Report to:

Hinckley and Bosworth Borough Council

Housing Needs Study Update

Final Report

March 2026

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Contents

Summary

Background

1. This report provides an update to the Hinckley and Bosworth Borough Council (HBBC) Housing Needs Study (HNS) of 2024. The final report is dated April 2024, although key analysis looked at a 21-year period from 2020 to 2041; key data was typically drawn for 2021-23 period (depending on availability and to include 2021 Census information).

2. Whilst the HNS report can be considered as up-to-date, there are a number of changes to national policy and data which mean an update of key information is useful, in particular a higher housing requirement being likely to drive a different demographic profile of the Borough in the future. This update looks at housing need over the 2024-45 period.

Overall Housing Need

3. This report has studied the overall housing need set against the emerging Local Plan – this shows a need for 711 dwellings per annum.

4. Taking the housing need number and using up-to-date demographic data (including 2022-based subnational population projections, mid-year population data (to 2024) and the 2021 Census) a bespoke population and household projection has been developed to look at the possible demographic implications of delivery of this number of homes each year from 2024 to 2045.

5. The method looked at the levels of migration likely to be needed to fill additional homes and also considered the possibility of greater levels of household formation amongst younger people (aged Under 45).

6. Overall, it is projected the population might increase by 27,000 people over the 21-year period (a 23% increase) with there being some ageing of the population, as well as notable increases in the 'working-age' population (16-64).

Figure 1: Projected population change 2025 to 2045 by broad age bands – Hinckley & Bosworth				
	2024	2045	Change in population	% change
Under 16	20,030	21,695	1,665	8.3%
16-64	70,031	86,979	16,948	24.2%
65 and over	26,621	35,022	8,401	31.6%
Total	116,682	143,696	27,014	23.2%

Source: JGC analysis

7. When compared with similar analysis in the 2024 HNS a stronger population increase is projected (due to the higher housing number) and with this much stronger growth in the number of people aged 16-64.

Figure 2: Projected population change in 2024 HNS and this study (figures based on a 21-year projection period)			
	2024 HNS	2026 update	Difference
Under 16	1,382	1,665	283
16-64	5,897	16,948	11,051
65 and over	9,811	8,401	-1,410
Total	17,090	27,014	9,924

Source: JGC analysis

8. The projection developed linking to delivery of 711 dwellings per annum is used in further analysis in this report (e.g. when looking at housing mix and the needs from older persons).

Affordable Housing Need

9. The assessment of the need for affordable housing has been updated by looking at the latest data on house prices, private rents and incomes. As with the HNS the analysis has been split between the need for rented affordable housing (social/affordable rents) and affordable home ownership (AHO).

10. Overall, since the HNS the analysis suggests only a very modest increase in house prices (increasing by around 4%) and a notably higher increase in private rents (up 13%); household incomes are estimated to be around 8% higher.

11. Using this information, along with other updated information (e.g. around relet supply) it has been estimated that the need for rented affordable housing is likely to be at around the same level as shown in the HNS (a very slightly higher per annum need figure of 436 compared to 430).

Figure 3: Comparing need for rented affordable housing in different reports

	HNS (2024)	Update (2026)
Current need	43	45
Newly forming households	472 (1,016 × 46.4%)	468 (1,046 × 44.8%
Existing households falling into need	81	87
Total Gross Need	596	600
Relet Supply	165	165
Net Need	430	436

Source: See Figure 3.2 of this study

12. However, the need for AHO looks to have dropped notably, this is mainly due to the balance between house prices and rents changing which means there are fewer households sitting in the affordability ‘gap’ between buying and renting.

Figure 4: Comparing Estimated Net Need for Affordable Home Ownership (per annum)

	HNS (2024)	Update (2026)
Total gross need	165	116
LCHO supply	15	38
Net need	150	78

Source: See Figure 3.6 of this study

13. Despite these changes, the general conclusions of the HNS remain sound, in that there is a clear need to maximise affordable delivery where opportunities arise and that this delivery should focus on rented accommodation. Furthermore, the update shows that rented housing should be at social rather than affordable rents (around 75% of the need being for social rents in terms of local incomes and affordability).

14. This report has also largely confirmed analysis around types of affordable home ownership. Whilst the need for AHO is not clear-cut it is the case that some delivery may be desirable to support viability and help provide mixed and balanced communities. For AHO products, the evidence suggests shared ownership is likely to be the best tenure when looking for homes to be considered as 'genuinely affordable' as opposed to discounted market housing – this is the same conclusion as the HNS.

Housing Mix

15. The report has also updated the HNS in looking at the mix of housing likely to be needed by size (and tenure) based on the new projections developed linked to 711 dwellings per annum being provided.

16. Due to the higher housing number and changes to local demographic trends it has been projected that the higher housing number would see a greater increase in younger age groups when compared to the HNS analysis (therefore likely to include more 'family' households with children).

17. In running new projections through the same model as the HNS it is suggested that a very slightly larger profile of homes might be required in all tenures. However, on balance it is not considered that the changes are so significant that the overall conclusions in the HNS need to be revised. The mix conclusions are confirmed in the table below:

<table>
<tr><th colspan="5">Figure 5: Suggested size mix of housing by tenure – Hinckley & Bosworth</th></tr>
<tr><th rowspan="2"></th><th rowspan="2">Market</th><th rowspan="2">Affordable home ownership</th><th colspan="2">Affordable housing (rented)</th></tr>
<tr><th>General needs</th><th>Older persons</th></tr>
<tr><td>1-bedroom</td><td>5%</td><td>20%</td><td>25%</td><td>40%</td></tr>
<tr><td>2-bedrooms</td><td>35%</td><td>50%</td><td>35%</td><td rowspan="3">60%</td></tr>
<tr><td>3-bedrooms</td><td>40%</td><td>25%</td><td>30%</td></tr>
<tr><td>4+-bedrooms</td><td>20%</td><td>5%</td><td>10%</td></tr>
</table>

Source: Housing Mix analysis (see Section 4)

Older and Disabled People

18. Analysis of the needs from older people and those with disabilities has been updated, again by reference to new population and household projections. Overall, the findings broadly confirm those in the HNS although a key difference is a higher projected level of disability amongst people aged Under 65 (due to stronger growth now being projected in younger age groups) and slightly lower growth in those aged 65+. Estimated needs for residential care bedspaces for older people are lower than shown in the HNS, although this is mainly due to a higher estimated current supply in this document. Updated key findings for the 2024-45 period include:

- a 32% increase in the population aged 65+ (potentially accounting for 31% of total population growth);
- an 60% increase in the number of people aged 65+ with dementia and 48% increase in those aged 65+ with mobility problems;
- a need for around 1,450 housing units with support (sheltered/retirement housing) – around 55% in the market sector;
- a need for around 870 additional housing units with care (e.g. extra-care) – again split between market and affordable housing (around two-thirds market);
- a need for 800 additional nursing and residential care bedspaces although there is estimated to be a current surplus of residential care; and
- a need for 460-790 dwellings to be for wheelchair users (meeting technical standard M4(3)).

Other Groups

19. The update also briefly looked at new evidence on self- and custom build housing. Since the 2024 HNS, there have been three additional years of housing register data. This has shown an overall decline in the average number of entries per base period from 17 to 15. However, the post-2021 review register (which included contacting previous entrants to see if they still wished to remain on the register) increased from 5 entries per base period to 11 entries. This indicates the future need, although if registrations increase, so too must supply.

20. At the same time, the average number of suitable plots permitted has increased from 1 per base period to 2 over the longer period and 3 per base period since 2021.

21. At the time of writing, cumulative demand to be met is that at the close of Base Period 7 (30th October 2022) which was 34 registrations, against which the supply of 17 plots can be removed. This leaves a cumulative unmet demand (shortfall) of 17 dwellings which must also be addressed.

22. The continuation of Draft Plan (2021) Policy HO06 to satisfy the demand for plots within the Borough remains valid. Furthermore, new legislation under the Levelling Up and Regeneration Act tightens what can be classed as part of the supply, and any unmet need is rolled forward. The Council, therefore, may wish to consider how the delivery of such housing is monitored.

Overall Summary

23. This report has updated the Hinckley and Bosworth Borough Council Housing Needs Study (HNS) of 2024. The main reason for updating is the Council moving the Local Plan forward with a new plan period (2024-45) and a higher housing number (711 dwellings per annum) with this update looking at the implications of potentially higher housing delivery.

24. The key finding from this study is a notable change in population and household projections as a result of the higher number (as well as more recent trend-based data including new ONS projections). Overall, the Borough would be projected to see less of an ageing population than was shown in the HNS and much stronger growth in what might be considered as 'working-ages' (people aged 16-64).

25. The updated projections developed did point to some changes in outputs when compared with the HNS, including when looking at affordable housing need, the mix of housing and older/disabled people. However, on balance it is not considered that any of the changes are sufficiently significant to change the broad conclusions of the HNS.

1. Background

Introduction

1.1 This report provides an update to the Hinckley and Bosworth Borough Council (HBBC) Housing Needs Study (HNS) of 2024[1]. The final report is dated April 2024, although key analysis looked at a 21-year period from 2020 to 2041; key data was typically drawn for 2021-23 period (depending on availability and to include 2021 Census information). Whilst the report can be considered as up-to-date, there are a number of changes to national policy and data which mean an update of key data is useful. Key changes include:

- A new National Planning Policy Framework (NPPF) in December 2024 which introduced a new Standard Method for assessing housing need. For HBBC the need is now set at 663 dwellings per annum, whereas the housing needs study used a figure of 468 dwellings per annum, based on the Standard Method applicable at that time. The notable change in number is likely to have some impact on estimates of how the population and households might change over time – i.e. delivery of more homes may well drive a greater growth in population;
- In addition, due to unmet need from Leicester, the Council will be moving forward with a slightly higher number again (to provide an average of 711 dwellings per annum);
- The NPPF also puts a stronger focus on delivery of social rented housing and less emphasis on the need to provide forms of affordable home ownership (although these remain in the definitions of affordable housing in Annex 2);
- The Council are now looking at a different plan period from that at the time of the housing needs study (which analysed needs over the 2020-41 period). Again a different plan period, including both start and end dates will have some impact on estimates of need, including demographic change as discussed above – this study uses a plan period of 2024-45; and
- In terms of data, much of the housing needs study drew on 2021 Census data which has not been updated. There are however some key updates (notably a new set of subnational population projections (SNPP)) and some new data around house prices, rents and incomes that can feed into an assessment of the need for affordable housing).

[1] https://www.hinckley-bosworth.gov.uk/download/downloads/id/8310/housing_needs_study_april_2024.pdf

Updated National Policy Context

1.2 Paragraph 63 of the National Planning Policy Framework (published December 2024, NPPF 2024) sets out that "the size, type, and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies". Included within the groups in the NPPF are those who require affordable housing (including Social Rent) older people and people with disabilities – it is these groups that provide the main focus of this report.

1.3 When compared with the NPPF in place at the time of the HNS the key change is in relation to the focus on social rented housing, although the overall change to the Standard Method is also key to this report (as noted above). In December 2025, Government published a consultation NPPF although for the purposes of this report it is not considered any aspect of that will impact on the analysis to follow.

Report Structure

1.4 Not all aspects of the HNS are being updated in this report, in particular the area profile in Section 2 largely drew on Census data which has not been updated. The area profile did include some analysis of prices and rents and this has been updated by reference to affordable housing need. Population data in the area profile is updated in the Overall Housing Need section. Consistent with the original HNS, this report looks at updating under a series of headings:

- Overall Housing Need;
- Affordable Housing Need;
- Housing Mix;
- Older and Disabled People; and
- Other Groups.

1.5 Additionally, it should be noted that the HNS looks at key data on a sub-area basis (for wards) and for urban and rural areas separately. This update only looks at Borough-wide analysis and sub-area data in the HNS should be considered as still valid. Where comparisons are made to the HNS, table references have been provided.

2. Overall Housing Need

Introduction

2.1 This section of the report considers overall housing need set against the emerging Local Plan – a need for 711 dwellings per annum. The method used has been to develop a population and household projection so there is a sufficient population to fill the suggested number of homes. The projections look at the 2024-45 period. The analysis below starts with a review of local population trends – data now available to mid-2024, compared with 2021 at the time of the HNS.

Population

2.2 As of mid-2024 (the latest date for which ONS has published mid-year population estimates (MYE)), the population of Hinckley and Bosworth is estimated to be 116,700; this is an increase of around 9,200 people over the previous decade (a 9% increase), which is lower than seen across the region and County but slightly above the national figure.

2.3 A similar analysis in the HNS (see Figure 2.3 of HNS) showed a slightly lower level of population growth in the 2011-21 period.

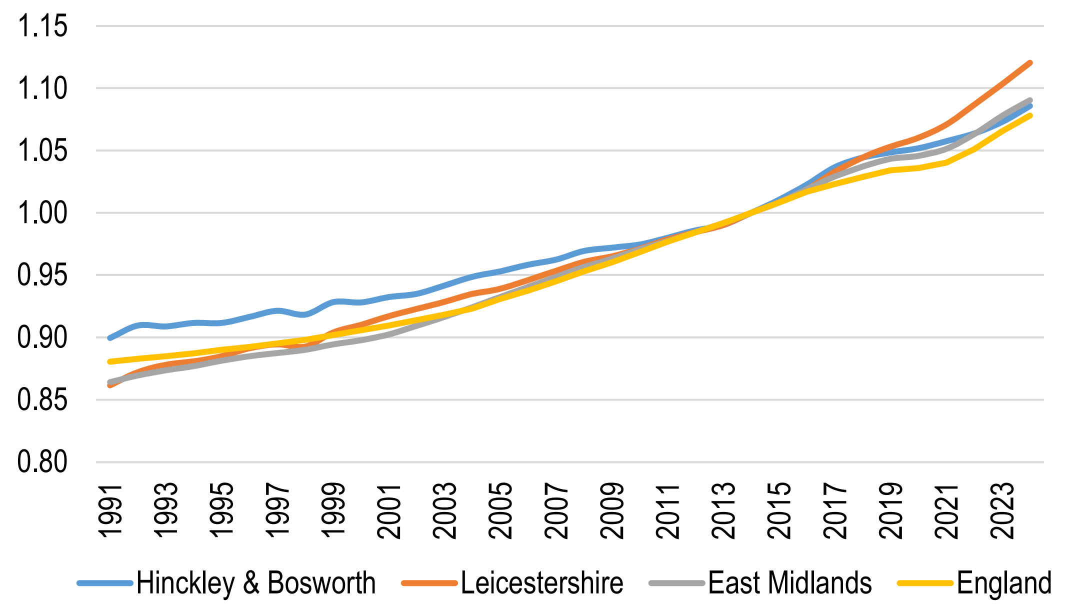
Figure 2.1: Population change (2014-24)

	2014	2024	Change	% change
Hinckley & Bosworth	107,468	116,682	9,214	8.6%
Leicestershire	665,412	745,573	80,161	12.0%
East Midlands	4,642,629	5,063,164	420,535	9.1%
England	54,370,319	58,620,101	4,249,782	7.8%

Source: ONS

2.4 The figure below shows an indexed population change back to 1991 (index to 1 in 2014). This shows population growth to have generally followed trends seen in other areas although generally at slightly lower rate of growth further in the past. The data also shows stronger growth over the past three years or so, a similar trend to that seen in other locations.

Figure 2.2: Indexed Population Change – 1991-2024

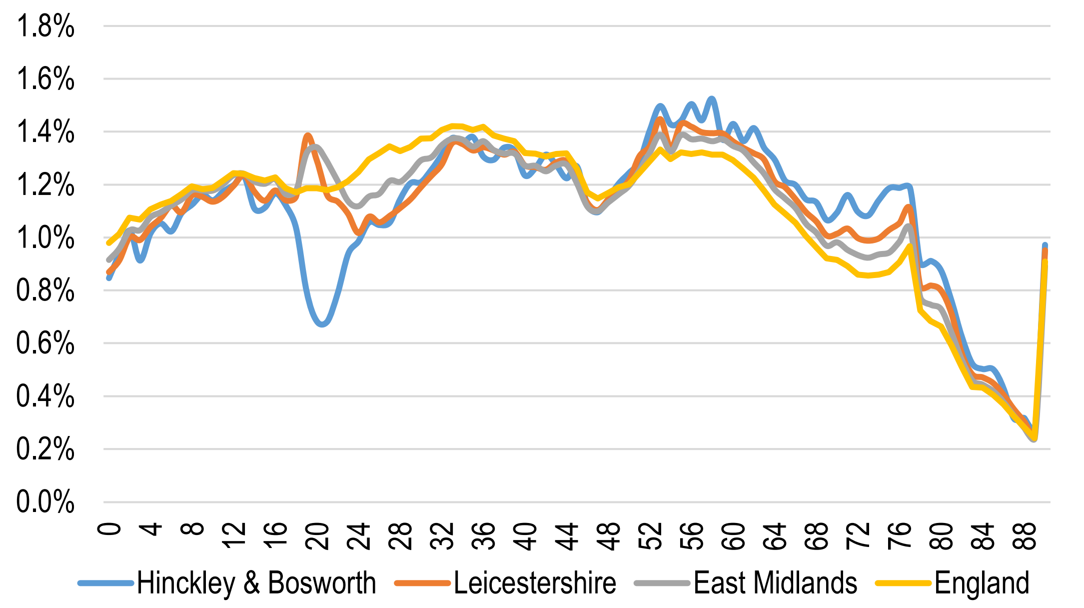


Source: ONS

Age Structure

2.5 The figure below shows the age structure by single year of age (compared with a range of other areas). Overall, the population structure shows a slightly older age profile to that seen in other locations. There are also some specific age groups that differ – most notably the Borough sees a lower proportion in late teens and early 20s (this finding will be related to a student population leaving the Borough for higher education, with evidence of some people returning after completing studies). This analysis broadly confirms that in Figure 2.7 of the HNS.

Figure 2.3: Population profile (2024)



Source: ONS

2.6 The analysis below summarises the above information (including total population numbers for Hinckley & Bosworth) by assigning population to three broad age groups (which can generally be described as a) children, b) working age and c) pensionable age). This analysis confirms the slightly older age structure with 23% of the population aged 65 and over (compared with 20% regionally and 19% across England). A comparable analysis which shows similar patterns can be found in Figure 2.8 of the HNS.

Figure 2.4: Population profile (2024) – summary age bands

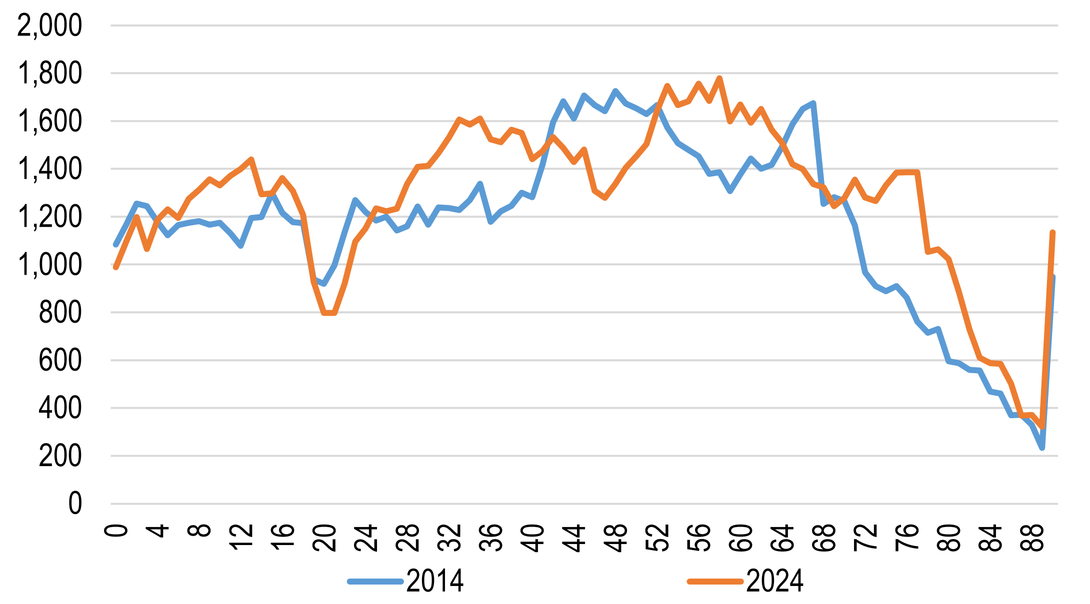
	Hinckley & Bosworth		Leicestershire	East Midlands	England
	Population	% of population	% of population	% of population	% of population
Under 16	20,030	17.2%	17.5%	18.0%	18.4%
16-64	70,031	60.0%	61.4%	62.1%	62.9%
65+	26,621	22.8%	21.1%	19.9%	18.7%
All Ages	116,682	100.0%	100.0%	100.0%	100.0%

Source: ONS

Age Structure Changes

2.7 The figure below shows how the age structure of the population has changed in the 10-year period from 2014 to 2024 – the data used is based on population so will also reflect the increase seen in this period. There have been some changes in the age structure although broadly the pattern has remained the same over time – the main exception looking to be the increase in the number of children aged over 5 and increases in people in their late 30s and early 40s. Where there are differences, it is often due to cohort effects (i.e. smaller or larger cohorts of the population getting older over time).

Figure 2.5: Population age structure (people) (2014 and 2024) – Hinckley & Bosworth



Source: ONS

2.8 Again, the information above is summarised into the three broad age bands to ease comparison. This shows population increases in all age bands with the highest proportionate increase being in those aged 65 and over (a 20% increase) – this age group also saw the largest increase in total population – this age group increasing by 4,500 people, accounting for 49% of all population change in the area.

2.9 This analysis can be compared with that in Figure 2.11 of the HNS which looked at a 10-year period from 2011 to 2021. There does appear to have been some shift in demographic change when comparing the two studies with the HNS data showing a much greater ageing of the population and lower growth in the number of people aged 16-64. In the HNS, the 10-year trend showed the population aged 65+ as having increased by 6,000 people, whereas those aged 16-64 had only increased by 1,300.

Figure 2.6: Change in population by broad age group (2014-24) – Hinckley & Bosworth

	2014	2024	Change	% change
Under 16	18,811	20,030	1,219	6.5%
16-64	66,557	70,031	3,474	5.2%
65+	22,100	26,621	4,521	20.5%
TOTAL	107,468	116,682	9,214	8.6%

Source: ONS

Components of Population Change

2.10 The table below consider the drivers of population change from 2011 to 2024. The main components of change are natural change (births minus deaths) and net migration (internal/domestic and international). There is also an Unattributable Population Change (UPC) which is a correction made by ONS upon publication of Census data if population has been under or over-estimated (this is only calculated for the 2011-21 period). There are also ‘other changes’, which are variable (sometimes positive and sometime negative but generally balancing out over time) – these changes are often related to armed forces personnel, prisons or boarding school pupils.

2.11 The data shows natural change to generally be dropping over time – there are now more deaths than births in the Borough – this has been the case for the past 5-years. Migration is variable, and always positive for internal (domestic) migration. For international net migration figures are generally much lower (and sometime negative) although the last 3-years in particular shows a higher level of net migration than had been seen generally in the past – this being a consistent trend to that seen nationally.

2.12 The analysis also shows (for the 2011-21) period a negative level of UPC (totalling around 1,800 people over the 10-year period), this suggests when the 2021 Census was published ONS had previously over-estimated population change. Overall, the data generally shows a continuing trend of increasing population throughout the period studied but at quite a variable rate year-on-year.

2.13 Equivalent data for the period to 2021 was shown in the HNS (see Figure 2.12). The latest data shows a continuation of the downward trend in natural change and continued high levels of domestic net migration.

Figure 2.7: Components of population change, mid-2011 to mid-2024 – Hinckley & Bosworth

	Natural change	Net internal migration	Net intern-ational migration	Other changes	Other (unattri-butable)	Total change
2011/12	293	430	58	14	-168	627
2012/13	172	364	66	32	-174	460
2013/14	184	932	116	12	-191	1,053
2014/15	139	1,011	163	17	-189	1,141
2015/16	103	1,259	126	13	-190	1,311
2016/17	183	1,525	24	0	-221	1,511
2017/18	0	1,008	-9	5	-190	814
2018/19	43	619	-21	-16	-182	443
2019/20	-171	670	-14	15	-137	363
2020/21	-105	845	-6	2	-134	602
2021/22	-90	607	144	13	0	674
2022/23	-213	919	286	-5	0	987
2023/24	-203	1,324	242	5	0	1,368

Source: ONS

Population and Household Projections

2.14 A demographic model has been developed to look at the potential implications of delivery of 711 dwellings per annum in the 2025-45 period. This considers the levels of migration likely to be needed to fill homes and also the possibility of seeing higher levels of household formation in younger age groups (where there is evidence of a historical constraint in formation).

2.15 The modelling essentially has two components, firstly a population projection and then converting this into household change estimates by applying data about the communal (institutional) population and household representative rates (HRRs) – essentially the changes of someone in a particular age group also being considered as the head of household. For a base population projection, key assumptions in the modelling are:

- Taking the 2022-based subnational population projections (SNPP) as a start point – this includes data on birth and death rates as well as migration; and
- Updating this projection to take account of mid-year population data to 2024 (looking at more recent data about births, deaths and migration).

2.16 For household projections data about the communal population is taken from the 2021 Census. Consistent with ONS projections. it is assumed actual numbers are held constant up to ages under 75, with the proportion of the population being used for 75+ age groups.

2.17 For household representative rates (HRRs) the figures are calculated at the time of the Census although consideration has also been given to data in the last three Census points (2001, 2011 and 2021). For Hinckley & Bosworth there was very little evidence of any suppression in household formation for younger households although to be consistent with work carried out across the County the method used includes a part-return to 2001 levels.

2.18 In other words levels of households formation as shown in the 2021 Census are assumed to move halfway back to the levels recorded in the 2001 Census (for age groups from 25-44). This really has a minimal impact for the Borough but has been included for consistency with the approach taken across the County.

2.19 The analysis below looks at how the population and household structures might change if housing delivery were to be in line with the emerging Local Plan (711 dwellings per annum). The modelling flexes migration to and from the Borough such that there is sufficient population for this level of additional homes to be filled each year.

2.20 Within the modelling, migration assumptions have been changed so that across the Borough the increase in households matches the housing need. It is assumed that around 3% of new stock will be vacant at any time (to allow for movement within the stock). This means that for 711 dpa it is assumed there would be household growth of approximately 690 per annum. Adjustments are made to both in- and out-migration (e.g. if in-migration is increased by 1% then out-migration is reduced by 1%).

2.21 The Planning Practice Guidance (PPG) was revised in December 2024, alongside the new Standard Method, and provides some indication of why the Government sees a need to increase housing delivery[2]. Paragraph 006 (Reference ID: 2a-006-20241212) states:

'Why is an affordability adjustment applied?

An affordability adjustment is applied as housing stock on its own is insufficient as an indicator of future housing need because:

- *housing stock represents existing patterns of housing and means that all areas contribute to meeting housing needs. The affordability adjustment directs more homes to where they are most needed*

- *people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.*

The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that minimum annual housing need starts to address the affordability of homes.'

2.22 The previous PPG also stated that an affordability uplift is required because *'household formation is constrained to the supply of available properties – new households cannot form if there is nowhere for them to live'*.

[2] https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

2.23 Essentially, the Government considers that by providing more homes there is the opportunity for increased migration to an area to fill the homes whilst equally, one of Government's core objectives in planning for the delivery of 370,000 homes a year nationally is to improve affordability. Increased housing provision should provide the opportunity for additional household formation (although the scope for this in Hinckley and Bosworth looks to be limited).

2.24 In developing this projection the population is projected to increase by 27,000 people over the 2024-45 period, with this increase being particularly strong in the 16-64 age group, although the highest proportionate change is projected in the 65 and over age group (31% of the growth is projected to be in age groups 65 and over, with this group increasing by 32%). There is also projected to be an increase in the number of children.

Figure 2.8: Projected population change 2025 to 2045 by broad age bands – Hinckley & Bosworth

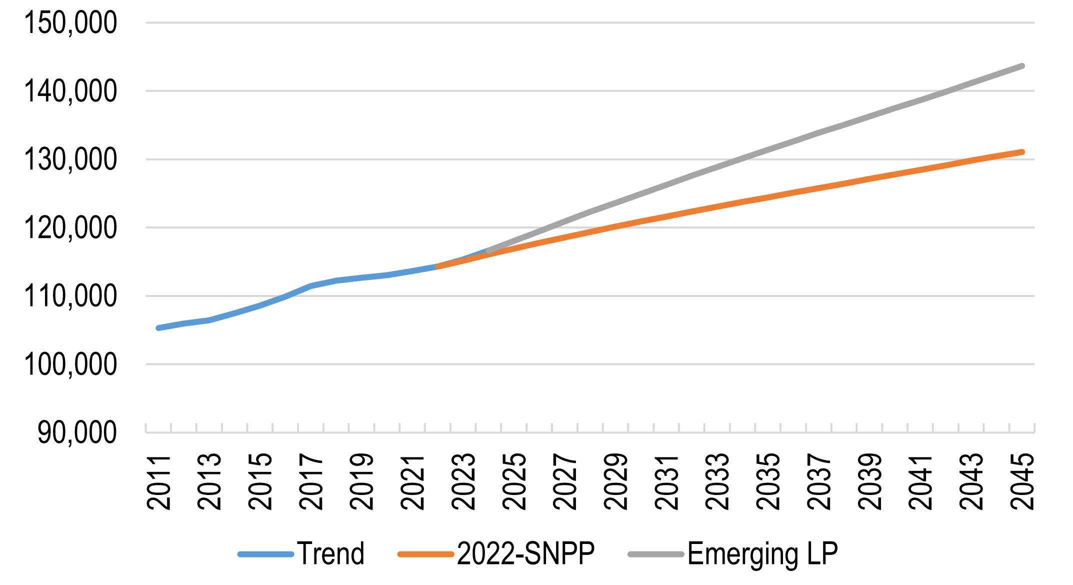
	2024	2045	Change in population	% change
Under 16	20,030	21,695	1,665	8.3%
16-64	70,031	86,979	16,948	24.2%
65 and over	26,621	35,022	8,401	31.6%
Total	116,682	143,696	27,014	23.2%

Source: JGC analysis

2.25 Below are a series of charts showing past trends and projected population growth and key components of change for each the projection linking to the emerging Local Plan. For comparison, data has also been provided from the 2022-based SNPP. The first figure looks at overall population growth, before considering natural change and net migration.

2.26 The analysis suggests the population of Hinckley & Bosworth could rise to 143,700 by 2045 (up from 116,700 in 2024 (estimated)) a 23% increase, or 1.1% per annum. For comparison, between 2011 and 2024 the population increased by an average of around 0.8% per annum, with a similar figure if looking over the past 3-4 years. The analysis therefore suggests a potential boost in population growth by delivery of 711 dwellings per annum and projected population change is also notably higher than the latest (2022-based) ONS projections.

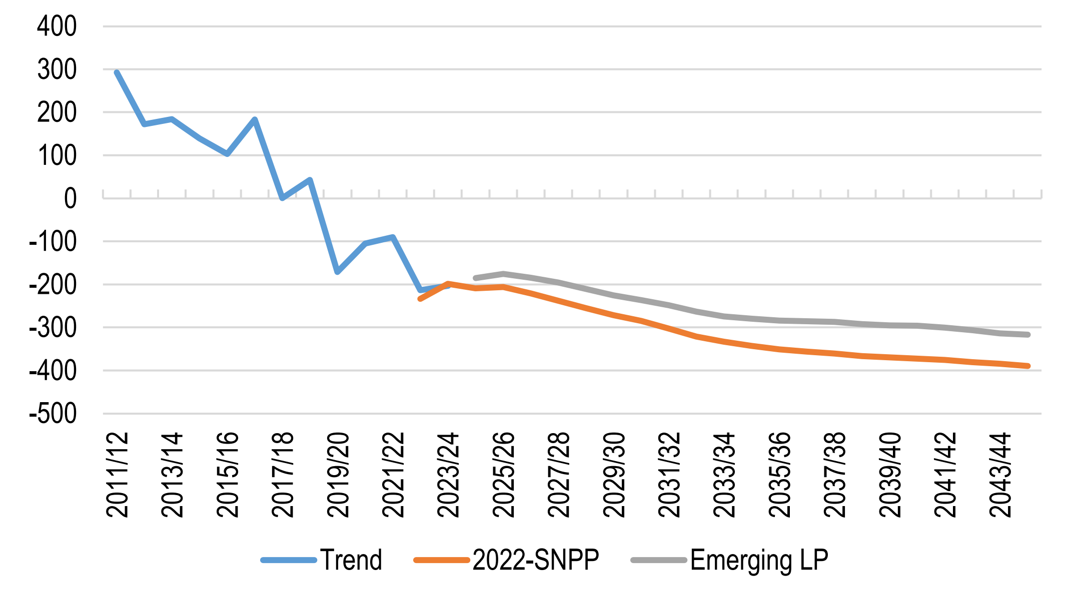
Figure 2.9: Past trends and projected population – Hinckley & Bosworth



Source: ONS and JGC analysis

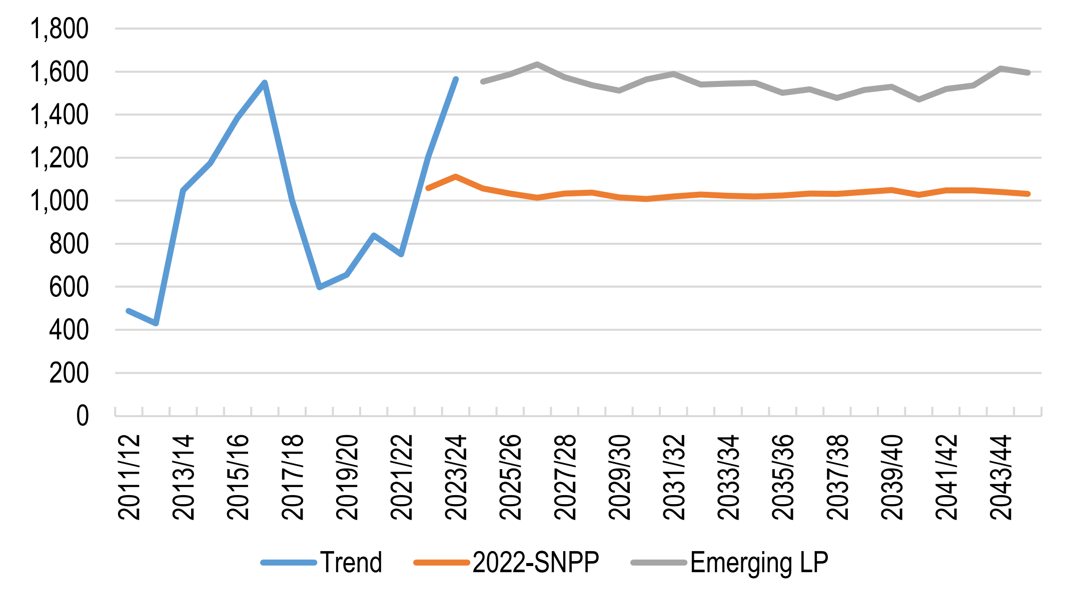
2.27 The figures below show projected natural change and net migration under the scenarios. Focussing on net migration, the analysis suggests with delivery linked to the Standard Method net migration would average a net in-migration of 1,500 people per annum over the 2024-45 period – this is higher than the level typically seen historically, and indeed at a level only seen twice over the past 13-years (in 2016-17 and 2023-24). For natural change, the downward trend is projected to continue moving forward but at a slightly lesser rate.

Figure 2.10: Past trends and projected natural change – Hinckley & Bosworth



Source: ONS and JGC analysis

Figure 2.11: Past trends and projected net migration – Hinckley & Bosworth



Source: ONS and JGC analysis

Comparison with HNS

2.28 The HNS also developed a projection linking to the Standard Method (see Section 3 of that report) – however that was based on a much lower estimate of need (for 468 dwellings per annum). Perhaps not surprisingly, this report with a higher need figure projects for a notably higher level of population growth (28,300 additional people over a 21-year period compared with 17,100 (also for a 21-year period (2020-41).

2.29 The age structure estimated in this report also sees a greater projected increase in younger age groups (those aged 16-64 in particular) when compared with the previous HNS – it is also notable that the projections in this report project a slightly lower increase in the number of people aged 65+. The table below summarises the projected changes in the two studies – data from the HNS is taken from Figure 3.5 of that report.

Figure 2.12: Projected population change in 2024 HNS and this study (figures based on a 21-year projection period)

	2024 HNS	2026 update	Difference
Under 16	1,382	1,665	283
16-64	5,897	16,948	11,051
65 and over	9,811	8,401	-1,410
Total	17,090	27,014	9,924

Source: JGC analysis (HNS data from Figure 3.5)

3. Affordable Housing Need

Introduction

3.1 This section provides an update to the assessment of affordable housing need in Section 4 of the Housing Needs Study. The analysis looks at data Borough-wide (whilst the HNS looked at a range of sub-areas) and is again split between needs for rented affordable housing (social/affordable rents) and affordable home ownership (AHO).

3.2 The key aspect of updating is around prices, rents and incomes but estimates of supply through the existing stock has also been updated. The method used is identical to that in the HNS and is not repeated in this study.

Prices, Rents and Incomes

3.3 The table below shows an estimate of current lower quartile house prices to buy and rent. As with the HNS data is based on a range of sources, including Land Registry and an internet based housing cost analysis (including data from Rightmove). The data below takes a base of late 2025 compared with 2023 in the HNS.

3.4 The analysis suggests across all sizes a lower quartile price of around £205,000 and a lower quartile rent of £850. When compared with the HNS (see Figures 4.2 and 4.3) there has been little change in house prices (increasing by 4% from £197,000) but a notably higher increase in rents (increasing by 13% overall from a figure of £750). By size there has been little change in estimated figures for homes to buy and increases between 10% and 17% for private rents (by size).

Figure 3.1: Estimated lower quartile cost of housing to buy (existing dwellings) and privately rent (by size) – Hinckley & Bosworth

	Lower quartile price	Lower Quartile rent, pcm
1-bedroom	£85,000	£650
2-bedrooms	£160,000	£825
3-bedrooms	£230,000	£1,050
4-bedrooms	£330,000	£1,400
All Dwellings	£205,000	£850

Source: Land Registry and Internet Price Search

3.5 When looking at incomes and consistent with the HNS an income distribution for all households across the Borough has been constructed (update to 2025). Overall, the average (mean) income is estimated to be around £52,200, with a median income of £43,400; the lower quartile income of all households is estimated to be £24,600. When compared with household income estimates from the last HNS (which took a 2022 base) figures are estimated to be around 8% higher.

Need for Social/Affordable Rented Housing

3.6 The table below shows an update estimate of the need from households unable to buy or rent housing in the Borough (taken to be a need for social and affordable rented housing). This shows a very slightly higher need in this study although overall the figures are very similar. In studying the table a number of minor points should be noted:

- The current need figure has increased slightly, mainly due to the increase in rents when compared to incomes. However, a modest change has been modelled by looking at estimates of how key variable might have changed (notably around overcrowding by tenure, with data from the English Housing Survey (EHS) being used;
- Estimates of the number of newly-forming households have not changed notably despite the higher overall housing need figure. As a key part of the Standard Method (and indeed the slightly higher figure being used by the Council) is to improve affordability and household formation it is considered that a higher level of household formation should not impact on affordable housing (i.e. if housing were to become more affordable due to higher delivery then additional households forming would not be expected to need affordable homes). This assumption, which is consistent with the HNS prevents a double counting between the affordable need and the purposes of the Standard Method;
- Despite a high increase in rents compared to incomes, the modelling shows housing to be very slightly more affordable to newly-forming households than was estimated in the HNS (although differences are very slight). This is due to an updating of the income distribution for new households based on more up-to-date information from the EHS; and

- In both studies the relet supply is shown to be the same (165 dwellings from the existing stock). This is despite this update looking at data for the 2022-25 period (compared with 2019-22) with both sources estimating the same figure. It should however be noted that the updated information does point to more lettings (in part due to an increase in newbuild) but that this does not appear to have had any impact on the overall turnover of the existing stock.

Figure 3.2: Comparing need for rented affordable housing in different reports

	HNS (2024)	Update (2026)
Current need	43	45
Newly forming households	472 (1,016 × 46.4%)	468 (1,046 × 44.8%
Existing households falling into need	81	87
Total Gross Need	596	600
Relet Supply	165	165
Net Need	430	436

Source: 2024 HNS (Figure 4.34) and this study

3.7 The analysis in this report does confirm the conclusions of the HNS in that there is a notable need for affordable housing, and it is clear that provision of new affordable housing is an important and pressing issue across the Borough. Affordable housing delivery should be maximised where opportunities arise.

Split Between Social and Affordable Rented Housing

3.8 The analysis continues by looking at the split between social and affordable rented housing (see paragraphs 4.69 to 4.76 of HNS). This included looking at the cost of different tenures of housing and the proportion of households able to afford different products.

3.9 The table below shows current (2025) rent levels in the Borough for a range of products along with relevant local housing allowance (LHA) rates – taken to be the Leicester Broad Rental Market Area (BRMA) for comparison and consistency with the HNS. This analysis shows that social rents are lower than affordable rents; the analysis also shows that affordable rents are notably lower than lower quartile market rents.

3.10 As with the HNS it can also be noted that LHA rates for all sizes of home are below lower quartile market rents. This does mean that households seeking accommodation in many locations may struggle to secure sufficient benefits to cover their rent.

3.11 When compared with the HNS (see Figure 4.21) it can be seen that social rents have increased by an average of 14% and affordable rents by 18% (market rents as previously noted increasing by 13%. Focussing on a 2-bedroom homes, the LHA maximum over the same period has increase by 15% (but as noted still falls some way below a lower quartile rent for this size of home).

Figure 3.3: Comparison of rent levels for different products – Hinckley & Bosworth

	Social rent	Affordable rent (AR)	Lower quartile (LQ) market rent	LHA (Leicester)
1-bedroom	£377	£484	£650	£539
2-bedrooms	£437	£616	£825	£648
3-bedrooms	£462	£700	£1,050	£773
4-bedrooms	£564	£909	£1,400	£1,047
All	£436	£622	£850	-

Source: RSH, market survey and VOA

3.12 The data in the table above has been used alongside income data to estimate the proportion of households able to afford a range of different products and this is shown in the table below (equivalent to Figure 4.23 of the HNS). This points to around 23% of households as being able to afford an affordable rent (either at 80% of the market or at current affordable rent levels) and 24% need social rented housing and 53% would need benefit support regardless of the tenure.

Figure 3.4: Estimated need for affordable rented housing (% of households able to afford)

	% of households able to afford
Afford 80% of market rent	16%
Afford current affordable rent	7%
Afford social rent	24%
Need benefit support	53%
All unable to afford market	100%

Source: JGC analysis

3.13 In the HNS it was recommended that the Council does not have a rigid policy for the split between social and affordable rented housing. However, given the NPPF push towards social rents and on the basis of the evidence above it is now suggested the Council considers seeking around three-quarters of rented housing as social rents (although it is recognised there may be viability issues with this for some schemes).

Establishing a Need for Affordable Home Ownership

3.14 The HNS also considered the need for affordable home ownership (AHO) based on looking at the number of households who are in the 'gap' between renting and buying a home (along with a number of supply assumptions). The data above suggests that this gap has been narrowing, with a greater increase in the cost of renting a homes than to buy. This is reflected in the estimates of need which are notably lower than shown in the HNS.

3.15 The first table below shows need estimates with three different assumptions about resale supply – this can be compared with Figure 4.26 of the HNS. When assuming the supply can only come from resales of AHO (such as shared ownership) a modest positive need is shown. When including a supply to include market homes sold at below a lower quartile price there is no clear need for AHO – this is the same conclusion as the HNS.

Figure 3.5: Estimated Net Need for Affordable Home Ownership (per annum)

	AHO resales only	AHO resales plus 50% of LQ sales	AHO resales plus 100% of LQ sales
Total gross need	116	116	116
LCHO supply	38	237	435
Net need	78	-120	-319

Source: JGC analysis

3.16 However, in comparing details from the two studies and focussing on the first of the three scenarios above (as this is the only one showing any net need) it can be seen that estimates of need are somewhat lower in this update. This is mainly due to a lower level of gross need (driven by the reduced 'gap' between buying and renting) although supply estimates have also increased based on looking at turnover data in the EHS.

3.17 Regardless of the figures, it is clear from the update (as with the HNS) that there is a far more limited need for AHO products than for rented affordable homes (and particularly social rents).

Figure 3.6: Comparing Estimated Net Need for Affordable Home Ownership (per annum)		
	HNS (2024)	Update (2026)
Total gross need	165	116
LCHO supply	15	38
Net need	150	78

Source: 2024 HNS (Figure 4.26) and this study

Types of Affordable Home Ownership

3.18 The final analysis looks at the affordability of different affordable home ownership products, in this case discounted market housing and shared ownership. This is an update to analysis from paragraph 4.108 onwards of the HNS.

3.19 The first table below shows the housing cost needed to make a home genuinely affordable in the current market (linked to estimates of local prices and rents). Taking a 3-bedroom home as an example, for a home to be 'genuinely affordable' to those unable to afford market housing a sale price of no more than £210,000 would be appropriate. For illustration this shows that this could be achieved with an Open market Value (OMV) of £300,000 and a 30% discount. The data in this table can be compared to Figure 4.28 of the HNS.

Figure 3.7: Affordable home ownership prices – Hinckley & Bosworth		
	What households able to rent but not buy could afford	Open Market Value (OMV) of Home with 30% Discount
1-bedroom	£85,000	£121,400
2-bedrooms	£160,000	£228,600
3-bedrooms	£210,000	£300,000
4-bedrooms	£280,000	£400,000

Source: JGC analysis

3.20 To consider the potential to achieve these selling prices on a new home analysis was undertaken to look at newbuild homes for sale in the Borough by size – this is shown in the table below and can be compared with Figure 4.29 of the HNS. This shows that median newbuild prices sit above the affordable price OMV as shown above and suggests it will be difficult to make discounted market housing genuinely affordable without discounts higher than 30% (which could impact on the viability of providing rented affordable housing). This is the same conclusion as in the HNS.

Figure 3.8: Estimated newbuild housing cost by size – Hinckley & Bosworth

	No. of homes advertised	Range of prices	Median price
1-bedroom	2	£180,000-£185,000	-
2-bedrooms	32	£220,000-£365,000	£265,000
3-bedrooms	79	£232,000-£650,000	£310,000
4+-bedrooms	78	£305,000-£950,000	£490,000

Source: Internet Property Search

3.21 For shared ownership and analysis has been carried out to look at the equity shares likely to be required to make shared ownership 'genuinely affordable'. This is a slightly different analysis to that undertaken in the HNS which sought to look at the OMVs required at different equity share levels.

3.22 The analysis suggests that equity shares generally in the 30%-40% range (for 2- and 3-bedroom homes) would potentially make shared ownership an affordable product in the Borough. This broadly confirms the HNS analysis in the shared ownership is likely to be preferable to discounted market housing but as it may be difficult to be considered as 'genuinely affordable'; this points to the need for the Council to prioritise delivery of rented affordable housing where possible.

Figure 43.9: Estimated equity share required to make shared ownership affordable – Hinckley & Bosworth

	Maximum equity share
1-bedroom	-
2-bedroom	28%
3-bedroom	37%
4-bedrooms	19%

Source: JGC analysis

4. Housing Mix

Introduction

4.1 The analysis below updates that in Section 5 of the HNS in looking at the mix of housing likely to be needed by size (and tenure) based on the new projections developed linked to 711 dwellings per annum being provided. The method used is the same as in the HNS with key tables below showing changes made.

Changes to Households by Age

4.2 The table below presents the projected change in households by age of household reference person, this shows growth as being expected in most age groups and in particular older age groups.

4.3 This can be compared with Figure 5.7 of the HNS which showed a greater ageing of the population (higher increases in those aged 75+) and much lower changes for younger age groups. For example, the 35-49 age group had been projected to increase by around 1,800 households (over a 21-year period) with the figure now standing at 4,800.

4.4 The differences are driven in part by changed demographics in the area (which has been showing less of an ageing population) and also due to the higher housing number modelled which has driven higher estimates of in-migration, which would be expected to be amongst younger age groups (older people typically being less likely to move home).

Figure 4.1: Projected Change in Household by Age of HRP in Hinckley & Bosworth				
	2024	2045	Change in Households	% Change
Under 25	817	975	159	19.4%
25-34	6,179	7,314	1,135	18.4%
35-49	12,215	16,977	4,762	39.0%
50-64	14,909	17,454	2,545	17.1%
65-74	7,410	8,454	1,044	14.1%
75-84	7,034	9,527	2,493	35.4%
85+	2,476	4,835	2,360	95.3%
TOTAL	51,039	65,537	14,498	28.4%

Source: JGC analysis

Mix of Housing Linked to Demographic Change

4.5 Consistent with the HNS, the table below shows modelled outputs to look at estimated housing needs by size of home and in broad tenures. The modelling looks at how different household groups occupy homes and how the number of households in these groups is projected to change over time. The table also builds in analysis around levels of overcrowding and under-occupation (which is significant in the owner-occupied sector).

4.6 Consistent with the HNS, the analysis shows a need for market housing focussing on 3+-bedroom homes, affordable home ownership on 2- and 3-bedroom accommodation and rented affordable housing showing a slightly smaller profile again.

4.7 These figures can be compared with Figure 5.13 of the HNS and generally shows a slightly larger profile of housing being needed – particularly in the market sector. This will be sue to the updated demographics now including more households who are likely to be ‘family households’ and therefore contain children. In the market sector the analysis below points to a need for around 60% of new market homes as being 3+-bedrooms compared with 55% in the HNS. Overall however the figures across the two studies are broadly comparable.

Figure 4.2: Modelled Mix of Housing by Size and Tenure				
	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	8%	32%	41%	19%
Affordable home ownership	18%	44%	31%	7%
Affordable housing (rented)	29%	38%	27%	6%

Source: JGC analysis

4.8 A further analysis is to look at the rented affordable housing split between older (65+) and younger households, this is shown in the table below and can be compared with Figure 5.14 of the HNS. Interestingly this shows very little difference between the two studies, although the overall needs (final row) does point to a slightly larger need overall (again linked to a different demographic profile).

Figure 4.3: Modelled Mix of Housing by Size and Age – affordable housing (rented) – Hinckley & Bosworth				
Age of HRP	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Under 65	25%	36%	31%	8%
65 and over	38%	62%		
All affordable housing (rented)	29%	38%	27%	6%

Source: JGC analysis

4.9 Finally, the analysis has looked at the rented affordable housing in comparison to the turnover of different sizes of accommodation (an update to Figure 5.15 of the HNS). This generally shows a very similar pattern to the HNS although the supply data does point to a slight increase in the availability of larger (4+-bedroom) homes – the number of letting still falls well below the estimated need for this size of accommodation.

Figure 4.4: Need for rented affordable housing by number of bedrooms					
	Gross Annual Need	Gross Annual Supply	Net Annual Need	As a % of total net annual need	Supply as a % of gross need
1-bedroom	149	41	108	24.8%	27.4%
2-bedrooms	238	82	156	35.8%	34.3%
3-bedrooms	173	38	135	31.0%	21.8%
4+-bedrooms	41	5	37	8.4%	11.4%
Total	600	165	436	100.0%	27.5%

Source: JGC analysis

Indicative Targets for Different Sizes of Property by Tenure

4.10 Drawing this data together it is possible to update the indicative targets for different sizes of home (by tenure) provided in the HNS (see from paragraph 5.32 of the HNS). The conclusions take account of a range of factors, including the modelled outputs and an understanding of the stock profile. The analysis (for rented affordable housing) also draws on the Housing Register data as well as taking a broader view of issues such as the flexibility of homes to accommodate changes to households (e.g. the lack of flexibility offered by a 1-bedroom home for a couple looking to start a family).

4.11 Regarding the Housing Register the table below provides an update based on Local Authority Housing Statistics (LAHS) data for 2025 (to be compared with Figure 5.8 of the HNS). This analysis shows an increase in the number of households on the Register (going from 895 in 2022 to 1,267 in 2025). The general profile by size is broadly similar with a focus on households needing a 1-bedroom home; however the number of households needing 4+-bedrooms has increased from 35 to 62 over the period.

Figure 4.5: Size of Social/Affordable Rented Housing – Housing Register Information (March 2025)

	Number of households	% of households
1-bedroom	717	57%
2-bedrooms	325	26%
3-bedrooms	163	13%
4+-bedrooms	62	5%
TOTAL	1,267	100%

Source: LAHS

4.12 Overall, despite there being some changes in the outputs of the analysis it is considered that the conclusions of the HNS remain broadly reasonable and this is shown in the table below. In particular it can be noted that whilst the modelled need for 3+-bedroom market housing has increased to 60% (from 55% in the HNS) it is the case that the HNS conclusions already suggested a strategic mix whereby 60% of homes had 3+-bedrooms. The suggested mix can also be seen in Figure 5 of the HNS.

<table>
<tr><th colspan="5">Figure 4.6: Suggested size mix of housing by tenure – Hinckley & Bosworth</th></tr>
<tr><th rowspan="2"></th><th rowspan="2">Market</th><th rowspan="2">Affordable home ownership</th><th colspan="2">Affordable housing (rented)</th></tr>
<tr><th>General needs</th><th>Older persons</th></tr>
<tr><td>1-bedroom</td><td>5%</td><td>20%</td><td>25%</td><td>40%</td></tr>
<tr><td>2-bedrooms</td><td>35%</td><td>50%</td><td>35%</td><td rowspan="3">60%</td></tr>
<tr><td>3-bedrooms</td><td>40%</td><td>25%</td><td>30%</td></tr>
<tr><td>4+-bedrooms</td><td>20%</td><td>5%</td><td>10%</td></tr>
</table>

Source: JGC analysis

4.13 At the same time as this report was being drafted, Iceni Projects were undertaking a housing mix study for the whole of Leicestershire (including Hinckley and Bosworth) – this also included analysis of housing mix by tenure. Whilst the analysis for Iceni was completed by JGC the assumptions made around under-occupation differed very slightly from those used in the original HBBC Housing Needs Study (and as updated in this report).

4.14 As a result, the conclusions from Iceni also differ very slightly from those in this report. Whilst the Leicestershire-wide mix report is yet to be finalised it is expected that the broad conclusions will remain unchanged. The table below shows the conclusions being drawn by Iceni – it can be seen these are set out as a range rather than a single figure and in general do not differ substantially from the conclusions in this report. The main difference is in the affordable home ownership tenure and it should also be noted the rented affordable housing is not split between younger and older households.

Figure 4.7: Alternative suggested mix of housing from Leicestershire-wide analysis for Iceni Projects

	1- bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	0-5%	30-35%	40-45%	20-25%
Affordable home ownership	10-15%	40-45%	35-40%	5-10%
Affordable housing (rented)	25-30%	35-40%	25-30%	5-10%

Source: Iceni Projects emerging housing mix report

5. Older and Disabled People

Introduction

5.1 Section 6 of the HNS looked a housing needs in relation to older people and people with disabilities, much of the analysis looked at how needs might change in the future based on population projections and the key analysis has been updated below.

Current Population of Older People

5.2 The table below provides baseline population data about older persons in Hinckley & Bosworth and compares this with other areas (the equivalent table in the HNS is Figure 6.1). The table shows the Borough has a slightly older age structure than seen regionally or nationally with 23% of the population being aged 65 and over in 2024. The general patterns are very similar to those shown in the HNS (for 2021).

Figure 5.1: Older Persons Population, 2024

	Hinckley & Bosworth		Leicester-shire	East Midlands	England
	No.	%	%	%	%
Under 65	90,061	77.2%	78.9%	80.1%	81.3%
65-74	13,230	11.3%	10.5%	10.0%	9.4%
75-84	10,108	8.7%	7.9%	7.3%	6.8%
85+	3,283	2.8%	2.7%	2.5%	2.5%
Total	116,682	100.0%	100.0%	100.0%	100.0%
Total 65+	26,621	22.8%	21.1%	19.9%	18.7%
Total 75+	13,391	11.5%	10.6%	9.8%	9.3%

Source: ONS

Projected Future Change in the Population of Older People

5.3 As with the HNS, a population projection has been used to provide an indication of how the number of older persons might change in the future. The projection in this update is based on delivery of 711 dwellings per annum (2024-45) which can be compared with similar analysis in the HNS (see Figure 6.3) which was based on a lower housing number (from the Standard Method in pace at the time) and for a different 21-year period (2020-41).

5.4 The table below shows the Borough is projected to see a notable increase in the older person population with a projected increase in the population aged 65+ of around 32% - the population aged Under 65 is in projected to see an increase of 21%.

5.5 These figures are quite different from those in the HNS, with that document projecting a greater ageing of the population (population aged 65+ to increase by 39%) and much lower increases in the number of younger people. This is driven by changes to demographic trends in the recent past and also the higher housing number against which the figures have been modelled.

5.6 In total population terms, the projection shows an increase in the population aged 65 and over of 8,400 people. This is against a backdrop of an overall increase of 27,000 – population growth of people aged 65 and over therefore accounts for 31% of the total projected population change (this figure was 57% in the HNS).

Figure 5.2: Projected Change in Population of Older Persons, 2024 to 2045 – Hinckley & Bosworth

	2024	2045	Change in population	% change
Under 65	90,061	108,674	18,613	20.7%
65-74	13,230	15,036	1,806	13.6%
75-84	10,108	13,599	3,491	34.5%
85+	3,283	6,388	3,105	94.6%
Total	116,682	143,696	27,014	23.2%
Total 65+	26,621	35,022	8,401	31.6%
Total 75+	13,391	19,986	6,595	49.3%

Source: JGC analysis

Health Related Population Projections

5.7 The table below updates analysis in Figure 6.8 of the HNS in looking at how the number of people with a range of disabilities might change in the future based on projected population change.

5.8 Consistent with the HNS, the analysis suggests a large increase in the number of older people with dementia (increasing by 60% from 2024 to 2045 and mobility problems (up 48% over the same period) – these figure are however slightly lower than shown in the HNS. Changes for younger age groups are smaller, reflecting the fact that projections are expecting older age groups to see the greatest proportional increases in population – however in this case the changes are much higher than in the HNS; for example the table below projects a 21% increase in the number of people aged 16-64 with impaired mobility, the equivalent figure in the HNS was just 7%.

Figure 5.3: Projected Changes to Population with a Range of Disabilities – Hinckley & Bosworth

Disability	Age Range	2024	2045	Change	% change
Dementia	65+	1,709	2,726	1,017	59.5%
Mobility problems	65+	4,521	6,667	2,146	47.5%
Autistic Spectrum Disorders	18-64	652	823	171	26.2%
	65+	235	309	74	31.3%
Learning Disabilities	15-64	1,693	2,096	403	23.8%
	65+	517	673	157	30.3%
Impaired mobility	16-64	3,939	4,764	825	20.9%

Source: POPPI/PANSI and JGC analysis

Need for Specialist Accommodation for Older People

5.9 The table below updates analysis of the need for specialist accommodation for older people. This is based on applying prevalence rates for different types of housing to estimate need and also considering the current supply of different types of housing. The detailed method used can be found from paragraph 6.16 onwards in the HNS. For the updating data is linked to the updated projections although supply estimates have also been updated to a 2025 base. The table can be compared with Figure 6.10 of the HNS. Key findings for the 2024-45 period include:

- a need for around 1,450 housing units with support (sheltered/retirement housing) – around 55% in the market sector;
- a need for around 870 additional housing units with care (e.g. extra-care) – again split between market and affordable housing (around two-thirds market); and
- a need for 800 additional nursing and residential care bedspaces although there is estimated to be a current surplus of residential care.

5.10 When compared with the HNS the general outcomes are broadly similar with the main difference being a lower estimated need for residential care bedspaces – this is main due to a higher supply being recorded in this update rather than any significant change in estimated need.

Figure 5.4: Specialist Housing Need (2024-45) – Hinckley & Bosworth

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition-al demand to 2045	Shortfall /surplus by 2045
Housing with support	Market	65	496	868	372	427	799
	Affordable	57	472	758	286	373	659
Total (housing with support)		121	968	1,626	658	801	1,458
Housing with care	Market	30	0	401	401	198	599
	Affordable	14	0	184	184	91	274
Total (housing with care)		44	0	585	585	288	874
Residential care bedspaces		39	652	520	-132	256	124
Nursing care bedspaces		44	198	585	387	288	676
Total bedspaces		83	850	1,105	255	544	800

Source: JGC analysis and Housing LIN/EAC

Wheelchair User Housing

5.11 The final updated analysis looks at the need for housing for wheelchair users with the method for calculating being found from paragraph 6.32 onwards in the HNS (and data to be compared with Figure 6.13). The table below estimates a need for between 458 and 787 additional homes for wheelchair user households over the 2024-45 period (22-37 per annum) which is very slightly lower than shown in the HNS – due to this report updating some of the base prevalence rates using more up-to-date information from the Survey of English Housing.

Figure 5.5: Estimated need for wheelchair user homes, 2024-45			
	Current need	Projected need (2024-45)	Total current and future need
Total	349	438	787
@ 25% of projection	349	109	458

Source: JGC analysis

6. Other Groups

Introduction

6.1 The HNS looked at a range of other groups (service personnel, households living in the private rented sector, looked after children and custom- and self-build housing). For most of these groups there is limited new data and so no updating has been carried out. The analysis has however briefly considered the latest information with regard to custom- and self-build housing.

Custom-and self-build

6.2 Since the 2024 HNS, there have been three additional years of housing register data. This has shown an overall decline in the average number of entries per base period from 17 to 15. However, the post-2021 review register (which included contacting previous entrants to see if they still wished to remain on the register) increased from 5 entries per base period to 11 entries. This indicates the future need, although if registrations increase, so too must supply.

6.3 At the same time, the average number of suitable plots permitted has increased from 1 per base period to 2 over the longer period and 3 per base period since 2021.

6.4 As of today, there are 65 people on the post-review register against a total of 17 plots. However, the Council have three years from the end of each base period to address this need.

6.5 As at October 2025 the cumulative demand to be met was that at the close of Base Period 7 (30th October 2022) which was 34, against which the supply of 17 plots can be removed. This leaves a cumulative unmet demand (shortfall) of 17 dwellings.

6.6 The continuation of Draft Plan (2021) Policy HO06 to satisfy the demand for plots within the Borough remains valid. Furthermore, new legislation under the Levelling Up and Regeneration Act tightens what can be classed as part of the supply, and any unmet need is rolled forward. The Council, therefore, may wish to consider how the delivery of such housing is monitored.