



Sidmouth Parish, East Devon District

Housing Needs Assessment

for

Sidmouth Town Council

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CNB HOUSING
I N S I G H T S

Contact: Chris Broughton



Website: www.cnbhousing.co.uk



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Executive Summary

Introduction

1. The aim of this study is to gather evidence to determine the following research questions from the perspective of local residents:
 - Can the community be considered balanced?
 - Is there sufficient affordable housing?
 - What type and mix of housing is needed in future?
 - Is current and projected care and nursing home provision in step with need?
 - How does the situation in Sidmouth compare to similar towns?

Method

2. Regarding affordable housing, in accordance with national good practice guidance data was collected from East Devon council's housing register and lettings system. Contextual information was collected from the Land Registry, the Valuation Office Agency and Rightmove regarding house prices and market rentals; information published by the council regarding planning policy, and lettings policy; and data from NOMIS regarding the census 2011 and 2021 and population projections.
3. Information regarding a) specialised housing for older people and b) care and nursing home capacity information is assessed separately. Data have been obtained from the East Devon Local Housing Need Assessment (LHNA) and from use of the Projecting Older People Population Information model, (POPPI), and other data from the Census 2021 and the Care Quality Commission (CQC).

Key outputs: Affordable housing

4. Regarding affordable housing there are two key outputs based upon East Devon council's affordable housing register (the waiting list). Firstly the snapshot number of households in affordable need expressing a preference to be housed in the parish, and secondly the requirement for additional affordable housing per annum after supply has been taken into account. The two key outputs are as follows.

Output 1:

- 431 households were on the register seeking to live in Sidmouth; of which
- 362 households were general needs; and
- 69 households on the register needed some form of accessible housing.

Output 2:

- an additional 65 to 67 units of affordable housing for general needs are needed per annum if the flow of those in affordable need is to be met. The number varies according to changing levels of supply annually.



Key outputs: Specialised housing, residential and nursing care for older people

5. Regarding specialised housing for older people the 20-year projected need (base 2022) for additional supply is:
 - owned sheltered housing 15 units per annum;
 - owned extra care housing 7 units per annum;
 - rented sheltered housing 3 units per annum; and
 - rented extra care housing 5 units per annum.
6. Regarding residential care and nursing care an estimated additional 90 bedspaces are required by the year 2040 (year 2023=159 and year 2040=249). Current capacity is 163 residential bedspaces and 50 nursing care bedspaces 221 in total.

Overall conclusions

7. There is significant need for additional affordable housing, both for general needs and special need for older people in Sidmouth on an annual basis according to our analysis of numbers on the East Devon housing register and analysis of projections for older people.
8. The key outputs regarding the annual flow of additional for affordable housing needs to be considered in context and in regard to prevailing housing and planning policies.
9. We have demonstrated that:
 - the population is aging and growing as a proportion of all households;
 - housing and household characteristics are highly unbalanced;
 - the local market housing supply is predominately 3 or more-bedroom detached owner-occupied housing;
 - parish house prices and market rents are higher than the district average;
 - supply of affordable housing by number of bedrooms does not align with need. A higher proportion of 1-bedroom affordable homes are needed;
 - Sidmouth attracts many older people from outside its boundaries;
 - the Devon Homechoice system for letting affordable housing does not prioritise local connection over need, so Sidmouth residents may not be able to access vacancies in the stock of affordable housing in Sidmouth;
 - significant amounts of affordable and market sheltered and extra care housing is needed to the year 2040;
 - whilst nursing and care home need is projected to grow by around 30% to the year 2040, data suggest that capacity would appear adequate for the next decade or so; and
 - opportunities for housebuilding beyond sites that might be allocated in the emerging replacement local plan are limited due to the status of much of the surrounding area.
10. Overall, Sidmouth will continue to attract incomers and concern is highlighted that local people may not be able to find suitable accommodation that they can afford in Sidmouth. This will worsen an already unbalanced community and affect social cohesion and the long term sustainability of the parish to sustain the support and services needed to sustain the aging population.



11. The sustainability of Sidmouth as a town that is largely self-contained is an important matter as the nearest main centres of employment are Exeter and Taunton around 15 and 30-miles away respectively.
12. The scope of sustainability is much wider than the scope of this study. For example we have not considered the impact of the demographic change that we have highlighted on education and primary health care, and key areas such as domiciliary care, retail and leisure services from the perspective of both service delivery and recruitment and retention of staff.
13. Public policy needs to address conflicting policies of supporting local people and attracting an increasing number of older people. Land constraints mean that development decisions are critical.

Overall conclusions comparing Sidmouth to Chard and Teignmouth

14. The 3 parishes have remarkably similar populations. The outlier would appear to be Chard as it is not coastal and its local economy is different involving manufacturing which to some extent has resulted in a different housing stock profile. However Sidmouth has a reputation for attracting older incomers to the area which requires different policy responses. Sidmouth has a significantly larger proportion of older residents than the other towns.

Recommendations

15. Publication of the HNA report could be a key enabler in promoting discussion involving the Town Council, the district and county council, the NHS and others to consider how the sustainability issues identified above can be addressed.
16. Many housing and accommodation issues are identified in the HNA report and the town council may also wish to consider how better use can be made of the housing stock to address its aims. The following could be considered:
 - engaging with land owners and housebuilders and asking them to deliver a mix of housing and accommodation that would more closely meet local need;
 - enabling a small annual programme of newbuild affordable homes prioritised to meet local need. In this way the most urgent need will be met;
 - recognising that suitable exception sites will both help deliver an annual supply of affordable housing and ensure that local people benefit from this supply;
 - enabling a supply of additional affordable specialised housing for older people which will indirectly assist in housing younger households due to vacancies in the system;
 - forming partnerships with housing associations so that small scale development opportunities can address local need;
 - consideration of innovations such as encouraging local people to form and deliver community led housing schemes, possibly by means of a Community Land Trust;
 - working with the district Council to agree a Sidmouth Parish local lettings policy and reviewing local connection criteria that would apply to Sidmouth that would ensure that local needs are prioritised and enable younger people to return to the parish; and



- working with the district council to develop policies that minimise vacant homes and discourage second homes.

17. After consideration of the above and consultation with the district and county council, the town council should consider amending its neighbourhood plan to address the major issues identified in this report that build upon the strategic planning policies of the district council. In that context, the HNA report should be cited as part of the evidence base.



1. Introduction

Introduction and summary of this chapter

- 1.1 The chapter states the aims of this study.
- 1.2 The study method is described which where appropriate closely follows government practice guidance regarding housing needs assessments as well as relevant aspects of the National Planning Policy Framework 2023 (NPPF).
- 1.3 The analysis is based on evidence from official data and contextual matters such as local planning policy.
- 1.4 This introductory chapter provides detailed definitions of terms crucial to the understanding of the report. It defines what is meant by the terms affordable rented and affordable home ownership housing in accordance with the National Planning Policy Framework and mixed and balanced communities.

Aim of the study

- 1.5 The aim of this study is to gather evidence to determine the following research questions from the perspective of local residents:
 - Can the community be considered balanced?
 - Is there sufficient affordable housing?
 - What type and mix of market housing is needed in future?
 - Is current and projected care and nursing home provision in step with need?
 - How does the situation in Sidmouth compare to similar towns?

Study Method

- 1.6 Contextual data is presented from the Census, the Land registry, the valuation office agency and ONS which is applied to all research questions.
- 1.7 Regarding balance, the methodology is a study of Census data, comparison of Census 2011 and 2021 data and population projections to define the extent to which the characteristics of the household population and the housing stock differ and the trajectory they are on.
- 1.8 Regarding affordable housing need, the method aims relies upon snapshot data from East Devon's housing register and data regarding supply to produce 2 key outputs.
- 1.9 The first output is the number of local households in housing need and affordable housing need. The second output, in accordance with good practice guidance, assesses the additional affordable housing required in the parish based upon the level of need found in the first output and an assessment of affordable supply over the 5-year horizon of the HNS.
- 1.10 Regarding the type and mix of market housing required in the future imbalances in the market produced by the data is compared to recent registered sales. These



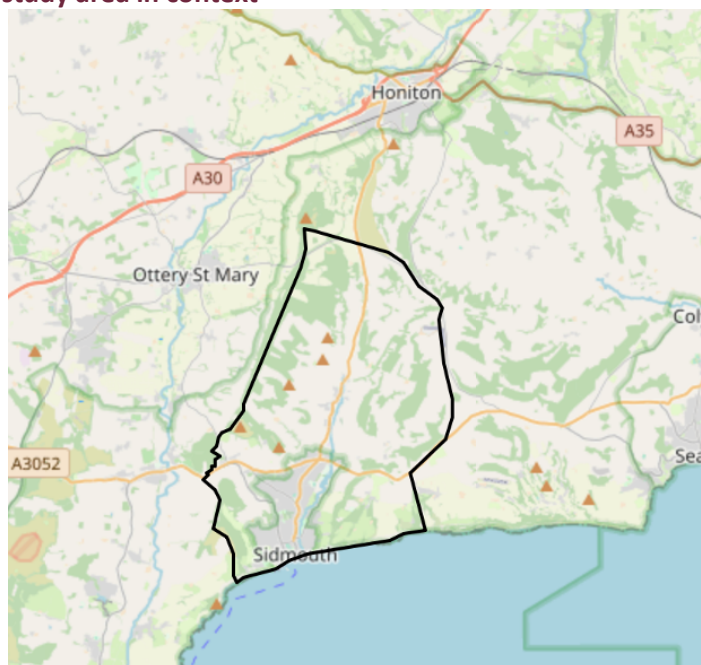
findings are then compared to the East Devon Council's Local Housing Needs Assessment 2022 (LHNA).

- 1.11 Regarding older people, nursing and care data is obtained from the LHNA regarding need for sheltered housing, the Housing Lin and Projecting Older People Information (POPPI) for information regarding nursing and care home provision. Capacity is quantified from the Care Quality Commission local area reports.
- 1.12 Regarding comparison, data for Teignmouth and Chard are presented

Geography of the study area

- 1.13 The study area, the civil parish of Sidmouth is depicted in the following map.

Map 1 **The study area in context**



Source: Nomis

Relevant planning policy context

- 1.14 A HNS must have regard to the local authority planning policy context.

The Local Plan

- 1.15 The current local plan is shortly to be replaced. The replacement plan will cover the period 2020 to 2040. Only the most relevant proposed policies and supporting text is presented below.



49. Policy – Rural Exception Sites and First Homes Exception Sites

Rural Exception Sites

A development proposal for a Rural Exception site will be supported, provided that:

- 1) the site is less than 15 dwellings or 0.5 hectares
- 2) It provides a mix of types of affordable housing meeting proven, unmet need of the local community, evidenced by the latest East Devon Local Housing Needs Assessment, Housing Needs Surveys produced by Devon Communities Together, and other local data such as a Neighbourhood Plan, Parish Survey or Parish Plan; and
- 3) Occupiers to have a local connection with the settlement or group of settlements

40. Policy - Affordable Housing

1. To foster balanced and mixed communities, planning obligations will be sought on all developments which propose affordable housing or which satisfy the criteria for qualifying cases for providing a mix of market and affordable housing. The following will apply:
 - a. The number, size, type and tenure of affordable housing will meet local need in accordance with Table 1, the Council's most up to date evidence of need and supply, the provisions of this policy, and the provisions of other Development Plan Documents where the latter have not been superseded by the Local Plan.

TABLE 1		
Location	Affordable housing as a percentage of the site total	Tenure mix of the affordable housing requirement
Second new town	At least 15% (this figure and potential for more will be dependent on delivery vehicles established for the implementation of the new town)	• 50% Social Rent • 10% Affordable Rent • 30% First Homes at 30% discount • 10% other affordable homeownership products
Rest of East Devon (excluding Cranbrook DPD area and existing commitments/completions)	At least 35%	• 64% Social Rent • 0% Affordable Rent • 36% First Homes at 30% discount • 0% other affordable homeownership products

24. Strategic Policy – Sidmouth and its future development

The sites/areas listed below are potential sites for allocation at Sidmouth as shown on the Policies Map. Sites are colour coded on the policies map to indicate whether they are preferred or 2nd choices sites and also where sites have been assessed and at this stage rejected as possible choices for allocation for development.

- **Land south west of Woolbrook Road (Sidm_01)** -This land to the north west of Sidmouth, is proposed for 127 new homes and 0.51 hectare of employment land.
- **Land west of Two Bridges Road, Sidford (Sidm_06)** - The proposed allocation is land to the east of the site (as shown as Sidm_06a on the policies map) only with a reduced site area at a much lower capacity than the original submitted site. The site would form a small-scale development to the north of Sidford to accommodate around 30 new homes.
- **Peak Coach House, (Numbers 1-3 Belfry Cottages), Cotmaton Road (Sidm_17)** -This site to the south west coastal fringe of Sidmouth, is proposed for 11 new homes.

In the event that all preferred allocations and 2nd choice sites being consulted on were allocated, this would lead to the following:

Total new homes proposed for allocation at Sidmouth = 168

Total land area proposed for employment at Sidmouth = 0.51 hectares

We are also proposing allocation of site Sidm_24 as an employment site for a further additional 1.6 Hectares of land.



1.16 We are advised that amendments have been made to draft policy 24 of the emerging local plan. The sites referenced in the preceding screenshot should now read:

- Sidm_31 Land north of Corefields, Sidmouth for 15 dwellings is included
- Sidm_34a Land between Furzehill and Hillside, Sidbury for 38 dwellings is included. The land includes an additional site Sidm_34b which the Local Planning Authority are still considering.

- 8.31. The LHNA 2022 modelled demand for specialist older person housing in the district in the plan period is 6,224 dwellings. This is an idealised outcome. The LHNA 2022 states that in practice the level of delivery identified as being required is likely to be unachievable given that it is about a third of the overall local housing need, if current rates of provision were to continue, then a further 1,630 specialist older person dwellings would be required, equating to about 9% of the Local Housing Need. The study breaks down the forecast into types of specialist housing.
- 8.32. Market and affordable dwellings will meet part of the need. Other specialist housing will be needed such as residential care homes and extra care homes (Use class C2 – Residential institution). In line with PPG, the LPA counts housing provided for older people, including residential institutions in Use Class C2, against their housing requirement. This takes into account the Government's formula used for the Housing Flow Reconciliation Return statistics to convert C2 bed spaces (gains and losses) to C3 dwelling equivalents.
- 8.33. The LHNA 2022 does not recommend the number of additional bed spaces needed in C2 care homes to meet the needs of elderly people. But it forecasts the overall demand for extra care housing to be 2,473 units to 2040. Nearly all would be C2 accommodation because of the level of care and access to communal facilities required. The need for sheltered accommodation is forecast to be 3,751 dwellings. However, the amount of sheltered housing and extra care units provided if current rates are maintained would be 1,590 and 40 respectively. There is considerable uncertainty at this time about how much of the modelled demand would arise, as demand depends on the ability of occupiers to afford the specialist housing products and the alternatives available such as assistive technology that helps to support people at home for longer.
- 8.34. Given the scale of need for older persons housing across the District as evidence by the LHNA 2022, there is no policy requirement for planning applications to demonstrate this need. Planning applications should demonstrate how the proposed development widens choice to meet the range of needs for older persons housing.
- 8.35. The policy identifies where the types of locations where specialist housing is being directed. These are places in the settlement hierarchy where there are services and facilities.
- 8.36. The policy provides site size thresholds, mindful that larger sites will be at the towns in tiers 1 and 2, the proposed urban extension north of Topsham, and the proposed second new town. The 200-dwelling threshold reflects the likely minimum size of a new Use Class C2 care home, is likely to reflect current business models, and may only be achievable on larger sites.
- 8.37. The plan's policies relating to high quality and inclusive design will support the delivery of this policy.

The neighbourhood plan

1.17 The Sid Valley Neighbourhood plan 2018-32 was adopted in 2019. There are 5 housing related policies

- Policy 9: Residential Development;
- Policy 10: Exception Sites;
- Policy 11: Affordable Housing within the built up area boundary (BUAB);
- Policy 12: Housing by Number of Bedrooms; and



- Policy 13: Local connection.

Key definitions used in this report

Government Practice guidance and the National Planning Policy Framework (NPPF) 2021

- 1.18 It is important that readers recognise that this housing needs survey (HNS) element of this study is consistent with the relevant aspects of practice guidance concerning housing needs surveys and the National Planning Policy Framework (NPPF). The reason that the HNS complies with this guidance is because the evidence the HNS presents must be a sound basis for any housing related policies that are included in the neighbourhood development plan.
- 1.19 The most relevant guidance was published by the government in the year 2000 and is called 'Housing Need Assessments: A Guide to Good Practice'. It describes best practice in designing producing and interpreting data from housing needs assessments and surveys. This report contains many references to guidance on a topic-by-topic basis.
- 1.20 Consideration of the (NPPF) June 2021 is important as it defines the term 'affordable housing'. This definition which appears in table 1.1 below is crucial to the HNS in order to distinguish between market housing and affordable housing tenures. Annex 2 of the NPPF defines the following tenures to be classed as affordable some of which are affordable home ownership in addition to affordable rented tenures.

Table 1.1 NPPF 2023 Annexe 2, Affordable Housing.

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); and which complies with one or more of the following definitions:

- a) **Affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- b) **Starter homes:** is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.



c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

d). **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

Source: NPPF 2023

Mixed communities

- 1.21 This term is used in the report. The following abstract from the government's guidance¹ is noteworthy and relevant context to this study.

Decent homes and mixed communities

What is a mixed community?

A mixed communities' approach aims to create better outcomes for the most vulnerable in society and sustainable communities for all. There is no 'one size fits all' approach and how mixed communities are developed will depend on the local context. However, **mixed communities** are areas that:

- attract and retain households with a wide range of incomes;
 - have good quality housing in attractive environments with access to good local schools and retail/leisure facilities and other services such as health;
 - have a mix of housing size, type and tenure;
 - attract and retain households with choice;
 - have strong local economies and contribute to strong regional economies;
 - are well connected to employment opportunities through neighbourhood design, transport and job access services;
 - provide access to other economic and social opportunities for all residents, enhancing their life chances;
 - have high quality housing and neighbourhood management;
- and

¹ Decent Homes: Definition and Guidance for Implementation (DCLG 2006) paragraph 3.6



- have low levels of crime and provide support services for vulnerable people.

- 1.22 We believe that a mixed and balanced housing supply is key to attracting and retaining people in the neighbourhood to the benefit of the community.

About CNB Housing Insights

- 1.23 CNB Housing Insights is a partnership operating in England and Wales, specialising in Local Housing Needs Assessments and surveys. More information about us can be found at www.cnbhousing.co.uk.
- 1.24 The experience of CNB partners spans a 30-year period which covers early the development of HNS methodology to the present day. Partners were formerly employed by leading housing consultancies Fordham Research, Opinion Research Services and arc4. Under the CNB Housing Insights brand we have partnered with, or sub contracted to Locality, ICENI (now incorporating the former GL Hearn Housing team), and AECOM. We have produced nearly 200 parish or community level housing needs assessments and delivered, or project managed a similar number of strategic studies for local authorities including housing needs surveys and assessment, SHMA and HEDNA. All these projects are based upon the methodology followed in this HNA.
- 1.25 CNB Housing Insights' role is limited to the collection and the objective and impartial analysis of data. For the avoidance of doubt, it has no role in community consultation regarding the development process.



2. A profile of Sidmouth Parish

Introduction and summary of the chapter

- 2.1 In chapter 2, we look closely at specific characteristics of Sidmouth's housing stock and resident households.
- 2.2 Using census 2011 and 2021 household and housing data, alongside government population projections, we identify current imbalances that exist and how trends will impact on any imbalances in the future. Community mix and balance is recognised as an important factor in the Local Plan, as discussed in the previous chapter.
- 2.3 The evidence suggests that imbalances exist, and these will become wider as the population ages.

Dwelling and Household Characteristics

Evidence from the census 2021

- 2.4 Whilst the analysis of the data in this section reveals some interesting findings, the findings are contextual i.e. not part of the calculation of the number of households in affordable need presented in section 4.
- 2.5 This section summarises data from the census 2011 and 2021. Data in the following figures is mostly presented as proportions (percentages) as this is the most effective means of comparison between geographies. The numbers from which the percentages are derived are stated in the data appendix.
- 2.6 According to the census 2021 there were 14,384 people living in 6,795 households within the parish. The average household size was 2.12 persons per household which is smaller than the average for England (2.41) and also smaller than the district of East Devon (2.26). Smaller average household size is consistent with a household population that is older and/or has few dependent or non-dependent children living in the household.
- 2.7 The following charts show selected housing and household characteristics that are key to understanding the drivers of housing need^{2,3}. The tables also help to define any apparent mismatches between housing and household characteristics that may lead to local gaps in housing supply.
- 2.8 Figure 2.1 shows the high proportion of households that were in owner occupied (owned outright) dwellings in the parish compared to the wider geographies.

² Local Housing Need Assessment: A guide to good practice (DETR 2000) para.2.6: an assessment of need is not simply a question of going to one source of data.

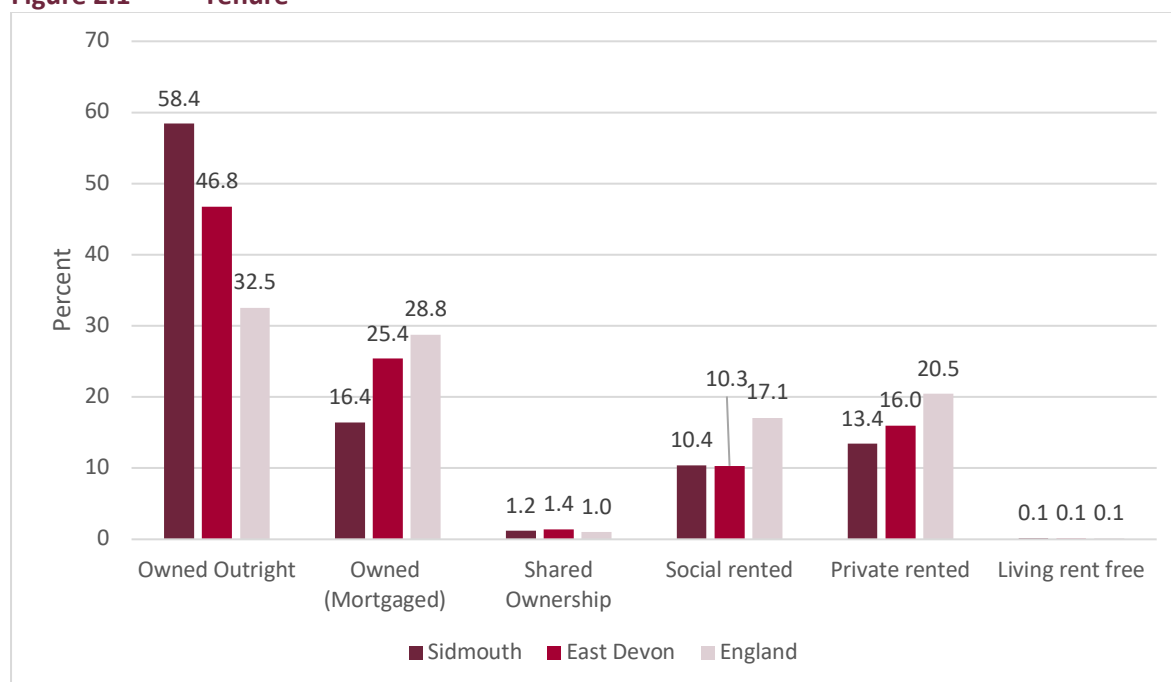
³ Local Housing Need Assessment: A guide to good practice (DETR 2000) para.2.6: it is desirable to draw on additional sources of information to provide a check on the information from particular sources, which may have limitations.



Owner occupation made up 76% of the housing stock. Compared with the district, the parish had a higher proportion of owner occupation overall.

- 2.9 The parish had a similar proportion of households living in social housing and private rented compared with the district, but the proportion is much lower than the English average. the number of owner occupied dwellings with a mortgage was much lower than the wider geographies - 16.4%, compared to 28.8% across England. This is likely to suggest an aging/non economically active population in Sidmouth and/or second homes.

Figure 2.1 Tenure



- 2.10 Snapshot data from the census 2021 and 2011 presented in tables 2.1 and 2.2 enables us to establish trends across the decade. We are presenting household numbers not dwelling numbers as tenure is defined by the occupant. Dwelling numbers may be higher due to vacant dwellings.



Table 2.1 Household tenure, census 2021 and 2011 compared.						
Census 2021						
Tenure	Sidmouth		East Devon		England	
	Number	Percent	Number	Percent	Number	Percent
Owens outright	4,075	58.4	31,228	46.8	7,624,693	32.5
Owens with a mortgage	1,146	16.4	16,967	25.4	6,744,372	28.8
Shared ownership	83	1.2	947	1.4	235,951	1.0
Social rented	725	10.4	6,898	10.3	4,005,663	17.1
Private rented	936	13.4	10,697	16.0	4,794,889	20.5
Lives rent free	10	0.1	51	0.1	30,517	0.1
All households	6,975	100.0	66,788	100.0	23,436,085	100.0
Census 2011						
Owens outright	3,817	57.7	27,837	47.1	6,745,584	30.6
Owens with a mortgage	1,350	20.4	16,446	27.8	7,229,440	32.8
Shared ownership	51	0.8	319	0.5	173,760	0.8
Social rented	653	9.9	5,515	9.3	3,903,550	17.7
Private rented	630	9.5	8,041	13.6	3,715,924	16.8
Lives rent free	112	1.7	913	1.5	295,110	1.3
All households	6,613	100.0	59,071	100.0	22,063,368	100.0
Difference 2021 minus 2011						
Owens outright	258	0.7	3,391	-0.4	879,109	2.0
Owens with a mortgage	-204	-4.0	521	-2.4	-485,068	-4.0
Shared ownership	32	0.4	628	0.9	62,191	0.2
Social rented	72	0.5	1,383	1.0	102,113	-0.6
Private rented	306	3.9	2,656	2.4	1,078,965	3.6
Lives rent free	-102	-1.6	-862	-1.5	-264,593	-1.2
All households	362	0.0	7,717	0.0	1,372,717	0.0

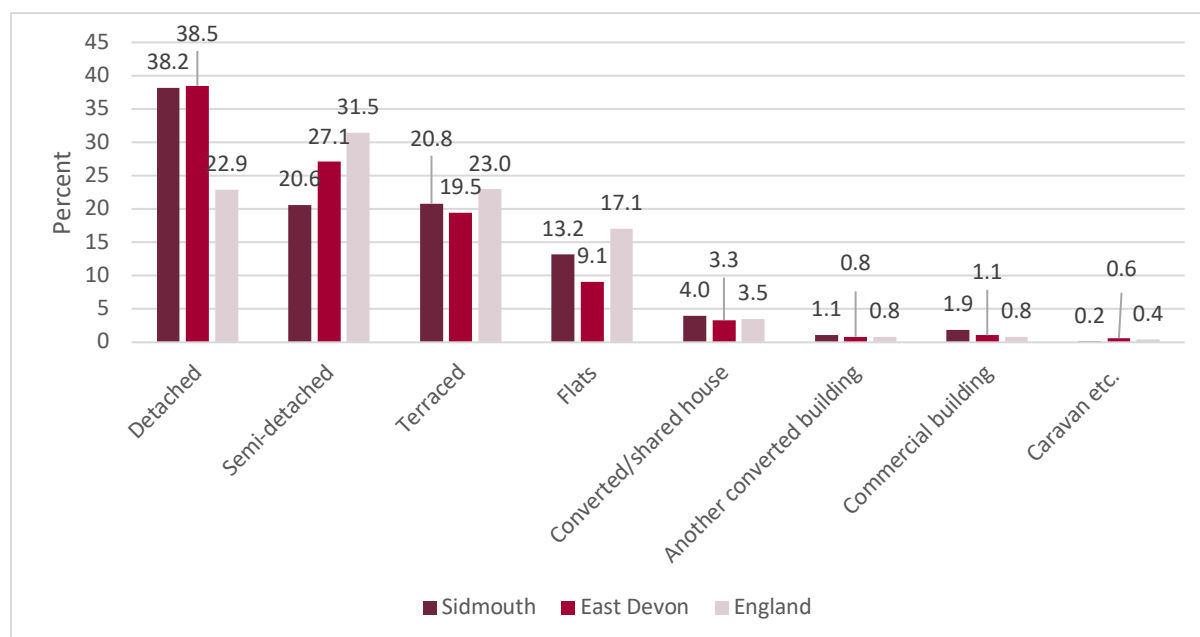
Table 2.2 Growth summary		
Area	No.	%
Sidmouth	362	5.5%
East Devon	7,717	13.1%
England	1,372,717	6.2%

- 2.11 Table 2.1 shows that households living as private renters and outright home owners grew in number the most. Households that “owned with a mortgage” decreased over the decade. The number of households living in affordable housing was greater in 2021 than 2011 but the growth was disproportionately low.



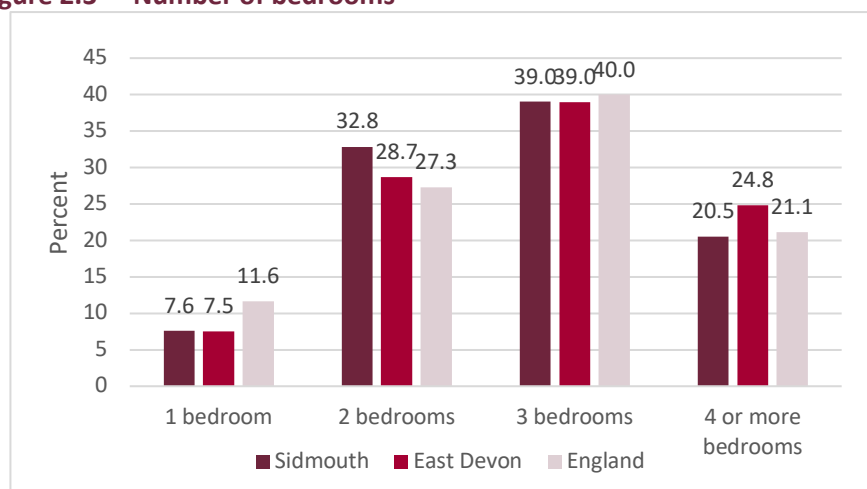
- 2.12 The apparent decrease in those living rent free is due to the term being wrongly interpreted in 2011 by some respondents, a matter that was corrected in 2021.
- 2.13 Figure 2.2 shows a particularly high proportion of households occupying detached dwellings in the study area compared to England as a whole. There was a low proportion of households occupying semi-detached dwellings compared to the wider geographies. A similar proportion of households occupy terraced homes across the geographies.

Figure 2.2 Accommodation Type



- 2.14 Figure 2.3 shows the number of bedrooms in dwellings within the study area. In the parish the predominant dwelling type was that of 3-bedrooms (39%), like the wider geographies. Notably there was a lower proportion of 4-bedroom dwellings in the parish than the wider geographies. The parish had higher proportion of 2-bedroom dwellings than the district and England as a whole.

Figure 2.3 Number of bedrooms





- 2.15 Of particular interest is the number dwellings that have 1, 2, 3 or 4 bedrooms by tenure. Figure 2.4 shows the distribution for the parish. Note that the denominator is all homes. For example 23.6% of parish households were home owners (without a mortgage) of 3-bedroom housing. Very few 4-bedroom homes were occupied by social tenants.

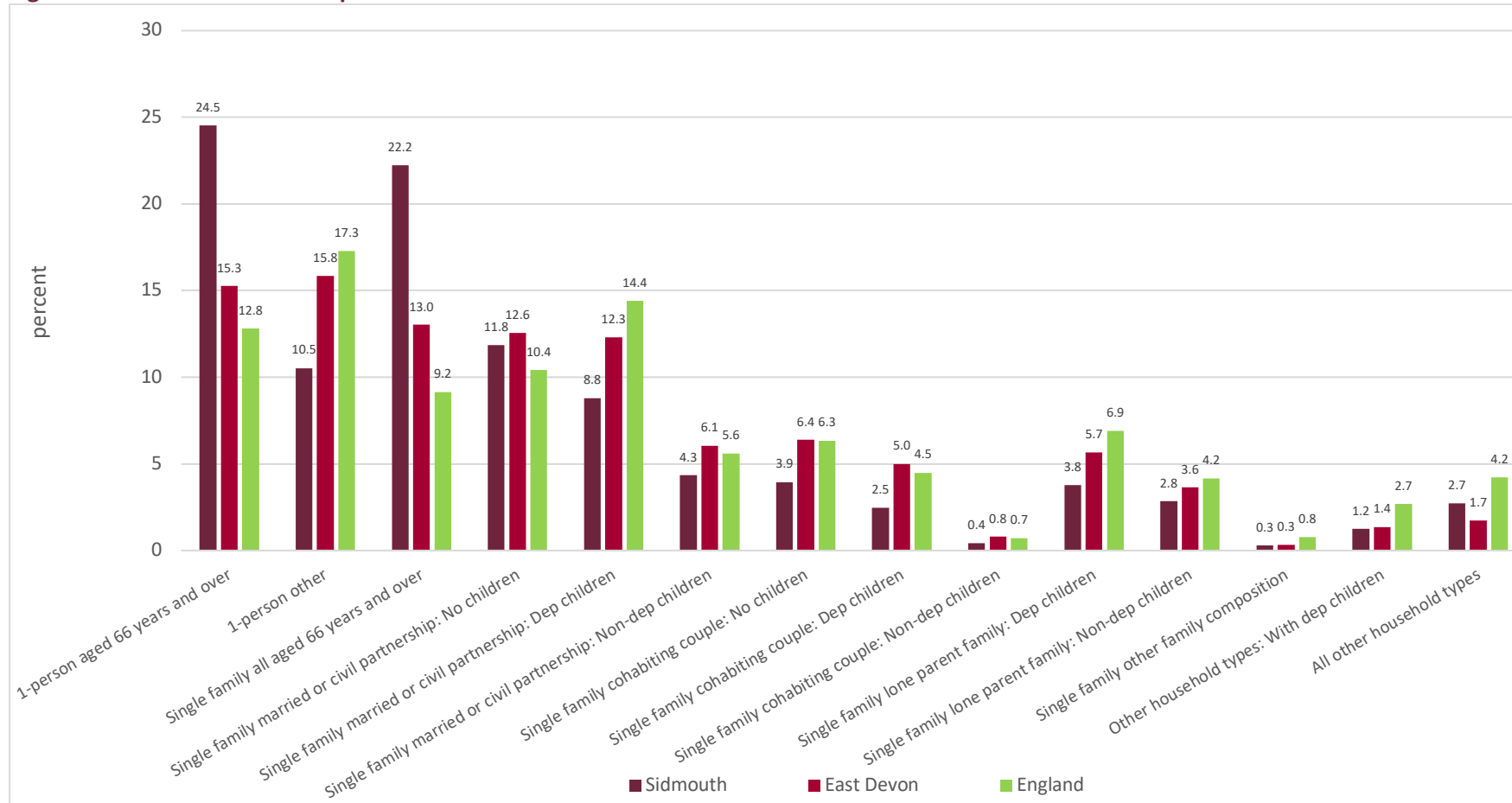
Figure 2.4 Number of bedrooms by tenure (parish only)



- 2.16 Figure 2.5 shows the household composition in 2021. This is a key table.



Figure 2.5 Household composition



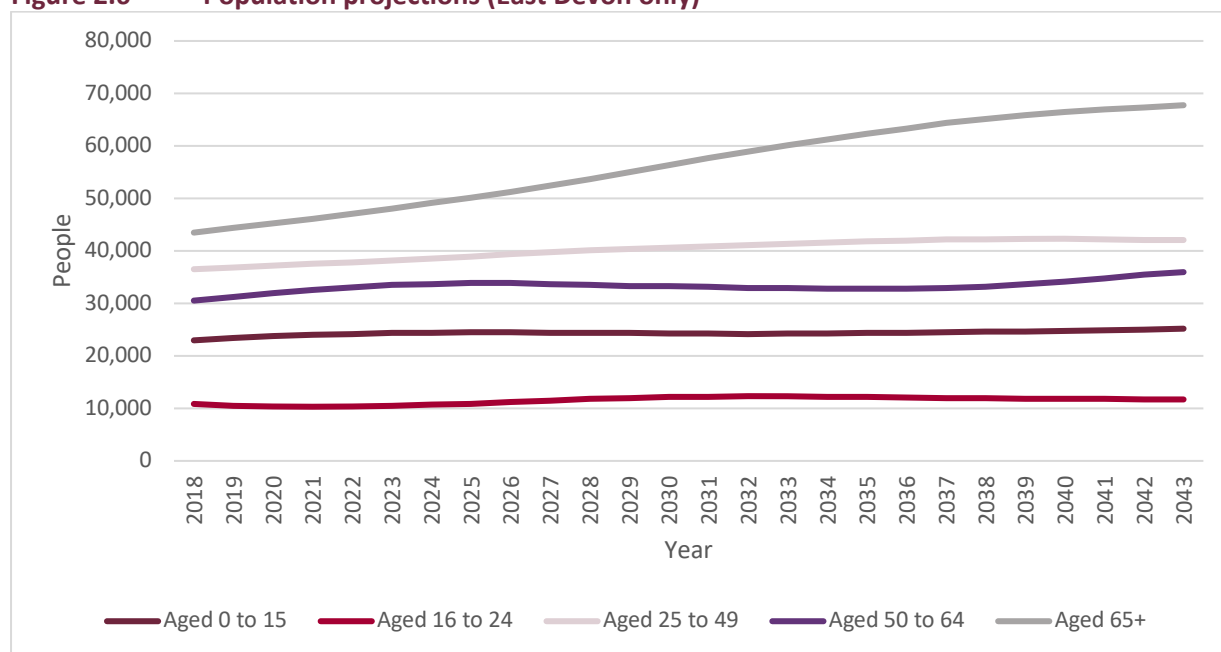
2.17 Figure 2.5 shows that the parish houses significantly larger proportion of older people (single people and families) and a lower proportion of younger single people than the wider geographies. As a consequence the proportion of households with children or non-dependent children is smaller than the wider geographies.



Population Projections

- 2.18 These projections are only available at local authority level. They are 2018 based and show a projected change in the structure of the population between 2018 to 2043 likely to affect the parish and the changing nature of housing need.
- 2.19 Data in the appendix shows a projected increase in the population overall by 38,463 people or 26.7%. All age groups are projected to increase, however the over 65 age group is projected to grow the most by 55.8% or 24,274 people.

Figure 2.6 Population projections (East Devon only)



Source: ONS

Key findings from the Census 2021 and population projections

- 2.20 The key features of the housing stock, when compared to wider geographies was the predominance of 3 or 4 or more-bedroom detached owner occupied dwellings. The household composition reveals a high proportion of households consisting of single people under the age of 66. The population projection reveals a future aging population, which may not be consistent with the parish housing stock and supply in years to come.
- 2.21 This evidence suggests that, as at census day 2021 a significant imbalance existed between housing and households:
- high proportions of older people mostly living as outright home owners;
 - low proportion of private rented sector housing; and
 - low proportion of social rented housing.



3. Local market house prices, rents and affordability

Introduction

- 3.1 The aim of this chapter is to assess the affordability and supply of market housing to the local household population. This will help us to understand the extent to which market house prices and rents drive the need for affordable housing and the options available to households.
- 3.2 Our estimate of entry level prices and rents will feed into our assessment in section 4 of the requirement for affordable housing and provide context for our overall findings.

- 3.3 The aim of this section is to assess the affordability of market housing to the local household population. This will help us to understand the extent to which house prices and rents drive the need for affordable housing and the options available to households. Data will feed into our assessment of the requirement for affordable housing and provide context for our overall findings.

Local rents and the household income required to service a rent.

- 3.4 Entry level market rental prices for the parish of Sidmouth are difficult to calculate as the parish has a small private rented sector and advertised vacancies are few. For information purposes only, at the time of writing there were 11 rental properties on Rightmove ranging from £725pcm to £1,600pcm.
- 3.5 So instead we use broad market area rents calculated by the Valuation Office Agency (VOA) as they apply to the parish.
- 3.6 Table 3.1 states the 2024/5 value of the local housing allowance (LHA) that applies to the parish, noting that the parish is in the Mid and East Devon BRMA (Broad Rental Market Area). This is significant as it is the maximum rent level that is eligible for housing benefit.
- 3.7 Any household eligible for housing benefit and seeking a private rental would need to 100% fund any rent above this level. The significance of this information is that any low-income household eligible for housing benefit would probably not have the full cost of the rental met by housing benefit. This will disproportionately impact on large households.

Table 3.1 Income required to service BRMA rents (Mid and East Devon)

Dwelling size	Weekly rental price £	Monthly rental price £	Annual gross household income required £
Shared accommodation	93	403	19,344
1 bedroom	121.97	529	25,370



2 bedrooms	157.64	683	32,789
3 bedrooms	189.86	823	39,491
4 bedrooms	253.15	1,097	52,655

Source: VOA

House prices and the income required to service a mortgage

- 3.8 The following tables state market house prices (price paid) at various benchmark levels. The 25th percentile value is particularly significant as this is identified by the good practice guidance⁴ as the entry level market price, being the lowest price at which there is a reasonable supply of housing in reasonable condition. This value is taken as the point at which households would require affordable housing if they could not afford lower quartile prices by number of bedrooms and dwelling type. This is the basis for assessing information provided by respondents in section 4 of this report.
- 3.9 The percentile value is calculated by listing all lettings or sales in a given period in ascending order according to their price or rent. The number of sales or rentals is divided by 100. The percentile price or rent corresponding to each percentile can be read off. The percentiles most frequently used in this study are the 25th (or lower quartile price point) or the 50th (the median price point).
- 3.10 Using historic data the broad average parish lower quartile price paid across all dwelling types is estimated at £289,500. This figure was obtained through Land Registry (price paid data for the period July 2023 to July 2024). There were 236 sales during this period.
- 3.11 Table 3.2 shows that on average, house prices are higher in the parish compared to the East Devon district average.

Table 3.2 Comparison of house prices between the parish and district		
	Percentile 25 (lower quartile) £	Percentile 50 (median) £
Sidmouth	289,500	402,500
East Devon	162,000	227,250

Source: Land Registry (price paid) and Rightmove

- 3.12 In table 3.3, using lower quartile dwelling prices for the parish and district, we estimate the income required to service a mortgage or loan based upon standard assumptions of a 10% deposit and 4.5 income multiplier.
- 3.13 Throughout the following affordability analysis, it must be borne in mind that a larger deposit, whether funded through savings, equity or 'the bank of mum and dad' will reduce the size of the loan and the income required to service it.

⁴ Local Housing Needs Assessments: A good Practice Guide (DETR 2000): para 4.22



Table 3.3 Household income required to fund a mortgage at benchmark prices				
	Price Level - Parish		Price Level - District	
	Lower quartile £	Median £	Lower quartile £	Median
Purchase price	289,500	402,500	162,000	227,250
Minimum deposit (10%)	28,950	40,250	16,200	22,725
Mortgage required	260,550	362,250	145,800	204,525
Annual gross household income required to service the mortgage	57,900	80,500	32,400	45,450

- 3.14 For contextual information only, table 3.4 estimates the affordability of lower quartile prices for the stated benchmark incomes and household configurations. The advantage of using these benchmark incomes is that they are applied all over England unless there is an additional allowance for London or the London fringe. They are preferred to local incomes as published by the ONS as averages are only published at the district rather than the parish level. The terms workplace based, and residence-based income measures can be confusing to readers.
- 3.15 It is apparent that using the above assumptions, none of the households listed could afford average lower quartile prices.



Table 3.4 House Purchase Affordability (selected key workers and national living wage)				
Status	Annual Gross income	Value of mortgage based upon income	Salary required to fund LQ price	LQ price 2023/2024
Police Constable				
Newly qualified	£31,143	£140,144	£57,900	£289,500
3-years' experience	£34,728	£156,276	£57,900	£289,500
Nurse				
Newly qualified	£27,055	£121,748	£57,900	£289,500
Average	£35,000	£157,500	£57,900	£289,500
Fireman				
Newly qualified	£32,224	£145,008	£57,900	£289,500
3-years' experience	£34,269	£154,211	£57,900	£289,500
Teacher				
Newly qualified	£28,000	£126,000	£57,900	£289,500
3-years' experience	£31,750	£142,875	£57,900	£289,500
Minimum Wage				
1 x full time	£18,525	£83,363	£57,900	£289,500
1 x full time, 1 x part time	£28,405	£127,823	£57,900	£289,500
2 x full time	£37,050	£166,725	£57,900	£289,500
Living Wage				
1 x full time	£21,225	£95,513	£57,900	£289,500
1 x full time, 1 x part time	£32,591	£146,660	£57,900	£289,500
2 x full time	£42,510	£191,295	£57,900	£289,500

Source: Land registry and national wage and salary rates published by government and national negotiating bodies.

- 3.16 In table 3.5 we consider the affordability of low-cost housing home ownership (LCHO) products defined as affordable housing within the NPPF 2021 annexe B definitions. Shared ownership 10% would be the most affordable option, with households requiring an income of £36,212 to fund the mortgage and rent. These options would not be affordable to single income households on national minimum or living wage as illustrated in table 3.4.



Table 3.5 Income required to fund affordable home ownership options

Starter Home (20% discount)	Costings/income required
Full price based on 25 th percentile	£289,500
Starter home price (20% off full price)	£231,600
10% deposit on equity share	£23,160
Mortgaged amount	£208,440
Income required for mortgage	£46,320
Starter Home (30% discount)	Costings/income required
Full price based on 25 th percentile	£289,500
Starter home price (30% off full price)	£202,650
10% deposit on equity share	£20,265
Mortgaged amount	£182,385
Income required for mortgage	£40,530
Shared ownership 50%	Costings/income required
Full price based on 25 th percentile	£289,500
Equity 50%	£144,750
10% deposit on equity share	£14,475
Mortgaged amount	£130,275
Service Charge (monthly)	£30
Rent (per month based on 2.75% on remaining equity p.a.)	£332
Income required for mortgage	£28,950
Income required for rent/service charge	£17,362.50
TOTAL income required	£46,313
Shared ownership 10%	Costings/income required
Full price based on 25 th percentile	£289,500
Equity 25%	£28,950
5% deposit on equity share	£1,448
Mortgaged amount	£27,503
Service Charge (monthly)	£30
Rent (per month based on 2.75% on remaining equity pa)	£597
Income required for mortgage	£6,112
Income required for rent/service charge	£30,100.50
TOTAL income required	£36,212



Price by house type

- 3.17 Further analysis can be done by studying the house types and average house prices associated.

Table 3.6 Variation in house price by type

Type	Percentile 25 £	Median £	Percentile 75 £	Count
Detached	478,000	580,000	800,000	48
Flat	163,000	163,000	163,000	23
Semi-detached	320,000	370,000	430,000	15
Terraced	280,000	354,000	417,000	24

The cost of upsizing

- 3.18 Clearly many households consider the number of bedrooms needed to be a primary driving factor in their need to move home. The Land Registry does not record or publish this information. The following information is taken from the last year of sales data on the Rightmove website within the Parish. There is enough information to indicate the extent to which price varies by number of bedrooms.

Table 3.7 Variation in house price by number of bedrooms

	1- bedroom	2- bedroom	3- bedroom	4- bedroom	5 or more- bedroom
Lower quartile £	85,000	310,000	335,000	440,000	543,000
Median £	130,000	385,000	392,500	650,500	718,000
Range from £	68,000	160,000	241,000	410,000	458,000
Range to £	183,000	792,000	985,000	1,150,000	1,395,000
Number	9	45	36	13	7

Source: Rightmove

Table 3.8 Additional household income required to facilitate upsizing

	Increase in price £	Increase in income required to fund £
1 to 2-bedroom	225,000	45,000
2 to 3-bedroom	25,000	5,000
3 to 4-bedroom	105,000	21,000
4 to 5-bedroom	103,000	20,600

Source: Rightmove and CNB Housing Insights



- 3.19 Table 3.8 shows that the cost of upsizing to a dwelling with more bedrooms is costly at any stage, although particularly from a 1 to 2 bedroom dwelling or a 3 to 4-bedroom dwelling. The cost of up sizing may be a particular challenge for growing families.

Key findings: local house prices, rents and affordability

- 3.20 Available house price data enables us to define the parameters for the affordable home ownership products defined in the NPPF. For the purposes of this HNS, households would need a minimum income of £36,212 per annum income to afford the lowest cost affordable home ownership option (table 3.7). An income of £57,900 per annum would be required to fund the average entry level market house price (table 3.5). This means low-income households on full time living wage income could not afford entry level prices or affordable home ownership options unless there was a larger second income available to the household.



4. Assessing the need for affordable housing

Introduction

- 4.1 This section uses data from the household survey and the East Devon housing register to assess the number of households in affordable housing need in the parish or with a defined connection to it, and the extent to which supply from the existing housing stock and committed future housebuilding might meet that need over the 5-year horizon of this HNS.
- 4.2 Data from East Devon's housing register informs the 2 key housing need outputs of the HNS.
- 4.3 The first output is the number of local households in affordable housing need. This is a snapshot of parish resident household circumstances using evidence from the housing register.
- 4.4 The second output, in accordance with good practice guidance, assesses the additional affordable housing required in the parish based upon the level of affordable need found in the first output and an assessment of affordable supply over the 5-year horizon of the HNS.

Key output 1: how many local households are in affordable housing need?

Data from the Council's housing register.

- 4.5 This information is needed to complete the analysis in relation to the key question: *"how many local households are in housing need?"*.
- 4.6 Summarising the screenshot within table 4.2, the council told us that:
 - 431 households were on the register seeking to live in Sidmouth; of which
 - 362 households were general needs;
 - 69 households on the register needed some form of accessible housing.



Table 4.1 Housing register data from East Devon Council

Housing Need by Band and Bedroom

	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed	Total
Band A		1				1
Band B	21	5	5		3	34
Band C	15	21	17	10		63
Band D	98	19	5			122
Band E	124	57	26	3	1	211
Grand Total	258	103	53	13	4	431

Housing Need by Bedroom and Accessibility

	General Needs	Maximum of 3 Steps	Step Free	Wheelchair Accessible	Total
1 Bed	204	36	16	2	258
2 Bed	92	6	4	1	103
3 Bed	50	2		1	53
4 Bed	12	1			13
5 Bed	4				4
Total	362	45	20	4	431

- 4.7 This information was given to our client ahead of CNB Housing Insights being commissioned to undertake the housing needs assessment (HNA). Unfortunately it is not consistent for what is needed for a HNA which is a measure of locally arising need. Accordingly we asked the council for specific information regarding households in affordable need with a local connection to the parish. Many councils have difficulty in providing this information so we also asked for numbers of households in affordable need resident in the parish and seeking more suitable housing in the parish. The council has not responded to this request.
- 4.8 We consider that Band E applicants should be disregarded as they have been assessed by the council as not being in affordable need this leaves 220 applicants. Therefore the **output 1** snapshot of households in need seeking to live in Sidmouth is 220 households.



- 4.9 The housing register provides part of the output as it records the number of households seeking social and affordable rented housing. It does not quantify the number of new households likely to form over the 5-year horizon of the HNS or the number in affordable need seeking affordable home ownership products defined in the NPPF. These factors are considered in **output 2**.

An alternative need scenario using housing register data from Gov.uk

- 4.10 Gov.uk publishes a series of live tables that are a time series. Live table 600 presents data from local authority housing registers by local authority area currently and historically. If this data is presented pro rata to Sidmouth, it is indicative of the Sidmouth parish share of East Devon's need as measured by the register.
- 4.11 This analysis is quite complex as we have to take supply into account to arrive at the scale of the gross register snapshot. Data in LT600 is net of supply and readers will be aware that to achieve output 2, we look at supply separately. Supply is taken from live table new social housing lettings otherwise known as CoRe (continuous recording of social lettings data). The advantage of using the live table data is that it distinguishes between lettings for special needs and general needs.
- 4.12 The full table is presented in the technical appendix (table 9.1). Headline findings are that on average:
- the pro-rata snapshot is 552 households
 - the annual supply pro rata is 48 dwellings per annum of which 13 are special needs units.

Social and affordable rented bedroom requirements using E.D. housing register data

- 4.13 We have used the housing register data from the sources stated (described above applicants seeking Sidmouth and all applicants on the register) to determine the proportion of dwellings needed by number of bedrooms. These data are compared to the profile of the stock of social and affordable rented housing in the parish. It is apparent that there is likely to be an under-supply of 1 bedroom dwellings and an over-supply of 2 and 3 bedroom affordable dwellings.



Table 4.2 Mismatch between snapshot need and parish stock by bedrooms needed						
	Parish level need		District level need		Parish affordable stock	
	Number	Percent	Number	Percent	Number	Percent
1-bedroom	258	59.9	2,897	53.9	210	29.0
2-bedroom	103	23.9	1,446	26.9	258	35.6
3-bedroom	53	12.3	769	14.3	219	30.2
4-bedroom	17	3.9	262	4.9	37	5.1
Total	431	100.0	5,374	100.0	724	100.0

Source: East Devon council 2024, Gov.uk local authority housing statistics 2023 and Census 2021

Key output 2: how much additional affordable housing is needed in the parish?

- 4.14 This section takes the necessary steps to estimate the additional housing that is required in the parish. This is a different question to key output 1: “*how many local households are in housing need?*”. The affordable housing requirement is achieved primarily by taking supply from affordable vacancies into account normally expressed as dwellings per annum. However, additional steps are necessary if we are to compare the *snapshot* of need as estimated in the previous section to the *flow* of supply⁵ i.e. dwellings per annum. So the conversion of snapshot numbers of need into a flow of need is necessary.
- 4.15 It is important that readers understand that housing need should be quantified as a flow of households rather than a snapshot. The reasons for this follows.
- 4.16 Households falling into housing need is a continuous process as the circumstances of a multitude of households change that affect the suitability of their housing. Examples of which are: death of a partner; birth of a child; child(ren) leaving the family home; other persons leaving the family home due to relationship breakdown; long term illness or disability; change in economic circumstances; homelessness or factors that render existing accommodation unusable (such as fire, flood or disrepair). All of these may amount to a household finding its housing accommodation unsuitable and being in housing need.
- 4.17 This concept is reflected in government practice guidance initially the good practice guidance issued in 2000 and is adopted in current NPPG (affordable housing).⁶
- 4.18 The good practice guidance⁷ was produced in the year 2000 and is the bedrock of housing needs assessments and is still in use today by housing consultants but not rural enablers.

⁵ NPPG Paragraph: 007 Reference ID: 67-007-20190722 Revision date: 22 07 2019

⁶ NPPG Paragraph: 024 Reference ID: 2a-024-20190222 Revision date: 20 02 2019

⁷ Local Housing Need Assessment: A guide to good practice (DETR 2000)



Assessing the flow of affordable need

- 4.19 It is standard practice to annualise the snapshot of need by dividing it by 5. 5 being the 5-year horizon of the HNA. There is a strong argument to suggest that this will underestimate the annual flow:
- households are constantly joining or leaving the housing register;
 - tenants in the private rented sector are disproportionately in housing need compared to other tenures and many are likely to fall into housing need over the next 5-years due to S.21 (no fault evictions) and that the English Housing Survey (EHS) suggests that the average length of a private rented sector tenancy is 4.2 years. Census 2021 counted 936 living in the private rented sector;
 - according to national data around 80% of applicants are rehoused within 3 years. Some councils suggest that the snapshot should therefore be divided by 3 not 5.

Assessing the flow of supply

- 4.20 There are several elements of supply that need to be considered:
- supply from vacancies; and
 - supply from committed future housebuilding (let or sold later than the date of this assessment).
- 4.21 We need to take future supply into account as the HNS estimates need over a 5-year period.
- 4.22 Information regarding supply is taken from:
- the council's 5-year land supply monitoring report; and
 - gov.uk new social lettings.
- 4.23 Our review of the council's 5-year land supply monitoring reveals that the following sites are expected to be delivered at some point in the future. There is no mention of the sites likely to be allocated in the emerging local plan cited in chapter 2 of this HNA.

Table 4.3 Screenshot of the council's monitoring report

MAIN TOWNS - TIER 2 MAIN CENTRES – SIDMOUTH	414
Site MT2-SI1 : Former EDDC offices, Knowle, Sidmouth	414
Site MT2-SI2 : Green Close, Drakes Avenue Sidford, Sidmouth (Lockyer Lodge)	424

Source: East Devon Council Housing Monitoring Update 2023 Appendix B

- 4.24 We are aware that planning consent has been refused for the first site and is subject to appeal. If consented on appeal we understand that there would be no



- affordable housing contribution as much of the site would be planning use class C2.
- 4.25 From the council’s site status review, it would appear that the second site is complete.
 - 4.26 We have concluded that the sites likely to be allocated in the emerging local plan would not be delivered within the 5-year Horizon of this HNA.
 - 4.27 Consented planning applications listings reveals no further consents for affordable housing or major market development likely to trigger an affordable housing contribution.
 - 4.28 Recent new build will have little impact on affordable supply due to vacancies and that the English Housing Survey⁸ estimates that the average length of a social or affordable tenancy is 12.7 years.
 - 4.29 According to the census 2021 there were 83 units of shared ownership in the parish. However stock on this scale will not produce many vacancies annually if any. The English Housing Survey⁹ estimates the average length of stay in a dwelling that is owned subject to mortgage is 9.4 years. We have assumed between 5 and 7 vacancies per annum although these might not remain in shared ownership if occupiers “staircase out” to 100% ownership.
 - 4.30 Regarding supply from affordable vacancies, data from gov.uk “social housing lettings” (CoRe) pro rata to the parish is 48 units per annum.
 - 4.31 Tables 4.4 and 4.5 bring compare the annual flows of need and supply per annum over the 5 year horizon of the HNA. The tables provide separate estimates for social and affordable rent and affordable home ownership.

⁸ Headline report 2021/2

⁹ Headline report 2021/2



Table 4.4 Detailed analysis of the flow of supply and affordable need (LT600 and CORE)															
	Gross flow of need			Supply flow from vacancies			Supply flow from first lettings and sales			Supply flow from all sources			Imbalance between supply and need		
	Affordable rent	Affordable home ownership	Affordable total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total
Year 1	145	65	210	48	5	53	0	0	0	48	5	53	-97	-60	-157
Year 2	145	65	210	48	5	53	0	0	0	48	5	53	-97	-60	-157
Year 3	145	65	210	48	6	54	0	0	0	48	6	54	-97	-59	-156
Year 4	145	65	210	48	6	54	0	0	0	48	6	54	-97	-59	-156
Year 5	145	65	210	48	7	55	0	0	0	48	7	55	-97	-58	-155
5-year totals	725	324	1049	240	29	269	0	0	0	240	29	269	-485	-295	-780

Table 4.5 Detailed analysis of the flow of supply and affordable need (housing register local connection to the parish)															
	Gross flow of need			Supply flow from vacancies			Supply flow from first lettings and sales			Supply flow from all sources			Imbalance between supply and need		
	Affordable rent	Affordable home ownership	Affordable total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total	Affordable rent	Affordable home ownership	Total
Year 1	79	41	120	48	5	53	0	0	15	48	5	53	-31	-36	-67
Year 2	79	41	120	48	5	53	0	0	17	48	5	53	-31	-36	-67
Year 3	79	41	120	48	6	54	0	0	21	48	6	54	-31	-35	-66
Year 4	79	41	120	48	6	54	0	0	21	48	6	54	-31	-35	-66
Year 5	79	41	120	48	7	55	0	0	9	48	7	55	-31	-34	-65
5-year totals	394	204	598	240	29	269	78	6	84	318	35	353	-154	-175	-329

Notes

Rounding errors may be present as data are presented as whole numbers

A negative number in the right 3 columns indicates a shortfall in supply

See the technical appendix for further information on the BNAM and the LT600 calculation



Key finding Output 2 “how much additional affordable housing is needed in the parish”

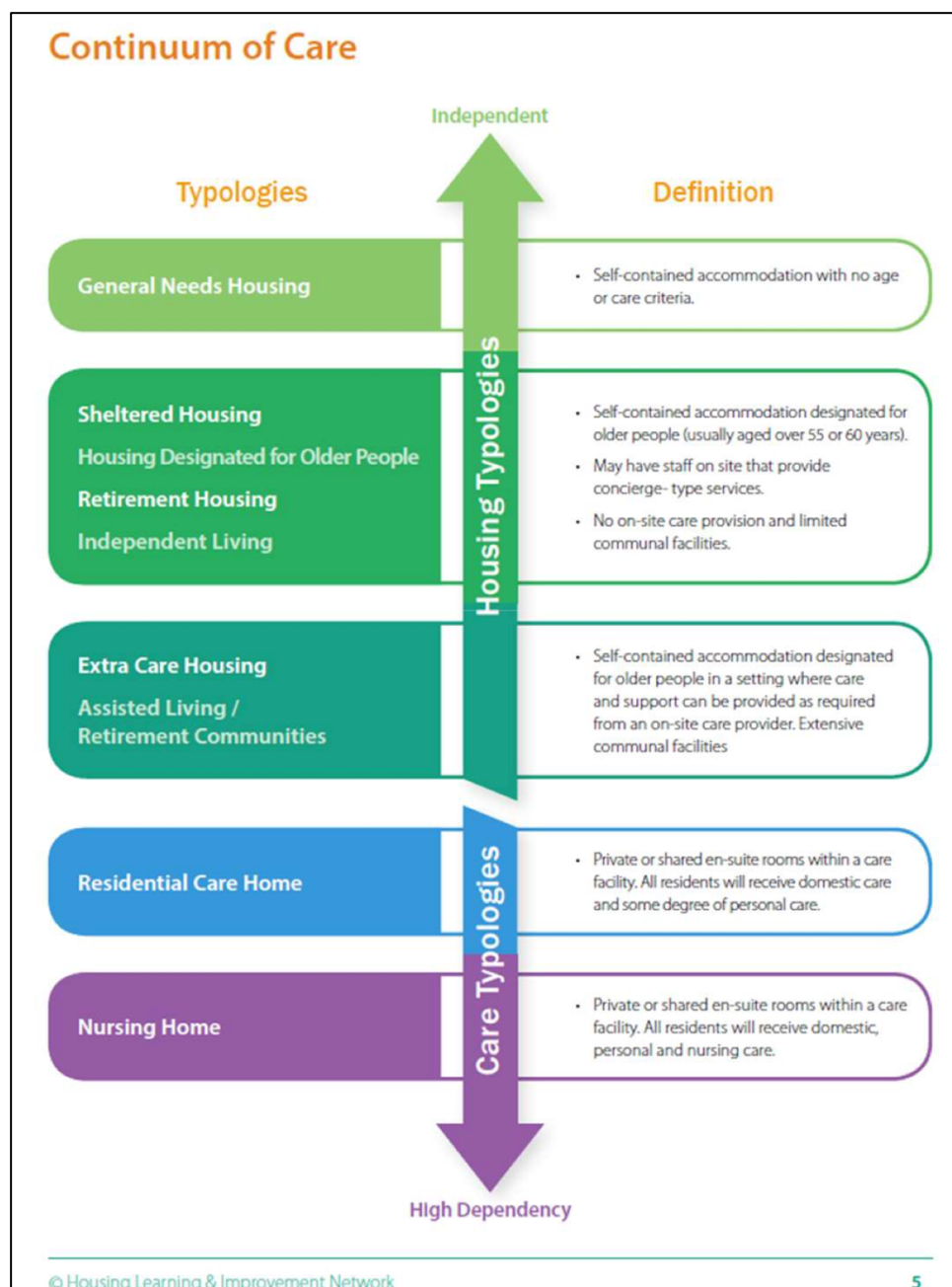
- 4.32 Table 4.5 presents our estimate of the future requirement for affordable housing in the parish which includes households seeking accessible housing. This is based upon information provided by the council that does not necessarily consist entirely of households with a local connection to the parish. Further information is awaited.
- 4.33 Table 4.5 shows that an additional 65 to 67 units of affordable housing are needed per annum if the flow of those in affordable need is to be met. The number varies per annum according to changing levels of supply.
- 4.34 Table 4.4 suggests that Sidmouth’s share of district wide need is between 155 and 157 dwellings per annum.
- 4.35 Our concluding remarks at the end of this report consider the feasibility of each scenario in a wider context.



5. Housing, care and support for older people

Introduction

- 5.1 The brief for this part of the analysis was to establish to what extent further specialist housing, residential and nursing care provision is required and to consider if the situation differed across comparable towns.
- 5.2 The following diagram taken from the Housing LIN (Housing Learning and Improvement Network) clarifies the definitions of alternative forms of accommodation for older people. Crucially for the understanding of the data presented in this chapter it distinguishes between housing and care.





- 5.3 Chapter 2, population statistics, shows that Sidmouth had a high proportion of people resident in the parish that are aged 66 or over. As at the census 2021 42%¹⁰ of the population was aged 66 or over (some 6,049 people). These were typically living independently as outright home owners. Population projections for East Devon district show that the proportion of people aged 65 or over is projected to rise to 55% of the population by 2043 (some 24,274 people or 2,315¹¹ pro rata to Sidmouth).
- 5.4 From the literature, from age 75 onward, health and mobility starts to deteriorate in many people and households dependent on the suitability of their existing housing will make choices about:
- staying put with appropriate adaptation care and support (whether informal or provided by the welfare authority);
 - moving to more suitable housing some of which may provide care and support to maintain independent living, sometimes called supported living; or
 - moving to a care or nursing home.

Literature review

- 5.5 A review of the published literature has been undertaken to investigate related public policy and the evidence supporting it.
- 5.6 The emerging East Devon Local Plan 2020 -2040 contains the following narrative in support of its policy, “41 Policy – Housing to meet the needs of older people”. Whilst policy 41 is lengthy we consider the following segment to be particularly significant to this report:

4. Suitable locations for specialist older person accommodation will be at settlements in tiers 1 to 4 of the settlement hierarchy where the site is within 400m walking distance of local shops and easily accessible by walking or by public transport to town centres and to health, care and community facilities.
5. The Council will support development proposing specialist older person housing at suitable locations in East Devon where this widens choice.
6. Where there is up to date evidence of specialist accommodation need in East Devon and subject to viability, development will be required to deliver one or more of the specialist types of accommodation for older people as follows:
 - a. On local plan site allocations development proposals for 20 to 199 dwellings will include at least 20% of those dwellings on-site as specialist older person dwellings (Use Class C3)
 - b. On local plan site allocations, development proposals for 200 or more dwellings will include at least 20% of those dwellings on-site as specialist older person dwellings as C3 dwellings or C2 equivalents

¹⁰ In comparison to the case study towns reported in Chapter 6: Teignmouth = 27.03% Chard = 24.00%

¹¹ This is a crude estimate using 2021 census data. The multiplier is the Census 2021 population of Sidmouth divided by population of East Devon



- 8.31. The LHNA 2022 modelled demand for specialist older person housing in the district in the plan period is 6,224 dwellings. This is an idealised outcome. The LHNA 2022 states that in practice the level of delivery identified as being required is likely to be unachievable given that it is about a third of the overall local housing need. If current rates of provision were to continue, then a further 1,630 specialist older person dwellings would be required, equating to about 9% of the Local Housing Need. The study breaks down the forecast into types of specialist housing.
- 8.32. Market and affordable dwellings will meet part of the need. Other specialist housing will be needed such as residential care homes and extra care homes (Use class C2 – Residential institution). In line with PPG, the LPA counts housing provided for older people, including residential institutions in Use Class C2, against their housing requirement. This takes into account the Government's formula used for the Housing Flow Reconciliation Return statistics to convert C2 bed spaces (gains and losses) to C3 dwelling equivalents.
- 8.33. The LHNA 2022 does not recommend the number of additional bed spaces needed in C2 care homes to meet the needs of elderly people. But it forecasts the overall demand for extra care housing to be 2,473 units to 2040. Nearly all would be C2 accommodation because of the level of care and access to communal facilities required. The need for sheltered accommodation is forecast to be 3,751 dwellings. However, the amount of sheltered housing and extra care units provided if current rates are maintained would be 1,590 and 40 respectively. There is considerable uncertainty at this time about how much of the modelled demand would arise, as demand depends on the ability of occupiers to afford the specialist housing products and the alternatives available such as assistive technology that helps to support people at home for longer.
- 8.34. Given the scale of need for older persons housing across the District as evidence by the LHNA 2022, there is no policy requirement for planning applications to demonstrate this need. Planning applications should demonstrate how the proposed development widens choice to meet the range of needs for older persons housing.
- 8.35. The policy identifies where the types of locations where specialist housing is being directed. These are places in the settlement hierarchy where there are services and facilities.
- 8.36. The policy provides site size thresholds, mindful that larger sites will be at the towns in tiers 1 and 2, the proposed urban extension north of Topsham, and the proposed second new town. The 200-dwelling threshold reflects the likely minimum size of a new Use Class C2 care home, is likely to reflect current business models, and may only be achievable on larger sites.
- 8.37. The plan's policies relating to high quality and inclusive design will support the delivery of this policy.

5.7 In 2023, Devon County Council produced the Devon Joint Strategic Needs Assessment. It provides a summary of health and wellbeing needs across the Devon County Council area. It contains a range of information about the health and factors that influence population health and wellbeing from a range of sources. It is an outcome focussed strategy rather than a plan so is not considered further.

5.8 Whilst this HNA report is mostly about measuring the future capacity needed for residential housing, care and nursing homes it should be noted that many people prefer to live out their lives in the dwelling they may have lived in for many years.¹² A local initiative, Sidmouth Hospice at Home,¹³ is a much valued source of care and support for service users who prefer to receive palliative care and support in their home.

¹² Whilst this is a widely accepted generalisation, it is supported by empirical evidence. It is a key finding of all Housing need surveys undertaken by CNB housing Insights over recent years.

¹³ <https://sidmouthhospiceathome.org.uk/about-us/history-of-sidmouth-hospice-care-at-home>



Detailed evidence

A) Housing

- 5.9 A local housing needs assessment (LHNA) was published by East Devon council in 2022. It a key document providing evidence for the new local plan.
- 5.10 The following is a key output of the LHNA. Output units are units of housing, specifically residential housing, planning use class C3. Our understanding is that this does not include residential and nursing care (planning use class C2). As the LHNA notes there is a formula for converting residential and nursing care bedspaces to dwellings but having read the complex LHNA several times, we believe that the following table has not been adjusted in this way. We are anxious to keep housing and care requirement separate for the purposes of our analysis. Note that the table uses a prevalence rate for people aged over 75 and disaggregates need and supply between owners and renters

Figure 65: Modelled Demand for Older Person Housing in East Devon 2020-40 based on Housing LIN Toolkit

EAST DEVON	Rate per 1,000 persons aged 75+	Gross need 2020	Existing supply	Unmet need in 2020	Additional need 2020-40	Overall need
Owned Sheltered Housing	120	2,696	1,065	+1,631	+1,596	+3,227
Rented Sheltered Housing	60	1,348	1,622	-274	+798	+524
Owned Extra Care	40	899	67	+832	+532	+1,364
Rented Extra Care	31	697	0	+697	+412	+1,109
TOTAL	251	5,640	2754	+2,886	+3,338	+6,224

- 5.11 If we apply our pro rata factor to the findings of the above table we find that over the 20-year period local need is estimated to increase as follows:

Table 5.1 LHNA figure 65, older person housing pro-rata for Sidmouth			
Type	East Devon 20-years	Sidmouth 20-years	Sidmouth p.a.
Owned sheltered housing	3,227	308	15
Owned extra care housing	1,364	130	7
Rented sheltered housing	524	50	3
Rented extra care housing	1,109	106	5

Source East Devon LHNA 2022

- 5.12 We have no independent data on the level of existing privately owned sheltered and extra care housing. We are unclear as to which group leasehold sheltered housing such as that proposed by the McCarthy and Stone development would belong.
- 5.13 The Social Housing Regulator publishes data on the social and affordable housing capacity for each local housing authority area. The data suggests that there are



around 170 dwellings classed as being suitable for households with special needs. This is likely to be accessible housing and sheltered housing.

Table 5.2 Social and affordable housing capacity general and special needs

	East Devon	Sidmouth pro rata
Council general needs	2,754	263
Council owned special need	1,420	135
RP general need	2,700	257
Registered provider special need	352	34

Source: Social Housing Regulator

Informal care

5.14 The census 2021 contains the following data.

Table 5.3 Number of the population that provide different levels of unpaid care

	Provides no unpaid care	Provides 9 hours or less unpaid care a week	Provides 10 to 19 hours unpaid care a week	Provides 20 to 34 hours unpaid care a week	Provides 35 to 49 hours unpaid care a week	Provides 50 or more hours unpaid care a week	Total: All usual residents aged 5 and over
Sidmouth	12,435	610	206	131	123	433	13,938
East Devon	130,146	5,580	1,904	1,214	1,257	4,236	144,337
England	48,734,833	1,668,989	634,736	452,264	517,505	1,404,771	53,413,098

Table 5.4 Proportion of the population that provide different levels of unpaid care

	Provides no unpaid care	Provides 9 hours or less unpaid care a week	Provides 10 to 19 hours unpaid care a week	Provides 20 to 34 hours unpaid care a week	Provides 35 to 49 hours unpaid care a week	Provides 50 or more hours unpaid care a week	Total: All usual residents aged 5 and over
Sidmouth	89.2	4.4	1.5	0.9	0.9	3.1	100
East Devon	90.2	3.9	1.3	0.8	0.9	2.9	100
England	91.2	3.1	1.2	0.8	1.0	2.6	100

Source: Census 2021

5.15 In table 5.4 it is noteworthy that in Sidmouth, higher proportions of people in most categories provide unpaid care than in the district and England as a whole. We have no numbers for domiciliary care paid for by the local authority or self-funded by clients. It follows that these higher levels of informal care are a result of the higher levels of older people resident in the parish.



B) Residential care and nursing care

- 5.16 Projecting Older People Population Information (POPPI) produces the following projection for East Devon.

East Devon					
Living in a care home					
People aged 65 and over living in a care home with or without nursing by local authority / non-local authority, by age, projected to 2040					
 Download  Print					
Show next five years					
	2023	2025	2030	2035	2040
People aged 65-74 living in a LA care home with or without nursing	1	1	1	2	2
People aged 75-84 living in a LA care home with or without nursing	22	24	25	26	31
People aged 85 and over living in a LA care home with or without nursing	30	31	37	46	50
People aged 65-74 living in a non LA care home with or without nursing	118	120	138	153	152
People aged 75-84 living in a non LA care home with or without nursing	494	530	565	587	677
People aged 85 and over living in a non LA care home with or without nursing	999	1,040	1,232	1,560	1,697
Total population aged 65 and over living in a care home with or without nursing	1,664	1,746	1,999	2,375	2,609
Figures may not sum due to rounding Crown copyright 2020					

- 5.17 If we apply our pro-rata multiplier, we estimate that the total Sidmouth population aged 65 or over, living in a care home with or without nursing 2023 to 2040 is as follows.

Table 5.5 POPPI projection of households needing to live in a care home with or without nursing					
Year	2023	2025	2030	2035	2040
East Devon	1,664	1,746	1,999	2,375	2,609
Sidmouth pro-rata	159	167	191	227	249

Source: POPPI



- 5.18 Regarding supply, the Care Quality Commission (CQC) publishes data on all registered care homes whether residential or nursing. The following maximum capacity exists. Note that the actual level of capacity at any one time will be lower due to vacancies and maintenance.

Table 5.6 Residential and nursing care capacity in Sidmouth	
Residential	163
Nursing	58
Total	221

Source: Care quality Commission October 2024

- 5.19 Readers are asked to note that this is a measure of capacity (number of bedspaces) not supply (vacancies). It can be compared to the preceding table with a degree of caution. Some vacancies in the stock are inevitable. This may be due to the death of residents or the need to refurbish rooms from time to time.

Future supply

- 5.20 A search of the East Devon planning portal over the last 5-years indicated no decided planning consents for sheltered or extra care housing (planning use class C2 or C3).
- 5.21 The following application was refused and is the subject of an appeal to the planning Inspectorate.

Planning – Planning Application Documents

[? Help with this page](#)

24/O263/MFUL | Redevelopment of site to provide: (a) Care home building (Class C2) with associated parking, landscaping, staff and resident facilities and associated works (b) Extra care apartment building (53 units) with associated communal lounge, wellbeing suite, restaurant and care provision (class C2) (c) Retirement living apartment building (33 units) with associated communal lounge (Sheltered housing) and (d) Erection of 4 houses and 3 townhouses (Class C3) along with accesses, internal car parking, roads, paths, retaining walls, refuse and landscaping associated with development; retention/refurbishment of building B, erection of habitat building and sub-stations. (Demolition of buildings other than building B) (Variation to previous application (23/O571/MFUL) showing removal of balconies and elevational changes to west elevation of Retirement Living block, and alterations to the southern end/elevations of the Retirement Living and Extra Care buildings) | Former Council Offices Knowle Sidmouth Devon EX10 8HL

- 5.22 The planning application was made on behalf of McCarthy and Stone which has a reputation for providing high quality leasehold accommodation and support which might not be affordable to households with modest savings or equity in their present accommodation¹⁴. It is apparent that the planning proposal includes such a 33 bed complex described in the application as sheltered housing. Although not specified in the application these are likely to be leaseholds rather than market or social rented. Also proposed is a 53 bed extra care unit presumably planning use class C2.

¹⁴ This statement is made on the basis of fieldwork undertaken by the author for local authority clients pursuant to strategic studies e.g. SHMA all over England in the last 10-years. It is based upon informal face to face interviews with innumerable estate agents and visits to McCarthy and Stone scheme managers.



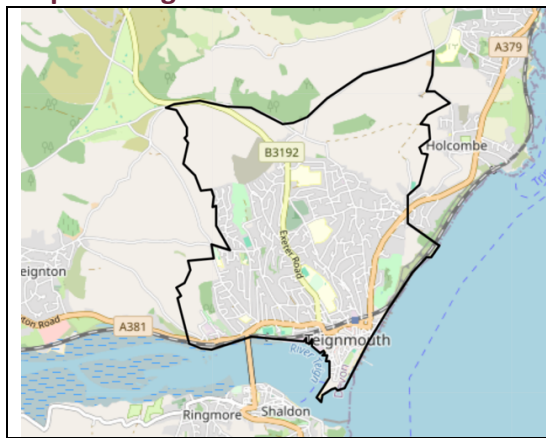
Comparison of Sidmouth to Teignmouth and Chard

- 5.23 This short section uses census 2021 data, and house price data to compare Sidmouth parish to two similar parishes; Chard in Somerset and Teignmouth in Teignbridge district.

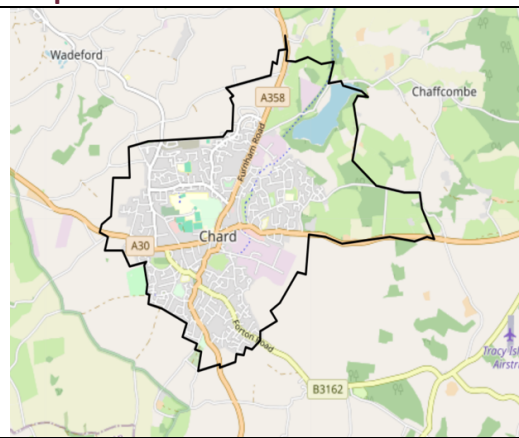
Comparing the area profiles

- 5.24 The two additional parish areas discussed in this chapter are shown in the following maps.

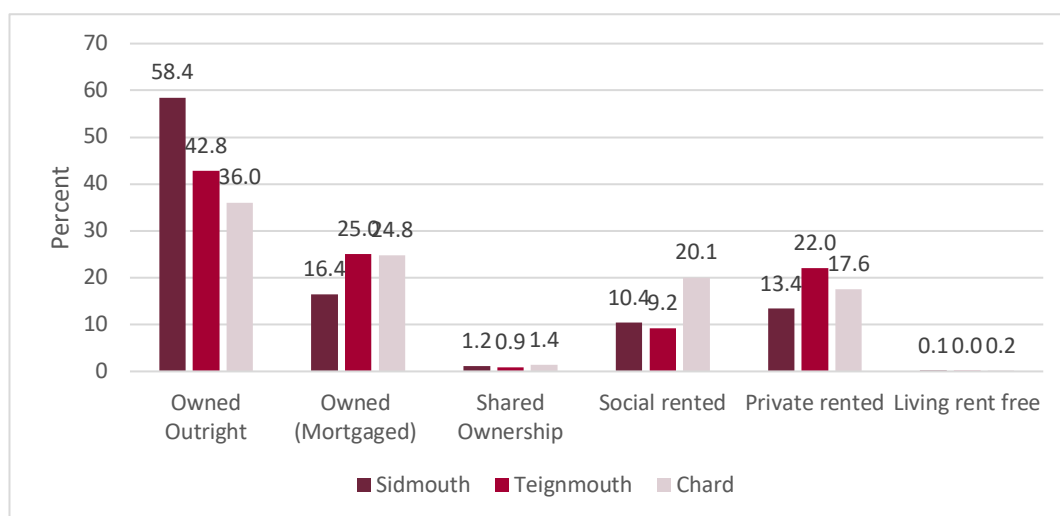
Map 2 – Teignmouth Parish



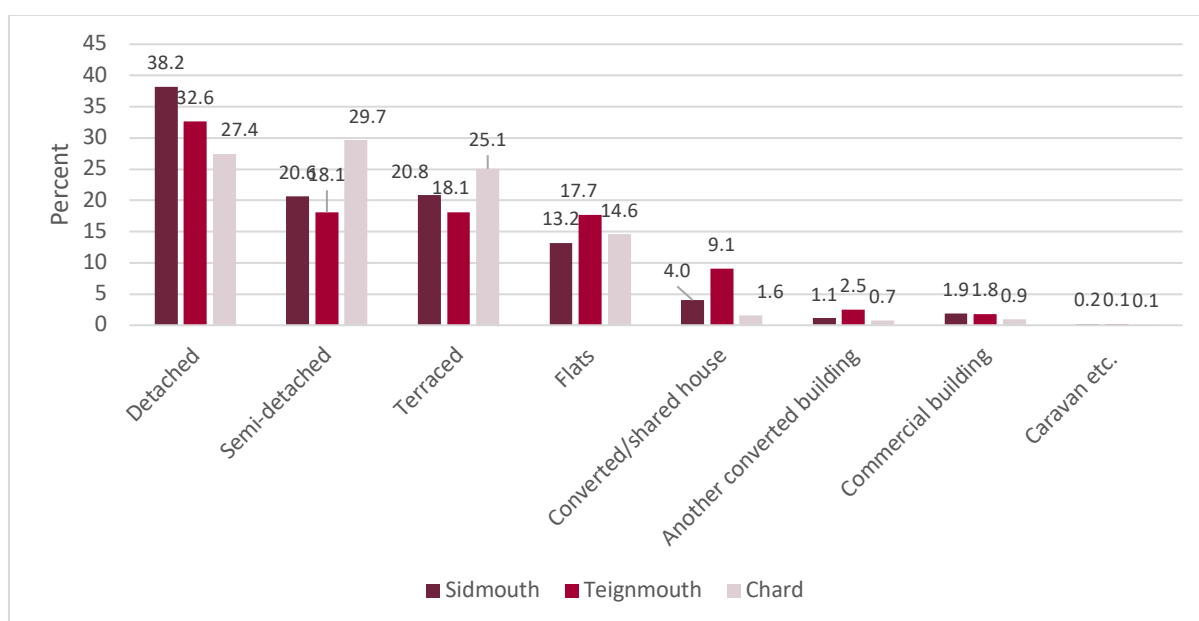
Map 3 – Chard Parish



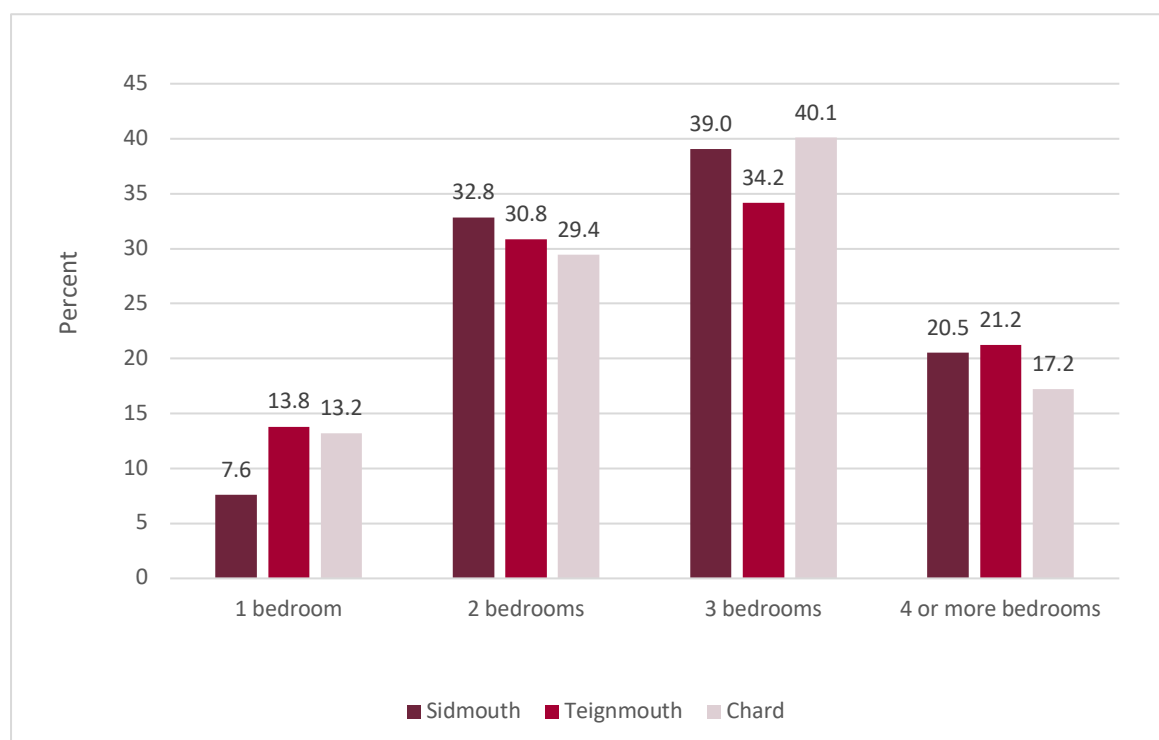
- 5.25 As noted in chapter 2, the average household size in Sidmouth parish was 2.12 persons per household. This is smaller than the parishes of Chard and Teignmouth. Teignmouth's average household size was 2.14, and Chard was 2.25. which was smaller than the average for England (2.41) and also smaller than the district of East Devon (2.26).
- 5.26 Figure 4.1 shows a comparison of the tenure across all three parishes. Sidmouth had a greater proportion of owned outright dwellings, and smaller proportion of mortgaged dwellings than Chard and Teignmouth. There was a larger proportion of social rented dwellings in Chard, and a larger proportion of private rented dwellings in Teignmouth.

**Figure 5.1 Tenure**

5.27 Figure 5.2 shows the house types in the three parishes. Sidmouth and Teignmouth have similar housing stock, however Chard has a higher proportion of semi-detached and terraced dwellings.

Figure 5.2 House Type

5.28 Bedroom analysis can be seen in figure 5.3. Overall, the distribution of number of bedrooms across all three parishes is similar.

**Figure 5.3** **Number of Bedrooms**

House Price Data

- 5.29 Now, we will compare the house price data for the three parishes.
- 5.30 Rental property is considerably more expensive in Sidmouth, compared to the other parishes. Although there were limited numbers of rental properties available for rent on Rightmove at the time of writing, there were enough to get an understanding of the rental market for each parish.

Table 5.7 **Comparison of rental house prices between the three parishes**

	Percentile 25 (lower quartile) £	Percentile 50 (median) £
Sidmouth	1,025	1,300
Teignmouth	837	950
Chard	825	950

Source: Rightmove

- 5.31 Table 5.2 shows house price paid data for sales in the three parishes.



Table 5.8 Comparison of house prices (sales) between the three parishes		
	Percentile 25 (lower quartile) £	Percentile 50 (median) £
Sidmouth	289,500	402,500
Teignmouth	230,313	325,000
Chard	204,375	275,000

Source: Land Registry (price paid)

- 5.32 Similarly to the rental prices, house prices are more expensive overall in Sidmouth, and less expensive in Chard.

Specialist housing and care findings

- 5.33 We can make a direct comparison between East Devon and Teignbridge as the LHNA study was carried out at the same time by the same consultancy. The East Devon table is presented here again for convenience.

Figure 65: Modelled Demand for Older Person Housing in East Devon 2020-40 based on Housing LIN Toolkit

EAST DEVON		Rate per 1,000 persons aged 75+	Gross need 2020	Existing supply	Unmet need in 2020	Additional need 2020-40	Overall need
Owned Sheltered Housing		120	2,696	1,065	+1,631	+1,596	+3,227
Rented Sheltered Housing		60	1,348	1,622	-274	+798	+524
Owned Extra Care		40	899	67	+832	+532	+1,364
Rented Extra Care		31	697	0	+697	+412	+1,109
TOTAL		251	5,640	2754	+2,886	+3,338	+6,224

Figure 64: Modelled Demand for Older Person Housing in Teignbridge 2020-40 based on Housing LIN Toolkit

TEIGNBRIDGE		Rate per 1,000 persons aged 75+	Gross need 2020	Existing supply	Unmet need in 2020	Additional need 2020-40	Overall need
Sheltered Housing	Owned	120	2,011	584	+1,427	+1,378	+2,805
	Rented	60	1,005	935	+70	+689	+759
Extra Care	Owned	40	670	0	+670	+459	+1,130
	Rented	31	519	50	+469	+356	+825
TOTAL		251	4,206	1569	+2,637	+2,882	+5,519

- 5.34 No equivalent table exists for the former South Somerset district.
- 5.35 It is apparent that projected need for older person housing is greater in East Devon. However, Teignbridge has a greater population than east Devon so the level of need for such accommodation is much greater in East Devon per capita.



- 5.36 Care home projections are available for all 3 districts and we have applied these data pro rata for the 3 parishes.

Teignbridge

Living in a care home

People aged 65 and over living in a care home with or without nursing by local authority / non-local authority, by age, projected to 2040



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	2023	2025	2030	2035	2040
People aged 65-74 living in a LA care home with or without nursing	5	5	6	7	7
People aged 75-84 living in a LA care home with or without nursing	13	14	15	16	18
People aged 85 and over living in a LA care home with or without nursing	47	49	60	78	84
People aged 65-74 living in a non LA care home with or without nursing	143	147	171	189	181
People aged 75-84 living in a non LA care home with or without nursing	401	427	460	477	559
People aged 85 and over living in a non LA care home with or without nursing	961	997	1,215	1,577	1,704
Total population aged 65 and over living in a care home with or without nursing	1,570	1,639	1,927	2,343	2,554

Figures may not sum due to rounding
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Table 5.9 POPPI projection of households needing to live in a care home with or without nursing

Year	2023	2025	2030	2035	2040
Teignbridge	1,570	1,639	1,927	2,343	2,254
Teignmouth pro-rata	136	142	167	202	195



South Somerset

Living in a care home

People aged 65 and over living in a care home with or without nursing by local authority / non-local authority, by age, projected to 2040


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	2023	2025	2030	2035	2040
People aged 65-74 living in a LA care home with or without nursing	1	1	1	2	1
People aged 75-84 living in a LA care home with or without nursing	0	0	0	0	0
People aged 85 and over living in a LA care home with or without nursing	0	0	0	0	0
People aged 65-74 living in a non LA care home with or without nursing	97	99	110	119	115
People aged 75-84 living in a non LA care home with or without nursing	440	471	507	514	584
People aged 85 and over living in a non LA care home with or without nursing	916	961	1,156	1,487	1,607
Total population aged 65 and over living in a care home with or without nursing	1,455	1,532	1,775	2,122	2,307

Figures may not sum due to rounding
Crown copyright 2020

Table 5.10 POPPI projection of households needing to live in a care home with or without nursing

Year	2023	2025	2030	2035	2040
South Somerset	1,455	1,532	1,775	2,122	2,307
Chard pro-rata	154	162	188	225	245

5.37 It is apparent that Teignmouth parish projections are lower than those of Sidmouth whereas projections are similar between Sidmouth and Chard especially when it is considered that South Somerset had a smaller population than East Devon.

5.38 Regarding capacity, according to CQC data:

- Sidmouth = 221 units
- Chard = 125 units
- Teignmouth = 218 (estimated¹⁵)

¹⁵ Some care homes also cater for under 65s.



6. Key Findings and Conclusions

Introduction

- 6.1 This chapter brings the various strands of evidence together to enable a conclusion to be reached about the scale and nature of housing need that prevails in the parish.

Overall conclusions of the Sidmouth HNA

- 6.2 There is significant need for additional affordable housing, both for general needs and special need for older people in Sidmouth on an annual basis according to our analysis of numbers on the East Devon housing register and analysis of projections for older people.
- 6.3 The key outputs regarding the annual flow of additional for affordable housing needs to be considered in context and in regard to prevailing housing and planning policies.
- 6.4 We have demonstrated that:
- the population is aging and growing as a proportion of all households;
 - housing and household characteristics are highly unbalanced;
 - the local market housing supply is predominately 3 or more-bedroom detached owner-occupied housing;
 - parish house prices and market rents are higher than the district average;
 - supply of affordable housing by number of bedrooms does not align with need. A higher proportion of 1-bedroom affordable homes are needed;
 - Sidmouth attracts many older people from outside its boundaries;
 - the Devon Homechoice system for letting affordable housing does not prioritise local connection over need, so Sidmouth residents may not be able to access vacancies in the stock of affordable housing in Sidmouth;
 - significant amounts of affordable and market sheltered and extra care housing is needed to the year 2040;
 - whilst nursing and care home need is projected to grow by around 30% to the year 2040, data suggest that capacity would appear adequate for the next decade or so; and
 - opportunities for housebuilding beyond sites that might be allocated in the emerging replacement local plan are limited due to the status of much of the surrounding area.
- 6.5 Overall, Sidmouth will continue to attract incomers and concern is highlighted that local people may not be able to find suitable accommodation that they can afford in Sidmouth. This will worsen an already unbalanced community and affect



social cohesion and the long term sustainability of the parish to sustain the support and services needed to sustain the aging population.

- 6.6 The sustainability of Sidmouth as a town that is largely self-contained is an important matter as the nearest main centres of employment are Exeter and Taunton around 15 and 30-miles away respectively.
- 6.7 The scope of sustainability is much wider than the scope of this study. For example we have not considered the impact of the demographic change that we have highlighted on education and primary health care, and key areas such as domiciliary care, retail and leisure services from the perspective of both service delivery and recruitment and retention of staff.
- 6.8 Public policy needs to address conflicting policies of supporting local people and attracting an increasing number of older people. Land constraints mean that development decisions are critical.

Overall conclusions comparing Sidmouth to Chard and Teignmouth

- 6.9 The 3 parishes have remarkably similar populations. The outlier would appear to be Chard as it is not coastal and its local economy is different involving manufacturing which to some extent has resulted in a different housing stock profile. However Sidmouth has a reputation for attracting older incomers to the area which requires different policy responses. Sidmouth has a significantly larger proportion of older residents than the other towns.

Recommendations

- 6.10 Publication of the HNA report could be a key enabler in promoting discussion involving the Town Council, the district and county council, the NHS and others to consider how the sustainability issues identified above can be addressed.
- 6.11 Many housing and accommodation issues are identified in the HNA report and the town council may also wish to consider how better use can be made of the housing stock to address its aims. The following could be considered:
 - engaging with land owners and housebuilders and asking them to deliver a mix of housing and accommodation that would more closely meet local need;
 - enabling a small annual programme of newbuild affordable homes prioritised to meet local need. In this way the most urgent need will be met;
 - recognising that suitable exception sites will both help deliver an annual supply of affordable housing and ensure that local people benefit from this supply;
 - enabling a supply of additional affordable specialised housing for older people which will indirectly assist in housing younger households due to vacancies in the system;
 - forming partnerships with housing associations so that small scale development opportunities can address local need;



- consideration of innovations such as encouraging local people to form and deliver community led housing schemes, possibly by means of a Community Land Trust;
- working with the district Council to agree a Sidmouth Parish local lettings policy and reviewing local connection criteria that would apply to Sidmouth that would ensure that local needs are prioritised and enable younger people to return to the parish; and
- working with the district council to develop policies that minimise vacant homes and discourage second homes.

6.12 After consideration of the above and consultation with the district and county council, the town council should consider amending its neighbourhood plan to address the major issues identified in this report that build upon the strategic planning policies of the district council. In that context, the HNA report should be cited as part of the evidence base.



7. Data Appendix

7.1 These tables provide the data to support figures 2.1 to 2.6. The source is census 2021 except for the population projections which are published by ONS.

Table A2.1 Tenure						
	Sidmouth		East Devon		England	
Owned Outright	4,075	58.4	31,228	46.8	7,624,693	32.5
Owned (Mortgaged)	1,146	16.4	16,967	25.4	6,744,372	28.8
Shared Ownership	83	1.2	947	1.4	235,951	1.0
Social rented	725	10.4	6,898	10.3	1,945,152	17.1
Private rented	936	13.4	10,697	16.0	2,060,511	20.5
Living rent free	10	0.1	51	0.1	4,273,689	0.1
All Households	6,975	100.0	66,788	100.0	521,200	100.0

Table A2.2 Accommodation type						
	Sidmouth		East Devon		England	
	Number	Percent	Number	Percent	Number	Percent
Detached	2,658	38.2	25,712	38.5	5,368,859	22.9
Semi-detached	1,436	20.6	18,114	27.1	7,378,304	31.5
Terraced	1,448	20.8	12,997	19.5	5,381,432	23.0
In a purpose-built block of flats or tenement	918	13.2	6,069	9.1	3,999,771	17.1
Part of a converted or shared house, including bedsits	280	4.0	2,207	3.3	821,153	3.5
Part of another converted building, for example, former school, church or warehouse	78	1.1	559	0.8	188,705	0.8
In a commercial building, for example, in an office building, hotel or over a shop	131	2	708	1	197,967	1
A caravan or other mobile or temporary structure	11	0	420	1	99,894	0
Total: All households	6,960	100	66,786	100	23,436,085	100



Table A2.3 Number of bedrooms						
	Sidmouth		East Devon		England	
	Number	Percent	Number	Percent	Number	Percent
1 bedroom	531	7.6	5,000	7.5	2,723,171	11.6
2 bedrooms	2,294	32.8	19,181	28.7	6,394,723	27.3
3 bedrooms	2,728	39.0	26,029	39.0	9,373,469	40.0
4 or more bedrooms	1,434	20.5	16,578	24.8	4,944,722	21.1
Total: All households	6,987	100.0	66,788	100.0	23,436,085	100.0

Table A2.4 Number of bedrooms by tenure (parish only)					
	Owned outright	Owned (mortgage)	Social rented	Private rented etc.	Totals
1-bedroom	159	21	210	144	534
2-bedroom	1,362	236	258	426	2,282
3-bedroom	1,649	576	219	280	2,724
4 or more- bedroom	907	396	37	93	1,433
All categories	4,077	1,229	724	943	6,973



Table A2.5 Household composition						
	Sidmouth		East Devon		England	
	Number	Percent	Number	Percent	Number	Percent
1-person aged 66 years and over	166	10.6	7,017	15.3	3,001,789	12.8
1-person other	413	26.3	7,288	15.8	4,050,440	17.3
Single family all aged 66 years and over	114	7.3	5,998	13.0	2,145,278	9.2
Single family married or civil partnership: No children	152	9.7	5,781	12.6	2,440,210	10.4
Single family married or civil partnership: Dep children	146	9.3	5,655	12.3	3,375,402	14.4
Single family married or civil partnership: Non-dep children	72	4.6	2,783	6.1	1,314,182	5.6
Single family cohabiting couple: No children	133	8.5	2,941	6.4	1,486,961	6.3
Single family cohabiting couple: Dep children	111	7.1	2,300	5.0	1,053,001	4.5
Single family cohabiting couple: Non-dep children	13	0.8	372	0.8	169,017	0.7
Single family lone parent family: Dep children	124	7.9	2,604	5.7	1,617,076	6.9
Single family lone parent family: Non-dep children	53	3.4	1,675	3.6	977,825	4.2
Single family other family composition	9	0.6	149	0.3	183,971	0.8
Other household types: With dep children	27	1.7	626	1.4	630,340	2.7
Other household types: Other, including all full-time students and all aged 66 years and over	36	2.3	801	1.7	990,594	4.2
Total	1,569	100.0	45,990	100.0	23,436,086	100.0

Table A2.6A Population projections in broad age bands						
Projected Year	Aged 0 to 15	Aged 16 to 24	Aged 25 to 49	Aged 50 to 64	Aged 65+	All Ages
2018	22,965	10,810	36,516	30,537	43,489	144,317
2019	23,396	10,505	36,828	31,262	44,425	146,413
2020	23,751	10,370	37,193	31,945	45,235	148,493
2021	24,045	10,322	37,550	32,510	46,129	150,552
2022	24,201	10,405	37,851	33,079	47,072	152,608
2023	24,339	10,541	38,170	33,501	48,067	154,613
2024	24,429	10,719	38,565	33,704	49,117	156,537
2025	24,509	10,913	38,941	33,862	50,156	158,380
2026	24,521	11,168	39,371	33,856	51,245	160,162
2027	24,441	11,503	39,792	33,705	52,439	161,885



2028	24,372	11,803	40,141	33,520	53,709	163,547
2029	24,350	11,995	40,405	33,323	55,064	165,138
2030	24,282	12,173	40,580	33,267	56,347	166,643
2031	24,274	12,234	40,834	33,115	57,638	168,092
2032	24,199	12,336	41,090	32,955	58,923	169,505
2033	24,230	12,299	41,327	32,904	60,098	170,859
2034	24,289	12,255	41,556	32,796	61,283	172,179
2035	24,354	12,170	41,805	32,778	62,335	173,442
2036	24,419	12,077	42,011	32,821	63,360	174,684
2037	24,490	11,987	42,155	32,945	64,346	175,921
2038	24,583	11,929	42,224	33,212	65,189	177,137
2039	24,683	11,877	42,292	33,607	65,864	178,322
2040	24,795	11,838	42,267	34,123	66,459	179,475
2041	24,914	11,779	42,211	34,779	66,921	180,603
2042	25,049	11,758	42,123	35,450	67,327	181,704
2043	25,194	11,747	42,112	35,966	67,763	182,780
	2,229	937	5,596	5,429	24,274	38,463
	9.7%	8.7%	15.3%	17.8%	55.8%	26.7%



8. Technical appendix

8.1 Our statement of need and supply for East Devon and Sidmouth using Gov.uk live tables, summarised in chapter 4, is presented in table 8.1.

Table 8.1 Processing Live Tables 600 and CoRe							
	Year:	2020/1	2021/2	2022/3	Average	Parish Pro-rata	Rounded
Need							
Waiting list snapshot LT 600		4,914	4,548	5,374	4,945	503.14	503
Supply							
Relets p.a. CoRe (Table 1D)		448	510	471	476.33	48.46	48
of which general need =		362	347	332	347.00	35.30	35
of which supported housing =		86	163	139	129.33	13.16	13
Need and supply summary							
Net register snapshot					4,945	503.14	503
Add supply vacancies and completions in year)					476	48.46	48
Gross register snapshot					5,422	552	552

8.2 Our full BNAM annualised need estimate is presented in table 8.2.

Table 8.2 Basic Needs Assessment Model (BNAM) (gross annual need)					
Row reference	Step	Prevalence rates	LT600 Pro rata	Housing register Local Connection (parish)	Notes
1	Number of households in the area	6,795.00	6,795.00	6,795.00	Census 2021
2	Existing households in need	679.50	552	220	
3	Proportion in affordable need	0.40	100%	100%	
4	Existing households	271.80	551.60	220.00	Row 2 x row 3



	in affordable need				
5	Convert to annual flow	54.36	110.32	44.00	Divide by 5 to annualise
6	Newly Forming households 5-year	526.61	526.61	526.61	SEH derived prevalence rate
7	Proportion in affordable need	66.00%	66.00%	66.00%	SEH derived prevalence rate
8	Newly forming household in affordable need 5 years	347.56	347.56	347.56	Row 6 x row 7
9	Convert to annual flow	69.51	69.51	69.51	Divide by 5
10	Proportion seeking to remain in the parish	34.76	34.76	34.76	50% may wish to leave (estimate)
11	Uplift to register data for affordable home ownership demand	N/A	64.74	40.86	Assumed 36% of rows values 5+9 per emerging local plan
12	Total GROSS annual flow of households in affordable need (rounded)	89	210	120	Sum of rows 5, 10 and 11 as applicable