

Small area housing needs analysis - Helsington Parish

SUMMARY

The report was commissioned by and produced for South Lakeland District Council and partners. The initial intention was to produce a comprehensive advisory document to serve rural villages and parishes. At its inception, Helsington Parish Council (SS and MC) requested that the parish be a pilot site and SLDC duly applied the methodology to Helsington Parish criteria.

The survey was undertaken to see if this method of evaluating housing needs is a useful one, and if it is superior to a traditional “parish survey” which is often quickly out-of-date.

It uses pre-existing official population, income and housing data, often for a larger area footprint, and extrapolates it down to a local level and into the future to predict future needs. It bases housing needs on this. It “seeks to broadly balance the population so that there is stronger growth (or less of a decline) in these key population age groups” (sec 3.11).

Other factors e.g. availability of services, schools, shops, health services, work, transport are not included.

The requirement to attract incomers e.g. as employees, is not included.

As yet it is not clear that this method is a (better) way to ascertain housing need or that it is a valid or reliable method. SLDC have confirmed that the resulting survey is one tool and not a standalone definitive document. SS believes it is now only for use by the SLDC and partners for use in wider planning strategy and not for use by individual parishes, as was first envisaged.

1. The current population, income and housing situation

Population. (Reliable data)

The population of Helsington (N=283) is **older** than the average (Age in Helsington > South Lakeland > Cumbria > North West England > UK)

Under 16 – UK average is 19.1%, Helsington is 6.4% (N=18)

Over 65 – UK is 18%, Helsington is 38.9% (N=110)

The population in Helsington **has fallen** (by 7.8% 2011-2017)

Where in the UK it has increased by 4.7%

In Helsington 82.6% (UK 30.6%) homes are **owner occupied, most are owned out-right** (63%) (UK 33.6%).

Income.

Income in Helsington is higher than average for UK (£51,011 v £39,227). (MC comment not noted in paper – from age profile this must represent, on average, an even larger disparity in disposable income due to lower frequency of dependent children and higher proportion of over working age so likely to be pensions etc.).
A quarter of the residents' income is less than £27,645. (UK comparator £17,491)

Housing Costs.

House prices (2018) are higher than UK average (mean £455,741 - £300,958, with surrounding areas being lower again – S Lakeland £290,921, Cumbria ££188,203).

The ration income: house price is highest in Helsington (1:8.9) compared to Cumbria (5.4: 1) S Lakeland (7: 1)

This may or may not reflect affordability for the current population as so many are retired and outright owners. No data is given for the variance in house prices in Helsington – i.e. the spread between the most and least expensive houses, so we do not know from this if there are houses available to those in the lowest quartile of income, who may be owner-occupiers pensioners anyway, or alternatively those of working age on low incomes in need of affordable housing.

2. Predictions of the Future (less reliable)

Over the next 20 years the population of Cumbria and S Lakeland is projected to **fall** (by -2.7% and -1.5%), with a smaller fall in the next 5 years.

However the percentage over 65 in Cumbria and S Lakeland is predicted to increase (some of these will continue to work due to pension age changes).

The document then applies projected population changes for the larger areas of S Lakeland and Cumbria to Helsington, the population of which would then be expected to **rise**.

(MC comment: This may or may not be a valid assumption and numbers are so small (all less than 5) this must be an unreliable prediction.

The data for “sustainable projection” seems to be absent (table 3.4 and 3.5 are the same).

The predicted population changes, if valid, would possibly equate to **3 new households**.

3. Affordable Housing Need

This uses the same secondary data, **looking at population, income and accommodation costs** to project need.

The availability of services, schools, shops, health services, transport is not included.

The requirement to attract incomers e.g. as employees, is not included

Lower quartile rent in Helsington is given as £750 per month requiring an income of £28,364 to rent (and £341,800 to buy requiring an income of £76,905).

Basing calculations on the income of the existing population seems suspect when the population is so atypical of those needing affordable housing – i.e. majority are over 50 year olds living in owner occupied houses mostly mortgage free.

On this basis the document suggests 10 new homes are needed at significantly lower costs in order to be affordable. It is not clear how this result is arrived at or if it is valid.

4. Older persons Housing

Estimates for Helsington are pro-rated figures for the whole local authority area – given that people often move areas to access.

Numbers in 5.1 “current need’ don’t add up for housing with support. Very small numbers – $2+1 = 2$ (or 3) housing with support and 2 housing with care.

Key Recommendations from the Report

3. Future Projected Population Change

3.11 On the back of the observation about the working-age/16-64 populations, a sensitivity projection has been developed. This seeks to broadly balance the population so that there is stronger growth (or less of a decline) in these key population age groups.

3.13 The analysis shows that with baseline assumptions there would be projected to be an increase of three households over 5-years. With the sustainable scenario developed, the household growth is the same.

4. Affordable Housing

4.6 The table below shows an estimated need for 6 units of social/affordable rented housing and 4 units of affordable home ownership (a total of 10 homes).

6. Older persons Housing

5.5 The table below shows that there is an estimated need for 2 units of housing with support (sheltered/retirement housing) and a further 2 dwellings with care (likely to be considered as extracare).

The analysis suggests a leaning towards market homes – however, this type of housing is not usually developed in such small units and tends to be larger developments drawing from a wider geographical area and requiring closer proximity to amenities.

7. Conclusions

7.2 In providing some final conclusions a number of observations and assumptions are made, and it should be stressed that the analysis to follow is not definitive and nor does it provide a recommended way forward for housing in Helsington.

7.3 Over the 2019-24 period the analysis suggests that a minimum of around 3 additional homes should be provided. Bearing in mind the low levels of children and 16-64 groups, there is an argument to suggest these should be family homes. This level of delivery would potentially see the maintaining of the school age and working-age population. Positive planning for growth would point to a higher level of delivery than this, although that needs to be balanced against recognition that current trends (District-wide) point to a lower level of need (linked to falling population numbers)

7.6 The analysis also identifies a need from older persons, linked to the very 'elderly' population in the area. Whilst the need shown may not be large enough to support a single scheme in the area, it does point to a need to consider older persons accommodation generally (potentially including consideration of needs in adjoining/nearby locations such as Kendal).