



# South Essex Housing Needs Assessment

*Stakeholder workshop*

1 December 2021

**Turley**

- **A new Housing Needs Assessment for Basildon, Brentwood, Castle Point, Rochford, Southend-on-Sea and Thurrock**

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Existing evidence  
base

# Introducing the existing evidence base

MAY 2016

**South Essex  
Strategic Housing  
Market Assessment**

MAY 2017

**Addendum to the  
South Essex SHMA**

JUNE 2016

**Brentwood Strategic  
Housing Market  
Assessment  
Part 2**

OCTOBER 2018

**Brentwood Strategic  
Housing Market  
Assessment  
Part 1**

# Scope of previous evidence

## South Essex SHMA and Addendum

- Objectively assessed need for **3,750 – 4,000 homes per annum**
  - Demographic trends, responding to market signals and supporting job growth
- Annual need for circa **2,239 affordable homes** over five years, and 2,148 per annum thereafter
- Size and type of housing needed
- Needs of specific groups

## Brentwood SHMA

*October 2018*

- Calculated need for **350 dwellings per annum**, but previously assessed need for **380 dwellings per annum** also remained valid
- Need for **107 affordable homes** per annum
- Size and type of housing needed
- Needs of specific groups



# A changing context...

MAY 2016

**South Essex Strategic  
Housing Market  
Assessment**

MAY 2017

**Addendum to the South  
Essex SHMA**

JUNE 2016

**Brentwood Strategic  
Housing Market  
Assessment  
Part 2**

JANUARY 2018

**Agreement from the six  
authorities to work jointly on  
housing and infrastructure  
development**

JULY 2018

**Revised National  
Planning Policy  
Framework**

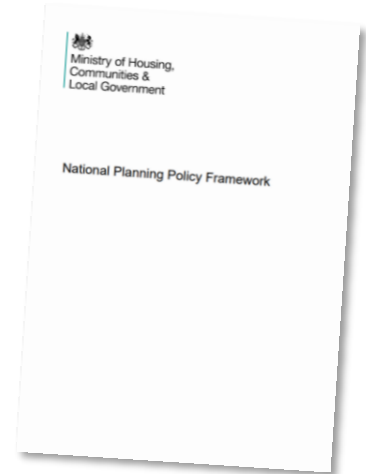
OCTOBER 2018

**Brentwood Strategic  
Housing Market  
Assessment  
Part 1**

# Changing policy context

# Revised National Planning Policy Framework

- First published in July 2018 but slightly altered twice since, most recently in July 2021
- A '**standard method**' for determining '*the minimum number of homes needed*'
  - Anticipated in the addendum to the South Essex SHMA, but lacking clarity at that time
  - Intended to simplify and replace previous system of objectively assessed need (OAN)
  - Acknowledgement that there will be circumstances when housing need could be higher, or exceptionally lower
- A requirement to assess '**the size, type and tenure of housing needed**' by different groups in the community
- All policies to be '*underpinned by **relevant and up-to-date evidence***', which is '*adequate and proportionate*'

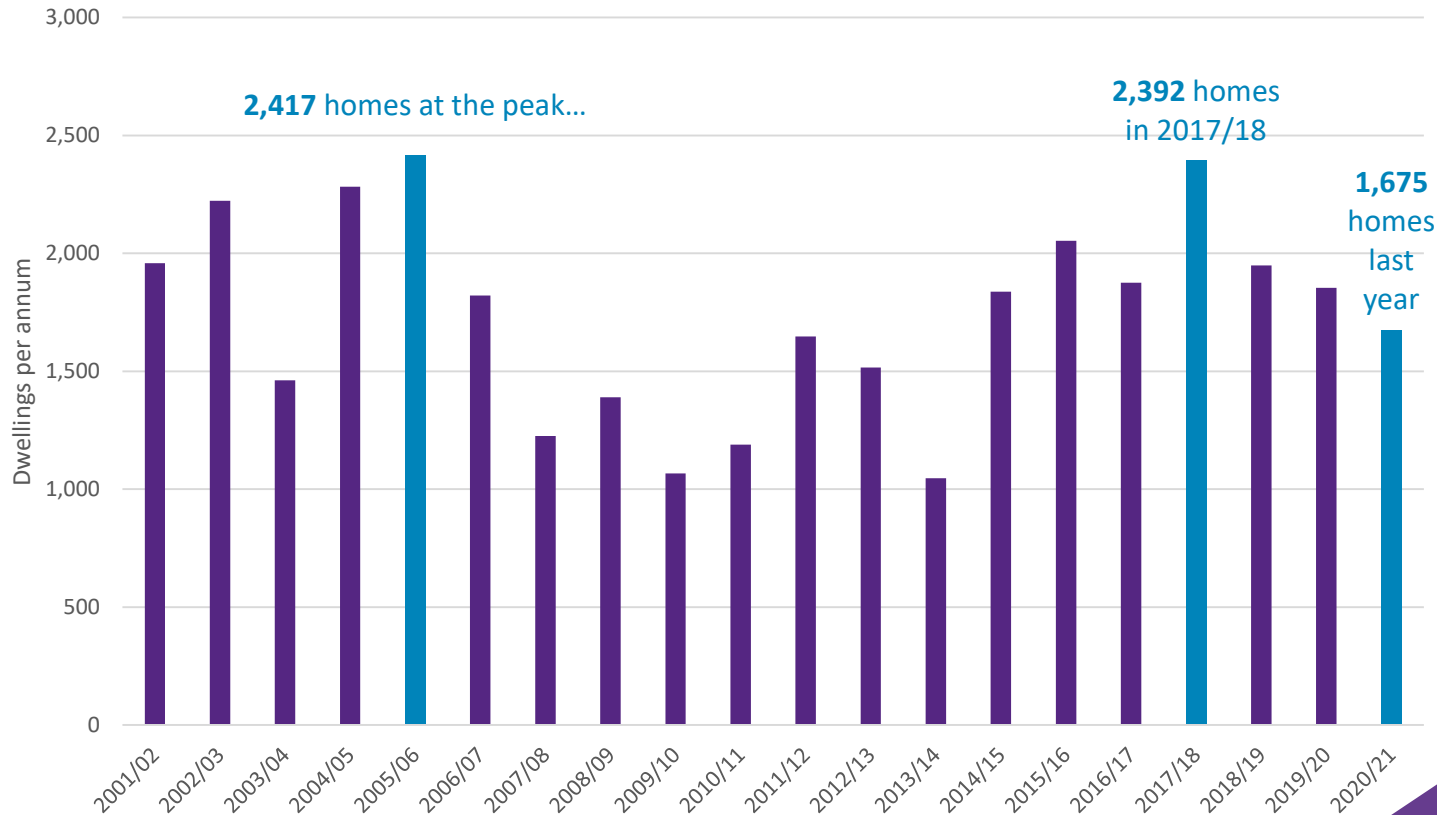




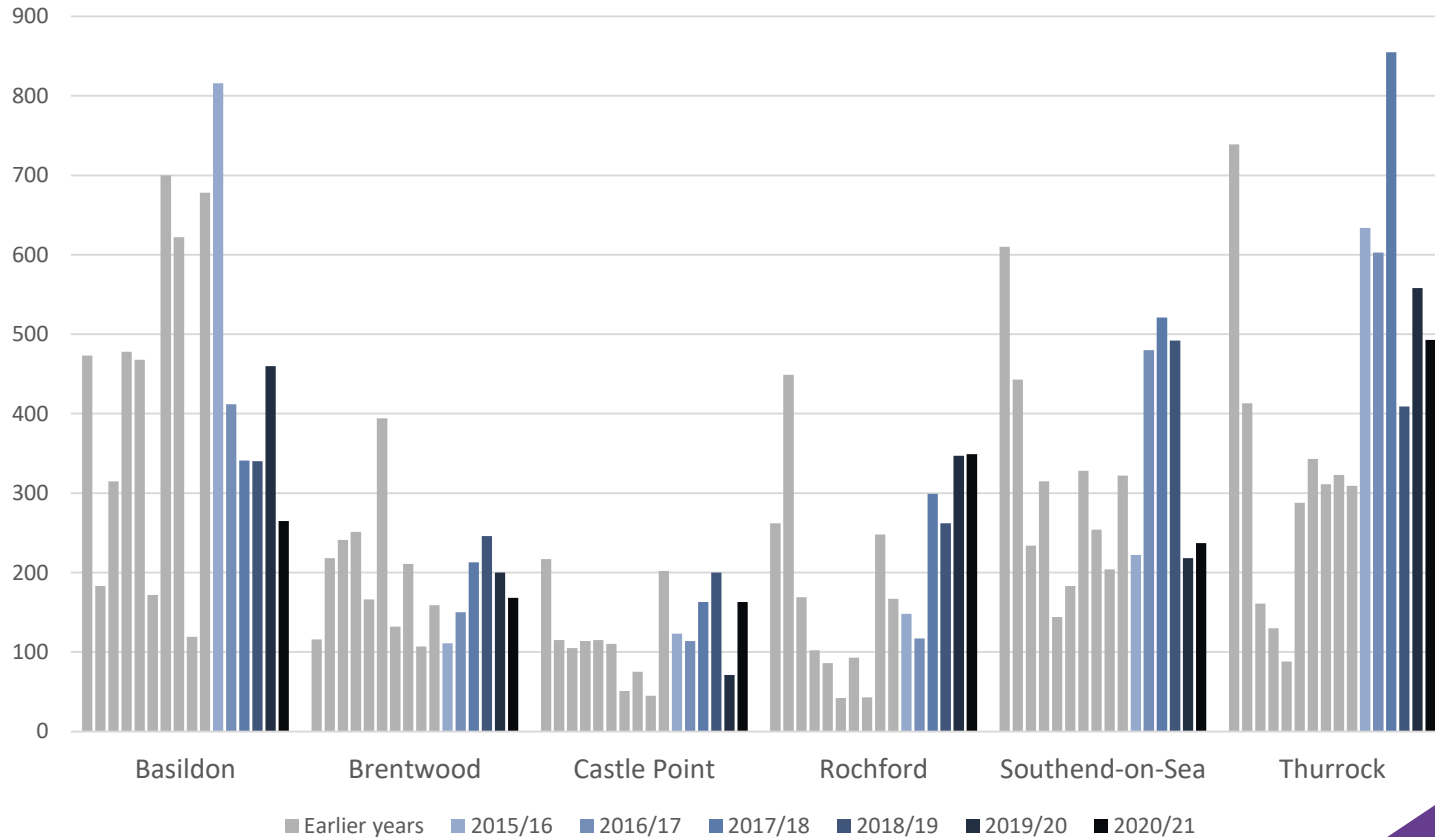
# Recent trends in the housing market

*Early findings for discussion*

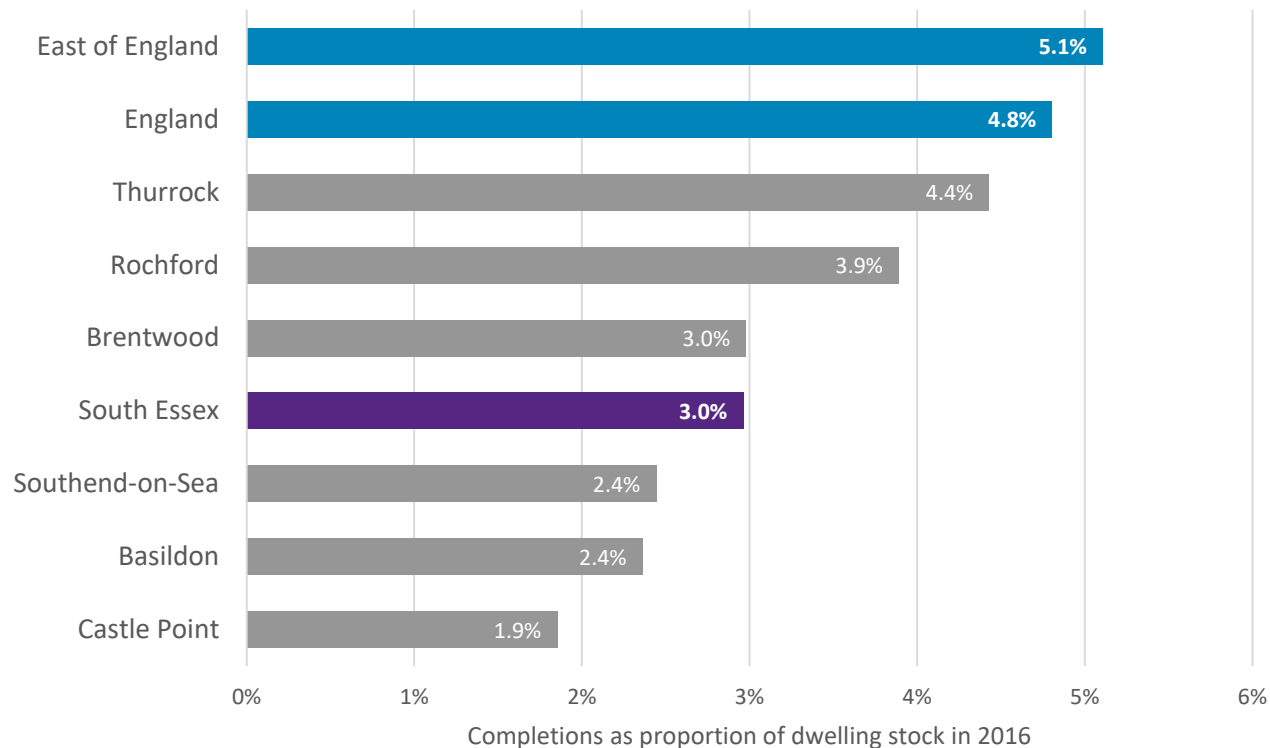
# Continued but slowing housing delivery...



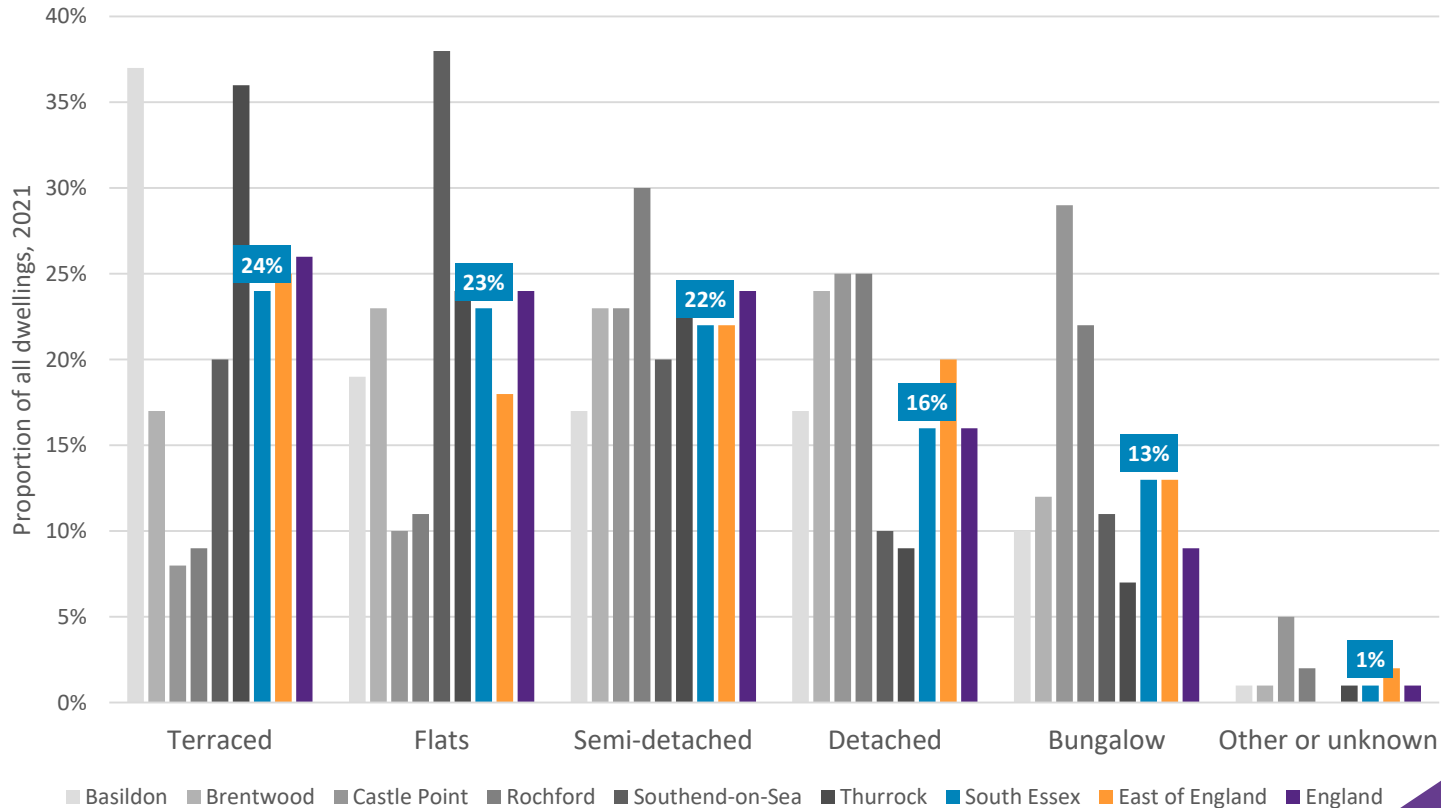
...with the same largely true at authority level



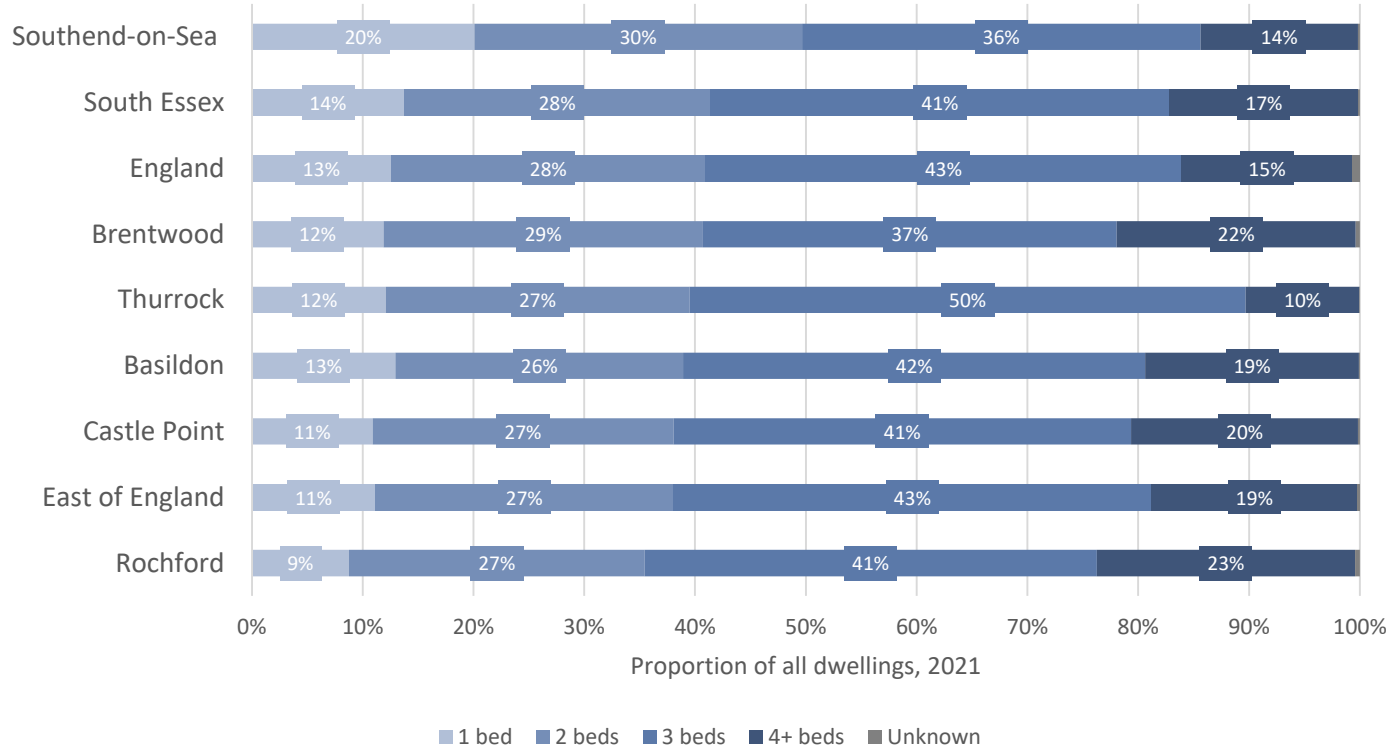
## Relatively limited growth in proportionate terms...



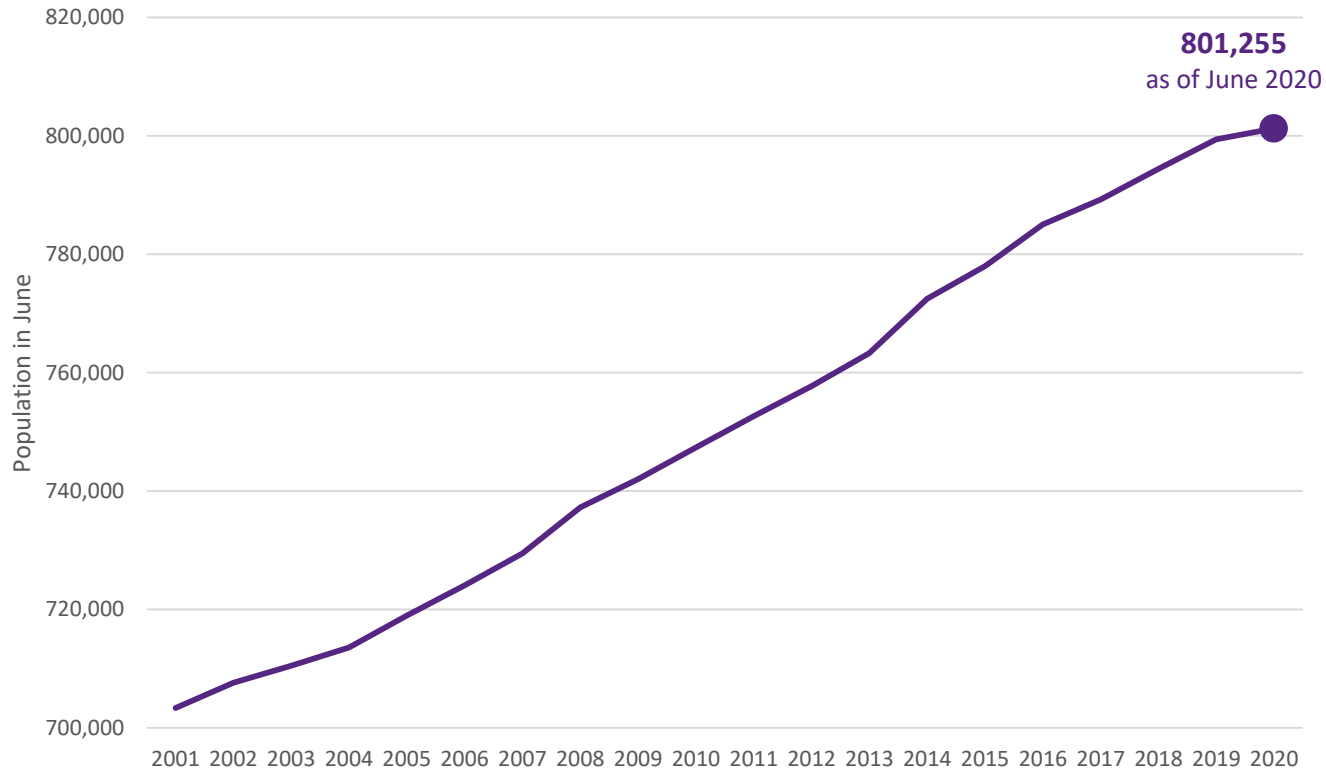
...with no change in the prevailing types of homes...



## ...or the size of housing available

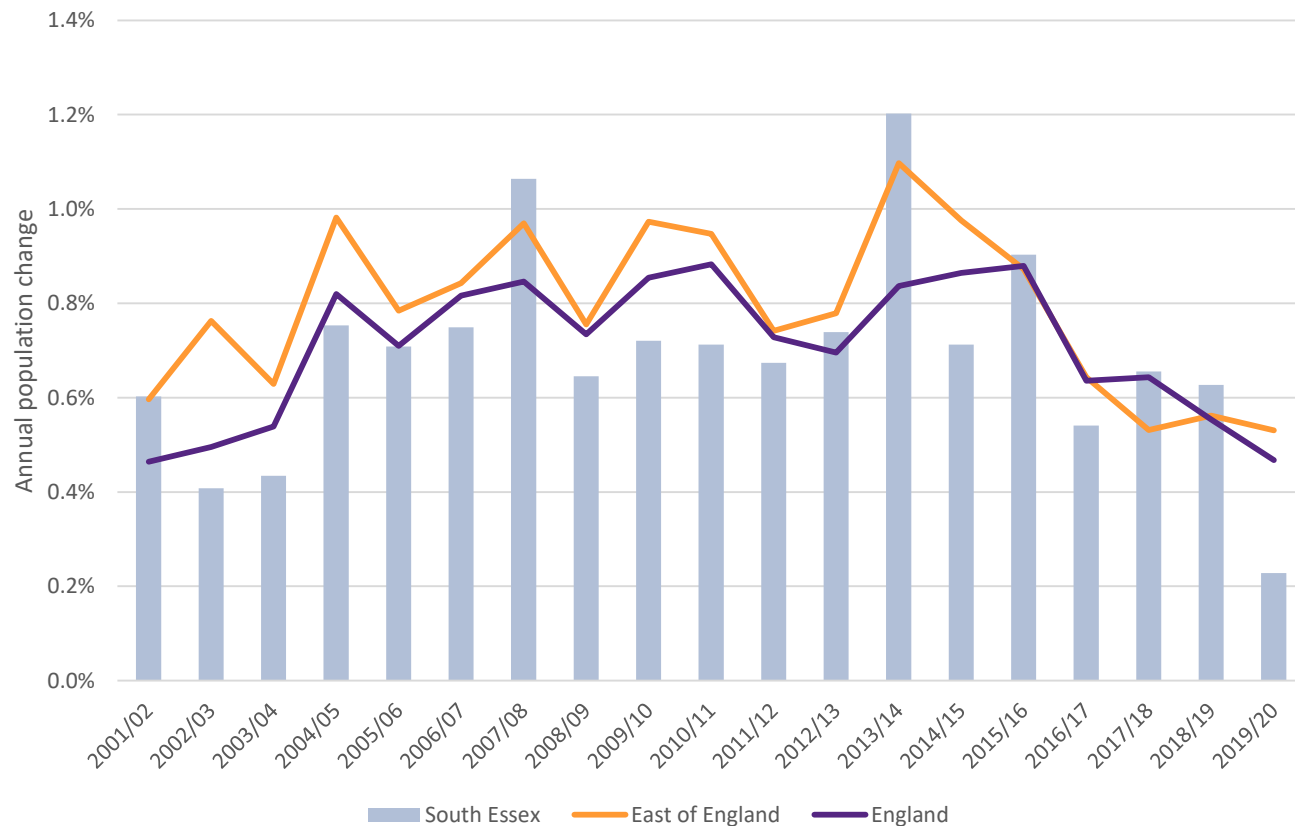


# Continued population growth...

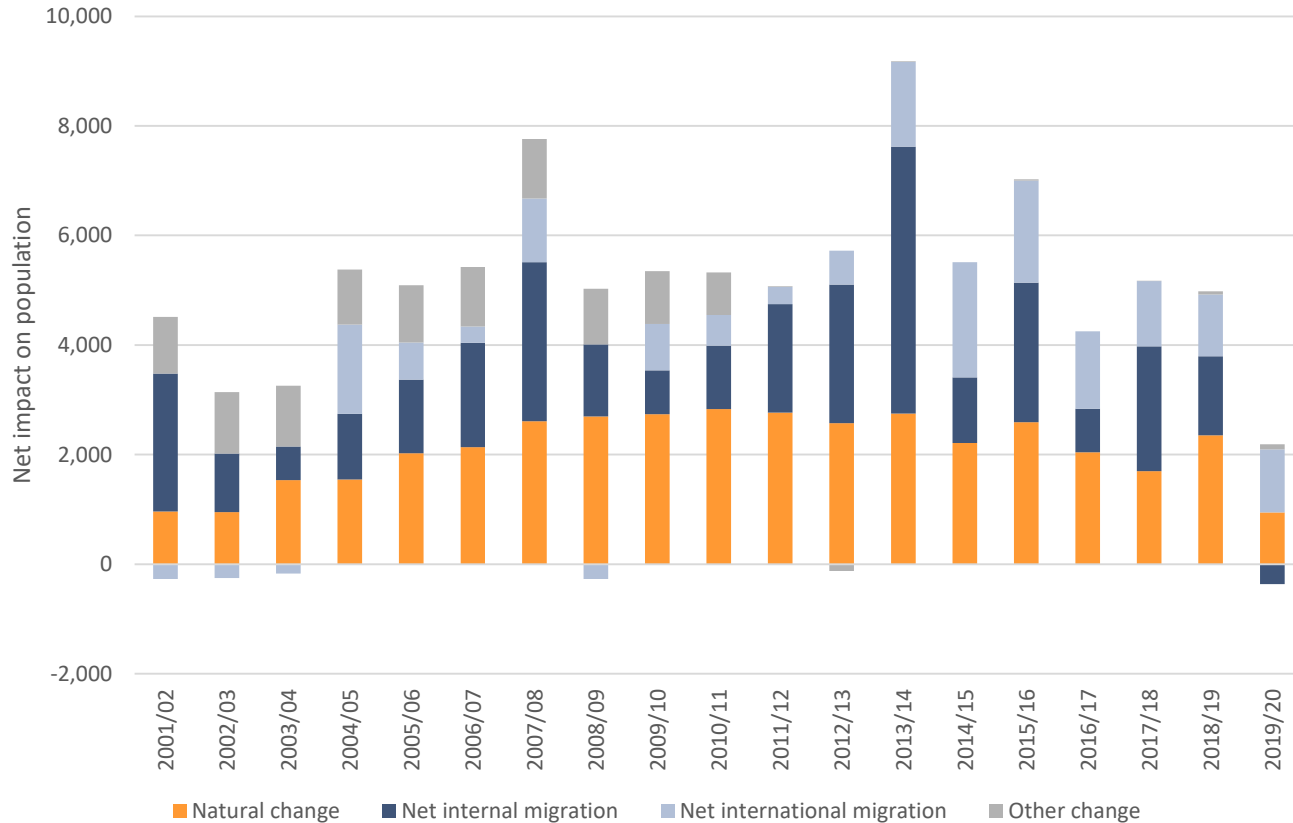




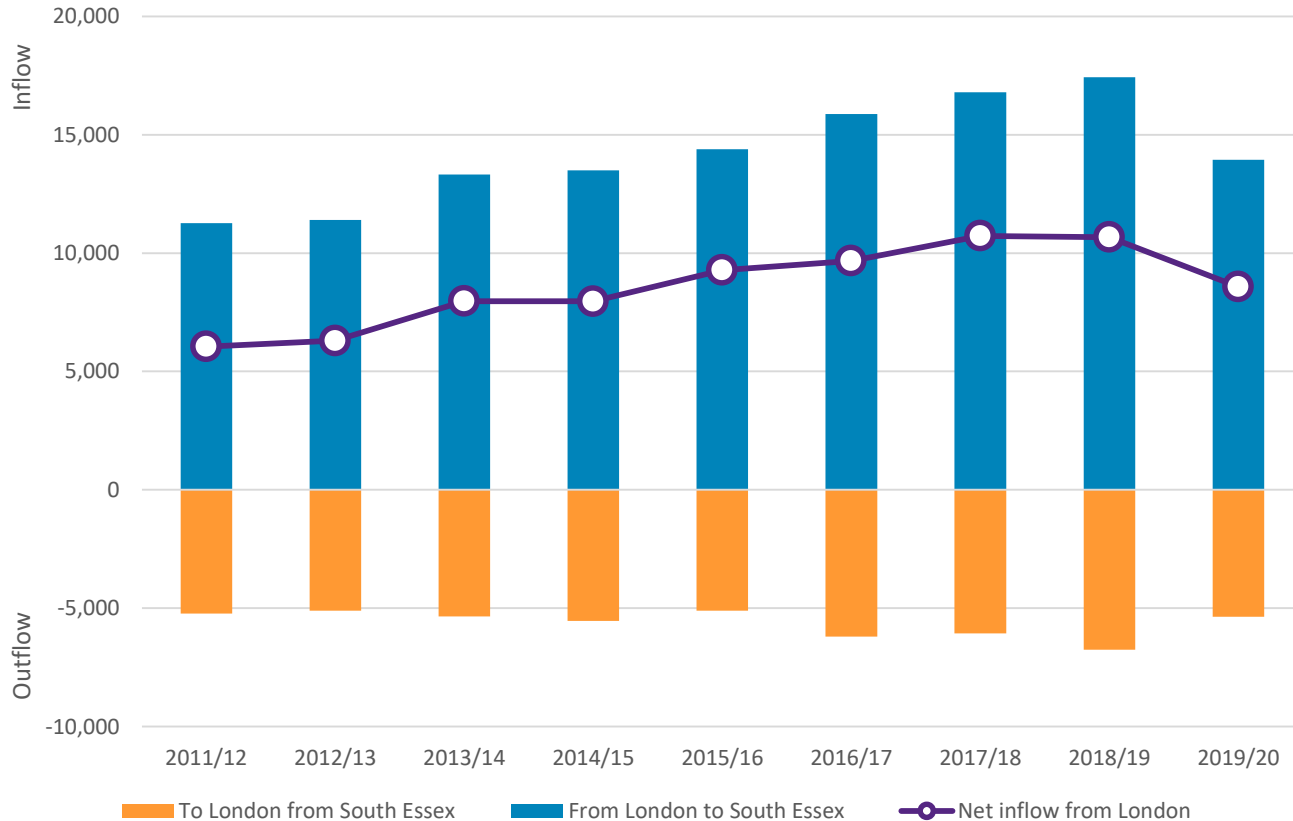
...which has latterly slowed...



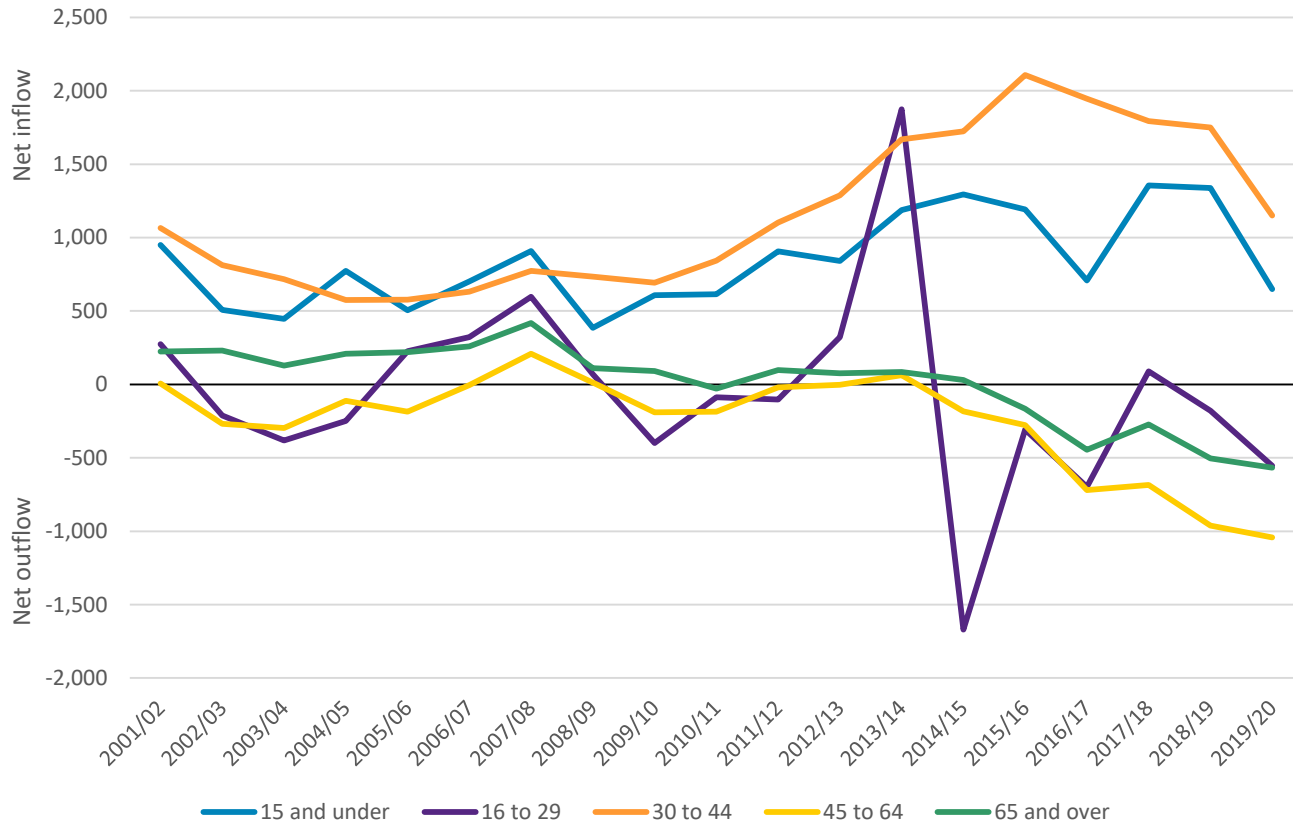
## ...due to internal migration, births and deaths



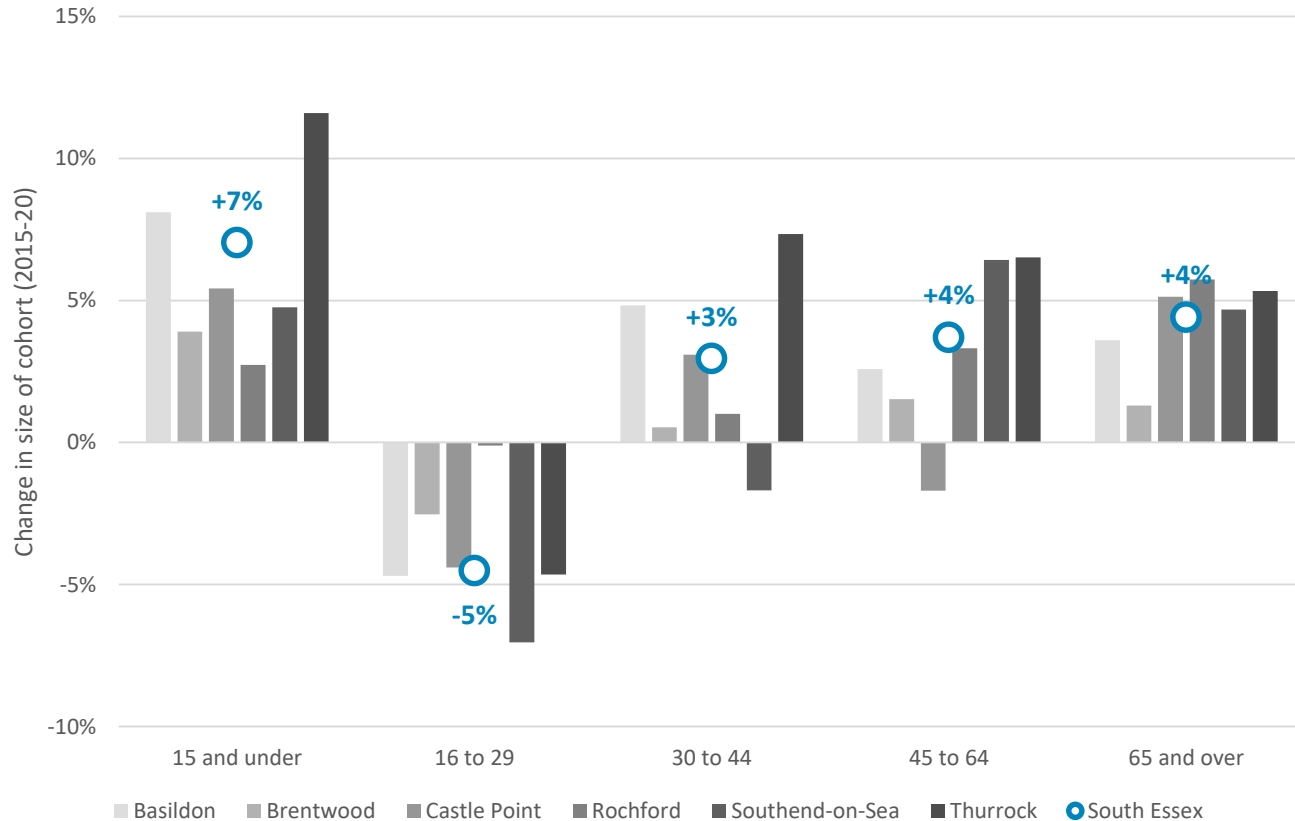
# Easing of a growing net inflow from London?



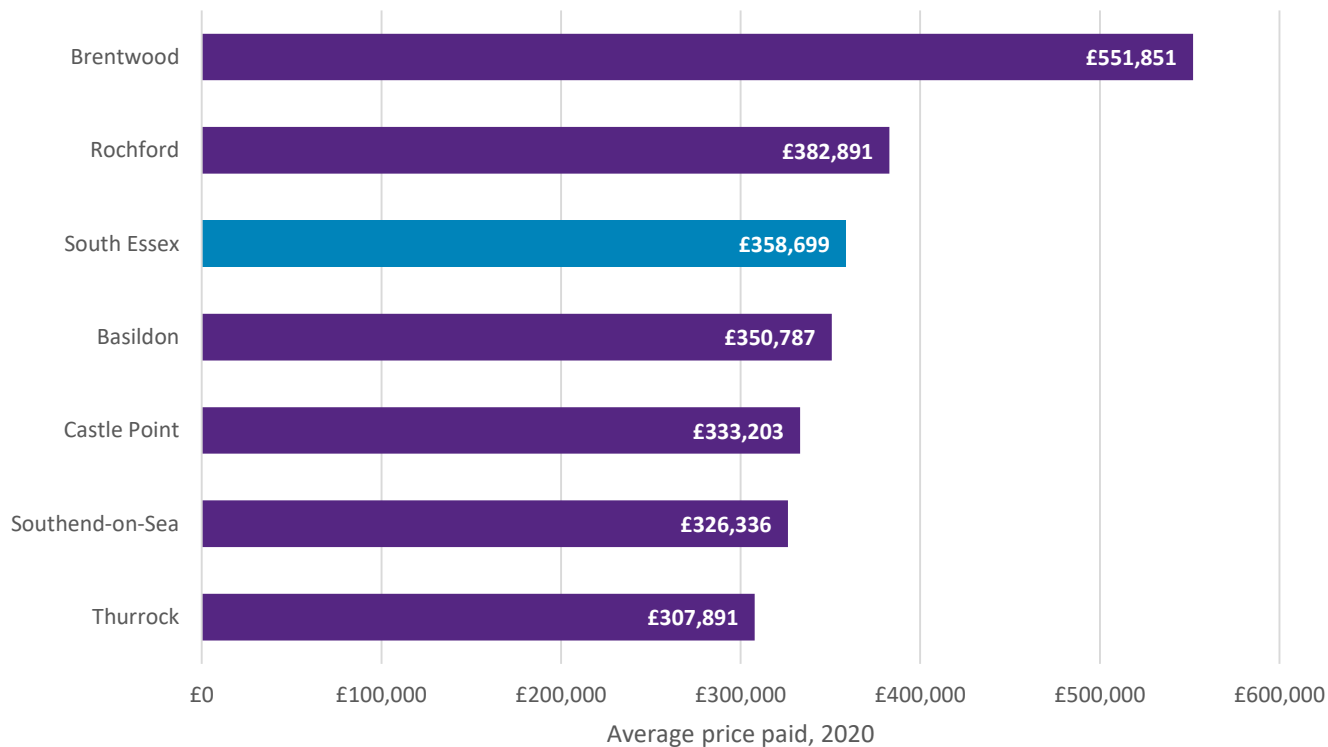
## A continued net inflow of families...



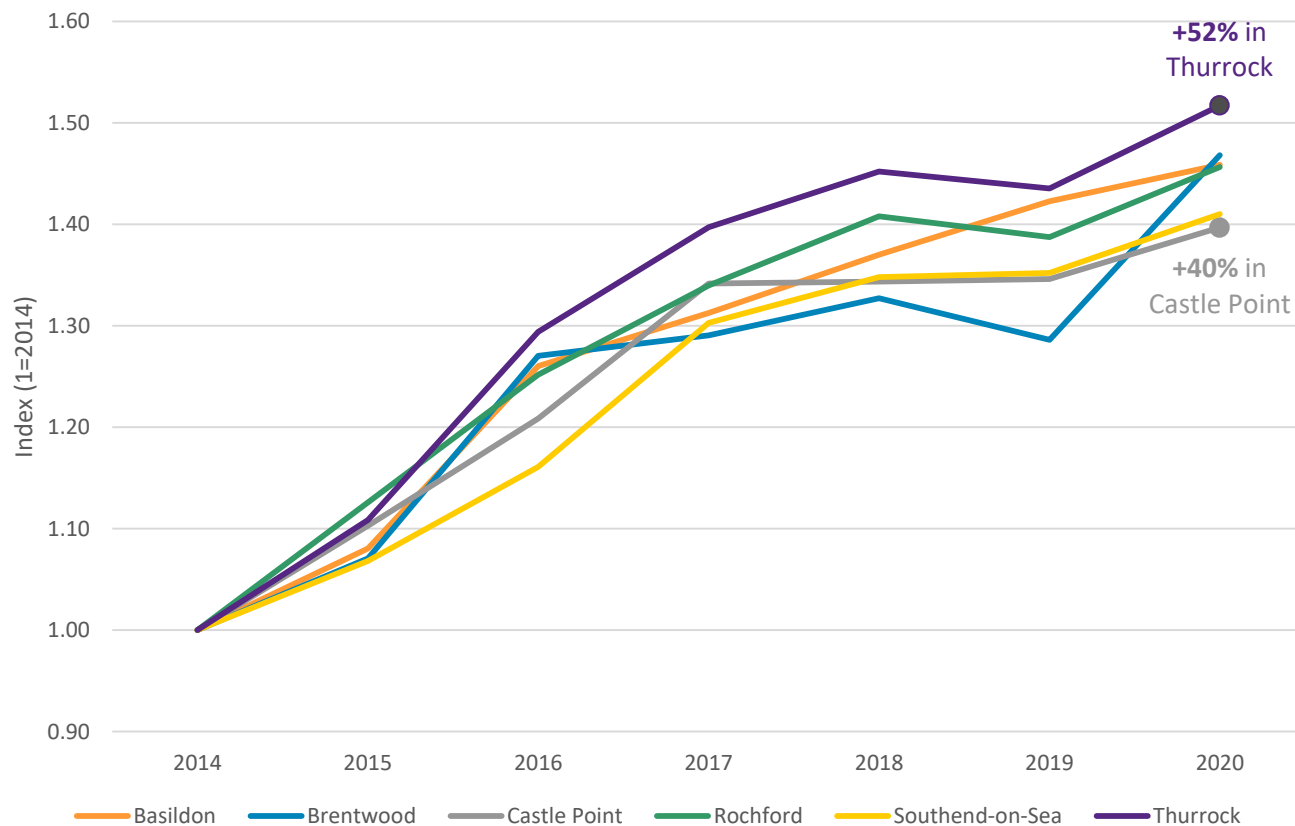
## ...who have recently grown in number



# House prices still highest in Brentwood...

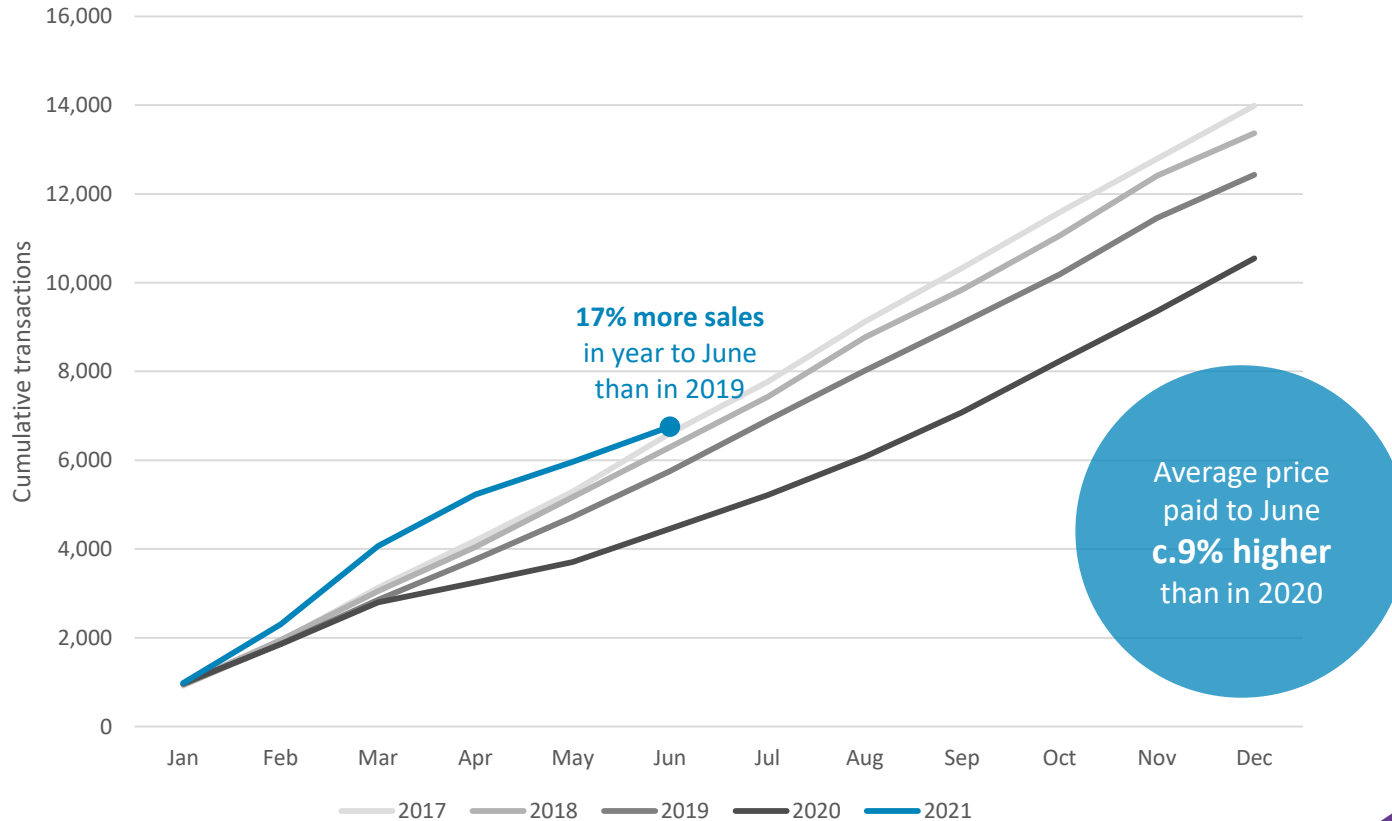


...but rising everywhere...



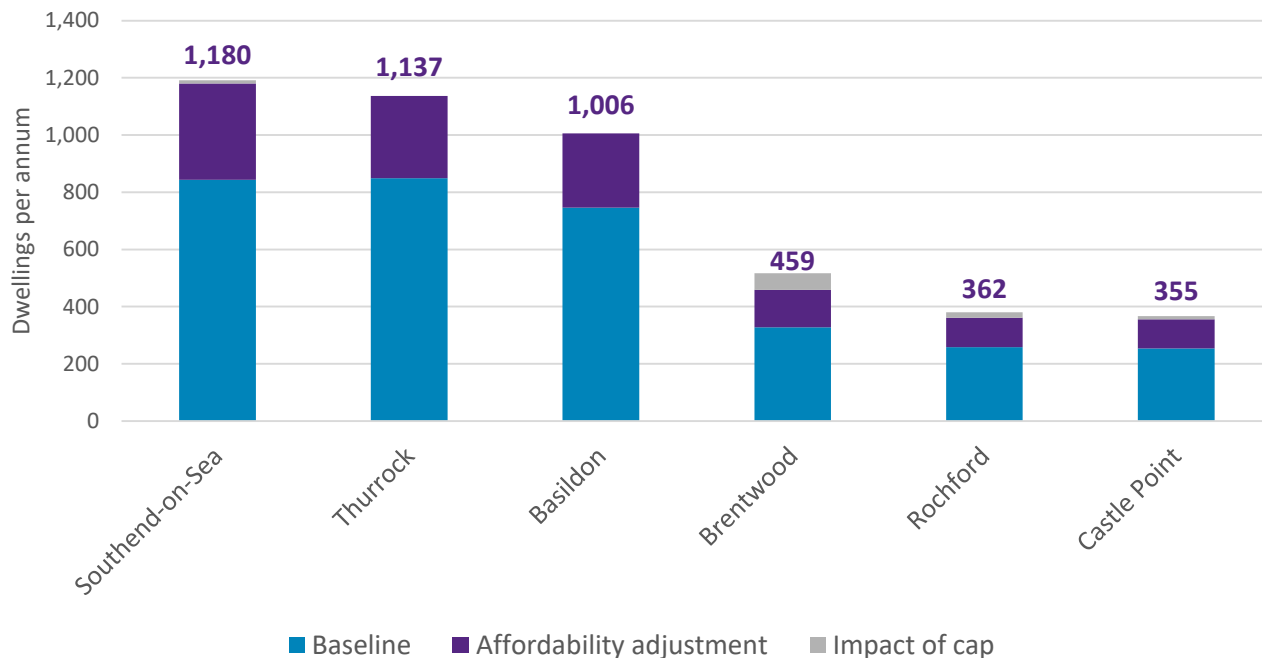


...with a high level of activity early this year



Next steps for  
the study

# Establishing the minimum need for housing



At least  
**4,499 homes**  
needed annually  
throughout  
South Essex

# Evaluating the outcome of the standard method

- Official guidance requires outcome of the standard method to be tested in the context of **previous assessments and past delivery**
- Accepts that there will be **circumstances where it is appropriate to consider whether housing need will actually be higher** than indicated by the method
  - Deliverable growth strategies
  - Strategic infrastructure improvements
  - Agreements to take on unmet need from elsewhere
- Some scope to justify **a lower level of need**, if there are '*exceptional local circumstances*', but this is a deliberately high bar

# Considering the types of housing needed

- Demographic modelling to estimate **how the population and household profile could change**, assuming that housing needs are met in full
  - Estimating size and type of housing needed based on tendencies of existing households
- Separate calculation of **affordable housing need**
  - Accounting for backlog and newly arising need
  - Considering role of different products, like First Homes
- Specifically considering **the needs of different groups** identified by the Councils
  - Older people
  - People with disabilities
  - Families
  - Privately renting households
  - Self-builders
  - Students



# Comments and questions

# Workshop