, with the biggest gap between growth and completions in East and North Kent (Canterbury and Thanet, Medway and Swale in particular). As was the case with South Essex and East London, the Thames Estuary Growth Commission raises the aspiration for the level of future growth above current demographic-rates of change.

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The Lichfields perspective

Kent sees a fall across all Housing Market Areas compared to the 2014-based projections, with household growth of 7,800 per annum over the next ten years. However, this base of household growth is markedly above the 6,800 net housing completions over the past three years, and the current standard method implies housing need figures of 10,600 per annum, with the biggest gap between growth and completions in East and North Kent (Canterbury and Thanet, Medway and Swale in particular). As was the case with South Essex and East London, the Thames Estuary Growth Commission raises the aspiration for the level of future growth above current demographic-rates of change.

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
### Leicestershire and Northamptonshire

#### Housing Market Areas
1. Leicestershire
2. North Northamptonshire
3. West Northamptonshire

#### Projected rate of household growth 2018-28 (2016-based)
- **Leicestershire:** 9.0%
- **North Northamptonshire:** 0.9%
- **West Northamptonshire:** 0.9%

#### Annual rate of household growth 2018-28 (2016-based)
- **Leicestershire:** 2.44
- **North Northamptonshire:** 2.32

#### Average Household Size in 2016
- **Leicestershire:** 2.44
- **North Northamptonshire:** 2.43
- **West Northamptonshire:** 2.43

#### Average Household Size in 2041
- **Leicestershire:** 2.32
- **North Northamptonshire:** 2.30
- **West Northamptonshire:** 2.28

#### Homes under standard method (potential, 2018-28 total)
- **Leicestershire:** 79,311
- **North Northamptonshire:** 79,311
- **West Northamptonshire:** 79,311

#### Homes under standard method (potential, 2018-28 annual)
- **Leicestershire:** 7,931
- **North Northamptonshire:** 7,931
- **West Northamptonshire:** 7,931

#### Fastest growing areas
1. Corby
2. Harborough
3. East Northamptonshire

#### Slowest growing areas
1. Oadby and Wigston
2. Melton
3. Leicester

#### Past and Projected Average Household Size

---|---|---|---|---
Leicestershire | 4,059 | 3,405 | -654 | 4,110 | 4,098
Leicester | 1,486 | 822 | -665 | 924 | 1,284
Blaby | 287 | 352 | 65 | 430 | 628
Charnwood | 898 | 763 | -135 | 920 | 819
Harborough | 413 | 413 | 0 | 559 | 533
Hinckley and Bosworth | 391 | 471 | 79 | 569 | 638
Melton | 168 | 96 | -72 | 118 | 122
North West Leicestershire | 307 | 440 | 133 | 529 | 797
Oadby and Wigston | 108 | 49 | -59 | 61 | 136
North Northamptonshire | 1,541 | 1,544 | 4 | 1,854 | 1,722
Corby | 436 | 434 | -1 | 497 | 378
East Northamptonshire | 373 | 419 | 47 | 529 | 495
Kettering | 451 | 438 | -13 | 521 | 512
Wellingborough | 282 | 253 | -28 | 308 | 337
West Northamptonshire | 1,778 | 1,552 | -226 | 1,967 | 1,859
Daventry | 280 | 307 | 27 | 424 | 508
Northampton | 1,123 | 870 | -252 | 1,052 | 855
South Northamptonshire | 376 | 375 | -1 | 491 | 496

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change.

See Endnotes for further information.
**Lincolnshire and Peterborough**

**Housing Market Areas**
1. Central Lincolnshire
2. Peterborough
3. Rest of Central Lincolnshire

**Projected rate of household growth 2018-28 (2016-based)**
- Central Lincolnshire: 7.2%
- Annual rate of household growth 2018-28 (2016-based): 0.7%

**Average Household Size**
- Size in 2016: 2.32
- Size in 2041: 2.19

**Homes under standard method (potential, 2018-28 total)**
- 47,969

**Homes under standard method (potential, 2018-28 annual)**
- 4,797

**Past and Projected Average Household Size**

**Fastest growing areas**
1. South Kesteven
2. Peterborough
3. West Lindsey

**Slowest growing areas**
1. Lincoln
2. Boston
3. East Lindsey

**Annual household growth - 2016-26 (2014-based)**
- Central Lincolnshire: 978
- Lincoln: 262
- North Kesteven: 410
- West Lindsey: 307
- Peterborough: 1,905
- Rutland: 95
- South Holland: 350
- South Kesteven: 619
- Peterborough: 841
- Rest of Central Lincolnshire: 569
- Boston: 223
- East Lindsey: 346

**Annual household growth - 2018-28 (2016-based)**
- Central Lincolnshire: 879
- Lincoln: 164
- North Kesteven: 366
- West Lindsey: 349
- Peterborough: 1,677
- Rutland: 127
- South Holland: 297
- South Kesteven: 593
- Peterborough: 660
- Rest of Central Lincolnshire: 486
- Boston: 149
- East Lindsey: 337

**Change**
- Central Lincolnshire: -99
- Lincoln: -98
- North Kesteven: -43
- West Lindsey: -42
- Peterborough: -227
- Rutland: 32
- South Holland: -53
- South Kesteven: -26
- Peterborough: -180
- Rest of Central Lincolnshire: -83
- Boston: -74
- East Lindsey: -9

**Potential standard method figure**
- Central Lincolnshire: 2,156
- Lincoln: 180
- North Kesteven: 445
- West Lindsey: 382
- Peterborough: 2,072
- Rutland: 179
- South Holland: 354
- South Kesteven: 709
- Peterborough: 769
- Rest of Central Lincolnshire: 569
- Boston: 178
- East Lindsey: 391

**Average net completions 2014/15-2016/17**
- Central Lincolnshire: 951
- Lincoln: 143
- North Kesteven: 468
- West Lindsey: 340
- Peterborough: 2,199
- Rutland: 234
- South Holland: 271
- South Kesteven: 539
- Peterborough: 1,154
- Rest of Central Lincolnshire: 601
- Boston: 213
- East Lindsey: 387

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.*
The latest household projections anticipate formation of c.35,000 households per annum in London between 2018 and 2028. This translates to a housing need figure of c.51,000dpa under the standard methodology when the caps are applied; a 35% reduction than the original standard methodology calculation based on the previous set of household projections of c.78,000. The emerging London Plan assessed its objectively assessed housing needs as c.66,000 dpa from 2019/20 to 2028/29 and is planning to deliver c.65,000 dpa over this period. Therefore, housing need figure under the standard methodology utilising the latest household projections is 22% lower than that being planned for in the emerging London Plan.
As expected the 2016-based household projections project lower growth across the North East than the 2014-based projections. Middlesbrough (77%), Sunderland (56%) and Newcastle (47%) have experienced the most significant reductions in projected future levels of household growth.

In terms of the standard methodology, the projections result in a 37% reduction using the Government’s standard methodology across the NE LEP and a 38% reduction across the Tees Valley LEP over a 10 year period. This re-emphasises the need for LPAs to pursue a level of growth above the standard methodology to ensure that an adequate housing supply does not constrain the North East’s economic ambition.
**Nottinghamshire and Derbyshire**

**Housing Market Areas**
1. Chesterfield
2. Derby
3. Derbyshire Dales
4. High Peak
5. Nottingham Core
6. Nottingham Outer

<table>
<thead>
<tr>
<th>Fastest growing areas</th>
<th>Slowest growing areas</th>
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<tbody>
<tr>
<td>South Derbyshire</td>
<td>Chesterfield</td>
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<tr>
<td>Newark and Sherwood</td>
<td>Nottingham</td>
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<tr>
<td>Ashfield</td>
<td>North East Derbyshire</td>
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</table>

**Projected rate of household growth 2018-28 (2016-based)**
- 6.0%

**Annual rate of household growth 2018-28 (2016-based)**
- 0.6%

**Average Household Size in 2016**
- 2.32

**Average Household Size in 2041**
- 2.22

**Homes under standard method (potential, 2018-28 total)**
- 63,949

**Homes under standard method (potential, 2018-28 annual)**
- 6,395

**Fastest growing areas**
- Chesterfield
- Derby
- Derbyshire Dales
-ListComponent=Household projections
- Nottingham Core
- Nottingham Outer

**Slowest growing areas**
- North East Derbyshire
- Chesterfield
- Nottingham
- North East Derbyshire

**Projected rate of household growth 2018-28 (2016-based)**
- 6.0%

**Annual rate of household growth 2018-28 (2016-based)**
- 0.6%

**Average Household Size in 2016**
- 2.32

**Average Household Size in 2041**
- 2.22

**Homes under standard method (potential, 2018-28 total)**
- 63,949

**Homes under standard method (potential, 2018-28 annual)**
- 6,395

### Annual household growth - 2016-26 (2014-based) vs 2018-28 (2016-based)

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<th>2016-based</th>
<th>Change</th>
<th>Potential standard method figure*</th>
<th>Average net completions 2014/15-2016/17</th>
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*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change.

See Endnotes for further information.
Surrey

Housing Market Areas
1. North East Surrey
2. Reigate-Tandridge
3. Runnymede and Spelthorne
4. West Surrey

Projected rate of household growth 2018-28 (2016-based) 6.6%
Annual rate of household growth 2018-28 (2016-based) 0.7%
Average Household Size in 2016 2.45
Average Household Size in 2041 2.34
Homes under standard method (potential, 2018-28 total) 40,349
Homes under standard method (potential, 2018-28 annual) 4,035

The Lichfields perspective

Surrey is an area where the Government's standard methodology was most likely to create upward pressure on housing need, and in a location largely washed over by Green Belt. But here there is a 35% fall in the projections to an annual rate (2,900) that almost exactly matches the levels of housing development over the past three years (2,826). Nonetheless, the pressures of affordability are such that even from this reduced starting point, the housing need under the current standard method would require housebuilding to increase by 45% with increases required in every local authority.

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
Like neighbouring Surrey, Sussex is a constrained county that has a longstanding need to boost its housing supply. Recent rates of housebuilding have been 5,450 per annum, and even with a fall in the rate of household growth in the latest projections, the ONS still projects the number of households to increase by 7,000 over the next ten years. When applied through the current standard methodology, this indicates a housing need of almost 9,150 per annum, with the greatest pressure in the largely landlocked Coastal West Sussex, where recent completions have been 2,500 per annum, but housing need under the new projections would be well 4,224 per annum.

The Lichfields perspective

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
Thames Valley

The Thames Valley sees a marked reduction (of over 2,000 pa) in the projected rate of household growth in a region where there was already concern that demographic trends did not reflect housing pressures. In Oxfordshire, the latest projections take growth down to just 1,500 pa (and just 67 pa in Oxford City itself). Even with uplifts for affordability under the current standard method, the need figure is just over 2,000, almost 3,000 below the City Deal commitment of 5,000 homes pa, and below recent rates of housebuilding. The position is similar – although less acute – in Berkshire, with combined figures (including South Bucks) of 3,720 under the current standard methodology cf 4,280dpa in the published SHMA. In Buckinghamshire the new figures combined with the standard method would increase supply above recent SHMA estimates.
West Midlands (outside Birmingham and Coventry)

Housing Market Areas
1. Herefordshire
2. Shropshire
3. Stoke-Stafford
4. Worcestershire

Projected rate of household growth 2018-28 (2016-based)  
6.0% 

Annual rate of household growth 2018-28 (2016-based)  
0.6% 

Average Household Size in 2016  
2.31 

Average Household Size in 2041  
2.19 

Homes under standard method (potential, 2018-28 total)  
53,738 

Homes under standard method (potential, 2018-28 annual)  
5,374 

Fastest growing areas
1. Wychavon
2. Telford and Wrekin
3. Malvern Hills

Slowest growing areas
1. Stoke-on-Trent
2. Staffordshire Moorlands
3. Stafford

The Lichfields perspective
Overall, the 11 WM authorities outside the Birmingham and Coventry LEP areas are projected to experience modest levels of growth over the next 10 years, of around 6%. The LHN standard methodology approach indicates that the annual average need could be 5,400. The combined LHN figure for Stoke on Trent and Newcastle under Lyme, of 780 dpa, is 44% lower than the Councils’ Preferred Option for Growth, of 1,390 dpa in their emerging Local Plan (February 2018). This latter figure was uplifted to help to deliver wider economic aspirations, flexibility and choice, factors which are not fully reflected in the LHN method.

Annual household growth - 2016-26 (2014-based)  
Annual household growth - 2018-28 (2016-based)  
Change  
Potential standard method figure*  
Average net completions 2014/15-2016/17  

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<th>Authority</th>
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<th>2018-28</th>
<th>Change</th>
<th>Potential standard method figure*</th>
<th>Average net completions 2014/15-2016/17</th>
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*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.
Yorkshire and The Humber

![Map of Yorkshire and The Humber]

**Housing Market Areas**
1. Calderdale
2. Doncaster
3. Hull East Riding
4. Kirklees
5. Leeds Bradford
6. North East Lincolnshire
7. North Lincolnshire
8. North Yorkshire
9. Rotherham
10. Ryedale
11. Scarborough
12. Selby

**Projected rate of household growth 2018-28**
- Calderdale: 4.8%
- Doncaster: 0.5%

**Average Household Size in 2016**
- 2.34

**Average Household Size in 2041**
- 2.23

**Homes under standard method (potential, 2018-28 total)**
123,446

**Homes under standard method (potential, 2018-28 annual)**
12,345

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**The Lichfields perspective**

As expected the 2016-based household projections project lower growth across Yorkshire and the Humber than the 2014-based projections; a growth of 4.8% over 10 years compared to 6.6% in the previous projections. Richmondshire (-199%), North East Lincolnshire (-59%) and Bradford (-50%) have experienced the most significant reductions in projected future levels of household growth.

In terms of using the Government's standard methodology, the projections result in a reduction for all LPAs in the region other than in; Craven, Ryedale and Barnsley. The greatest reductions to the standard methodology approach to assessing local needs are in; Kirklees, Bradford, Leeds, Sheffield and York.

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**Endnotes/Contacts**

*Based on the standard method as per the current Planning Practice Guidance (September 2018). This is subject to change. See Endnotes for further information.*
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Endnotes
Government is expected to consult on changes to the standard methodology imminently; therefore the standard method figures in this publication may well change in the near future.
Calculations for the standard method are based on the 2016-based household projections for the 10 year period 2018-28. Data on adoption dates of Local Plans and their requirements has been taken from the Government spreadsheet published in September 2017 in the ‘Planning for the Right Homes in the Right Places consultation’ – Lichfields accepts no responsibility for the accuracy of that data. Areas with plans adopted since 2017 (including their requirement) have been updated by Lichfields. Affordability data is based on the 2017 median workplace affordability ratio published in ONS in March 2018. Caps do not take into account plans which are current undergoing examination and may be found sound before the transitional arrangements take effect nor plans which have/will be submitted before the 24th January 2019 deadline and subject to the current methodology for housing. The caps on these areas may change in the future once plans become adopted.

Some areas have negative household growth, and therefore if the uplift were applied as per the standard method these numbers would reduce further. For the purposes of this analysis, areas with negative household growth do not have their percentage ‘uplift’ applied – the standard method figure is taken as the household growth figure. These authorities are: Barrow-in-Furness, Copeland, Blackpool, Richmondshire, Cambridge and City of London.

Three areas contain joint spatial plans but do not provide a breakdown of housing target for each local authority within the joint area. These are Central Lincolnshire (comprising Lincoln, North Kesteven and West Lindsey), Christchurch and East Dorset (comprising the two respective authorities) and West Dorset, Weymouth and Portland (comprising the two respective authorities). For the purposes of calculating the standard method cap an assumption has been made about the distribution of the overall housing requirement between individual local authorities. Stevenage and East Hertfordshire Local Plans both are currently subject to holding directions, however as they have been found sound by Inspectors, for the purposes of this analysis their housing requirements have been treated as adopted. This could be subject to change.

No affordability data for West Somerset is available. A proxy based on the average ratio of Mendip, Sedgemoor, South Somerset and Taunton Deane has been used.

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